

# PROJECT COST MANAGEMENT



Information in this document is subject to change without notice. Companies, names and data used in examples are fictitious.

Copyright ©2025 by InEight. All rights reserved. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express permission of InEight.

Microsoft Windows, Internet Explorer and Microsoft Excel are registered trademarks of Microsoft Corporation.

Although InEight Estimate Essentials has undergone extensive testing, InEight makes no warranty or representation, either express or implied, with respect to this software or documentation, its quality, performance, merchantability, or fitness for purpose. As a result, this software and documentation are licensed "as is", and you, the licensee are assuming the entire risk as to its quality and performance. In no event will InEight be liable for direct, indirect, special, incidental or consequential damages arising out of the use or inability to use the software or documentation.

Release 25.3 Last Updated: 24 April 2025



# CONTENTS

Course Description Course Objectives How to Use this Manual Lessons Lesson Format Call-Outs	19 19 20 20
LESSON 1 – ESTIMATING CORE CONCEPTS	
1.1 Overview of the Estimating Process	
Step 1 - Enter Project Details	
Step 2 - Enter Proposal Deliverables	
Step 3 - Calculate Direct & Indirect Project Cost	
Step 4 - Add Markup, Contingency, & Fees	
Step 5 - Distribute Cost + Markup to required Structure	
1.2 Key Concepts and Terms	29
1.2.1 Job Folder	29
1.2.2 Library	30
1.2.3 Form	30
1.2.4 Cost Item	32
1.2.5 Pay Item	32
1.2.6 Resource	32
1.2.7 Resource Assembly	33
1.2.8 Cost Item Assembly	33
Lesson 1 Review	35
Lesson 1 Summary	35

LESSON 2 – GENERAL NAVIGATION	37
2.1 General Navigation	38
Step by Step – Estimate preferences setup	38
2.1.1 Estimate first time access	39
Step by Step – Launch Estimate	39
Step by Step – Estimate subsequent use	43
2.1.2 Backstage View	
2.1.2.1 Archive / Restore	46
Step by Step – Archive and Restore a Job	46
2.1.2.2 Settings	47
2.1.2.3 Prompt to Save	48
2.1.2.4 Decimal Precision	48
2.1.3 Open a Job Folder	49
Step by Step – Open a Job Folder	49
2.1.4 Common Navigation	50
2.1.5 Help Bubbles	51
2.1.6 Data Map	52
2.1.7 InEight Estimate Layout	53
2.1.8 Overview - Setup Tab	53
2.1.9 Overview - Estimate Tab	54
2.1.10 Overview - Quote Tab	55
2.1.11 Overview - Price Tab	56
2.1.12 Overview - System Tab	57
2.1.13 Overview - Integrations Tab	58
2.1.14 Library	58
2.1.15 Open Forms	59
Step by Step – Open Forms	59
2.2 System Settings Options	60
Step by Step – Decimal Precision	61
2.3 Columns	62
2.3.1 Move Columns	62
Step by Step – Move Columns	63
2.3.2 Sort and Filter Columns	65
Step by Step – Sort Columns	65
Step by Step – Filter Columns	65
2.3.2.1 Filter Editor Overview	67
Creating complex filters using the Filter Editor	67
Step by Step – Filter Editor	70
2.3.3 Group Columns	71

Step by Step – Group Columns	
2.3.4 Saved Views	
Step by Step – Create a Saved View	
2.3.5 Subtotal Calculator	
2.3.6 Register Running Totals	
2.4 Find Feature	
Step by Step – Find Feature	
2.5 Keyboard Shortcuts	
2.5.1 Navigating in a register	
2.5.2 Navigating in a record	
2.5.3 Menu and keystroke commands	
2.5.4 Function keys in Estimate	
Lesson 2 Review	
Lesson 2 Summary	. 80
LESSON 3 – LIBRARY SETUP	81
3.1 Library Overview	
3.1.1 Library Tabs	
3.1.1.1 Setup Tab	
3.1.1.2 Estimate Tab	
3.1.1.3 System Tab	
External Reports	
3.1.1.4 Integrations	
App Logs	
3.2 Library Job Properties	
3.3 Library Address Book	
3.3.1 Pre-existing Estimate data	
3.3.2 Estimate specific data	
3.3.3 Address Book layouts	
3.3.3.1 Vendors and Contacts	
3.3.3.2 Vendors and Default Quotes	
3.3.3.3 Contacts	. 97
3.3.4 View Vendors and Contacts in InEight Platform	. 98
3.3.5 Vendor and contact creation	
3.3.6 Merge and Upload Contacts and Vendors into Platform	104
3.3.6.4 Disconnected Contacts and Vendors	
Inactive Contacts and Vendors	105
Step by Step – Merge Estimate Vendors to Platform	107
Step by Step – Upload Estimate Vendors to Platform	.108
Step by Step – Merge Contacts to Platform	109

Step by Step – Upload Contacts to Platform	111
Step by Step – Create Vendors and Contacts via Quote Record	113
3.4 Library Job Properties Pricing	121
3.4.1 Job Properties Overview	121
3.4.2 Balanced Price Options	121
3.4.2.1 Calculate Balanced Pay Item Prices using Cost Amount:	122
3.4.2.2 Calculate Balanced Pay Item Prices using Billing Amount:	122
3.4.2.3 Distribution of Unassigned Costs/Billing Amount by Individual	
Categories	123
3.4.2.4 Markup Options	125
3.4.2.5 Categorize Business Overhead as Indirect Cost	126
3.4.2.6 Calculate Proposal Recap Forecast Markup	127
3.5 Library Foundation Setup Data	130
3.6 Resources	131
3.6.1 Library Resources Register	132
Overview - Library Resource Rate Register	133
3.6.2 Labor Resources	. 134
3.6.3 Resource Rate Record	134
Overview - Resource Rate Record	135
Step by Step – Create a Labor Resource	137
3.6.4 Construction Equipment Resources	139
3.6.5 Rented Equipment Resources	139
Step by Step – Create a Rental Equipment Resource	140
3.6.6 Equipment Consumption Rates	140
3.6.7 Non-Hourly Rate Calculator	
Step by Step – Non-Hourly Rate Calculator	141
3.6.8 Installed Materials, Installed Equipment & Supplies Resources	
Step by Step – Create an Installed Material Resource	143
3.6.9 Unique Resources	144
3.7 Resource Assemblies	
3.7.1 Library Resource Assembly Register	
Overview - Library Resource Assembly Register	
3.7.2 Resource Assembly Record	
Overview - Resource Assembly Record	
3.7.2.1 Productivity Rate Indicator in the CBS Register	
Step by Step – Create a Resource Assembly	
Exercise 3.1 – Create Resources & Resource Assemblies	
3.8 Importing Resources	
3.8.1 Open Resource Rate Register	. 152

Step by Step – Opening the Labor tab	152
3.8.1.1 Creating A Labor Saved View - Resource Rate Register	
3.8.2 Setting up the excel file	154
3.8.2.2 Creating the resource	154
Step by Step – Creating the Resource	154
3.8.2.3 Resource Cost Details	
Step by Step – Resource Cost Detail	157
3.8.3 Filter/Sort/Paste - Resource Cost Details Register	
Step by Step – Filter Resource Cost Detail Register	159
3.8.4 Manual Set-Up of Scales 2 & 3 - Optional	160
3.8.4.4 Resource Rate Register	161
3.8.4.5 Resource Cost Details Register	161
Step by Step – Manual Setup of Scales	161
3.8.4.6 Non Labor Resource Setup	162
3.8.5 Creating A Materials Saved View - Resource Rate Register	162
3.8.6 Creating A Material Resource	163
Step by Step – Creating the Resource	163
3.8.7 Create A Material Saved View - Resource Cost Details Register	165
Step by Step – Material Saved View	165
3.9 Quantity Checking	166
Step by Step – Quantity Checking	167
3.10 Security in Estimate	168
3.10.1 Role based permissions	168
3.10.2 Security in Estimate	171
3.10.3 Granting permissions to access Jobs and Snapshots	172
3.10.3.1 Organizational Breakdown Structure	
3.10.4 Granting permissions to destinations and commands	
3.10.4.2 Access Control Report	
Step by Step – Access Control Report	
3.10.5 Granting permissions to the Estimate Library	
3.10.6 Common roles used when securing an Estimate	
Lesson 3 Review	
Lesson 3 Summary	186
LESSON 4 – PROJECT SETUP	187
4.1 Job Creation	
4.1.0.1 Platform project association	
4.1.0.2 Job Register Management	
Job register grouped by Platform project	
OBS filter tree	

Data Version and Upgrade Required Columns	
Step by Step – Create a New Job	
4.2 Project Creation	
4.2.1 Considerations	
4.3 Job Properties	
4.3.1 Overview Tab	
4.3.2 Cover Sheet Tab	
4.3.3 Cost Basis Tab	
4.3.4 Shift Rate Calculator	
Step by Step – Shift Rate Calculator	
4.3.5 Import Filtered Resources	
Step by Step – Import Filtered Resources	
4.3.6 Fuel Cost Tab	
Step by Step – Enter Fuel Costs	
4.3.7 Job Folder Tags Tab	
4.3.8 Schedule Tab	
4.3.9 Other Job Properties Tabs	
Exercise 4.1 – Define Job Properties	
4.4 Pay Item Creation	
4.4.1 Overview - Pay Item & Proposal Register	
Step by Step – Create a Pay Item	
4.4.2 Pay Item Prices by Category	
4.4.3 Standard Proposal report	
Exercise 4.2 – Create Pay Items	
Lesson 4 Review	
Lesson 4 Summary	
LESSON 5 – DIRECT COSTS	210
5.1 Cost Breakdown Structures	
5.1.1 Cost Item Terminology 5.1.2 Work Breakdown Structures	
5.1.3 Locked vs. Unlocked Approach	
5.1.4 Take-Off Quantities Step by Step – Adjust take-off quantities	
5.2 Cost Item Creation	
5.2.1 Insert Subordinate Cost Item Option 1	
•	
Option 2	
5.2.2 Insert Cost Item	∠∠I

Option 1	227
Option 2	
Step by Step – Create a subordinate cost item	
5.2.3 Move Cost Items	
Exercise 5.1 – Create cost items	
5.3 Costs and Production	
5.3.1 Cost Item Record	
5.3.2 Cost Segments	
5.3.3 Cost Sources	
5.3.3.1 Plug Tab	
5.3.3.2 Detail Tab	
5.3.4 Plug Costs	
Step by Step – Define a plugged cost	
5.3.5 Detail Costs	
Step by Step – Detail costs	
5.3.5.3 Add Cost Detail	
Step by Step – Add cost detail	
5.3.5.4 Add Assembly	
Step by Step – Define cost detail by adding an assembly	
Exercise 5.2 – Define cost detail	241
5.4 Cost Item Details	
5.4.1 Cost Item Setup	
5.4.1.1 Cost Curves	
Cash Flow	
Cash Flow example	
Period Quantities	
Step by Step – Adjust shift arrangements	
5.4.2 Notes	
5.4.3 Man-Hour Factors	
5.4.4 Unique Identifier	
5.4.4.2 Highlight Unique (Delta) Toggle	
5.4.5 Cost Drivers	
5.4.6 Suspend Cost Items	
Step by Step – Suspend a Cost Item	
5.4.6.3 Editable Man-Hour Factors in Suspended Cost Items	
5.4.6.4 Unsuspend a Cost Item	
Step by Step – Unsuspend a Cost Item	
5.4.6.5 Suspend Column	
5.4.7 Adding Cost Adjustments	

Exercise 5.3 – Manage cost item details	. 268
Lesson 5 Review	269
Lesson 5 Summary	269
LESSON 6 – INDIRECT COSTS	271
6.1 Indirect Costs Overview	
6.1.1 Navigation to Indirect Costs	
6.2 Default Indirect Cost Items	
6.2.1 Independent Indirect Cost Items	
6.2.1.1 Job Management & Equipment	
Step by Step – Add job management & equipment costs	
Step by Step – Add job management & equipment costs	
6.2.2 Dependent Indirect Cost Items	
6.2.2.2 Default Dependent Cost Item Deletion	
Step by Step – Delete existing default dependent cost items	
6.2.2.3 Prime Bond	
Step by Step – Define prime bond	
Multiple bond rate dependent items	
Deleting Bond Tables	
6.2.2.4 Price % Add-On	
Step by Step – Define a price % add-on	279
6.2.2.5 Direct Cost Add-On	
Step by Step – Define a direct cost add-on	. 280
6.2.2.6 Repositioning Dependent Cost Items	. 282
6.3 User-Defined Indirect Cost Items	283
Step by Step – Add user-defined indirect cost items	284
6.4 Cost Allocation	285
6.4.1 Cost Allocation	286
6.4.2 View Filter Excludes Cost Item Allocation Details	287
Step by Step – Cost Allocation	. 287
6.4.3 Cost Allocation to By Unit Cost	294
Step by Step – Cost Allocation by Unit Cost	. 294
6.5 Dependent Cost Item Allocation	
Step by Step – Dependent Cost Item Allocation	
6.5.1 Turning Off Cost Allocation	305
Step by Step – Turning Off Cost Allocation	
6.5.2 Breaking a Cost Allocation Link	
Step by Step – Breaking a Cost Allocation Link	
6.5.3 Pay Item Assignment for Allocation Distribution in an Unlocked Job	308

Exercise 6.1 – Define Indirect Costs	
Lesson 6 Review	
Lesson 6 Summary	
LESSON 8 – QUOTE MANAGEMENT	313
8.1 Quote Management Overview	
8.1.1 Quote Management Workflow	
8.1.2 Quotes and Quote Groups	
8.1.2.1 Resource Level Quote Groups	
8.1.2.2 CBS Level Quote Groups	
8.2 Requests for Quote	
8.2.1 Request for Quote (RFQ) Register Overview	
8.2.2 Request for Quote (RFQ) Record	
8.2.3 Create an RFQ	
8.2.3.1 Line Items	
8.2.3.2 Terms & Conditions	
8.2.3.3 Vendor Companies	
8.2.4 Attachments	
8.2.5 Setup	
8.2.6 Publish an RFQ	
Step by Step – Create and publish an RFQ	
8.2.7 RFQ Email Draft	
8.3 Quotes	
8.3.1 Sample Received Quote Scope Sheet	
8.3.2 Quote Register Overview	
8.3.3 Quote Record Overview	
8.3.4 Header Block	
8.3.4.1 Quote records	
8.3.5 Price Block	
8.3.6 Quote Record Tabs	
8.3.6.2 Resources & Cost Items	
Cost item tags and user defined fields	
8.3.7 Data Blocks	
8.3.8 Data Block Tabs	
8.3.8.3 Special Terms & Conditions	
8.3.8.4 Qualifications	
8.3.8.5 Packages	
Step by Step – Create a multi-packaged quote	
8.3.8.6 Taxes	
8.3.8.7 Seller's Profile	

8.3.8.8 Setup	.345
8.3.8.9 Minority	346
8.3.9 Create a Quote from RFQ	347
Step by Step – Create a quote from RFQ	.347
8.3.10 Enter Quote Details	.348
Step by Step – Enter quote details	.348
Step by Step – Create a multi-packaged quote	. 349
8.3.11 Use Unit Price or Extended Price on Quote Record Item	.353
8.3.12 Duplicating an Existing Quote	.354
Step by Step – Duplicate an existing quote	.354
Exercise 8.1 – Quote Management	356
8.4 Quote Comparison & Award	.357
8.4.1 Quote Comparison & Award Overview	357
8.4.2 Edit Mode	358
8.4.3 Substitute Values	358
8.4.4 Display Ignored Quotes	. 361
8.4.5 Export Quote Comparison and Award to Microsoft Excel	. 363
8.4.6 Additional Quote Comparison and Award functions	. 364
8.4.7 Configure Totals	. 365
8.4.8 Adding Notes to Quote Comparison & Award	366
Step by Step – Add the Notes section to Quote Comparison & Award	
form	
8.4.9 All Quote Groups Layout	369
8.4.10 Compare and Award Quotes	
8.4.10.1 Open Status	372
8.4.10.2 Award Status	.372
8.4.10.3 Review	
Step by Step – Compare and award quotes	
8.4.11 Package Entire Quote	
8.4.12 Incomplete Quotes	.375
8.5 Scope Items	
8.5.1 Scope Item Setup	
Step by Step – Set up scope items	380
Step by Step – Set up quotes for scope items	
8.5.2 Scope Item Creation and Award	
Step by Step – Manage and award scope items	
8.6 Quote Item Adjustment	. 383
Step by Step – Quote item adjustment	
Lesson 8 Review	.385

Lesson 8 Summary	
LESSON 9 – FINALIZE THE ESTIMATE	
9.1 Job Markup (Profit)	
9.1.1 Target Price	
9.1.2 Price Breakdown Structure	
9.1.3 Markup vs. Margin	
9.1.4 Define Profit	
9.1.4.1 Profit as a Percentage of Target Price	
Step by Step – Add profit as a percentage of target price	
9.1.4.2 Profit Through Direct Cost Markup Record	394
Step by Step – Modify the direct cost markup record	
9.2 Cost Estimate Audit/Review	
9.2.1 Price Breakdown Structure Tabs	395
9.2.1.1 Markup Analysis	
9.2.1.2 Cost Source	
9.2.1.3 Resource Utilization	
9.2.1.4 Subcontract Status	396
9.2.1.5 Vendor Status	
9.3 Spread Target Price Over Pay Items	
9.3.1 Current Price vs. Target Price	
9.3.2 Proposal Recap	
9.3.3 Spread the Target Price	
9.3.4 Define Pricing for Pay Items Manually	
Step by Step – Define pricing manually	
9.3.5 Use AutoPrice to Balance and Hit the Target Total	
Step by Step – Use AutoPrice to balance and hit the target total	
9.3.6 Use AutoPrice to Unbalance and Hit the Target Total	
Step by Step – Unbalance hit target total	
9.4 Selective Pay Item Markup	
Exercise 9.1 – Manually Price Pay Items	
9.5 Bid Adjustments	406
9.5.1 Lock Price	
Step by Step – Lock Price	
Step by Step – Make Last Minute Bid Adjustments	
9.5.2 Suspend Pay Items	
Lesson 9 Review	411
Lesson 9 Summary	

## **STEP-BY-STEP PROCEDURES**

Step by Step – Estimate preferences setup	38
Step by Step – Launch Estimate	. 39
Step by Step – Estimate subsequent use	43
Step by Step – Archive and Restore a Job	46
Step by Step – Open a Job Folder	. 49
Step by Step – Open Forms	59
Step by Step – Decimal Precision	61
Step by Step – Move Columns	63
Step by Step – Sort Columns	65
Step by Step – Filter Columns	. 65
Step by Step – Filter Editor	. 70
Step by Step – Group Columns	71
Step by Step – Create a Saved View	. 73
Step by Step – Find Feature	. 76
Step by Step – Merge Estimate Vendors to Platform	107
Step by Step – Upload Estimate Vendors to Platform	108
Step by Step – Merge Contacts to Platform	.109
Step by Step – Upload Contacts to Platform	111
Step by Step – Create Vendors and Contacts via Quote Record	.113
Step by Step – Create a Labor Resource	137
Step by Step – Create a Rental Equipment Resource	140
Step by Step – Non-Hourly Rate Calculator	141
Step by Step – Create an Installed Material Resource	.143
Step by Step – Create a Resource Assembly	147
Step by Step – Opening the Labor tab	152
Step by Step – Creating the Resource	.154
Step by Step – Resource Cost Detail	157
Step by Step – Filter Resource Cost Detail Register	159

Step by Step – Manual Setup of Scales	
Step by Step – Creating the Resource	
Step by Step – Material Saved View	
Step by Step – Quantity Checking	
Step by Step – Access Control Report	
Step by Step – Create a New Job	
Step by Step – Shift Rate Calculator	
Step by Step – Import Filtered Resources	
Step by Step – Enter Fuel Costs	
Step by Step – Create a Pay Item	
Step by Step – Adjust take-off quantities	
Step by Step – Create a subordinate cost item	
Step by Step – Define a plugged cost	
Step by Step – Detail costs	
Step by Step – Add cost detail	
Step by Step – Define cost detail by adding an assembly	
Step by Step – Adjust shift arrangements	
Step by Step – Suspend a Cost Item	
Step by Step – Unsuspend a Cost Item	
Step by Step – Add job management & equipment costs	
Step by Step – Add general expense costs	
Step by Step – Delete existing default dependent cost items	
Step by Step – Define prime bond	
Step by Step – Define a price % add-on	
Step by Step – Define a direct cost add-on	
Step by Step – Add user-defined indirect cost items	
Step by Step – Cost Allocation	
Step by Step – Cost Allocation by Unit Cost	
Step by Step – Dependent Cost Item Allocation	
Step by Step – Turning Off Cost Allocation	

Step by Step – Breaking a Cost Allocation Link	307
Step by Step – Create and publish an RFQ	323
Step by Step – Create a multi-packaged quote	339
Step by Step – Create a quote from RFQ	347
Step by Step – Enter quote details	348
Step by Step – Create a multi-packaged quote	349
Step by Step – Duplicate an existing quote	354
Step by Step – Add the Notes section to Quote Comparison & Award form	367
Step by Step – Compare and award quotes	373
Step by Step – Set up scope items	380
Step by Step – Set up quotes for scope items	381
Step by Step – Manage and award scope items	382
Step by Step – Quote item adjustment	384
Step by Step – Add profit as a percentage of target price	393
Step by Step – Modify the direct cost markup record	394
Step by Step – Define pricing manually	399
Step by Step – Use AutoPrice to balance and hit the target total	399
Step by Step – Unbalance hit target total	400
Step by Step – Lock Price	406
Step by Step – Make Last Minute Bid Adjustments	406

## EXERCISES

Exercise 3.1 – Create Resources & Resource Assemblies	
Exercise 4.1 – Define Job Properties	
Exercise 4.2 – Create Pay Items	
Exercise 5.1 – Create cost items	
Exercise 5.2 – Define cost detail	
Exercise 5.3 – Manage cost item details	
Exercise 6.1 – Define Indirect Costs	
Exercise 8.1 – Quote Management	
Exercise 9.1 – Manually Price Pay Items	

This page intentionally left blank.



## INTRODUCTION

#### COURSE DESCRIPTION

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

## COURSE OBJECTIVES

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

- Construct and modify cost estimates
- Calculate profit and finalize bid proposals

#### HOW TO USE THIS MANUAL

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

#### LESSONS

The following lessons are covered in this course:

	Course Lessons
Lesson	Торіс

#### Course Lessons

Lesson 1	Estimating Core Concepts
----------	--------------------------

- Lesson 2 General Navigation
- Lesson 3 Library Setup
- Lesson 4 Project Setup
- Lesson 5 Estimate Direct Costs
- Lesson 6 Estimate Indirect Costs
- Lesson 7 Finalize the Estimate

#### **LESSON FORMAT**

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

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

#### CALL-OUTS

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

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

NOTE Notes are for critical information you need to know.

#### ONGOING USE

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

This page intentionally left blank.



# LESSON 1 – ESTIMATING CORE CONCEPTS

#### **LESSON DURATION: 30 MINUTES**

#### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Explain the estimating process in InEight Estimate
- Explain key terms and concepts

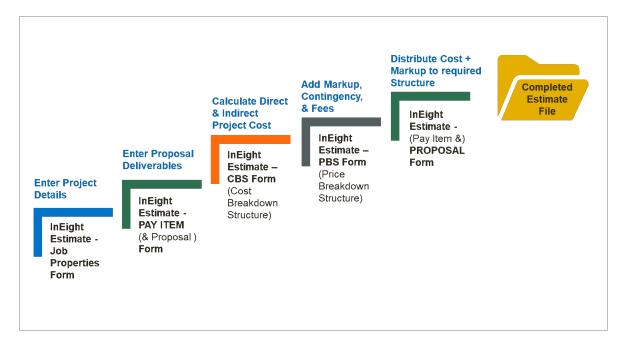
#### **LESSON TOPICS**

## 1.1 OVERVIEW OF THE ESTIMATING PROCESS

The estimating process typically progresses through the following five steps. If you are an Owner you may not take part in all five of these steps, but may instead do a few in an iterative process as you progress through stage gate approval phases.

- 1. Enter project details.
- 2. Enter proposal deliverables.
- 3. Calculate Direct & Indirect Project Cost.
- 4. Add Markup, Contingency, & Fees.
- 5. Distribute Cost + Markup to required structure.

The below table displays how these five steps correspond with specific forms in InEight Estimate:



Note the forms used in InEight Estimate to accomplish the steps above:

- Job Properties
- Pay Item & Proposal
- CBS (Cost Breakdown Structure)
- PBS (Price Breakdown Structure)

The rest of this section walks you through an overview of each step in the process and its corresponding form in InEight Estimate.

#### **STEP 1 - ENTER PROJECT DETAILS**

When you decide to estimate a new project, the first step is to create a new estimate and set it up with the general project details. In InEight Estimate, you'll enter basic information and project specific settings in the Job Properties form from the Setup tab.

The Job Properties form is organized into tabs to help you keep track of all the basic information and settings for the project. It begins with the Overview tab. You will move from left to right entering your project specific information and adjusting any settings that differ from the default.

) 💾 👻					Training Jo	ob - Estimate						-	в ×
e Setup	Estimate Quot	e Price	Executio	n System	Integrat	ions						童	: 🖽 🔇
	Indation p Data * Proposal	8. Bid Wizard	d Resource Rates *	🐔 Labor 🚵 Equipment	Resource Assemblies	Cost Item Assemblies	Standar	rd Reports					
	Initialize			Resources		Assem	blies	Reports					,
ost Breakdown S	tructure (CBS) Reg	ister	Job Properti	es ©									-
Overview Securi	ty Cover Sheet	Cost Basis	Minority Set	up Fuel Cost	Job Tracki	ng Job Folde	r Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment	- •
Identification													
Location:	I-10 MP 100 to MP 12	0	Type:	Highway and Gen	eral Enginee	ring			Contra	act Duration:			160
City:	Phoenix		Engineer:	Example Engineer	Fred Jone	s			Ti	me Measure:	Contract Da	/S *	
County:	Maricopa		Owner:	Example Owner	Jerry Slate			[	E Fo	recast Start:	6/11/2019	•	
Country:	United States 🔹		Architect:	Example Architect	Robert Fr	ost		[	E For	ecast Finish:	11/20/2019	•	
State:	Arizona 👻	1								Duration:			162
Latitude:		0.00000											
Longitude:		0.00000											
Proposal													
Bid Date:	12/23/2013 -	]				Opening	Type:	Public					
Bid Time:	10:00:00 PM					Proposa	Type:	Unit Price					
Estimator:	Example Prime Cont	ractor 1 Ton	Cross		1	Plan Ho	lders:						5
Bid Location:	Engineer's Office					Liquidated Dar	mages:						\$1,000.00
Owners Estimate:				\$6,	000,000.00	Liq. Damag	es Per:	Day				•	
					RFQ Contact	: Example Prim	e Contra	ctor 1 Tom Cro	SS				1
											ОК		ancel

#### **STEP 2 - ENTER PROPOSAL DELIVERABLES**

For Contractors who are submitting a proposal to a client, this step enables you to enter the client provided deliverables clients are requesting pricing for. Most Owners will skip this step unless there is a need to track various funding sources or prepare for internal or external company billing.

In InEight Estimate this list of items is recorded in the Pay Item & Proposal Register on the Setup tab.

• Notice that your pay items have no pricing when first entered because you have yet to figure out costs. You will come back to this form later in the process to distribute your costs and markup.

Pro	posal Re	cap - Training Job	•						×	Item Recap - 200	SITEWORK & ROAL	DWAY						×
		Current	Target	Forecast	Variance					Description		Unit Price (balanced)	Total Price (balanced)		Total Price (current)			
	Price:	\$6,569,735.00	\$6,569,736.28	\$6,577,223.80	\$1.28 AI	DD				Price		(Dener ICCO)	\$3,164,056		\$3,402,700			
Þ	larkup:	\$984,118.34	\$984,119.62	\$1,041,388.54	\$57,268.92 C	п				<ul> <li>Distribution</li> </ul>			\$549,496.57		\$888.140.0			- 11
Ma	rgin%:	14.98	14.98	15.83	\$66,039.81 C	п				🗸 🙏 Markus			\$478,396,13		\$717,152.3			
										A Pro	fit (Markup records)		\$313,781.00		\$552,537.2	0		
							P	ricina is	now sp	read to								
rag	columns h	ere to group							y items						Saved vi	ews: Standard	/ien	- )
	Position i	Pay Item Number	Descript	ion		Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Currency	Unit Price (current)	Total Price (current)	Unit Markup (balanced)	Lock Quantity	Total Markup (balanced)	Lock Price	Unit Distribution	Total Distribution	Unit I (curr
5	<b>1</b>	200	SITEWO	RK & ROADWAY					U.S. Dollar		\$3,402,700.00			\$478,396.13			\$649,383.87	
		641 0 100	Mobile	ration		1.00	1.00	Lump Sum	U.S. Dollar	\$395,600.00	\$395,600.00	\$2,848.15		\$2,848.15		\$6,553.48	\$6,553.48	
	+ 1.1											\$976.24		\$9,762.36		\$1,973,16	\$19,731.56	
	+ 1.1 + 1.2	201 0 102	Cleari	ng & Grubbing		10.00	10.00	Acre	U.S. Dollar	\$5,900.00	\$59,000.00	\$970.24						
		201 0 102		ng & Grubbing ssified Excavation		10.00 50,000.00	10.00		U.S. Dolar	\$5,900.00	\$59,000.00	\$1.11		\$55,694.42		\$1.65	\$82,417.49	
	+ 1.2		Unda					Cubic Yard										
	+ 1.2 + 1.3	202 0183	Unda: Aggre	ssified Excavation	x Type A	50,000.00	50,000.00	Cubic Yard Ton	U.S. Dollar	\$5.50	\$275,000.00	\$1.11		\$55,694.42		\$1.65	\$82,417.49	
	+ 1.2 + 1.3 + 1.4	202 0 183 303 59 12	Unda: Aggre Aspha	ssified Excavation gate Base	х Туре А	50,000.00	50,000.00 45,000.00	Cubic Yard Ton	U.S. Dollar U.S. Dollar	\$5.50 \$26.50	\$275,000.00	\$1.11 \$3.02		\$55,694.42 \$120,771.08		\$1.65 \$4.14	\$82,417.49 \$165,733.22	
	+ 1.2 + 1.3 + 1.4 + 1.5	202 0183 303 5912 303 4263	Unda: Aggre Aspha WATER	ssified Excavation gate Base It Concrete Hot Mi		50,000.00	50,000.00 45,000.00 35,000.00	Cubic Yard Ton	U.S. Dolar U.S. Dolar U.S. Dolar	\$5.50 \$26.50	\$275,000.00 \$1,060,000.00 \$1,613,100.00	\$1.11 \$3.02		\$55,694.42 \$120,771.08 \$289,320.12		\$1.65 \$4.14	\$82,417.49 \$165,733.22 \$374,948.12	

#### STEP 3 - CALCULATE DIRECT & INDIRECT PROJECT COST

Once you've set up your estimate, you will perform take-offs and cost analysis to determine the total estimated cost to complete the entire scope of work.

The Cost Breakdown Structure (CBS) Register is the main form where you will do your cost estimating.

- It is the hierarchy of work activities that make up the estimate
- Each row in the CBS represents a work activity and is called a cost item

3	<u> </u>						Training Job -								×
File	Setup	Estimate	Quote	Price Execution	Sy	stem	Integrations	Actions	More Acti	ons				鱼目	] (
ļ	Print	🕀 New	唱 Сору	Split	-	₽	Here Cost Item		📑 Assembly	1	2	10	YY	E	
ą	Preview	🛞 Delet	e 💼 Paste	🔁 Toggle Suspended		周	🔚 Subordina	te Cost Item	🚍 Subordina	ate Assembly		×		2	
X	Export to Excel	° Cut	+ Fill Dowr	n 빠 Indent				t Cost Item				and / pse *	Filter Clear Filter		
	Print			Edit					Insert				View		
ob	Properties	Cost I	reakdown Str	ucture (CBS) Register	0										
rac	columns here to c	TOUD						Find:	[Search For]	5av	ed views:	Previou	is View	-	7
- ag		a oup						rinu:	[ocarent ann]	507	cu news.				
	CBS Position Code	<u>⊨</u> D	escription		Op Cor	tional de		Forecast (T/O) Quant	ity	Unit of Measure	Unit C	Cost	Total Cost (Forecast)	Allocated	d
÷		J	DB						20.00	Mile	\$293	3,095.93	\$5,861,918.63		]
	+	P	rime Bond		PR	IME BON	ND .		1.00	Lump Sum	\$4	7,069.88	\$47,069.88		
	+	P	rice % Add-Or	n	PR	ICE % A	DD-ON		1.00	Lump Sum	\$29	4,928.95	\$294,928.95		
	+	J	ob Financing		FIN	NANCE E	XPENSE		1.00	Lump Sum		\$0.00	\$0.00		
	+	1	ndirect Cost Es	scalation	IND	DIRECT	COST ESCAL		1.00	Lump Sum		\$0.00	\$0.00		
	+	C	irect Cost Esca	alation	DIF	RECT CC	OST ESCALAT		1.00	Lump Sum	\$18	3,837.35	\$18,837.35		
	+	1	ndirect Cost A	dd-On	INE	DIRECT	COST ADD-ON		1.00	Lump Sum		\$0.00	\$0.00		
	+	J	ob Manageme	nt & Equipment	JO	B MANA	GEMENT & E		1.00	Lump Sum	\$15	7,096.28	\$157,096.28		
	+	G	eneral Expens	se in the second se	GEI	NERAL E	EXPENSE		1.00	Lump Sum	\$	4,200.00	\$4,200.00		
	+	0	irect Cost Add	l-On	DIF	RECT CO	OST ADD-ON		1.00	Lump Sum	\$10	4,301.10	\$104,301.10		
	+ 1	1	obilization		64	1 0 100			1.00	Lump Sum	\$1	1,909.51	\$11,909.51		
	+ 2	c	learing & Grub	obing	20	10102			10.00	Acre	\$3	3,918.50	\$39,184.97		
	■ 3	u	nclassified Exc	cavation	203	2 0 183			50,000.00	Cubic Yard		\$4.68	\$233,915.81		]
	+ 3.1		Excavation		3.1	L			50,000.00	Cubic Yard		\$3.00	\$149,922.88		
	+ 3.2		Embankment		3.2	2			50,000.00	Cubic Yard		\$1.68	\$83,992.94		
	■ 4	A	ggregate Base	e	303	3 5912			45,000.00	Ton		\$15.40	\$692,928.99		]
	+ 4.1		Furnish & Haul B	Base Material	4.1	L			45,000.00	Ton		\$11.54	\$519,513.30		]
	+ 4.2		Finegrade Subg	rade	4.2	2			400,000.00	Square Yard		\$0.19	\$75,848.36		]
	= 42		Install Accrease	to Page	1.5	,			45 000 00	Top		êD 17	ANT 547 22		1

#### STEP 4 - ADD MARKUP, CONTINGENCY, & FEES

Once you have estimated all project costs, you may need to add markup, contingency or other fees and define the job's profit in the Price Breakdown Structure form.

Description		Assigned	Unassigned	Total	% of Target
🖌 🔺 Price Brei	akdown Structure				
🗸 🔺 Targe	et Price	\$5,252,19	\$645,755.99	\$5,897,950.68	100.00
~ 🛕 м	larkup	\$0.00	\$315,692.95	\$315,692.95	5.3
✓ ▲	Target Profit		\$0.00	\$0.00	0.0
	💧 Indirect Cost Markup		\$0.00	\$0.00	0.0
	🛕 Direct Cost Markup		\$0.00	\$0.00	0.0
✓	Business Overhead	\$0.00	\$315,692.95	\$315,692.95	5.3
	Price % Add-On	\$0.00	\$265,407.78	\$265,407.78	4.5
	Job Financing	\$0.00	\$33,105.26	\$33,105.26	0.5
	Indirect Cost Escala	\$0.00	\$2,131.11	\$2,131.11	0.0
	Direct Cost Escalation	\$0.00	\$15,048.80	\$15,048.80	0.2
	Business Overhead	\$0.00	\$0.00	\$0.00	0.0
- 🖌 📥 T	otal Cost	\$5,252,19	\$330,063.05	\$5,582,257.73	94.6
✓ ▲	Indirect Cost	\$0.00	\$329,063.05	\$329,063.05	5.5
~	🔺 Job Overhead	\$0.00	\$329,063.05	\$329,063.05	5.5
	Prime Bond	\$0.00	\$43,789.75	\$43,789.75	0.7
	Indirect Cost A	\$0.00	\$5,888.67	\$5,888.67	0.1
	Direct Cost Add	\$0.00	\$104,088.34	\$104,088.34	1.7
	Job Overhead I	\$0.00	\$175,296.28	\$175,296.28	2.9
✓ ▲	Direct Cost	\$5,252,19	\$1,000.00	\$5,253,194.68	89.0
	Direct Cost Items	\$5,252,19	\$1,000.00	\$5,253,194.68	89.0

#### STEP 5 - DISTRIBUTE COST + MARKUP TO REQUIRED STRUCTURE

You now have a target price or total estimated value that you can spread to your required project deliverables, back in the Pay Item & Proposal form. InEight Estimate has tools within this form to help automatically distribute your cost, overhead and all markups to the listed items.

Prop	osal Re	ecap - Tra	ining Jol	<b>b</b>			×	It	tem Recap -	641 0100 Mo	bilization			~
			Current	Target	Forecast	Variance					Balanced Unit	Current Unit		
F	Price:	\$6,455,4	450.00	\$6,553,976.75	\$6,462,850.00	\$98,526.75	ADD			Price:	\$18,300.00	\$386,800.00		
Р	rofit:	\$544	,294.64	\$642,821.40	\$604,568.97	\$38,252.43	ADD			Profit:	\$2,049.63	\$370,501.39		
Marg	jin%:		8.43	9.81	9.35	\$32,502.50	ADD		-	Total Cost:	\$16,298.61	\$16,298.61		
									Busines	s Overhead:	\$840.31			
									Jot	b Overhead:	\$3,546.52	-		
									Unassigned	Direct Cost:	\$2.26			
									Assigned	Direct Cost:	\$11,909.51			
									[]	formula from 1		and a strength of the state	- 4 10	
ag co	olumns h	here to gro	up						Find:	[Search For]	··· Sa	red views: Stand	ard View	-
P	olumns h ay Item lumber	-	up Descript	ion		Pay Quantity	Forecast (T/O) Quantity		Find: Unit of Measure	[Search For] Currency	··· Sav Unit Price (current)	red views: Stand Total Price (current)	ard View Unit Price (balanced)	Total Price
PN	ay Item	1							Unit of		Unit Price	Total Price (current)	Unit Price (balanced)	Total Price (balanced
P N +	ay Item lumber	) ) ) 100	Descript Mobilizat			Quantity	Quantity	00	Unit of Measure	Currency	Unit Price (current)	Total Price (current) 0 \$386,800.00	Unit Price (balanced) \$18,300.00	Total Price (balanced \$18,3
P N + +	ay Item lumber • 641 0	) ) ) ) ) ) ) ) ) ) ) ) ) )	Descript Mobilizat	ion		Quantity 1.00	Quantity 1.	00 00	Unit of Measure Lump Sum	Currency U.S. Dollar	Unit Price (current) \$386,800.0	Total Price (current) 0 \$386,800.00 0 \$61,200.00	Unit Price (balanced) \$18,300.00 \$5,867.33	Total Price (balanced) \$18,3 \$58,6
P N + +	ay Item lumber 641 0 201 0	0100 0102 0183	Descript Mobilizat	tion & Grubbing fied Excavation		Quantity 1.00 10.00	Quantity 1.	00 00	Unit of Measure Lump Sum Acre	Currency U.S. Dollar U.S. Dollar	Unit Price (current) \$386,800.0 \$6,120.0	Total Price (current)           0         \$386,800.00           0         \$61,200.00           0         \$425,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31	Total Price (balanced) \$18,3 \$58,6 \$315,5
P N + + +	ay Item lumber 641 0 201 0 202 0	0100 0102 0183 5912	Descript Mobilizat Clearing Unclassi Aggrega	tion & Grubbing fied Excavation	Туре А	Quantity 1.00 10.00 50,000.00 40,00	Quantity 1. 10. 50,000.	00 00 00	Unit of Measure Lump Sum Acre Cubic Yard W Sprea	Currency U.S. Dollar U.S. Dollar U.S. Dollar	Unit Price (current) \$386,800.0 \$6,120.0 \$8.5	Total Price (current)           0         \$386,800.00           0         \$61,200.00           0         \$425,000.00           0         \$830,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31 \$19.47	Total Price (balanced) \$18,3 \$58,6 \$315,5 \$778,8 \$1,986,6
P N + + +	ay Item lumber - 641 0 - 201 0 - 202 0 - 303 5 - 303 4	0100 0102 0183 5912	Descript Mobilizat Clearing Unclassi Aggrega Asphalt	tion & Grubbing fied Excavation te Base		Quantity 1.00 10.00 50,000.00 40,00	Quantity 1. 10. 50,000.	00 00 00	Unit of Measure Lump Sum Acre Cubic Yard	Currency U.S. Dollar U.S. Dollar U.S. Dollar	Unit Price (current) \$386,800.0 \$6,120.0 \$8.5 \$22.0	Total Price (current)           0         \$386,800.00           0         \$61,200.00           0         \$425,000.00           0         \$380,000.00           \$1,330,000.00         \$1,330,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31 \$19.47 \$52.28	Total Price (balanced) \$18,3 \$58,6 \$315,5 \$778,8 \$1,986,6
P N + + + +	ay Item lumber - 641 0 - 201 0 - 202 0 - 303 5 - 303 4	0100 0102 0183 5912 4263 (B) 0464	Descript Mobilizat Clearing Unclassi Aggrega Asphalt 36 Inch	tion & Grubbing fied Excavation ate Base Concrete Hot Mix 1	ass III	Quantity 1.00 10.00 50,000.00 40,000 38,000	Quantity 1. 10. 50,000. Pricing is i bid	00 00 00	Unit of Measure Lump Sum Acre Cubic Yard W Sprea	Currency U.S. Dollar U.S. Dollar U.S. Dollar	Unit Price (current) \$386,800.0 \$6,120.0 \$8.5 \$22.0 \$35.0	Total Price (current)           0         \$386,800.00           0         \$61,200.00           0         \$425,000.00           0         \$4380,000.00           0         \$1,330,000.00           0         \$100,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31 \$19.47 \$52.28 \$87.19	Total Price (balanced) \$18,3 \$58,6 \$315,5 \$778,8 \$1,986,6 <b>\$87,19</b>
P N + + + + + + +	ay Item lumber - 641 0 - 201 0 - 202 0 - 303 5 - 303 4 - 413(	0100 0102 0183 5912 4263 (B) 0464 0220	Descript Mobilizat Clearing Unclassi Aggrega Asphalt <b>36 Inch</b> 10 Inch	tion & Grubbing fied Excavation tte Base Concrete Hot Mix T RCP Culvert Cla	DR21)	Quantity 1.00 10.00 50,000.00 40,00 38,00 <b>1,00</b>	Quantity 1. 10. 50,000. Pricing is i bid		Unit of Measure Lump Sum Acre Cubic Yard W Sprea ems	Currency U.S. Dollar U.S. Dollar U.S. Dollar	Unit Price (current) \$386,800.0 \$6,120.0 \$8.5 \$22.0 \$35.0 \$35.0 \$100.0	Total Price (current)           0         \$386,800.00           0         \$61,200.00           0         \$425,000.00           0         \$4380,000.00           0         \$100,000.00           0         \$336,000.00           0         \$336,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31 \$19.47 \$52.28 <b>\$87.19</b> \$29.82	Total Price (balanced) \$18,30 \$58,6 \$315,50 \$778,80

## **1.2 KEY CONCEPTS AND TERMS**

To help you get started in InEight Estimate, you should know a few key terms:

- Job Folder
- Library
- Form
- Cost Item
- Pay Item
- Resource
- Assembly

#### **1.2.1 JOB FOLDER**

**Job folders** hold all the information for an individual project estimate. It is possible to import master data into a job folder, but when you work in a job folder it is independent, meaning any activity performed in that folder will not affect any other jobs and will not affect the library.

TIP

When moving back and forth between jobs, make sure to always double-check that you are in the right job.

#### 1.2.2 LIBRARY

The Library is a storehouse for master data, such as:

- Labor, equipment, and material unit cost rates
- Standard account codes
- Units of measure

When you create a new job from scratch, default data and settings copy from the Library into your new job folder, except for the resource rates. Multiple list of resource rates can be maintained in the library so you must select which rates to populate a new estimate with. Four tag fields are available to filter the resource rates you bring into an estimate from the master library. For example, you may select a subset of your labor rates based on the geographical location of the project.

#### 1.2.3 FORM

Any screen you open in InEight Estimate is considered a Form. There are three types of forms: Standard, Register, and Record forms.

**Standard Forms** resemble typical data entry forms with fields available to fill in key project information. They also may contain radio buttons or checkboxes to define settings for the job.

Standard Shift Art, speenents     Standard Wage Rate Composite     Rules       Work Hours per Shift     8.00     Scale 1:     100.00 %     Pay Item Unit Price Precision:     2       Pay Hours per Shift:     8.00     Scale 2:     0.00 %     Activate PBS Changes Log       Shifts per Day:     1.00     Scale 3:     0.00 %     Activate Quantity Checking       Days per Week:     5.00     Shift     Checkboxes     When man-count changes:     © Change UM / Man-Hour	verview Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipmen
Davs per Week: 5.00 Characteristic C	Work Hours per Shift Pay Hours per Shift:	8.00	Scale 1: Scale 2:	100.00 %		Lock Cost Items Pay Item Unit Pr Activate PBS Cha	ice Precision: inges Log	2			e Original Cos	t Item
Entry Fields Change Days Radio buttons	Days per Week:	5.00					t changes: 🔘	Change UM / M	an-Hour			

TIP

InEight Estimate uses tabs to group and organize entry fields and settings in a logical way, so that the information is easy to access.

**Register Forms** have a grid format of rows and columns, giving it a spreadsheet look and feel. Register forms allow you to see information for multiple items at once. The Cost Breakdown Structure (CBS) Register is an example of a register form.

rad	columns here to group			Find: [Search For	1 ···· Saved	views: Standa	rd View	-	
	·			rind.					
	CBS Position Code	Description	Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Allocated	
T	+ 1	Mobilization	641 0100	1.00	Lump Sum	\$11,909.51	\$11,909.51		
	+ 2	Clearing & Grubbing	201 0102	10.00	Acre	\$3,918.50	\$39,184.97		
	□ 3	Unclassified Excavation	202 0183	50,000.00	Cubic Yard	\$4.54	\$226,856.16		
	+ 3.1	Excavation	3.1	50,000.00	Cubic Yard	\$2.86	\$142,863.22		
	+ 3.2	Embankment	3.2	50.000.00	Cubic Yard	\$1.68	\$83,992.94		
	□ 4	Aggregate Base	303 Views	nultiple	Ton	\$15.40	\$692,928.99		
1	+ 4.1	Furnish & Haul Base Material	4.1	• 00	Ton	\$11.54	\$519,513.30		
	+ 4.2	Finegrade Subgrade	4.2 Items	at once	Square Yard	\$0.19	\$75,848.36		
1	<b>■</b> 4.3	Install Aggregate Base	4.3	.00	Ton	\$2.17	\$97,567.33		
	+ 4.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton	\$1.63	\$73,460.92		
1	+ 4.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard	\$0.06	\$24, 106.42		
	<b>□</b> 5	Asphalt Concrete Hot Mix Type A	303 4263	35,000.00	Ton	\$42.62	\$1,491,580.59		
1	+ 5.1	Furnish & Haul Hot Mix	5.1	35,000.00	Ton	\$39.27	\$1,374,562.54		
2	+ 5.2	Install Hot Mix Type A	5.2	35,000.00	Ton	\$3.34	\$117,018.05		
	□ 6	36 Inch RCP Culvert Class III	413(B) 0464	<u>1,024.00</u>	Linear Feet	\$67.54	\$69,159.49		
	+ 6.1	Furnish RCP Materials	6.1	1,024.00	Linear Feet	\$33.48	\$34,286.70		
	+ 6.2	Excavate RCP Trench	6.2	1,858.56	Cubic Yard	\$4.51	\$8,379.59		
	+ 6.3	Install RCP Pipe	6.3	1.024.00	Linear Feet	\$11.74	\$12,017.60		

In a register form, you can open a **Record** for individual items you want to drill into.

The Tab key is the best way to move among fields in InEight Estimate (instead of the Enter key).

The below figure displays a Cost Item Record accessed by double clicking on that item on the Cost Breakdown Structure (CBS) Register.

:BS	Code:	Opt	ional Code:	Desc	ription:				Forecast (T/O)	Qty:	Unit of Me	asur
H	4	303	5912	Agg	regateBa	ise			45,	000.00	Ton	
	4.1	4.1		Furn	ish & Ha	ul Base Mat	terial		45,	000.00	Ton	
	ssignment: 3 5912 🔹	40			escriptio regateBa		Record f	oci	uses		Cost Segn Direct Cos	
C <u>o</u> s	st Item Summar	у	<mark>≩∕</mark> <u>D</u> etail :	\$11.54	<b>₽</b> Pi	ug:\$0.00	on 1 i	ter	n			
_	st Item Summar g columns here			\$11.54 Find:			on 1 i		n Previous View		•	
_					[Search		··· Saved views	s: F Qu		Was	te %	Qua
_	columns here		oup	Find: Resource	[Search	For]	··· Saved views	s: F Qu	Previous View antity		te %	Qua
_	g columns here Row Number 😑	to gr	oup Code	Find: Resource	[Search	For] Description	Saved view	s: F Qu	Previous View antity		te %	Qua

TIP

#### 1.2.4 COST ITEM

**Cost items** are the individual cost-related activities that make up the project. Cost items are organized into a hierarchy in the Cost Breakdown Structure (CBS) Register. Each row in the CBS is considered a cost item.

CBS Position Code	Description	Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost
+ 1	Mobilization	641 0 100	1.0	00 Lump Sum	\$11,909.5
+ 2	Clearing & Grubbing	201 0 102	10.0	00 Acre	\$3,918.50
□ 3	Unclassified Excavation	202 0183	50,000.0	00 Cubic Yard	\$4.68
+ 3.1	Excavation	3.1	50,000.	00 Cubic Yard	\$3.00
+ 3.2	Embankment	3.2	50,000.	00 Cubic Yard	\$1.68
□ 4	Aggregate Base	303 5912	45,000.0	00 Ton	\$15.40
+ 4.1	Furnish & Haul Base Material	4.1	45,000.0	00 Ton	\$11.54
+ 4.2	Finegrade Subgrade	4.2	400,000.0	00 Square Yard	\$0.19
<b>■</b> 4.3	Install Aggregate Base	4.3	45,000.0	00 Ton	\$2.17
+ 4.3.1	Place Aggregate Base	4.3.1	45,000.0	00 Ton	\$1.63
+ 4.3.2	Blue Top Aggregate Base	4.3.2	400,000.0	00 Square Yard	\$0.0

#### **1.2.5 PAY ITEM**

Pay items typically represent the owner required deliverables a contractor must submit pricing for. Pay items are used to distribute the cost calculated in the Cost Breakdown Structure, with all markup, including any fees or contingencies calculated in the Price Breakdown Structure. This allows the total estimate value to be distributed to a structure that is different than the CBS. Pay Items are predominantly used by contractors to prepare a bid sheet. Owners may use pay items to identify funding sources or for various reporting needs.

Position Pay Item Code Number		Pay Item Number	Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Currency	Unit Price (current)	Total Price (current)
	□ 1	200	SITEWORK & ROADWAY				U.S. Dollar		\$3,402,700
	+ 1.1	641 0 100	Mobilization	1.00	1.00	Lump Sum	U.S. Dollar	\$395,600.00	\$395,600
	+ 1.2	201 0 102	Clearing & Grubbing	10.00	10.00	Acre	U.S. Dollar	\$5,900.00	\$59,000
	+ 1.3	202 0 183	Unclassified Excavation	50,000.00	50,000.00	Cubic Yard	U.S. Dollar	\$5.50	\$275,000
	+ 1.4	303 5912	Aggregate Base	40,000.00	45,000.00	Ton	U.S. Dollar	\$26.50	\$1,060,000
	+ 1.5	303 4263	Asphalt Concrete Hot Mix Type A	38,000.00	35,000.00	Ton	U.S. Dollar	\$42.45	\$1,613,100
	<b>□</b> 2	400	WATER & SEWER				U.S. Dollar		\$718,550
	+ 2.1	413(B) 0464	36 Inch RCP Culvert Class III	1,000.00	1,024.00	Linear Feet	U.S. Dollar	\$97.45	\$97,450
	+ 2.2	800 0220	10 Inch PVC Force Main (SDR21)	12,000.00	12,000.00	Linear Feet	U.S. Dollar	\$29.50	\$354,000

## 1.2.6 RESOURCE

**Resources** are the building blocks of a detailed cost estimate.

Resources are the people, equipment, material, and supplies needed to complete the project. Resources are employed to cost items to develop an estimate, and are organized into seven categories or types:

- 1. Labor
- 2. Construction Equipment
- 3. Rented Construction Equipment
- 4. Installed Equipment
- 5. Installed Materials
- 6. Supplies
- 7. Unique

#### **1.2.7 RESOURCE ASSEMBLY**

A **Resource Assembly** is a group of resources that are often used together. For example, for civil work, you may group together an operator foreman, operator, and laborer, along with a loader and excavator. When estimating, you can employ this assembly which includes all of the pre-selected resources.

sou	rce A	ssembly	/ Regis	ter O															
g col	lumns	here to g	roup																
Co	ode	<u>=</u>	Descrip	otion		Resou File D	urce escription		Quantity		Unit of Measure	2	Unit C	Cost	Total Cost	Currency		anizational gory	Geograpi Area
-	ссо	NC	Concre	ete Crew		Stand	lard Assemb	ly File		1.00	Hour			\$375.03	\$375.03	U.S. Dollar	Cond	rete	
		Row Number	<u> </u>	Resource Code	Description		Quantity	Unit of Measure	Unit Cost	Curr	ency	Cost Driver		Resource File Descr	iption	Organizati Category	onal	Geographic Area	Wage Zone
	$\rightarrow$		1	LC2	Carpenter Journ	eyman	2.00	Each	\$28.92	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Carpenter		Southwest	Wage Zon.
			2	LF2	Finisher		1.00	Each	\$28.07	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Finisher - C	Conc	Southwest	Wage Zon.
			3	LIW1	Iron Worker		1.00	Each	\$35.55	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Iron Worke	er	Southwest	Wage Zon
			4	LL2	Laborer		1.00	Each	\$26.37	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Laborer		Southwest	Wage Zon
		5 ECRHC		Hydraulic Crane	25 Ton	1.00	Each	\$117.60	U.S.	Dollar	CI Du	ra	Standard	Equipment Rate	Crane				
			6	LC1	Carpenter Appre	ntice	1.00	Each	\$27.48	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Carpenter		Southwest	Wage Zon
			7	LO2	Operator Class 2	2	1.00	Each	\$28.07	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Operator		Southwest	Wage Zon
			8	ETFT	Flatbed Truck		1.00	Each	\$22.60	U.S.	Dollar	CI Du	ra	Standard	Equipment Rate	Truck			
			9	LC3	Carpenter Forem	nan	1.00	Each	\$31.47	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Carpenter		Southwest	Wage Zon.
+	CGR	ADE	Gradin	g Crew		Stand	lard Assemb	ly File		1.00	Hour			\$234.73	\$234.73	U.S. Dollar	Eart	hwork	
+	CMA	INT	Equipm	ent Mainter	ance	Stand	lard Assemb	ly File		1.00	Each			\$73.60	\$73.60	U.S. Dollar	Mech	nanic	
+	CPA	/E	Paving	Crew		Stand	lard Assemb	ly File		1.00	Hour			\$476.24	\$476.24	U.S. Dollar	Asph	nalt	

#### **1.2.8 COST ITEM ASSEMBLY**

A **Cost Item Assembly** is a predefined group of cost items that has cost based on estimator inputs to a set of questions. Cost item assemblies provide parameter-driven estimating and can also refer to reference tables. They allow companies to create intelligent construction systems to automatically estimate various scopes of work, based upon a user providing specification and dimension variables.

0	st Item Assembl	y Register 🛛								
ra	g columns here to g	roup								
	Code 🚊	Description	Assembly File Description	Default Quantity	Default Unit of Measure	Default Unit Cost	Default Total Cost	Default Currency	Organizational Category	Geographic Area
	RW01	Standard Retaining Wall Assembly	Standard Cost It	20.00	Cubic Yard	\$424.67	\$8,493.38	U.S. Dollar	Concrete	
	TEST	TEST		1.00	Each	\$0.00	\$0.00	U.S. Dollar		
	TEST - DRS	Test Cost Item Assembly - Ductbank	Standard Cost It	1.00	Each	\$0.00	\$0.00	U.S. Dollar	Concrete	Northeast
	TEST DS	Test Cost Item Assembly - Ductbank	Standard Cost It	1.00	Each	\$0.00	\$0.00	U.S. Dollar	Excavator	Southwest
ı		1								

#### **LESSON 1 REVIEW**

- 1. Which InEight Estimate form is used to enter basic information about the job as well as define our cost basis?
  - a. Pay Item & Proposal
  - b. Job Properties
  - C. Library
  - d. Job Folder
- 2. All default data and settings copy from the Library into your new job folder *except*:
  - a. Labor rates
  - b. Equipment rates
  - c. Material rates
  - d. All of the above
- 3. These are considered the "building blocks" of the job you employ them to cost items to develop your estimate.
  - a. Assemblies
  - b. Pay Items
  - C. Resources
  - d. Forms

#### **LESSON 1 SUMMARY**

As a result of this lesson, you can:

- Explain the estimating process in InEight Estimate
- Explain key terms and concepts

This page intentionally left blank.



# LESSON 2 – GENERAL NAVIGATION

### **LESSON DURATION: 45 MINUTES**

### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Navigate the InEight Estimate system interface
- Navigate system settings
- Manage columns in InEight Estimate registers

### **LESSON TOPICS**

## 2.1 GENERAL NAVIGATION

This section explores the layout of InEight Estimate.

As a new user to the InEight, the First-time sign in dialog box opens when you first sign in, and presents questions about your working environment in the Project Suite environment. Preferences are set for language, date, and number formats and the User Agreement, which you must accept before you begin. The First-time sign in dialog boxes only show for the initial sign-in to any of the InEight products.

#### STEP BY STEP – ESTIMATE PREFERENCES SETUP

First time s	ign in	(2)		— (3)			
Lang	Jage	User agreement		Preferences	8		
Plea	se choose ye	our preferred langua	ge				
() D	utch (Nederlan	ds)					
🔘 Er	glish						
OE	pañol (Améric	a Latina)					
O Fr	ançais (Canad	a)					
O N	ors <mark>k (Bo</mark> kmål)						
	ortuguês (Bras	il)					
						Cancel	Next

1. Select your **preferred language**, and then click **Next**.

2. Scroll to the bottom of the user agreement, and then select the **check box** for the terms and conditions and privacy policy. **Click Next**.

TIP Make sure you have scrolled to the end of the user agreement

3. Select a **date format** and **number format**, and then click **Next**.

### 2.1.1 ESTIMATE FIRST TIME ACCESS

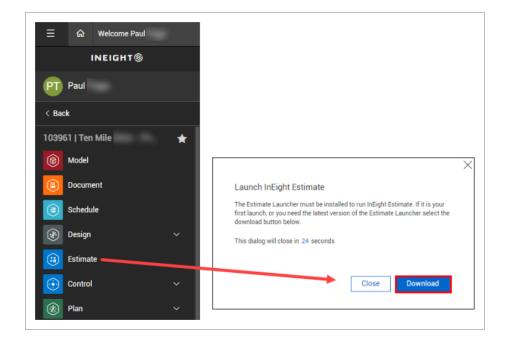
Platform's primary function lets you connect and share data between all Eight applications involved in managing a project. This allows project management workflows to pass between jobsite, field office, and front office seamlessly in a consistent and standardized user interface.

#### STEP BY STEP – LAUNCH ESTIMATE

1. After selecting a project from the home page, you can access Estimate from the Main menu in Platform by selecting **Estimate**, or by clicking **Launch** on the **Estimate** tile.

2023 Glow Creek L. O	Assigned disciplines 44	Assigned commodities 42	MODEL	Laurch	InEight <sup>®</sup> SCHEDULE
Model  Document Schedule Design Country forecasting Engineering	(**) InEight <sup>®</sup> ESTIM	ATE + X Launch	Compliant®	ICE Laureh	B COMPLETIONS
Dauxity sources	REPOR	IT Launch	InEight® EXPLORE	Laurch	

2. When you select Estimate from the home page for the first time, you must click **Download** to access the Estimate Launcher file.



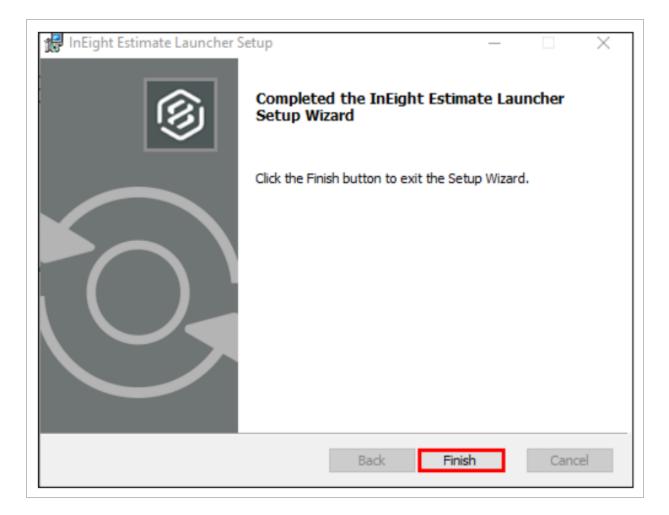
• The EstimateLauncher.msi file shows.

Estimate	
Control	~
🛞 Plan	~
PROJECT SETTINGS	_
Project home	
Project details	
Settings	
Workflows	
© 2022 InEight Inc. Privacy S	tatement
🗗 EstimateLauncher.msi	^

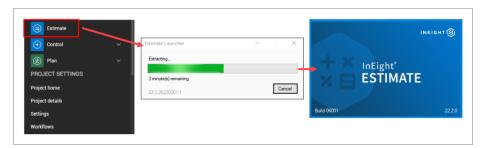
- Opening the EstimateLauncher.msi file opens the InEight Estimate Launcher Setup window.
- 3. Select **Open**, and then click **Next** to start the one-time Estimate Launcher download. Afterwards, you will be able to open Estimate from the Main menu or the home page.



4. Click **Finish** to complete the Estimate Launcher Setup installation.



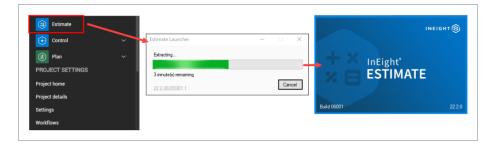
5. Select **Estimate** again to start the Estimate Launcher, which extracts the required files to launch the Estimate application.



After setting up your Estimate preferences and installing the Estimate launcher, you can begin using Estimate.

#### STEP BY STEP – ESTIMATE SUBSEQUENT USE

1. Launch Estimate by selecting **Estimate** from the Main menu.



• Estimate in the cloud looks and functions much like the Estimate on-premise version. For example, opening a job from the landing page brings you to the Cost Breakdown Structure register, or the register designated as the start page in the application settings.

$\Theta$			InEight Estimate			- 0 ×					
tart		₀ht°									
ew		5110	_								
Г	EST	ΙΜΑΤ	E								
m											
re .											
ose Job	Create a new Job f	rom									
un all Julia											
e Al 3005		la se la		<u>_</u> ¥¥							
rs	+	( <u>1</u>		T <del>T</del>							
N											
	Scratch	Template	Existing Job	Bid Wizard							
nplates											
pshots	Open a recent Job										
hive / Restore	Code	Descrip	tion	Organization	Project ID					Adard View         O           Total Cost (Percent)         5.04pec           5.30         45,835,105.09           5.30         45,835,39           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         450.00           0.00         950.00           0.00         950.00           0.00         950.00           0.00         950.00           0.00         950.00           9.01         951.00           9.01         951.00	
	105091 Misty Mounain Hops	Mountai	n Shadow Energy - Misty Mountai	n							E ee Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject Subject
t Jab Al Jaba r Y y	105091 2411	-2411									
	105092-2411										
	203092-2411										
					105092-2411	- Estimate					
		File Setus	- Estimate Quote	Price System Int	105092-2411 egrations Actions More Actions	- Estimate					× ≣ ⑦
	More Jobs		• Estimate Quote			- Estimate	20 /1	<b>.</b>	• =1	宜 BS Tree Filter Mode	
	More Jobs	File Setu 7 🚟 Print 7 Review	🕒 New 🖓 Copy	Toggle Suspended	regrations Actions More Actions	The Assembly	12	<b>7 6</b>	E	宜 BS Tree Filter Mode Filter	•
	More Jobs	File Setur The Setur Preview Construction File Setur	🕒 New 🖓 Copy	C Toggle Suspended	egrations Actions More Actions	ost Item	12	Filter Clear Filter	CBS Tree Filter	宜 BS Tree Filter Mode Filter	•
	More Jobs	File Setur Reference Print Preview Print	New Copy     Delete Paste      Cocel     Cut + Fill Down	C Toggle Suspended	egrations Actions More Actions ⇔ Indent  륜 -≘ Cost Item ⇔ Outdent ≩ 륜 ≅ Subordinate C	ost Item 문 Assembly	Expand /	Filter Clear Filter	CBS Tree	宜 BS Tree Filter Mode Filter	•
	More Jobs	File Setur Print Proview Preview Print Cost Breakd	New Copy     New Copy     Ordete Paste     Cut F Fill Down  wm Structure (CBS) Register	Edit	egrations Actions More Actions In Indent Signature (Constitution) In Outlent Signature (Constitution) International (Consti	ost Item	Expand /	Fiter Clear Filter	CBS Tree Filter View	ES Tree Filter Mode Filter • • • Expand CBS Tree	с е ,
	More.Jobs	File Setur Reference Print Preview Print	New Copy     New Copy     Ordete Paste     Cut F Fill Down  wm Structure (CBS) Register	Edit	egrations Actions More Actions In Indent Signature (Constitution) In Outlent Signature (Constitution) International (Consti	ost Item	Expand /	Fiter Clear Filter	CBS Tree Filter	ES Tree Filter Mode Filter • • • Expand CBS Tree	: • • •
	More Joha	File Seba Pint Preview Print Cost Breakd CBS Tree (Fil Code	New Copy     Delete     Cut     Fil Down  wm Structure (CBS) Register  Iter Hode)  Cescription	togle Suspended     tdit     tdit     Drag columns here to gr     Drag columns here to gr     Drag columns here to gr	egrations Actions More Actions In Indent Signature (Constitution) In Outlent Signature (Constitution) International (Consti	ost Item Gostoriate Assembly to the Item Insert	Expand / Colapse +	Filter Clear Filter Saved view	CBS Tree Filter View	E E Elter Mode     Filter     Expand CBS Tree     View     Total Cost	e A V
	More Jobs	File Setu Print Print Print Cost Breakd CBS Tree (Fil Code V	New Copy     Delete to Pate     Cot     C	Toggle Suppended     Edit     Drag columns here to gr     CSS     CSS Position Code	Actors Actors Marc Actors	oot Item 🖶 Subordinate Assembly Insert	Forecast (T/O) Quantity	Filter Clear Filter Saved view Unit of Measure	CBS Tree Filter View Unit Cost	1 E BS Tree Filter Mode Filter *** * Expand CBS Tree View Total Cost (Forecast)	e subject
	More John	File     Seta	New Copy     Delete     Cut     Fil Down  wm Structure (CBS) Register  Iter Hode)  Cescription	Toggle Suspended     Edit     Drag columns here to gri     C85     Position Cade	agrations Actions Nore Actions In Protect IIII A Cost Term IIIII A Cost Term IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	ost Item Gostoriate Assembly to the Item Insert	Forecast (T/O) Quantity 20.00	Filter Clear Filter Saved view Unit of Measure	Unit Cost \$291,755.30	In E BS Tree Filter Mode Filter · · · Pupand CBS Tree View Total Cost (Forecast) \$5,835,106.09	subject
	More Jobs	File     Setal	Abrew Cory     Cory     Delete Cory     Delete Pate     Cory     Delete Pate     Cory     Delete Pate     Cory     Delete Pate     Cory     Delete     Cory     Cory     Delete     Cory     Delete     Cory     Cory     Delete     Cory     Cory	Toggle Suppended     Edit     Drag columns here to gr     CBS     CBS Code	egration Actors More Actors In protect Sectors Actors More Actors In Output Sectors Actors Actors Actors Actors Actors In Output Sectors Actors Actors Actors Actors Actors Actors Actors Actors In Output Sectors Actors	Coloral	Porecast (1/O) Quantity 20.00 1.00	Filter Clear Filter Saved view Unit of Mile	CBS Tree Filter View Unit Cost	Image: Filter Mode           BS Tree Filter Mode           Filter           Filter           View           Total Cost           (Forecast)           \$5,835,106.09           \$46,915.38	e A
	More Jobs	The Setur Print Print Cost Breaked Cost	Aced     Aced	Toggle Suppended     Edit     Drag columns here to gr     CBS     CBS Code	Actors Actors Marc Actors In the Index Marc Actors Marc Actors In the Index Marc Actors In the Index Marc Actors In the Index Marc Actors Index Marc Actors Ind	Assendby Them Disact Assendby Insert Code RISHE DONO	Expand / Collapse / Porecast (7/c) Quantity 20.00 1.00 1.00	Filter Clear Filter Saved view Unit of Mile Lump Sum	CBS Tree Filter View ws: Standard Unit Cost \$291,755.30 \$46,915.38	Im         E           BS Tree Filter Mode         Filter Mode           Filter         Cash         Filter           Verw         Total Cost         Forecast)           \$5,835,106.09         \$6,915.38         \$293,538.39	e A
	Mare John	The Solution	Arrow Correction	Toggle Suppended     Edit     Drag columns here to gr     CBS     CBS Code	agration Actors Marc Actors the Indext Section Actors International Secti	Assembly     School on the Assembly     Insert     School on the Assembly     Insert     Code     Code     RiskE BONO     RiskE BONO     RiskE DRENGE     Deplect Coopt (SCAATON	Porecast (T/o) Quantity 20.00 1.00 1.00	Filter Clear Filter Saved view Unit of Measure Mile Lump Sum Lump Sum	CBS THRE Filter View View Unit Cost \$291,755.30 \$46,915.38 \$40,915.38 \$40,915.38 \$203,538.39 \$6,000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000	Image         E           BS Tree Filter Mode         Filter           Filter         Image: Construction of the second of t	e A
	More Jobs	The Solution → Prote → Prot	Annu Congregation of the second of the	Toggle Suppended     Edit     Drag columns here to gr     CBS     CBS Code	agation Actions Hore Actions the Indext Size Actions Action A	Enternal Control of Co	Porecast (T/O) Quantity 20.00 1.00 1.00 1.00	Filter Clear Filter Saved view Unit of Mile Lump Sum Lump Sum Lump Sum	CBS Tree Filter Wisw Wisk Standard Unit Cost \$291,755.30 \$46,915.38 \$293,538.39 \$0.00	Image         E           BS Tree Filter Mode         Filter           Filter         Image: Construction of the second of t	subject
	More Jobs	Code Code Code Code Code Code Code Code	Area Cory     Area Cory	Pogel Supervise     Edit     Cost Supervise     Cost Supervise	Actors Actors Hore Actors	Ausenbly     Ausenbly     Ausenbly     Ausenbly     Ausenbly     Insert     Insert     Ausenbly     Insert     Insert     Ausenbly     Insert     Inser	Forecast (7/0) Quantity 20.00 1.00 1.00 1.00 1.00	Filter Clear Filter Saved view Unit of Measure Lump Sum Lump Sum Lump Sum Lump Sum Lump Sum	CBS Time Pilter View View Utvice CBS Time CBS Ti	Image: Provide and the second seco	subject
	More John	The Solution → Prote → Prot	Annu Congregation of the second of the	Togel Supervised     Toge	Actors Actors Hore Actors  Actors Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors Actors A	Insert Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Code Reset Reset Reset Reset Code Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Reset Res	Forecast (7/c) Quantity (7/c) Quantity 20.00 1.00 1.00 1.00 1.00 1.00 1.00	Filter Glear Filter Saved vier Unit of Mile Lump Sum Lump Sum Lump Sum Lump Sum Lump Sum	View View Witw Witw With Cost \$291,755.30 \$45,915.38 \$293,555.30 \$45,915.38 \$293,555.30 \$45,915.38 \$293,555.30 \$45,915.38 \$293,555.30 \$45,915.38 \$293,555.30 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$200,000 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38 \$45,915.38	Image: bit is a state of the stat	e subject
	More Jobs	Cost Break	Annu Congregation of the second of the	Pogel Supervise     Edit     Cost Supervise     Cost Supervise	Actors Actors Hore Actors  Actors Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors Actors  Actors Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors  Actors Actors Actors Actors Actors  Actors  Actor	Austroly	Porecast (T/O) Quantity 20.00 1.00 1.00 1.00 1.00 1.00 1.00 1.0	Filter Clear Filter Saved view Mile Lump Sum Lump Sum Lump Sum Lump Sum Lump Sum Lump Sum Lump Sum	Unit Cost 4291,755.30 \$40,915.38.39 \$0.00 \$0.00 \$157,006.32 \$42,20.00	Image: Project Control	subject
	Mare Jobs	Image: Second secon	Annu Control Cont	Togel Supervise     T	Actors Ac	Assembly ant Them Debreforder Assembly Insert Code Code RIDE Confo RIDE	Forecast (7/50) Quantity 20.00 1.00 1.00 1.00 1.00 1.00 1.00 1.0	Filter Clear Filter Saved view Mile Lunp Sum Lunp Sum Lunp Sum Lunp Sum Lunp Sum Lunp Sum Lunp Sum	View View With Cost Unit Cost 4291;75:30 546;915:33 4293;53:38:39 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:00 50:000	Image: Prime         Prime           Bit Tree Filter Mode         Prime           Prime         Prime           Total Cost         (Porneast)           (Porneast)         \$4,005,303.99           \$40,000         \$60,000           \$61,000         \$61,000           \$61,000         \$61,000           \$61,000         \$61,000           \$61,000         \$61,000           \$61,000         \$61,000           \$61,000         \$61,000           \$61,000         \$61,000           \$61,000         \$61,000           \$61,000         \$61,000	r e y Subject
	More Jobs	Code Code Code Code Code Code Code Code	Add Cost      South      Cost      Cost	Togel Supervise     Edit     Class colores have to ge     Clas colores have to ge     Clas colores	Actors Ac	Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Constant Const	Image: Second process of the second proces	Filer Clear Filer Saved view Unit of Messure Lump Sum Lump Sum Lump Sum Lump Sum Lump Sum Lump Sum Lump Sum	Link Cost 4291,755.30 90,00 90,00 90,00 91,00 91,10,95 11,00 95 11,00 95 11,00 95 11,00 95 11,00 95 11,00 15 15 15 15 15 15 15 15 15 15	Image: Prime         Image: Prime           Bit Tree Filter Mode         Prime           Pispend CBS Tree         Prime           Verw         Total Cost           Verw         S0.00           \$40,855,806.09         \$40.00           \$40,000         \$40.00           \$40,000         \$40.00           \$41,000,01         \$11,000,510,10	s v e subject s s s s
	More Jobs	Free     State       ●     Prote       ●     P	Average of the second sec	Togel Susemble      T	Actors Actors Hore Actors Actors Actors Control Contro	Assembly at them  Assembly  Assembly  Assembly  Assembly  Insert  Assembly  Insert  Assembly  Insert  Code  Relice Sono	12         Expand / Colleges /           Porezati (7/0) Quantity         20.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00	Filer Clear Filer Saved view Clear Saved view Clear Saved view Clear Saved view Clear Saved Save	Lint Cost \$293,538.39 \$6,000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.00000 \$0.00000 \$0.000000 \$0.00000000 \$0.0000000000	the Filter Filter Mode     STree Filter Mode     Filter     Paperd CBS Tree     Total Cost     (forecast)     49,915.38     49,915.3     49,915.3     49,915.3     49,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00     40,00	ri e Subject
	More Jobs	Price     State	Add Cost Statistics     Deter Cost Statis     Deter Cost Statistics     Deter Cost	Toget Supervise         •           Edit         •           Class columns have to grow         •           Class columns have to grow         •           Class columns have to grow         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •           •         •      •         •      •	Actors Ac	Execution and a second a second and a second a sec	Image: Second (Collapse)         Expand (Collapse)           Poresatt (7/6) Quenthy         20.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00	Filer Clear Filer Saved view Unit of Measure Mile Lump Sum Lump Sum	Link Cost 4291,755.30 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$\$40,915.38\$ \$40,915.38\$ \$40,915.38\$\$40,915.38\$ \$4	Image: Part of the second s	r e A Subject
	More Jobs	Price     State       ●     Prote       ●	Aphal Correct Santation     Aphala Correct Santation     Add     Add	Togel Supervise     Edit     Edit      Drag columns here to gr      Drag columns here to gr      Prestorn Code III      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #      #	Actors Actors Hore Actors Acto	Assembly at them  Assembly  Assembly  Assembly  Assembly  Insert  Assembly  Insert  Assembly  Insert  Code  Relice Sono	Image: Second Processes         Expand ( Calapse /           Processes         0000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000	Piler Clear Piler Saved view Measure Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Cube Yet Cube Y	Lint Cost \$293,538.39 \$6,000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.0000 \$0.00000 \$0.00000 \$0.00000 \$0.00000000 \$0.0000000 \$0.0000000000	Image         Image           85 Three Filter Mode         Rear           NBar         Papand CBS Tree           Vitree         Image           Total Cost         (forcast)           \$5,835,106.09         \$6,000           \$60,000         \$60,000           \$104,901,100         \$104,901,100           \$104,901,100,911         \$20,945,915,815           \$14,900,203,915,815         \$14,900,915	H V P V P V P V P V P V P V P V P V P V
	Mare Jobs	Price         State	Arrow Correction Conservation     Arrow Consenvection     Arrow Conservation     Arrow Conservation     Arrow	Togels Supervise         Image: Supervis	Actors Ac	Execution and a second	Image: Second (Collapse)         Expand (Collapse)           Poresatt (7/6) Quenthy         20.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00           1.00         1.00	Piler Clear Piler Saved view Measure Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Cube Yet Cube Y	Link Cost 4291,755.30 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$\$40,915.38\$ \$40,915.38\$ \$40,915.38\$\$40,915.38\$ \$4	Image: Product of the second secon	H V P V P V P V P V P V P V P V P V P V
	Mare Jobs	Price     State       ●     Prote       ●	Aphal Correct Santation     Aphala Correct Santation     Add     Add	Togels Supervise         Image: Supervis	Actors Actors Hore Actors Acto	Execution and a second	Image: Second Processes         Expand ( Calapse /           Processes         0000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000           1000         1000	Piler Clear Piler Saved view Measure Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Lung Sum Cube Yet Cube Y	Link Cost 4291,755.30 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$40,915.38 \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$ \$40,915.38\$\$40,915.38\$ \$40,915.38\$ \$40,915.38\$\$40,915.38\$ \$4	Image         Image           85 Three Filter Mode         Rear           NBar         Papand CBS Tree           Vitree         Image           Total Cost         (forcast)           \$5,835,106.09         \$6,000           \$60,000         \$60,000           \$104,901,100         \$104,901,100           \$104,901,100,911         \$20,945,915,815           \$14,900,203,915,815         \$14,900,915	H V P

### 2.1.2 BACKSTAGE VIEW

When you open Estimate, you land in the Backstage view. You can also get to the Backstage view from other tabs, by selecting the File tab.

5tart	In Fight®	)			
lew	InEight® ESTIM	ATE			
<sup>open</sup> 1	ESTIM	AIC			
ave	Create a new Job from				
lose All Jobs			<u>**</u> 5		
obs 2		° [+]*	<u>+</u>		
ibrary	Scratch Templat	te Existing Job B	id Wizard		0
Templates					
Snapshots 3	Open a recent Job				
Archive / Restore	Code	Description	Organization	Project ID	
ettings	* 106029	Training Job - Maricopa County No. TM2924	SE2017 - TIC Denver	106029	
ixit 4	091020240012	Springville 220/66 kV (S) - RUOES 1.5 Emerg	Account Portfolio Level	09102024_0012	
	* 102447	Border west Project	SE3009 - South Central	102447	
	31-7818 00	Civic Center Parking Structure	Account Portfolio Level	31-7818.00	6
	SR919-1240	Job001 JOB Added by Automation	Account Portfolio Level	2411 Test1	
	NP-OnPremJob	Training Job - Maricopa County No. TM2924	SE3007 - MEC Industrial	106032	
	EST-SCH-24-11	Training Job - Maricopa County No. TM2924	Account Portfolio Level	EST-SCH-24-11	
	104035	MM Commerce Flour Loadout Carry Jo	SE2013 - T.E. Ibberson	104035	
	101003	Training Job - Maricopa County No. TM2924	SE4000 - Mining District	101003	
	31-7818 00 v2	Richmond Station Parking Structure	Account Portfolio Level	31-7818.00	
	More Jobs				

Section	Description
1	Create new jobs, open, save, or close opened jobs.
2	Access the library and open the Jobs page. In the Jobs page, you can access the following options: <ul> <li>Job Register</li> </ul>

- Delete Job
- Compare Jobs

Section	Description
	Connected Analytics
3	<ul> <li>Access templates, snapshots, and archive or restore options.</li> <li>Templates - Create job templates.</li> <li>Snapshots - Open the Snapshots page where you can create job snapshots and open the Snapshot Register to access previously created snapshots.</li> <li>Archive / Restore - Open the Archive / Restore page where you can access the following options: <ul> <li>Archive Job</li> <li>Restore job</li> <li>Merge Jobs with Archive</li> <li>Archive Template</li> <li>Restore Template</li> </ul> </li> </ul>
4	<ul> <li>Open the Settings page where you can access the following options:</li> <li>General - Customize General, Title Bars, Navigation Bar, Job Startup, and Language options.</li> <li>Decimal Precision - Manage decimal precision for various values in Estimate.</li> <li>Restore Defaults - Click to restore default values for selected settings.</li> </ul>
5	Create a new job from scratch, from a template, from an existing job, or by using the Bid Wizard
6	View up to 10 recently opened jobs as a list or thumbnail tiles to quickly access recently opened jobs. You can click the <b>Favorites</b> icon to the left of the job code to label up to five jobs as favorites. The jobs labeled as favorites show at the top of the list.
7	Change between the list view or tile view using the <b>List-Tile view</b> icon at the top right of the section. The source for the thumbnail images in the tiles is from the estimate project in InEight Platform. The following image shows the tile view.

#### 2.1 General Navigation

Section	Description									
	InEight Estimate									
	Start IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Create a new Job from	ATE							
	Close All Jobs Jobs Library Templates	Scratch Template	Existing Job Bid	Wizard 5		0				
	Snapshots 3	Open a recent Job	Description	Organization	Project ID					
	Archive / Restore	★ 106029	Training Job - Maricopa County No. TM2924	SE2017 - TIC Denver	106029					
	Settings 4	★ 091020240012		Account Portfolio Level	09102024_0012					
	Exit	102447	Border west Project	SE3009 - South Central	102447					
		★ 31-7818 00	Civic Center Parking Structure	Account Portfolio Level	31-7818.00					
		SR919-1240	Job001 JOB Added by Automation	Account Portfolio Level	2411 Test1					
		NP-OnPremJob	Training Job - Maricopa County No. TM2924	SE3007 - MEC Industrial	106032					
		EST-SCH-24-11	Training Job - Maricopa County No. TM2924	Account Portfolio Level	EST-SCH-24-11					
		104035	MM Commerce Flour Loadout Carry Jo	SE2013 - T.E. Ibberson	104035					
		101003	Training Job - Maricopa County No. TM2924	SE4000 - Mining District	101003					
		31-7818 00 v2	Richmond Station Parking Structure	Account Portfolio Level	31-7818.00					
		More Jobs 8								
		v				1				

8 Open the Job Register where you can search and open jobs that do not show in Open a recent job list.

#### 2.1.2.1 ARCHIVE / RESTORE

From the Backstage View, you can back up and restore your jobs using the Archive/Restore feature.

### 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

©				InEight Estimate				- 0	×
Start A	rchive / Rest	ore							
llew									
Open			<b>F</b>	副	17	俞			
Save					_				
Close Job	Archive Job	Restore Job	Merge Job with Archive	Archive Library	Restore Library	Merge Library with Archive	Archive Template	Restore Template	
Close All Jobs	Ö.o	Ö							
Jobs	<i>20</i>	õ							
Library	System Backup	System Restore							
Templates									
Snapshots									
Archive / Restore									

- 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

#### 2.1.2.2 SETTINGS

From the Settings in the Backstage view, you can adjust some system settings:

- General Settings
- Default Job Start page
- Decimal Precision

#### • Language

3	Settings	
Coptions	General         □ Prompt to Save Every 5 ⇒ 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	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 Struc • Language Select a Language: English (United States) •
Restore Defaults		OK Cancel

#### 2.1.2.3 PROMPT TO SAVE

An important setting to visit in the Tools menu is **Prompt to Save**. InEight Estimate does not automatically save your work. Instead, it will prompt you to save as often as you specify in the general settings.

#### 2.1.2.4 DECIMAL PRECISION

The **Decimal Precision** setting is also helpful. This is where you can specify the way your numbers display in the system. For example, you may want your costs to display to the hundredth decimal place (2), and your quantities to display as whole numbers with nothing to the right of the decimal (0).

TIP Changing decimal precision does not affect the way your numbers are calculated.

### 2.1.3 OPEN A JOB FOLDER

From the Backstage view, you can open a job folder by selecting **Start**. This opens the Start page, where if you see your job, click to open it. If it's not showing, click **More Jobs** on the bottom left, and then select the job from the Job Register. The Job Register lists all of your existing job folders.

$\odot$		InEight Estimate		-	
Start		ght® TIMATE			
New		IMATE			
Open					
Save	Create a new Job	from			
	Create a new Job	Irom			
Close All Jobs	<u> </u>		.*.		
Jobs	+		ĨŦ		
Library					
Templates	Scratch	Template Existing Job	Bid Wizard		
Snapshots	Open a recent Job				
Shapshots					
	Code	Description	Organization	Project ID	-
			Organization Account Portfolio Level	Project ID 09102024_0012	
Archive / Restore	Code	Description	-	-	
Archive / Restore	Code	Description Springville 220/66 kV (S) - RUOES 1.5 E	Account Portfolio Level	09102024_0012	
Archive / Restore	Code ★ 091020240012 ★ 102447	Description Springville 220/66 kV (S) - RUOES 1.5 E Border west Project	Account Portfolio Level SE3009 - South Central	09102024_0012 102447	
Archive / Restore	Code ★ 091020240012 ★ 102447 ★ 31-7818 00	Description Springville 220/66 kV (S) - RUOES 1.5 E Border west Project Civic Center Parking Structure	Account Portfolio Level SE3009 - South Central Account Portfolio Level Account Portfolio Level	09102024_0012 102447 31-7818.00	
Archive / Restore	Code ★ 091020240012 ★ 102447 ★ 31-7818 00 SR919-1240	Description Springville 220/66 kV (S) - RUOES 1.5 E Border west Project Civic Center Parking Structure Job001 JOB Added by Automation	Account Portfolio Level SE3009 - South Central Account Portfolio Level Account Portfolio Level SE3007 - MEC Industrial	09102024_0012 102447 31-7818.00 2411 Test1	
Archive / Restore	Code ★ 091020240012 ★ 102447 ★ 31-7818 00 SR919-1240 NP-OnPremJob	Description Springville 220/66 kV (S) - RUOES 1.5 E Border west Project Civic Center Parking Structure Job001 JOB Added by Automation Training Job - Maricopa County No. TM2	Account Portfolio Level SE3009 - South Central Account Portfolio Level Account Portfolio Level SE3007 - MEC Industrial	09102024_0012 102447 31-7818.00 2411 Test1 106032	
Archive / Restore Settings Exit	Code ★ 091020240012 ★ 102447 ★ 31-7818 00 SR919-1240 NP-OnPremJob EST-SCH-24-11	Description           Springville 220/66 kV (S) - RUOES 1.5 E           Border west Project           Civic Center Parking Structure           Job001 JOB Added by Automation           Training Job - Maricopa County No. TM2           Training Job - Maricopa County No. TM2	Account Portfolio Level SE3009 - South Central Account Portfolio Level Account Portfolio Level SE3007 - MEC Industrial Account Portfolio Level	09102024_0012 102447 31-7818.00 2411 Test1 106032 EST-SCH-24-11 104035	

#### 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.

) 💾 🕘							Training Job - I	stimate								>
ile Setup	Estimate	Quote	Price	Execution		System	Actions	More Actio	ns						童	
Print	🛃 Open	⊁ Cut	+ Fill D	own	+	8	Cost Item		🔁 Asse	mbly	2.	1			E	
Preview	🕂 New	🖥 Сору	🔀 Split		-	愚	🔚 Subordinate C	lost Item	🔁 Subo	rdinate Assembly		- ×			2	
Export to Excel	😣 Delete	Paste	🔁 Togg	le Suspended			🕂 Dependent Co	ost Item				Expand Collapse		Clear Filter		
Print	Edit					Insert							View			
ost Breakdown S	tructure (Cl	35) Registe	r O													
rag columns here to	group							Find	[Search	n For] …	Save	d views:	Previous Vie	w		•
CBS Position Code	Des	cription				Foreca: (T/O) C	st Juantity	Unit of Measure		Unit Cost	Total Co (Foreca		Currency	Optiona Code	I	
	JOI	В				1.00 L		Lump Sur	ı	\$5,861,800 \$5,		,800.79	U.S. Dollar			
+	Pri	me Bond					1.00	Lump Sur	n	\$47,069.28	\$47	,069.28	U.S. Dollar	PRIME E	BOND	
	Pri	ce % Add-0	n				1.00	Lump Sur	ı	\$294,923.52	\$294	,923.52	U.S. Dollar	PRICE 9	% ADD-OI	N
+								Lump Sur		\$0.00			U.S. Dollar			F

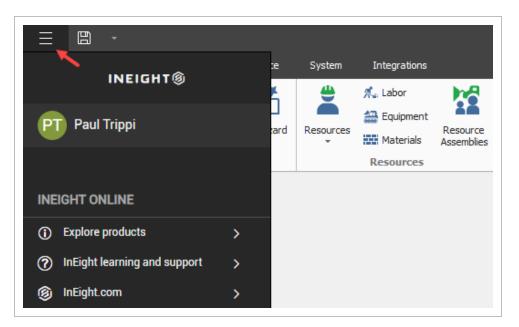
You can change the default form that opens when you start up a job. From the Backstage view, click on **Settings** to change the Job Startup > Start Page settings.

Deployment Mode     SQL Security     Security Noles     Attachment Settings     Licenses     Currency     Title Bars		Settings	- 0		
Deployment Mode     SQL Security     Security Roles     Attachment Settings     Timesheet Warehouse Settings     Licenses     Currency     Title Bars	General Decimal Precision Fax Mail	Prompt to Save Every 10 👘 Minutes	<ul> <li>Ribbon</li> </ul>		
Show Job Code     Start Page:     Cost Breakdown Stru     Show Job Description     Show Job Code and Description     Show Job Code and Description	Network     Deployment Mode     SQL Security     Security Roles     Attachment Settings     Timesheet Warehouse Settings	Keep Employed Assemblies Collapsed Summarize Values in Group Row	When a record form is closed, return focus to: (a) The last form accessed		
		<ul> <li>Show Job Code</li> <li>Show Job Description</li> </ul>	Start Page: Cost Breakdown Stru Cost Breakdown Structure (CBS) Register Pay Item & Proposal Register		
Language       Quote Comparison & Award         Select a Language:       English (United States)         Vone       None			Price Breakdown Structure		

#### 2.1.4 COMMON NAVIGATION

Access the common navigation slide-out panel by selecting the main menu located on the top left side of the Estimate page. This feature provides a common navigation user experience that is shared amongst all InEight products. The primary intent of this navigation menu is to provide a consistent InEight product experience, with similar Project Suite graphical interfaces, while working within multiple InEight products.

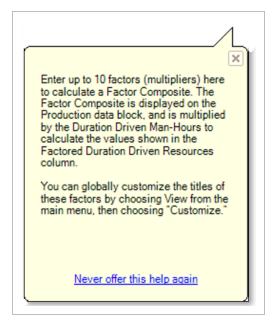
Estimate's on-premise software is authenticated by your Windows login credentials, which is shown below the main menu.



### 2.1.5 HELP BUBBLES

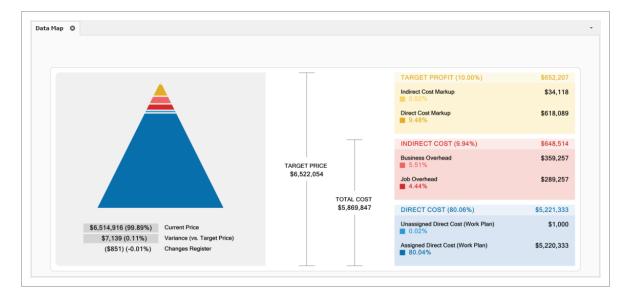
Help bubbles appear at various times in InEight Estimate, including the first time you open InEight Estimate. These messages contain important information to clarify key functions in the system.

You can dismiss the message until the next time by closing it with the X in the corner or dismiss it permanently by clicking the **Never offer this help again** link.



### 2.1.6 DATA MAP

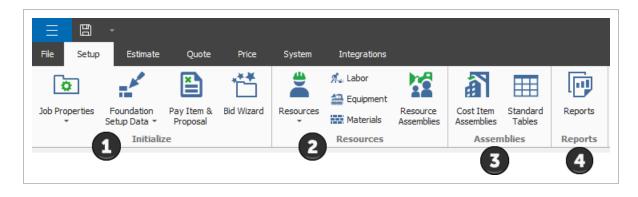
Found in the Price tab, the Data Map is a great way to view a high level summary of your estimate and can be accessed at any time during the estimating process. You can see totals of direct costs, indirect costs, profit, and overall bid price.



### 2.1.7 INEIGHT ESTIMATE LAYOUT

The layout of InEight Estimate is workflow based. You will move from left to right on the tabs as you enter your data for the project and work on developing your estimate.

### 2.1.8 OVERVIEW - SETUP TAB



	Section	Description
1	Initialize	From the initialize section, you can access the following registers. Job Properties is where you enter the basic project details. Foundation Setup Data is where you populate all account codes and validated fields. The Pay item & Proposal Register provides an alternate structure to distribute estimated values. Bid Wizard helps automate the process of setting up estimates by copying information that already exists in other jobs.
2	Resources	In the Resources section, Resource Rates opens the Resource Rate Register, where detail costs for labor, equipment and material is stored. The Resource Assemblies opens the Resource Assembly Register, where you create a combination of resources as an assembly and reuse it as needed in multiple cost items.
3	Assemblies	You can create a Cost Item Assembly to automatically estimate different scopes of work based on input values. Standard tables - allow you to create tables of reference data that can be accessed in any cost item assembly.
4	Reports	The Reports section is available from any tab. Depending on the tab you access it from will bring you to reports specific to that tabs data. Here you will find reports on resources such as Resources Changes, Resource Utilization, and Resource Cost Details.

### 2.1.9 OVERVIEW - ESTIMATE TAB



	Section	Description					
1	Quantity Takeoff	Import and manage quantity takeoff data using the Quantity Item Sources, Quantity Item, and Quantity Item Employments registers.					
2	2 <b>Breakdown</b> Access the Cost Breakdown Structure (CBS) Register, Accourd Utilization Register, and Work Breakdown Structures (WBS) R						
3	Resources	Resource Rate Register is where you create or modify the rate charged for labor, material and equipment resources. Different views of the Resource Rate register such as Resource Utilization and Resource Cost Details are available from the Resources section.					
4	Workbook	InEight Estimate's integration with Microsoft Excel is a two-way integration that allows you to update register fields in Estimate with data contained in an Excel workbook, and update Excel cells with data contained in a register field in Estimate. This is where you open the embed excel workbook which is maintained as part of the estimate job folder and where you preform the sync functions to send values back and forth.					
5	Schedule	Access bi-directional integration with Microsoft Project and Oracle Primavera. The Cash Flow graph displays the projected cash flow of your project, along with the job financing expense, individual cost category costs and resource utilization.					
6	Indirect Cost	Indirect Cost Items filters the CBS register to display cost items that contain overhead costs that are not directly associated with any particular deliverable items. Clicking on % Price Add on or Prime Bond opens up these individual records.					
7	Overhead	Price Breakdown Structure (PBS) Register is a visual run-down of the					

	Section	Description
	and Profit	costs and profit that make up your Target Price. You can access the Direct and Indirect Markup records or see totals of direct costs, indirect costs, profit and overall bid price summarized in a Data Map.
8	Alternates	Alternates are used to define alternate scenarios in order to assess the impact of those scenarios.
9	Reports	Run reports on CBS Summary, CBS Details, CBS Outline, CBS Estimate Summary, CBS Currency Comparison.

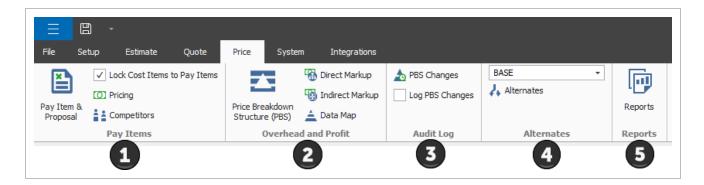
### 2.1.10 OVERVIEW - QUOTE TAB

File Setup Estimate	Quote Price S	System Integrations	
Address Book	Request For Quote (RFQ)	Resources Cost Items	Reports
Setup	Quote Management	Quote Comparison & Award	Reports
1	2	3	4

	Section	Description
1	Setup	Quotes are organized using Address book, Quote Group Tags, Minority Setup and attachments in the Setup section. Address book stores and maintains all information pertaining to subcontractors, vendors, architects/engineers, etc. that you work with regularly. The Minority Setup tab within Job Properties stores information about the agency that authorizes the status of Minority Enterprises along with their different types. You can use Quote Group Tags to group together multiple resources or cost items that will be sent in a single request for quote package to solicited contractors or vendors
2	Quote Management	Quote Management allows you to access the Requests for Quote (RFQs) register and Quotes. Request for Quotes (RFQs) are invitations to sellers, requesting that they submit pricing to provide services, equipment or material based on the line items and resources included in your estimate. The Quote Register stores all of the quote

	Section	Description
		responses you receive for that job.
3	Quote Comparison & Award	The Quote Comparison & Award section allows you to perform comparative analysis across all the quotes you've received. You can view a comparison of submitted pricing by resources or cost items.
4	Reports	From the Reports section in Quotes you can run reports on Quote Summary, Quote Record, Compare & Award, and Minority Participation.

### 2.1.11 OVERVIEW - PRICE TAB



	Section	Description
1	Pay Items	From the Pay Items section you can lock Cost items to Pay items and access the Pay item & Proposal register. Under Pricing in Job Properties, you can set up how the tool calculates profit and spreads pricing to your pay items. In the Competitors section, you can keep track of companies that have submitted bids as well as record and track competitor bid prices.
2	Overhead and Profit	The Price Breakdown Structure (PBS) Register is a visual run-down of the costs and profit that make up your Target Price. You can access the Direct and Indirect Markup records or see totals of direct costs, indirect costs, profit and overall bid price summarized in a Data Map.
3	Audit Log	You can access the PBS Changes register (which logs any changes that effect the Target Price) and turn on/off logging PBS changes

	Section	Description
4	Alternates	Alternates are used to define alternate scenarios in order to assess the impact of those scenarios on the total estimate value.
5	Reports	From the Reports section in the Price tab, you can generate reports for Standard Proposal, DOT Proposal, Pay Item Summary, Pay Item Currency Comparison, Pay Item Price Breakdown.

### 2.1.12 OVERVIEW - SYSTEM TAB

File	Setup	Estimate	Quote	Price	System	Integrations			
Ħ	⊙ Si	aved Views 👻	😋 Colors 🗸		🗐 External 🛙	Reports +	$\bigcirc$	🔒 About Estimate	0
-	🐼 Ti	itles +	🔅 Output S	ettings +	🎦 External F	References +	$\odot$	🍪 Release Notes	
Customize	2	9					Estimate Help	InEight.com	InEight University
		Ŀ	Customiz	e				Help	

S	ection	Description
1	Custom	You can customize the titles and colors for different fields. You can export and import saved Views, Titles, Colors and Output Settings. You can customize reports generated by Estimate using External reports. External References allows you to open external programs with Estimate.
2	Help	You can access a comprehensive help system from the Help menu. You can get information about the Estimate Version and all new updates about the different versions.

### 2.1.13 OVERVIEW - INTEGRATIONS TAB

$\equiv$	B	•					
File	Setup	Estimate	Quote Price	System	Developer Tools	Integrations	Actions
€ <sup>±</sup>		<b>O</b> <sup>±</sup>	<b>E</b>		App Logs		
	Estimate w Project	Publish Cost Items to Active Project	Publish Cost Items for Change Managem				
	1		nt Platform 3				

	Section	Description
1	Publish Estimate to a New Project	Sends job data to InEight Platform Integration. You can continue using Estimate during the publish and will be notified after the data has been sent successfully.
2	Publish Cost Items to Active Project	Sends cost items to the active project.
3	Publish Cost Items for Change Management	Sends cost items to InEight Platform Integration to import to InEight Change.
4	App Logs	Shows a list of InEight Project Suite application logs that you can export to Excel.

### 2.1.14 LIBRARY

Click on the Library icon and the Library opens in its own window.



Users with sufficient security can access master information available in the Library.



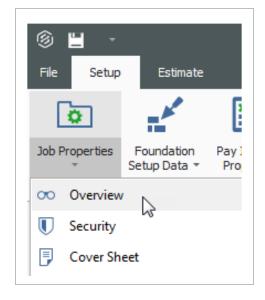
The Library is covered in greater detail in 3.1 Library Overview on page 82

### 2.1.15 OPEN FORMS

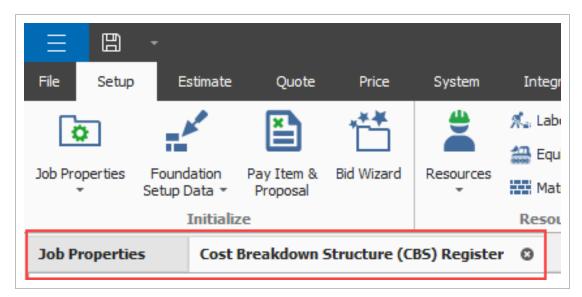
The following steps assume you already opened the Training Job.

#### 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

= 8 -								1234 - Esti	mate					
File Setup	Estimate	Quote	Price System	Integrations	Actions More Act	ions								
📇 Print	🕀 New	📲 Сору	🍓 Toggle Suspended	Indent 🖚	🖾 Split	📙 Link Field	- Cost Item	Assembly	2. Resource	10			T	CBS Tree Filter Mode:
neview	🛞 Delete	🕞 Paste		- Outdent	🚉 Split by Cost Type	📇 Unlink Field	🔚 Subordinate Cost Item	🚍 Subordinate Assembly	Resource Assembly	- X				Filter -
Export to Excel	}< Cut	+ Fill Down					Dependent Cost Item			Expand / Collapse *	Filter	Clear Filter	CBS Tree Filter	Z Expand CBS Tree
Print			Edit			Workbook		Insert					View	

= 8 -							1234 - Estimate
File Setup Estin	nate Quote F	Price System I	Integrations Actions	More Actions			
E Schedule Selection	∢⊧ Swap -	💾 Bid Wizard	∑ Unit / Total Confirmation	(+) Add Quote	+	Select in Model	Sync Model Quantities
🚈 Unschedule Selection	😑 Remove 👻	Subtotal Calculator	😳 Refresh Benchmarks			Frame Selected	🚯 Send Selected CBS to Model
Calculate Plug Days	C Update -	Quantity Checking	1 Roll Up Quantities		Import / Update CBS 👻		
Schedule	<b>Batch Operations</b>		Tools		Data Source	Mo	del Connector

### 2.2 SYSTEM SETTINGS OPTIONS

From the Backstage View, you can access system settings. System settings contain options and settings that effect the entire InEight Estimate system. These settings include:

- General settings (options)
- Title Bars
- Navigation Bar
- Job Startup
- Language

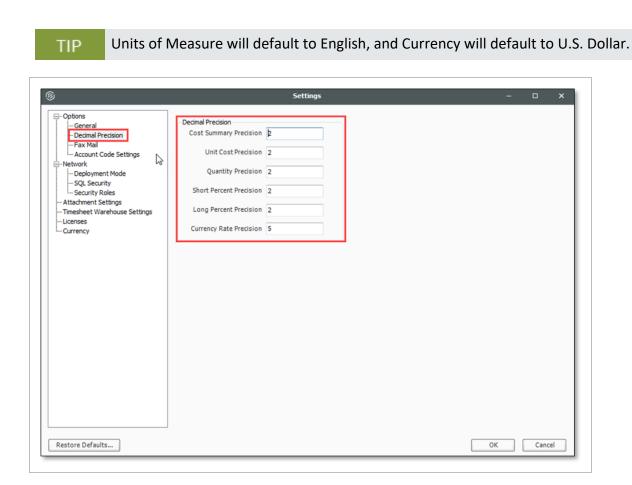
All of the settings under the Options branch are user-level settings.

General	
<ul> <li>Prompt to Save Every 5  Minutes</li> <li>Live Register Scrolling</li> <li>Align and Match Columns</li> <li>Keep Employed Assemblies Collapsed</li> <li>Summarize Values in Group Row</li> <li>Show up to 15  Detail Rows in Registers without Scrolling</li> </ul> Title Bars <ul> <li>Show Job Code</li> <li>Show Job Description</li> <li>Show Job Code and Description</li> </ul>	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 Struc • Language Select a Language: English (United States) •
	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 Ishow Job Code Show Job Description

The following step by step walks you through configuring general settings (options).

#### **STEP BY STEP – DECIMAL PRECISION**

- 1. With InEight Estimate open, click on the **File** tab to go to the Backstage view.
- 2. Select **Settings**.
- 3. Select **General** under Options in the node tree on the left.
- 4. To activate Prompt to Save, select the **Prompt to Save** checkbox.
- 5. Select how often you want to be prompted (in minutes).
- 6. Select **Decimal Precision** in the tree on the left.
- 7. Review the default settings.



# 2.3 COLUMNS

Within each register, you can move, sort, filter and group your columns to view the information the way you need to see it.

### 2.3.1 MOVE COLUMNS

You can move columns by selecting a column header and using drag-and-drop. If there are columns on the register that you don't use, you can hide and unhide them from view, as needed.

#### 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	PF IME BOND
U.S. Dollar	PFICE % ADD-ON
U.S. Dollar	FI JANCE EXPENSE
U.S. Dollar	IN TRECT COST ES
U.S. Dollar	DIRECT COST ESC
U.S. Dollar	INDIRECT SOST A
U.S. Dollar	JOB MANAGEMENT
U.S. Dollar	GENERAL EXPENSE
U.S. Dollar	DIRECT COST ADD
U.S. Dollar	641 0 100
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.

			•
Unit Cost	Total Cost (Forecast)	Currency	Optional Code
\$5,861,800	\$5,861,800.79	U.S. Dollar	+
\$47,069.28	\$47,069.28	U.S. Dol	1
\$294,923.52	\$294,923.52	U.S. Follar	
\$0.00	\$0.00	U.S. Dollar	
\$0.00	\$0.00	U.S. Dollar	
Customize			×
	from by low to p r gister.	lace it into t	he
Custom Captio	n <u>Defaul</u>	t Caption	
Optional Code	Optional Code		^
Owned Equipme Billing	nt Owned Eo Billing	quipment	
Owned Equipme Total	nt Owned Eo Total	quipment	
Owned Equipme Total Cost	nt Owned Eo Total Cos		
Owned Equipme Jnit Cost	nt Owned Eo Unit Cost	quipment	
Pay Hours Rules	Pay Hours Rules	3	
Pay Item Assignment	Pay Item Assignme	nt	
Pay Item Description	Pay Item Descriptio	n	
Pay Item ine Number	Pay Item Line Numb	ber	

- 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.

	To Column	—		×
Column:	lumns that are not	currently	in the vie	↓ Caracteria
		ок	Canc	el

6. Click **OK**.

### 2.3.2 SORT AND FILTER COLUMNS

You can sort and filter your columns to drill down to specific information.

#### 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 (Forecast)
	Values Text Filters
	Enter text to search
	(All)     Month
	Acre Pound
	Cubic Yard ✓ Square Feet
_	✓ Each Square Yard
_	Linear Feet Ton
-	✓ Lump Sum
_	Mile
_	
	Clear Filter Filter Editor Close

- 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 **(AII)**, then click **OK**.

#### 2.3.2.1 FILTER EDITOR OVERVIEW

Column filters can be managed on individual columns or for the entire register using the Filter Editor. The Filter Editor tool lets work with all the column filters for a register view in one place as well as creating more complex filters through the use of grouping and applying And/Or statements.

When you add a new Group, a new Condition is automatically added to that Group.

With each additional Condition statement, you need to select an operator and a value in order for your customized filter to take effect on your chosen column. Many new comparison operators have been added to this version as shown below:

Filter Editor		×
And 🕤		
[WBS: CEAS (Civil Engineering Acco	unt Code System)] Begi	ns with <enter a="" value=""> 😮</enter>
Or 💿		
[WBS: CEAS (Civil Engineering )	Account Code System)]	🖬 🗉 🛛 Begins w 💌 <enter a="" th="" valu<=""></enter>
		$\geqslant$ Is greater than or equal to $ riangle$
		< Is less than
		$\leqslant~$ Is less than or equal to
		⇔ Is between
		🕰 Is not between
		Rec Contains
		RCB Does not contain
		Begins with
•		n∎C Ends with
		8%¢ Is like
Load Save	OK	8%C Is not like
45,000.00	Ton	Is any of
400,000.00	Square Yard	<ul> <li>Is none of</li> </ul>
35,000.00	Ton	🔿 Is blank
35,000.00	Ton	Is not blank

#### CREATING COMPLEX FILTERS USING THE FILTER EDITOR

You can define filters across any of the columns available in the CBS register. You can also open the Filter Editor using the button in the column filter drop-down, but regardless of how you access it, the Filter Editor dialog permits defining a filter for the entire register and not just the selected column.

orecast T/O) Quantit	, T	Unit of Measure	Unit Cost	Total Cost (Forecast)	Subject Cost	Subject Cost Rate	Allocated	Allocation Source	Currency
	1.00	Lump Sum	\$6,508,579.45	\$6,508,579.45					U.S. Dollar
Filt	er Edito	or				×			U.S. Dollar
And	^								U.S. Dollar
Ĩ.	UM/ Da	v -	Begins with <enter a<="" td=""><td>a value&gt; 🕲</td><td></td><td></td><td></td><td></td><td>U.S. Dollar</td></enter>	a value> 🕲					U.S. Dollar
	UM/Da								U.S. Dollar
	UM/Eq	uip-Hour							U.S. Dollar
	UM/Ho	ur							U.S. Dollar
	UM/ Ma	an-Hour							U.S. Dollar
	UM/Sh								U.S. Dollar
			ustment Amount						U.S. Dollar
			ustment Percent						U.S. Dollar
		ned Billing Unit							U.S. Dollar
			istment Amount istment Percent						U.S. Dollar
		ned Total Billin							U.S. Dollar
		ned Total Cos							U.S. Dollar
_	Undefi	ned Unit Cost							U.S. Dollar
	Unit Co	st			el	Apply			U.S. Dollar
35,0	Unit of	Measure			-	_			U.S. Dollar

Because all the register fields are available, more complex filters can be created by using Grouping and Or operators. In the following example, a filter has been defined to return all Terminal Cost Items that either have a cost source of Plug, or exceed \$100,000 of Total Cost (Forecast).

rag	columns here to group								
	CBS Position Code 😐	Description	Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Is Terminal 🔻	Cost Source ▼
»	+	Price % Add-On	PRICE % ADD	1.00	Lump Sum	\$312,935.61	\$312,935.61	$\checkmark$	
	+	Direct Cost Add-On	DIRECT COST	1.00	Lump Sum	\$110,803.57	\$110,803.57	✓	
	+	Job Management & Equipment	JOB MANAGEM	1.00	Lump Sum	\$157,096.28	\$157,096.28	√	Detail
	+ 3.1	Excavation	3.1	42,000.00	Cubic Yard	\$3.44	\$144,552.52	1	Detail
	+ 4.1	Furnish & Haul Base Material	4.1	45,000.00	Ton	\$13.67	\$615,142.90	✓	Detail
	+ 5.1	Furnish & Haul Hot Mix Filte	r Editor	▶			× 374,562.54	✓	Detail
3	+ 5.2	Install Hot Mix Type A And (	>				117,018.05	1	Detail
	+ 7.1	Furnish 10 Inch PVC Materials	s Terminal] Equals Ched	189,660.73	✓	Detail			
	+ 7.2	Excavate-instal-backfill to inch P	0	111,403.37	√	Detail			
	+ 8.2	Furnish & Install 24 Inch PVC	[Cost Source] Equals [Total Cost (Forecast	103,388.90	✓	Detail			
	+ 11.2	Subcontract Rebar	Linual cost 6 dicease	\$42,000.00	$\checkmark$	Plug			
	+ 12.1.1	Furnish Retaining Wall Materia		125,719.65	✓	Detail			
	+ 14.1.2	Raw Materials Tanks		244,383.14	$\checkmark$	Detail			
	+ 14.2.1	Install Heating System					392,662.73	✓	Detail
	+ 14.2.3	High Pressure Pumps		518,778.57	√	Detail			
	+ 14.3.2	Instal Cooling Columns					147,669.50	$\checkmark$	Detail
	+ 17.2	Concrete Reinforcement					\$1,500.00	$\checkmark$	Plug
	+ 17.3	Cast in Place Concrete					\$3,500.00	✓	Plug
	+ 17.4	Concrete Masonry Unis					\$2,900.00	$\checkmark$	Plug
	+ 17.5	Paneling	Load Save		OK Ca	ncel Apply	\$2,100.00	✓	Plug
	+ 17.6	Wood Doors	save			Арру	\$1,000.00	$\checkmark$	Plug
	+ 17.7	Wood Flooring	09640	1.00	Lump Sum	\$1,800.00	\$1,800.00	✓	Plug
	+ 17.8	Office Furniture	12510	1.00	Lump Sum	\$2,100.00	\$2,100.00	1	Plug
	+ 17.9	Fire Protection Aping	15300	1.00	Lump Sum	\$3,300.00	\$3,300.00	$\checkmark$	Plug
	+ 17.10	Interior Lumin ires	16510	1.00	Lump Sum	\$3,400.00	\$3,400.00	$\checkmark$	Plug
_	+	Cassial Dick Howanes	UNIACCIONED D		Ends	£1,000,00	£1.000.00		Oh an
		0		Σ 0.00			∑ <b>\$0.00</b>		
	2	6 🌹					\$4,830,378.06		

When modifying a filter, the Filter Editor can be invoked by clicking the Edit Filter button located on the bottom right of the CBS page.

Dra	g columns here to gr	oup					,
	CBS Position Code 🖮	Description	Account <b>T</b>	Unit of Measure	Total Cost (Forecast)	Ur	ing Account Code ription
÷		ЗОВ		Mile	\$5,666,162.55	4	
	+	Prime Bond	7000	Lump Sum	\$45,861.93	\$	
	+	Price % Add-On	7000	Lump Sum	\$284,057.38	\$28	
	+	Direct Cost Escalation	7000	Lump Sum	\$13,933.28	\$	Æ
	+	Direct Cost Add-On	7000	Lump Sum	\$99,962.10		OVERHEAD
	<b>□</b> 1	SITEWORK & ROADWAY		Each	\$2,387,025.45	\$	ORK
	+ 1.2	Clearing & Grubbing	1110	Acre	\$39,184.97		
	<b>□</b> 1.3	Unclassified Excavation	1122	Cubic Yard	\$158,985.21		ATION
	+ 1.3.2	Embankment	1122.200	Cubic Yard	\$69,678.93		
	¤ 1.4	Aggregate Base	1120	Ton	\$692,928.99		Æ
	+ 1.4.1	Furnish & Haul Base Material	1120.100	Ton	\$519,513.30		4
	□ 1.5	Asphalt Concrete Hot Mix Type A	1240	Ton	\$1,486,222.28		ONCRETE PAVEMEN
	+ 1.5.1	Furnish & Haul Hot Mix	1240.100	Ton	\$1,374,562.54		WCRETE PAVEMEN
	<b>2</b>	WATER & SEWER		Each	\$519,502.60	\$5)	
	Σ	0			∑ <b>\$0.00</b>		
		78			\$5,615,073.91		
•							

#### 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.

Filter Editor		x
And Or Or Add Condition Add Group Clear All	ith <enter a="" value=""> 🕲 ith <enter a="" value=""> 🕲</enter></enter>	
Load Save	OK Cancel Apply	

- 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.

#### 2.3.3 GROUP COLUMNS

Sometimes you may want to organize your information into groups. Instead of filtering your information down to one value (e.g., unit of measure = Ton), you can look at your information with a separate group for each value (e.g., a group for Tons, a group for Cubic Feet, etc.).

#### 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").

Cos	Cost Breakdown Structure (CBS) Register 🛛 🕲									
Drag	g columns here to group	D Unit of								
		Measure Description	(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.

Init of leasure 😑											
leasare	sure										
Unit of Aleasure	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		\$498,571.30					
🖾 Each	29			59.00		\$1,684,854.23					
D 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		\$2,034,391.03					

- 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.

### 2.3.4 SAVED VIEWS

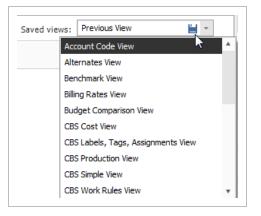
Once you have set up a view the way you like it, you can save the view so you won't have to configure it again later. InEight Estimate also comes with some pre-built views to help you organize the screen the way you want to see it.

Views are accessed from the **Saved Views** menu in the top right portion of a register.

The following steps assume you have made changes to your register view and want to save it for future use.

#### 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

9	Save Current View	
Type a name for the current view. All filters, sorts, groups, and column settings will be saved under this name so that you can recall them later while in this register.		
View name:		
📄 Save as L	ocked Corporate View	
Includ of the	e this view in the Saved Views section report control	
	OK Cancel	

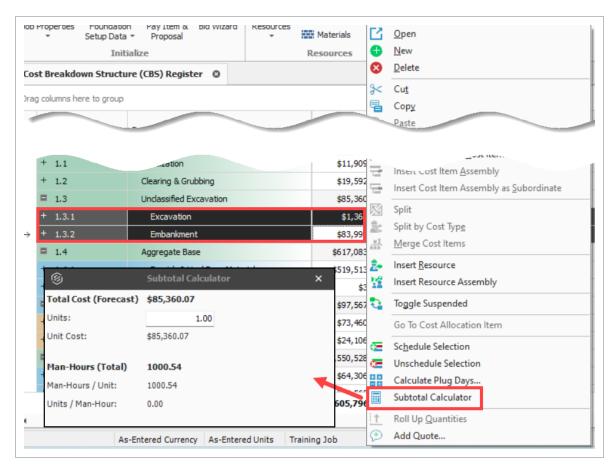
- 3. Enter the View Name, then select OK.
  - The new view displays in the drop-down menu

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

## 2.3.5 SUBTOTAL CALCULATOR

You can select multiple cost items and use the Subtotal Calculator to summarize and display Unit Cost, Man-Hours/Unit and Units/Man-Hour. Highlight a cost item in the CBS and right click on a Total Cost

column (e.g., Total Cost (Forecast), Labor Total Cost, Owned Equipment Total Cost, etc.). Select **Subtotal Calculator** from the right click menu, and enter the number of units to use in your calculation.



# 2.3.6 REGISTER RUNNING TOTALS

You can select multiple rows in a register and see the sum total amount at the bottom of the register.

For example, you can hold down the CTRL key and multi-select cost items 2.1.1, 2.2.1, and 2.3.2 in the CBS register, you can see the sum of the three selected cost items toward the bottom row of the register.

XB         Postbol Code		Dra	g columns here to group									Save	d views: KickStart	Major Cost Cate 👻
Pres Mail         Pres Mail         Pres Mail         Data         Data <thdata< th=""> <thdata< th="">         Data<th>Description</th><th></th><th>CBS Position Code</th><th>Description</th><th></th><th></th><th>Unit Cost</th><th></th><th></th><th>Equipment Total</th><th>Equipment</th><th></th><th></th><th>Subcontract Total Cost</th></thdata<></thdata<>	Description		CBS Position Code	Description			Unit Cost			Equipment Total	Equipment			Subcontract Total Cost
Pine S Add Off         Pine S Add Norma         Pine S Add Norma <td></td> <td></td> <td><b>2</b></td> <td>WATER &amp; SEWER</td> <td>1.00</td> <td>Each</td> <td>\$553,789.30</td> <td>\$553,789.30</td> <td>\$129,366.37</td> <td>\$116,635.21</td> <td>\$3,652,11</td> <td>\$0.00</td> <td>\$289,860.00</td> <td></td>			<b>2</b>	WATER & SEWER	1.00	Each	\$553,789.30	\$553,789.30	\$129,366.37	\$116,635.21	\$3,652,11	\$0.00	\$289,860.00	
Interstanding         I : 12         December Stremment         Lines         Dates         Different         Lines         Barry Interstanding         Barry Interstanding <td></td> <td></td> <td>□ 2.1</td> <td>36 Inch RCP Culvert Class III</td> <td>1,024.00</td> <td>Linear Feet</td> <td>\$67.54</td> <td>\$69,159.49</td> <td>\$20,073.46</td> <td>\$13,802.73</td> <td>\$949.15</td> <td>\$0.00</td> <td>\$32,654.00</td> <td></td>			□ 2.1	36 Inch RCP Culvert Class III	1,024.00	Linear Feet	\$67.54	\$69,159.49	\$20,073.46	\$13,802.73	\$949.15	\$0.00	\$32,654.00	
Deck Construint         Deck Const	Job Financing		+ 2.1.1	Furnish RCP Materials	1,024.00	Linear Feet	\$33,48	\$34,286.70	\$0.00	\$0.00	\$0.00	\$0.00	\$32,654.00	
International Control         Internaterest contenaterest control         Internaterest contro	Indirect Cost Escalation		+ 2.1.2	Excavate RCP Trench	1,858.56	Cubic Yard	\$4.51	\$8,379.59	\$4,963.56	\$3,416.03	\$0.00	\$0.00	\$0.00	
Darct Oard Add On Strendord al Add On Strendord al Conference Martin A Strendor Martin A Strendor	Direct Cost Escalation		+ 2.1.3	Instal RCP Pipe	1,024.00	Unear Feet	\$11.74	\$12,017.60	\$6,605.19	\$5,412.41	\$0.00	\$0.00	\$0.00	
2 2         3 bit Ample New (Sec.12)         12,000.00         Jume Fet         6 27,01         6 27,01         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,00         4 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70         6 40,70			+ 2.1.4	Backfil RCP Pipe	1.587.20	Cubic Yard	\$9.12	\$14,475,59	\$8,504,71	\$4,974,28	\$949.15	\$0.00	\$0.00	
Bit International State         * 2.31         Parted 32 Information 1200000         Parter Feet         13.00         940.00         92.00         92.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00         93.00			P 2.2	10 Inch PVC Force Main (SDB 21)	12,000,00	Linear Feet	\$23.18	\$278,113,97	\$54,705,77	\$56,697,60	\$0.00	\$0.00	\$158,772.00	
Marken Marken         * 2.2         December MeddedMill Dohm         Junce         Junce         Marken Marken         Parken         Parken MeddedMill Dohm         Junce         Parken         Parken MeddedMill Dohm         Parken MeddedMill D							\$13.89					\$0.00		
Part of the state s														
Condentities         B         2.3.1         Decembral Advective         James Perfet         8.00         4.0.00         4.0.00         4.0.00         4.0.00           Longendra La Standy         Factoria         Consense 24/do Price Vel Price         James Perfet         8.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.00         4.0.0.00         4.0.00         4.0.00														
Dumphada (Satisfield)         *         2.3.11         Excense 24 loop ProC e R0         1.3000         Caller Verd         1.30000         Caller Verd														
Indext-Cusies         4         2.3.1.2         December 24 couple         2.6.0.0         Cusies         4.6.7.2.4         4.1.9.66.7.6         94.7.2.7.9         94.0.0         94.0.0         94.0.0         94.0.0           Ingent Bits Mark         4         2.3.2         Read 34 horp?c - 0.0.1         Cusies         12.3.0         19.0.2         19.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0         94.0.0														
Special Biol Monarove         #         2.3.3         Funds & Stand & Standowski         Standowski <thstandowski< th="">         Standowski</thstandowski<>														
2.3.3         Basefit 34 ben/PC         Class Y and Link         Set / (All or All or														
B 2.4         4 Foot Dameter Monhole         56.00         Sach         45,394.03         457,304.47         433,717.27         411,783.20         60.00         450,080.00           + 2.4.1         Furnish /F. Monhole Metricula         10.00         Sach         42,012.01         520,045.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         400.00         40		11												
2.4.1         Furnish 4H Marholde Maternalis         Each         \$2,001.00         \$22,024.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00         \$200.00														
+ 2.4.2 Excavate-Instal-Red/III Marhole 16:00 Each 51,592.53 525,480.47 \$13,717.27 \$511,763.20 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.00 \$50.0														
			* 2.4.2	Excavate-Instal-Backfil Manhole	16.00	Each	\$1,592.53	\$25,480.47	\$13,717.27	\$11,763.20	\$0.00	\$0.00	\$0.00	

Estimate calculates subtotals for quantities when the UOMs match. Superior cost items are not included in the subtotals to avoid any double counting in the subtotal.

It is not necessary to export data to Microsoft Excel and run separate calculations to better understand costs of multiple items. The sigma symbol shows in the subtotaled row to indicate it is the total of the selected rows.

# 2.4 FIND FEATURE

The Find feature lets you search across all columns in the register with a single operation. The matching results are then highlighted in yellow. A scroll bar annotation is provided to indicate the rows in the grid containing matches. This lets you easily navigate to the search results in the register.

The Find feature also includes the flexibility to perform more precise searches using various syntax in the search bar. The Find search bar shows the currently selected and total number of search results.

NOTE If you type in two words, such as **total cost**, the grid considers them as individual conditions and selects records that contain either **total** or **cost**.

Search Syntax	Example
+	To find records that contain both search terms like <b>total cost</b> , type <b>+</b> before the second word. For example: <b>total +cost</b> .
-	Type - to exclude records that contain a specific word, for example: <b>total-cost</b> . You

Search Syntax	Example
	can combine different operators. Use + and - to select records that contain both <b>pay</b> and <b>item</b> , excluding records that contain <b>assignment</b> . For example: <b>pay +item -</b> <b>assignment</b> .
"quotes"	To search for a string that contains a space character, you need to enclose this string in quotation marks. For example: <b>"total cost"</b> .
:	To search against a specific column, type the first letters of the column's display name plus a colon character. For example: <b>optional:</b> <b>unassigned</b> . Now the grid displays records containing <b>unassigned</b> in the <b>optional code</b> column.

If you add another column-specific condition, the grid joins them using the + logical operator. Then the record shows the result that matches both options. The same happens when you join a column-specific condition with the one applied to all columns. An example of this search criteria looks like this: **optional: unassigned +"pay item"**.

#### STEP BY STEP - FIND FEATURE

- 1. From the Cost Breakdown Structure (CBS) Register, bring up the Find feature using **CTRL+F**.
- 2. In the search bar, type in Materials.
- 3. When all the searches are highlighted in yellow, use the **up** or **down** arrows to the right of the search bar to navigate to the next search result in the register.

g	columns here to grou	up			× mate	rial	1/13 🛛 \land 🗸	Q
	CBS Position Code 📒	Description	Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Subje
	÷	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$0.00	\$0.00	
•	÷	Job Management & Equipment	JOB MANAGEMENT & EQUIPMENT	1.00	Lump Sum	\$157,096.28	\$157,096.28	
•	÷	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	\$98,633.23	\$98,633.23	
•	+ 1	Mobilization	641 0100	1.00	Lump Sum	\$11,909.51	\$11,909.51	
•	+ 2	Clearing & Grubbing	201 0102	10.00	Acre	\$3,918.50	\$39, 184.97	
8	3	Unclassified Excavation	202 0183	50,000.00	Cubic Yard	\$4.68	\$233,915.81	
•	+ 3.1	Excavation	3.1	50,000.00	Cubic Yard	\$3.00	\$149,922.88	
ŀ	+ 3.2	Embankment	3.2	50,000.00	Cubic Yard	\$1.68	\$83,992.94	-
5	4	Aggregate Base	303 5912	45,000.00	Ton	\$15.40	\$692,928.99	
ľ	+ 4.1	Furnish & Haul Base Material	4.1	45,000.00	Ton	\$11.54	\$519,513.30	
ŀ	+ 4.2	Finegrade Subgrade	4.2	400,000.00	Square Yard	\$0.19	\$75,848.36	
8	4.3	Install Aggregate Base	4.3	45,000.00	Ton	\$2.17	\$97,567.33	
•	+ 4.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton	\$1.63	\$73,460.92	
·	+ 4.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard	\$0.06	\$24,106.42	
1	5	Asphalt Concrete Hot Mix Type A	303 4263	35,000.00	Ton	\$42.62	\$1,491,580.59	

- 4. To add the Find feature to the register functions header, select the **Options** icon to the far right of the search bar. Then select **Always Expanded**.
- 5. To search in a specific column only, select the **Options** icon to the far right of the search bar. Then select **Search in Selected Column Only**. Search a specific term in your selected column.
- 6. To close the Find functionality, click the **Close** icon to the left of the search bar. You can also hold down the **Shift** key and then select the **F3** key to use this feature.

NOTE A drop-down can be used to see a list of previous searches.

# 2.5 KEYBOARD SHORTCUTS

#### 2.5.1 NAVIGATING IN A REGISTER

Press	То
Arrow keys	Move one cell up, down, left, or right
Tab	Move to the next cell in the same row
SHIFT+Tab	Move to the previous cell in the same row
Home	Move to the beginning of the cell

#### 2.5 Keyboard Shortcuts

Press	То
End	Move to the end of the cell
Page Down	Move to the last row in the register
ALT+Down Arrow	Shows the contents of drop-down list choices for applicable fields
Numpad *	Expands the subordinate leaves of a tree structure for the currently highlighted branch
Numpad + key	Expands the currently highlighted section to display subordinate sections
Numpad - key	Collapses the currently highlighted section to remove the display of subordinate sections
CTRL+Spacebar	Selects and Deselects a row
CTRL+Tab	Toggles the display of open windows
ALT	Activates form menus
ALT+F4	Closes active form
CTRL+G	Opens the Go To Column navigator

# 2.5.2 NAVIGATING IN A RECORD

Press	То
Left and right arrow keys	Move one character left or right in an editable field
TAB	Move to the next editable field in the record
SHIFT+TAB	Move to the previous editable field in the record
Home	Move to the beginning of the field
End	Move to the end of the field
ALT+Down Arrow	Shows the contents of drop-down list choices for applicable fields
F4	Shows the contents of drop-down list choices for applicable fields
CTRL+Spacebar	Selects and deselects a row

Press	То
CTRL+TAB	Toggles the display of open windows
ALT	Activates form menus
ALT+F4	Closes active form
CTRL+G	Opens the Go To Column navigator

## 2.5.3 MENU AND KEYSTROKE COMMANDS

All forms have their own set of commands specific to the form. Commands for a form show in the ribbon on contextual tabs (Actions and More Actions) when it is open and the form is active. Click a command on the tab to order it. Some routine commands can be ordered using the standard Windows keystroke combinations (e.g., Ctrl+C, Ctrl+V) or right-click with the mouse when the field is selected.

## 2.5.4 FUNCTION KEYS IN ESTIMATE

F1	Open to the Help
F2 (grid)	Edit cell value: Enter edit mode for cells that are editable on the grid
F2 (tree list)	Edit cell value: Enter edit mode for cells that are editable on the tree list
F3	Find next: Finds the next value based on the search criteria
F4 (grid)	Show selection register or options in the drop down
F5	Refresh, wherever available
F5	Collapse subordinate Items
F6	Expand subordinate Items

**NOTE** In the Account Code Utilization Register, F5 can either refresh or collapse subordinates based on whether an account code is selected.

#### **LESSON 2 REVIEW**

- 1. The \_\_\_\_\_\_ is a great way to get a summary view of your bid. You can see totals of direct costs, indirect costs, profit and the overall bid price.
  - a. Job Folder
  - b. Data Map
  - C. System tab
  - d. Resource Rate Register
- 2. You can group by more than one column to have multiple grouping levels.
  - 1. True
  - 2. False
- 3. Display settings for Units of Measure, Currency, and Colors can be adjusted from the \_\_\_\_\_\_ tab.
  - a. Setup
  - b. Estimate
  - C. System
  - d. Help

#### **LESSON 2 SUMMARY**

As a result of this lesson, you can:

- Navigate the InEight Estimate system interface
- Navigate system settings
- Manage columns in InEight Estimate registers



# LESSON 3 – LIBRARY SETUP

#### **LESSON DURATION: 60 MINUTES**

#### LESSON OBJECTIVES

After completing this lesson, you will be able to use the following forms and explain their purpose:

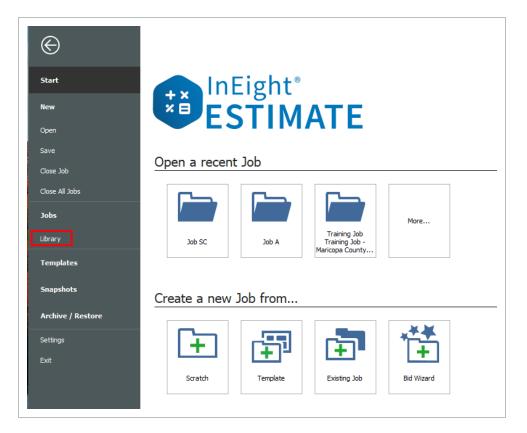
- Library Job Properties
- Library Foundation Setup Data Register
- Library Resource Rate Register
- Library Assembly Register

#### **LESSON TOPICS**

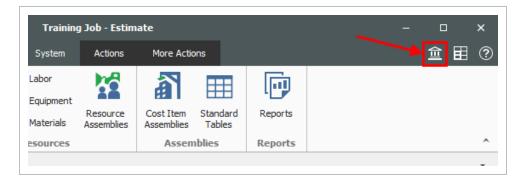
# **3.1 LIBRARY OVERVIEW**

The Library is where you set up and maintain master information that imports into your projects, including resource rates, tags, units of measure, cost item assemblies, and master breakdown structures. It is also where security roles and permissions are configured.

You access the Library from the Backstage view in Estimate. Click on the Library link to open.



You can also access the Library by clicking on the Library icon, when on the InEight Estimate landing page.



When the Library opens, you see ribbons available under the main menu tabs. Each Menu tab has unique sections which hold the necessary forms. In this lesson you will learn about each tab and their components.

## 3.1.1 LIBRARY TABS

The Library has four tabs which organizes the forms under sections. The tabs are:

- Setup
- Estimate
- System
- Integrations

The Actions and More Actions tabs appear when you open a register and contain functions for the register you have active. .



#### 3.1.1.1 SETUP TAB

#### **Overview - Setup Tab**

	Name	Description
1	Job Properties	The job properties maintained in the library will serve as the default settings for any new estimate that is created from scratch. When creating a new job it will inherit all the job properties set in the master library.
2	Foundation Setup Data	A master set of account codes, tags, and units of measure. When a new folder is created, the master set is automatically copied from the Library to the new folder.
3	Address Book	Used to store and maintain all information pertaining to the companies with whom you work and contact regularly (subcontractors, vendors, architects, etc.).
4	Trench Calculator	Stores and maintains common trench configurations that are used from project to project.
5	Shift Rate	Allows you to set up shift rate configurations that you can access at the

#### Overview - Setup Tab (continued)

	Name	Description
	Calculator	project level.
6	Resources	Opens the Library Resource Rate Register where you can create and edit all resources and resource cost details available for import into your projects.
7	Most Used Resources	For quick access to the Labor, Equipment and Materials tabs of the Master Resource Rate Register.
8	Resource Assemblies	Takes you to the Library Resource Assembly Register where you can set up resource assemblies to import into individual projects.
9	Cost Item Assemblies	Cost Item Assemblies are predictive models to quickly and accurately estimate elements of a job that can be repetitive in nature on the job or from job to job.
10	Standard Tables	The Standard Tables are used to create and/or list job-level table data that is accessible by any of the Cost Item Assemblies that exist in a job. The Standard Table Record allows the user to create and or modify a Table record. The Standard Table Register lists all the job level tables created / available in the project.
11	User Roles	Opens the Register where you assign users to a role which can include the forms, tabs and menu commands to which each role has access. The user names that are used when setting up your User Profiles come from Active Directory, and they are the user names that each user uses when logging onto his/her personal computer.
12	Access Control	Allows you to customize your system permissions by restricting destinations or commands that only designated roles should have access to.
13	Reports	Opens the Reports window, where you can access all system reports and configure the default report settings.



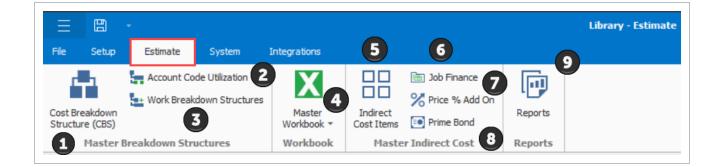
#### 3.1.1.2 ESTIMATE TAB

#### **Overview - Estimate Tab**

	Name	Description
1	Cost Breakdown Structure (CBS)	Opens the Library Cost Break Structure register, where you can define the CBS that will automatically import when a new project is created.
2	Account Code Utilization	Used to roll estimate line items into an account code hierarchy and benchmark against historical projects in a way that is consistent across projects.
3	Work Breakdown Structures	Opens the Library Work Breakdown Structure register, where you can define additional Work Breakdown Structures that will automatically import when a new project is created.
4	Master Workbook	Opens the master Microsoft Excel template which will be embed into each new estimate job folder. The cells in the embed excel workbook can be linked to send information to or from InEight Estimate Fields.
5	Indirect Cost Items	Takes you to the Library Cost Breakdown Structure Register where you can edit and define indirect cost items.
6	Job Finance	Takes you to the Library Cost Breakdown Structure Register where you can edit the Job Financing cost item.
7	Price % Add On	Takes you to the Price $\%$ Add On record, where you can define the price $\%$ add to be included in the Library CBS.
8	Prime Bond	Opens to the Library Prime Bond record where you can define the bond tables that will import automatically when a new project is created.

#### Overview - Estimate Tab (continued)

	Name	Description
9	Reports	Opens the Reports window, where you can access all system reports and configure their report settings.



#### 3.1.1.3 SYSTEM TAB

#### **Overview - System Tab**

	Name	Description
1	Customize	Window to customize the field titles that are displayed throughout various screens in the system, including all cost category titles, user-defined Tags, and more.
2	Saved Views	Allows you to save your views onto a disk or load from a disk.
3	Titles	Allows you to save titles onto a disk or load from a disk.
4	Colors	Allows you to save your colors onto a disk or load from a disk.
5	Output Settings	Allows you to save your output settings onto a disk or load from a disk.
6	External Reports	Menu to not only generate reports created by Estimate, but also to open programs, folders, documents, reports, or Internet resources with the associated program.
7	External References	Allows you to open programs, folders, documents, reports, or Internet resources with the associated program.

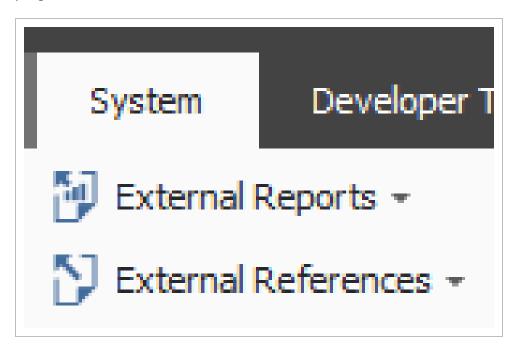
#### Overview - System Tab (continued)

	Name	Description
8	Help Section	Offers you links to Estimate's general Help menu, information about Estimate (i.e., version number, system information, tech support, etc.), What's New in the new version, and InEight's external website.



#### EXTERNAL REPORTS

The External Reports menu lets you generate reports created by Estimate, and also lets you open program files, folders, documents, or other internet resources.

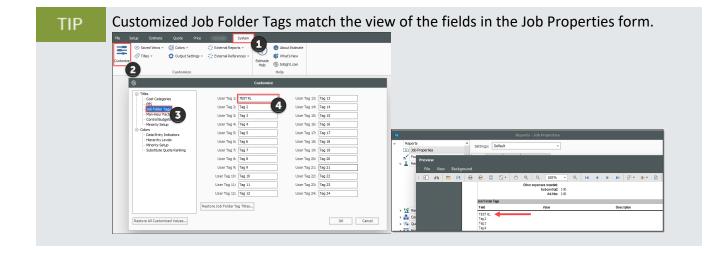


Each menu item can be added to the External Reports menu. Upon selecting one of the menu items, the associated program, file, folder document or URL will open, as defined by the command entered in the Open column.

System Develope				
External Reports - InEight Folder Estimate Open Su	pport Tickets			
Integrations Customize				
Each brog	ws you to open pro gram. In menu item that yo n you select one of gram, folder, docu	nenu allows you to r ograms, folders, do ou add here will be f these menu items, ment, report, or Int	Istomize Menu Items       –       □       ×         not only generate reports created by Estimate, but it also cuments, reports, or Internet resources with the associated         added to the External Reports menu in Estimate. From there, the associated Windows program will open the designated ernet resource defined by the command.         k on the Help button.	st it) 4,5
	Menu Order 🚊	Menu Text	Open	5 <b>,</b> 9
<i>→</i>	1	InEight Folder	www.ineight.com	3,9
	2	Estimate Open S	https://ineight.com/help-support/	,04
	3	Integrations	https://ineight.com/integrations/	2,9
				3,9 3,1 3,0 2,2 9,7
	Add Edit	Delete	OK Cancel Help	),1

To add a new menu text, first select the **Add** button and enter in a name in the **Menu Text field**, then type in the location of the new Menu text under the Open field.

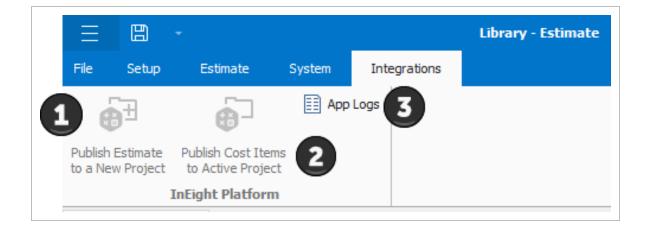
6	Customize Menu Items — I	- x
	nal Reports menu allows you to not only generate reports created by Estimate, but u to open programs, folders, documents, reports, or Internet resources with the as	
Each m (	🛞 New Menu Item — 🗆	× here,
progra M	lenu Text: 2	
N an	ype the name of a program, folder, document, report, or Internet resource and /indows will open it for you. If you do not know the command, click the Browse bu nd select the file that you would like to open.	/tton
	Browse OK Canc	el
1 Add	Edit Delete OK Cancel	Help



#### 3.1.1.4 INTEGRATIONS

#### **Overview - Integrations Tab**

	Name	Description
1	Publish Estimate to a New Project	Lets you publish an estimate job to a new project. This requires the installation of the data provider plug-in.
2	Publish Cost Items to Active Project	Lets you publish cost items to an active project. This requires the installation of the data provider plug-in.
3	App Logs	Lets you open the Estimate application logs in Project Suite, view log details, and export to Excel.



#### APP LOGS

The InEight Project Suite App Log lets you drill down to the Detail level which helps you find, analyze and solve application errors.

🖹 Expo	t to excel									
	Level	Time 📃	Domain	Area	Ŧ	Message	ExceptionMessage	ExceptionType	Route	CorrelationId
)etails	Error	2023/11/28 11:21:18 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		0b1c7752-578f-4e12-b02b-ccd8fa4d14
)etails	Error	2023/11/28 11:10:53 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		94fdc0a9-36b9-4696-a07c-08bf45f262
)etails	Error	2023/11/28 9:46:24 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		12cac03b-76ea-4808-9330-3d57b4b31
letails	Error	2023/11/28 9:45:44 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		205bcf4b-fa41-428b-b9cd-9270e460be
<u>etails</u>	Error	2023/11/28 8:26:02 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		2c9a0ea7-e898-4512-97b8-57a194732
<u>etails</u>	Error	2023/11/28 8:16:04 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		244b84e1-f82b-4c17-894d-dd5851b31
<u>etails</u>	Error	2023/11/28 8:06:00 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		30d6c546-2581-42fd-aa16-2341bbcf9e
etails	Error	2023/11/28 7:56:01 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		5d9f3e27-f3d8-417e-ab07-a4bf512f0e3
<u>etails</u>	Error	2023/11/28 7:49:44 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		432e359a-4e04-4040-b5df-f6470a650f
<u>etails</u>	Error	2023/11/28 7:43:58 AM	HDDesign	Design		EntityChange -> Publish NoMessageTargetsException:	No ESB subscriptions exist that match top	ng.NoMessageTargetsException		cf6f4150-6eec-4f82-b2c7-14d2df91770
	Correlati Expires: Machine	2023-12-13 11:2		18fa4d148	Bd Bro	owse Chain				
	Mes	sage								
	EntityCh	ange -> Publish NoMess	ageTargetsEx	eption:						
	InEig	ht.Platform.N	lessagir	ig.No	Me	ssageTargetsException				
		the second s	aatab tania-D	nianCont	Item :	workType=EntityChange, sourceDomain=De				
	No ESB s	subscriptions exist that r	naten topic=D	esignoosi	incenti,					

# **3.2 LIBRARY JOB PROPERTIES**

The Library Job Properties form serves as a template for new jobs. Some of the tabs on the Library Job Properties form hold basic settings that will require a default selection which will apply to all new jobs created from scratch. Time can be saved when utilizing Library Job Properties, because the data and settings you fill out will be automatically imported into a new job. Once imported, these settings can be changed at the job level if necessary.

It may be helpful to complete the following tabs / fields at the Library level:

- Overview Tab Notes Field: Filling out the Notes section at the Library level would be helpful for any instructions or reminders that you want to display on all projects' Job Properties form. For example, "Always double check currency exchange rates"
- **Cost Basis Tab**: Shift arrangements may or may not be standard across all projects, as well as wage rates and scales. The cost basis default rules should be established within the library.
- Fuel Cost Tab: Entering a default fuel cost here will factor with the utilization of your equipment

to be included in your equipment rates

= 8	•								Librar	ry - Est	timate								æ	-	٥	×
File Setup	Estimate	e Syste																		1	<u>î</u>	?
٥	-	2		通		🐔 Labor 🔐 Equipment			1		÷	†4†	D	]								
Job Properties	Foundation Setup Data *	Address Book	Trench Shi Calculator Cal	ft Rate F culator	Resources	Materials	Resource Assemblie	e Cost is Asse	Item Stan mblies Tab	dard oles	User Roles	Access Control	Report	s								
	Master	Initializatio	n		M	laster Resour	ces	Mas	ter Assemb	lies	Roles and Pe	ermissions	Repor	ts								^
Job Propertie	s ©																					•
Overview 0	Cover Sheet	Cost Basis	Minority Setu	Fuel C	Cost Job	Folder Tags	Pricing S	chedule	Cash Flow	Equi	ipment Maintenar	nce Bench	marking	Alternates								
Code	: Library											Status:	Bidding		-	Organiza	tion:					
Description	c																					
Notes	•																					^
																						~
Last Saved	: 11/28/2023	9:32:00 AM																		-		
Job created by	: Sarita																					
Source Job	:																					
																			ок		Cancel	
																				_		

# **3.3 LIBRARY ADDRESS BOOK**

Estimate's vendor and contact information in the address book register integrate with InEight Platform's vendor and contact master data libraries.

Vendors and contacts are created and maintained in Platform's master data library as a single source repository of vendor and contact data.

		ries / Ve	ndors										0	4° ®			
								VENDO	RS	VENDOR T	PES	7					
Ŧ													5	<b>7</b> (1)	α		
	ID		Name 1		Alternate name			Туре					'Y				
		T		T			T				T	)			T		
	0010118762		1123910 B.C. Ltd		Sun Star Shuttle			Z001				7	.mloops		-		
ו	0010105600		1127571 B.C. Ltd		Sparrow Excavation	on and Fe	ncing	Z001			-1		.illooet				
	0010069102		112792 Canada Inc		DBA AMJ Campbe	II Van Lin	nes	Z001			_\		elta				
	0010106779		1128354 Alberta Ltd		Yvolution Metal W	orks		Z001				1	Y				
	0010097951		1135391 Ontario Ltd		DBA Orleans Auto	pro		Z001				9	ans		_		
	0010114422		1138357 Alberta Ltd.		Young Contracting	3		Z001				/	Jnoka				
	0010111084		1142023 B.C LTD		Barcelo Flame Gri	lled Chick	(en	Z001			-(		Burnaby				
	0010092209		1165292 BC Ltd		DBA Hydro Tech			Z001			_\		rnaby				
	0010006725		1169572 Alberta Ltd.		DBA A-1 Portable	s		Z001				2	rose				
	0010119746		11754491 Canada Ltd		Synstone			Z001					atford				
	0010102352		1189589 AB Ltd		Fire-Alert SE Edmo	onton		Z001				/	dmonton				
	0010118867		1190475 BC LTD		Vancouver Island		Marina	Z001			-(		Juncan				
		$\mathbf{N}$	1130413 00 010			rolestar	warme	2001					· ·		-		
														Library - I	Estimate		
					stem Integrations	Actions	1.1										
			Print	V.	V, E	🕲 Delete	W <sup>4</sup> Merg	e Vendors			Y	7	V.	1			
			Ve	ndors and	Vendors and Contacts	Copy			뤈 UnLin	Expand /	Filter	Clear	View Vendors V				
			Print		efault Quotes Layouts	+ Fill Dow	n Edit		Workt	Collapse *	- View	Filter	InEight Pla	tform			
			Address Book Registe														
			Drag columns here to grou	p													
			Vendor ID	Vendor Nar	ne	<u>1</u>	Vendor Type		Tax ID	Tax Jurisdiction	Address	1		Address 2	Country / Region	City	State
			+ 0010087554	1 Alliance G	eomatics LLC		2001		461564451	4803300400	1261A 1	20th Ave	NE		United States Of America	Bellevue	Washingto
			+ 1 NP - Vendor2	1_NP - Ven	dor2		1_NP Vendor		12345	abc	90th Stre	et			United States Of America	Scottsdale	Arizona
			+ <u>1 NP - Vendor 1</u>	1_Vendor1			1_NP Vendor										
			+ <u>1 NP - Vendor 1</u>	1_Vendor1			1_NP Vendor										
			+ 0010099994		ered Materials LLC		Z001			1516913100	1162 Mar				United States Of America	Wabash	Indiana
			+ 0010099994		ered Materials LLC		2001			1516913100	1162 Mar				United States Of America	Wabash	Indiana
			+ 0010119449 + 0010098991	11032119	Canada Inc ntario Ltd oa Fire Alert		2001 2001		731900882 898821194	7001509700 7001520100		nbank Ro ylor Creel	ad Suite 12		Canada Canada	Ottawa Orleans	Ontario
			+ 0010098991 + 0010106673	1105900 O			2001 2001			7001520100 7000328680			k Dr Pass Road		Canada		Ontario British Col
				1107075 8			2001 2003			7000328680	15705 O			PRIMARYAd	Canada India	Osoyoos PRIMARYAddress1	British Coli Tamil Nada
			+ 0010097822 + 0010033404	11088009 ( 111008 Ca			2003			7001565130	6866 Md			Promerci Ad	Canada	Greely	Ontario
			+ 0010033404	111008 Ca			2002			7001568530	5243 Rol				Canada	Seeley's Bay	Ontario
			+ 0010118762	1123910 B			2001			7000301500	1016 Qu				Canada	Kamloops	British Colu

The vendor and contact data structure shows a new hierarchy where multiple contacts can be assigned to one vendor.

Ade	dre	ss Bo	ok Register	0											
raç	) co	lumns	here to group									•			
	Ve	endor	D	Vendor Name	<u>i.</u>	Vendor Type	Tax	ID	Tax Jur	isdiction	Address	1	Country Region	1	City
÷	-	0010	106779	1128354 Alberta Ltd		Z001	8638	77379	700014	7200	Box 516		Canada		Vimy
			Vendor ID	First Name	Last Name	Company	÷.,	Addres	ss 1	Address 2	City		Country Region	/ Primary Email	
	-	÷	0010106779	Frank	Matty	Alberta								Frankmatty@gr	nail.com
			0010106779	Tom	Cross	Alberta Ltd						1		Tomcross@gma	il.com

## 3.3.1 PRE-EXISTING ESTIMATE DATA

Upon upgrading to version 23.6, address book records show a combined list of both pre-existing Estimate Address Book records and Platform vendors and contacts. Pre-existing Estimate Address Book records are still editable, but Platform records are not. The pre-existing disconnected vendors and contacts show a red glyph to the left of the Vendor ID column which shows that these records are disconnected from Platform.

Address Book Register	r O
Drag columns here to grou	p
Vendor ID 🚊	Vendor Name
8 +	Alpha
X +	Al.Ven1
Disconnected from InEight Platform	Ed-Sub2
8 +	Example Vendor 4 DBE

The existing contact records also have a vendor record associated with it. New vendors and contacts must be added via Platform, and changes to any Platform originated records must be modified in Platform. This promotes the use of Platform as the single source of creation and maintenance for vendor master data.

# 3.3.2 ESTIMATE SPECIFIC DATA

Certain vendor affiliated qualification information required for estimating purposes such as licensed, bonded and insured data, or minority participation, is maintained directly in Estimate only rather than in Platform.

There can be other Estimate vendor and contact data that only exist in Estimate and not in Platform, such as License, Bond, Insurance and Minority Certifications, and Default Quotes.

Address Book Registe	er N	/endor Record	0					
Vendor Details				Contacts	Notes	License / Bond / Insurance	Minority Certifications	Default Quote
Vendor ID:	1_NP - Ve	endor2						
Vendor Name: \star	1_NP - Ve	endor2		License	d			
Vendor Type:	1_NP Ver	ıdor			Licensor:	Jeff Lewis		
Tax ID:	12345				Class:	A		
Tax Jurisdiction:	abc			Iden	tification:	GDIMNDG83		
Address 1:	90th Stre	et		Bonded				
Address 2:				-		Owens Inc		
Country / Region:	United St	ates Of America	Ŧ	(	Company:			
City:	Scottsda	le			Agent:	Phil Jones		
State:	Arizona		Ŧ		Phone:			
Postal / Zip Code:	85258			Cost p	per 1,000:	0.00		
Phone Number:	999999999	)		Insured				
Fax Number:	96325874	1						
Web Site URL:				(	Company:	Evergreen Insurance		
Peference Number:			=		Agent:			

## 3.3.3 ADDRESS BOOK LAYOUTS

You can choose between three address book page arrangements, vendors and contacts, vendors and default quotes, and contacts.

File Setup	Estimate	System D	eveloper Tools	Integrations	Actions							
Print		U.		C Open + Fill D 🛞 Delete	0.0	k Field Link Field	14	7	T	) I I		
P Export to Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts	📲 Сору			Expand / Collapse *	Filter	Clear Filter	View Vendors	View Contacts	
Print		Layouts		Edit	Worl	kbook		View		InEight	Platform	

#### 3.3.3.1 VENDORS AND CONTACTS

Vendors and Contacts are arranged where the vendor is the primary record in the register, and the contacts associated with the vendor are shown as secondary detail records.

File		Set	φ.	Estima	ate	System	Inte	grations	Actions
Ŕ		iew	Excel		ors and itacts	Vendors a Default Que		Contacts	Copy
			<b>ok Reg</b> here to	-	0				
		ndor I			Vendor				<u>i</u>
÷	-	0010	Vendo			4 Alberta Ltd Name		Last Nam	ne
		÷	00101	06779	Fran	k		Matty	
		4	00101	<u>06779</u>	Tom			Cross	_
		•							

#### 3.3.3.2 VENDORS AND DEFAULT QUOTES

Vendors and default quotes are arranged where the vendor is the primary record in the register, and the default quote group assignments for the vendor are shown as secondary detail records.

File		Setup	Estin	ate	System	Integrations	Actions
٩	Print Prev Expo		Veni cel Co	dors and	Vendors an Default Quot		Copy
_	P	rint			Layouts		_
Add	dres	s Book	Register	0			
Drag	g coli	umns her	e to group				
	Ver	ndor ID		Vendor	Name		<u>i.</u>
	+	0010087	7554	1 Alliano	ce Geomatics Ll	LC	
$\rightarrow$	-	<u>1 NP - V</u>	/endor2	1_NP -	Vendor2		
			uote oup		Resource Code	Resource Description	
		→ As	sphalt Mate	erials			

#### **3.3.3.3 CONTACTS**

Contacts are arranged where the contacts are shown in a flat list and are not secondary detail records under the Vendor. This layout can be used to search more easily for contacts regardless of their vendor assignment.

File	Setup	Estimate		System Ir	ntegrations	Actions
뤔	Print	) [I]		I		🛞 Delete
ą	Preview	16	1	* <b>S</b>	i	Сору
ę	Export to Excel	Vendors Contac		Vendors and Default Quotes	Contacts	+ Fill Down
	Print			Layouts	T	Edit
	columns here to		'		•	
	First Name		Last	Name	Company	
	Nadeesha		Karu	nanayaka	AXN	
	Joe		Lang	more	You.Inc	

# 3.3.4 VIEW VENDORS AND CONTACTS IN INEIGHT PLATFORM

Select View Vendors or View Contacts to open a new InEight Platform master data vendors and contacts browser.

			éntres Va	Tenders and Contacts Default Quotes		a towneday your							
=	A Master data libraries	/ Vendors			0 🗸 🙁 (	<u>ا</u> ا	🛱 Master data libraries / (	Contacts			0	d 🖉 😞	() I
				VENDORS VENDOR TYPES					CONTACTS	CONTACT TYPES			
۲				(		Q	I I I Promot			- (	D7	17 0	D Q
	ID .	Name	Ť	Туре			Full name	Primary email	Contact type	Office number		Is User	
		T I	Υ	T /		T	T	T	T		- 7	All	- 1
	0010087554	1.40	ance Geomatics LLC	Z001	Sellevue		Tem Cross	Tomcross@gmail.com	Vendor	(		false	
	1_NP - Vendor2	J_NP	- Vendor2	1_NP Vendor	rottsdale		Jim Softy	jim.softy@gmail.com	Vendor			false	
	1_NP - Vendor1	J_Ve	sdar.L	1_NP Vendor			Tom Cross	Tom.Cross@gmail.com	Vendor			false	
0	0010099994	10K.8	ngineered Materials LLC	2001	oash	0	Frank Matty	Frankmalty()gmail.com	Vendor			taise	
	0010119449	1103	2119 Canada Inc	2001	Attance.	0	nandytest123 gmail.com	nandytest123@gmail.com	Test contact type A	889899		falce	
	0010098991	1105	900 Ontario Ltd oa Fire Aler)	Z001	deans		TestUser100nandy@gmail.com	TestUser100nandy@gmail.com	Test contact type A	889		false	
	0010106673	1107	075 B.C. LTD	Z001	9005		NP-Contact1 With Vendor	nikitaben pareikh@ineight.com	Designer	123456789		false	
	0010097822	1108	3009 Canada Inc	2003	MARYAddress1		Paving Dude II	paying dudell@allstarpaying.com	Vendor			false	
	0010033404	1110	18 Canada inc.	2002	lovely		Nadoosha Karunanayaka	abc@gmail.com	Owner	3145		talse	
	0010102467	1112	304 Ontario Inc	2001	(celey's Bay		Bhatt Shreya	fitnessmylife2018@gmail.com	Owner			talse	

To view or edit a vendor, click the Vendor ID. The Platform Edit vendor > **Vendor Details** page opens.

⊟ ਿ Master data libraries / Vendors			QA-T01-23.6 (	D 4	8	6 III
Vendor > Edit vendor	VENDOR DETAILS USERS	CONTACTS				
			C	ancel	Sa	ve
	Vendor details					Î
	• ID	* Name				
	0010010622	Smith and Construction				- 1
	Alternate name	Vendor type				- 1
		Z001 ·				- 1
	Vendor tax ID	Vendor tax jurisdiction				- 1
	120998877	7001910900				
	Status	Default currency				
	Available •	Canadian Dollar 🔹				

## 3.3.5 VENDOR AND CONTACT CREATION

You can quickly create ad hoc vendors and contacts via the Quote Register and Record forms.

After you receive vendor quotes and you are ready to enter quote information, it can be an optimal moment to create new vendors and contacts if they are not currently in the Address Book. Creating vendors and contacts on the fly while the vendor quote information is readily available, and then

entering the quote information is more expedient than leaving the quote to create the vendor and contact in Platform. This is especially useful when you have multiple new vendor quotes.

You can create vendors and contacts on the fly in both the Quote Register > Address Book Register Library and directly from the Quote record.

	ote Register 🛛 🕲	Quote Record	b									
Drag	g columns here to gr	roup										
	Description 😐	Quote Status	Vendor			Vendor	Name	Contact			Quote Total	Awarde Total
A	Asphalt Materials	Received	Lewis Concrete AA1	L		Lewis C	Concrete	<ad-hoc con<="" td=""><td>tact&gt;</td><td></td><td>\$1,115,975</td><td></td></ad-hoc>	tact>		\$1,115,975	
A	Guard Rail Items	Invalid	_PC1PC1			_PC1		SUB 18 111	1 test		\$0.00	
A	Guard Rail Items	Invalid	SUB4		1	SUB4		SUB4 Harry	Belefony		\$0.00	
	new J-11	Received	SJ-5 SJ-5	Ø								
ß	Pipe Materials	Received	Ven10	® -						Address	Book Register	- Librar
Δ	Pipe Materials	Received	Example Vendor 4 DB	Actions								
4	sa	Received	Example Prime Contra		)E		H New	1			)B	2
ß	Sign Items	Invalid	Example Sub #34 DBE	¥ 💶		•	🖷 Сору	5×1			•⊙	<
	Sign Items	Incomplete	[Enter Vendor Name]	Vendors and Contacts	Vendors Default Q			Expand / Collapse *	Filter	Clear Filter	View Vendors	View Co
<u>A</u>	Site work	Received	Civilworks Inc Ven		youts	outes	Edit	Conapse .	View	1 liver	InEight	Platfor
	test	Received	[Enter Vendor Name]	1218	-	test						
*				+ 9999	<u>99</u>	Rob	ert Roberts				Z002	
				+ <u>aa</u>		cc						
				+ <u>AA1</u>		Lew	is Concrete					
)uc	IOTE RE( ote Register ider	Cord Quote Record	0				is Concrete					
пеа		halt Materials										
				_								
	Vendor: <ac< td=""><td>d-Hoc Vendor&gt;</td><td></td><td>🛨 🗉</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></ac<>	d-Hoc Vendor>		🛨 🗉								
	1	d-Hoc Vendor> d-Hoc Contact>		•								

For example, when you are in a quote record and need to quickly create a new vendor because the vendor you received a quote from does not yet exist, you can select the **Vendor Quick Add** button, and then enter in the vendor details in the Vendor Record – Library form.

Quote Record	0			1				Vendo	r Record	- Library	
Header				Vendor Details	2	_	Contacts	Notes	Licens	e / Bond / Insura	
Description:	Site work		1	Vendor ID: *	V187		Drag colum				
Vendor:	<ad-hoc vendor=""></ad-hoc>		0 🗹	Vendor Name:	Lewis Concrete					Last Name	Address 2
Contact:	<ad-hoc contact=""></ad-hoc>		0 🗉	Vendor Type:	Z004	•					
Primary Email:				Tax ID:							
External Ref.:				Tax Jurisdiction:							
				Address 1:	125 Maple Ave						
Resources Cos	it Items			Address 2:							
Package 🖮				Country / Region:	United States Of America	•					
				City:	Phoenix						
Package 🚊	Code 🖮	RFQ ID	Quote Group	State:	Arizona	Ŧ					
D P1 (Dem	o,Exav,Grading)			Postal / Zip Code:	85256						
II P2 (Assis	ted Parking Lot)			Phone Number:	480 555 2656						
P3 (Pavir	ng)			Fax Number:							
*				Web Site URL:							
				Reference Number:							
				Quote							
				Currency:	U.S. Dollar	•					
				Do NotUse:							
							4				
									1	ОК	Next >
										ок 1	Next >

You can also add additional qualification information in the License/Bond/Insurance and Minority Certifications tabs.

2			Vendor	Record - Library						
Vendor Details		Contacts	Notes	License / Bond / Insurance	Minority Ce	ertifications	Default Quotes			
Vendor ID: 1	V187						-			
Vendor Name:	Lewis Concrete	Licensed								
Vendor Type:	Z004 ·	L	icensor:	John Lewis					]	
Tax ID:			Class:	General Engineering					]	
Tax Jurisdiction:		Identi	fication:	ROC 338065					]	
Address 1:	125 Maple Ave	Bonded								
Address 2:		M pouged								
Country / Region:	United States Of America 🔹	C	ompany:	Hartley Bonding					]	
City:	Phoenix		Agent:	Jim Smith						
State:	Arizona 👻		Phone:	480 555 6582					]	
Postal / Zip Code:	85256	Cost pe	er 1,000:	53.00	Contacts	Notes	License / Bond / Insurance	Minority C	Certifications	Default Quotes
Phone Number:	480 555 2656	Insured			Name	Authorit	y and Certification Numb	er		
Fax Number:					DBE	AW93746				
Web Site URL:		C	ompany:		MBE					
Reference Number:			Agent:	Tom Jones	WBE					
Quote			Phone:	480 568 6584	Other Min	ority Certif	ications:			
Currency:	U.S. Dollar -				OBE1	CL038746	i			
Do NotUse:					OBE2					
0011010901					OBE3					
					OBE4					
					OBE5					
				ОК	OBE6					
					OBE7					
					Certificati	on Comme	nts:			

# **NOTE** The additional qualification information is added and maintained in Estimate and cannot be added to the vendor record when creating vendors directly in Platform.

After the vendor is created, it is included in the Library Address Book and can be chosen as a vendor to be used on a quote.

6			Address F	Book Register - Li	brary			E
A	ctions							
Drag	g columns here to gro	qu				× Enter text to search	^	$\vee$ \$
	Vendor ID 🚊	Vendor Name		Vendor Type	Address 1	Country / Region	Tax ID	Tax Juris
	+ <u>v1212-a</u>	tst						
÷	+ <u>V187</u>	Lewis Concrete		Z004	125 Maple Ave	United States Of America		
	+ <u>V2</u>	@ewd						
	+ <u>V201</u>	MAINT.		Z004	Add1	Albania	T.303	CO-
	+ <u>V203</u>	J&J						
	+ Vendor 1	vendor 1		VT1				
		VandarOsCara		7000				

If you have a new contact to add, you can select the **Contact Quick Add** button, and then enter the contact information.

	0			8	Contact F	tecord - Library	- 0 :
Header				Contact Details	2		
Description:	Site work			First Name: *	Robert	Address 1:	125 Maple Ave
Vandari	Lewis Concrete VI	07	• 57	Last Name: *	Cantor	Address 2:	
	<ad-hoc contact=""></ad-hoc>	187		Company: *	Lewis Concrete	Country/Region:	United States Of America
Primary Email:	Churrie Condetz		-0	Primary Email: *	rcantor@lewisconcrete.com	State:	Arizona
External Ref.:				Contact Type:	Estimate Contact	··· City:	Phoenix
				Department:		Postal/Zip Code:	85256
Resources Cos	st Items			- Position:	Contractor	Fax Number:	
Package 🛓				Title:	Sr. Contractor	Office Number:	480 555 2658
				Language Preference:		··· Mobile Number:	480 555 6887
Package 🖮	Code 🖮	RFQ ID	Quote Group	Vendor		Security	
D P1 (Dem	o,Exav,Grading)			Vendor ID: V187		Last Changed By: Pa	aul Trippi
D P2 (Assis	ted Parking Lot)			Vendor: Lewis	s Concrete V187	Last Changed On: 12	2/29/2023 11:50:42 AM
🛛 P3 (Pavir	ng)			Do Not Use:			

After the contact is created, it becomes associated with the newly created vendor in the Library Address Book.

Solution Ac	tion:				Address	s Book Register - Li	brary					Œ
Drag	colu	umns	here to group	)					× Enter text to se	arch	^	~ 🔅
	Ven	ndor I	D 📃	Vendor Name		Vendor Type	Address	1	Country / Region		Tax ID	Tax Jurisd.
→ [	-	<u>V187</u>		Lewis Concrete		Z004	125 Map	ole Ave	United States Of Ar	merica		
			Vendor ID	First Name	Last Name	Company	<u> </u>	Address 1	Address 2	City		Sta
		÷	<u>V187</u>	Robert	Cantor	Lewis Concrete		125 Maple	Ave	Phoenix	x	Ari
		4				x						•
									Г	OK	Canc	

The vendor and contact information are stored in Platform where it can be easily accessed by selecting one of the vendor ID links in the Library Address Book. The vendor can also be used by other Platform applications.

6 - Address Book Register - Library			æ						
Actions									
Drag columns here to group									
Vendor ID 🗽 Vendor Name Vendor Type Addres	ss 1 Countr Region	try / Tax ID	Tax Jurisd						
→ - <u>V187</u> Lewis Concrete 2004 125 Ma	aple Ave United	d States Of America							
Vendor ID First Name Last Name Company is.	Address 1 A	Address 2 City	Sta						
→ V18Z Robert Cantor Lewis Concrete	125 Maple Ave	Phoenix	Art						
		OK Car	icel						
				ineightsuite	qa 23.12 ⑦ 4 <sup>11</sup> ⑧ 1	•			
Vendor > Edit vendor VENDOR DETAILS USER	RS CONT	TACTS							
					Cancel Sav	ve			
						A			
Vendor details									
• ID		* Name							
V187		Lewis Concrete							
Alternate name		Vendor type							
		Z004		*					
Vendor tax ID		Vendor tax jurisdiction							
Status		Default currency							
Available		Select one		*					
Default payment terms		Default incoterms							
Default payment terms		Default incoterms		*					
Default incoterms location									
Addresses	Ven	ndor > Edit vendor			ENDOR DETAILS USERS	CONTACTS	/		
	۲								(i) Q
Country / Region		Full name	Primary email		Contact type	Office number		Is User	
			<b>T</b>	T		T		All	4
							/		+
		Robert Cantor	Name23@Exi	imple.com	Estimate Contact	480 555 2658	<u> </u>	false	
							/		

# 3.3.6 MERGE AND UPLOAD CONTACTS AND VENDORS INTO PLATFORM

You can manage and retain all vendor information in the Estimate Address Book that are not linked (disconnected) with Platform, including contacts and companies that are referenced in multiple estimates, quotes and RFQs.

Disconnected Vendors and Contacts can be merged with existing Platform vendors and contacts, or they can be uploaded to create new Platform vendors and contacts by navigating to the Library > Setup > Address Book. You can also upload new Estimate vendors and contacts into Platform's master data repository.

Estimate's process of uploading contacts and vendors into Platform's master data library (as a means for all InEight products to access as a source system of contact and vendor data) not only lets you send this information to Platform, but it provides you with a mechanism to clean up and simplify existing Estimate Address Book data. For example, your current Estimate Address Book might contain many duplicate contacts containing the same first and last name, but with different addresses, emails, or mobile numbers. Merging these records helps administer customer data better so that you can eventually only maintain a single contact or vendor that has the most up to date and most accurate information.

Ado	dress Book Regi	ister ©		
rag	columns here to	group		
	Vendor ID	Company =	Vendor	Address 1
X		Phoenix Contractors	Example Vendor 1888	100 Tenth Street
8		Phoenix Contractors	Example Vendor 1666	100 Tenth Street
8		Phoenix Contractors	Example Vendor 5551	100 Tenth Street
8		Phoenix Contractors	Example Vendor 222	100 Tenth Street

#### 3.3.6.4 DISCONNECTED CONTACTS AND VENDORS

Pre-existing Estimate vendors and contacts that are disconnected from Platform show a red glyph to the left of the Vendor ID column, and only exist in Estimate at this time. To only show the disconnected records, click the column filter in the Vendor ID column, and then select (Blanks). You can either delete the disconnected records or choose to merge or upload them into Platform.

Showing only the disconnected vendors or contacts helps you see the vendors and contacts that are not connected with Platform.

Drag	columns here to	group		
	Vendor ID	▼ First Name	Last Name	Com
8	Values Tex	t Filters		Phoe
8				Phoe
8	Enter text to s	earch	Q	Phoe
8	(All)	/	<b>^</b>	Phoe
8	✓ (Blanks) <sup>4</sup>			PC5
8		rime Contractor	13	PC3
	Example S	ub #14 DBE		new
	Example S	ub #24 DBE		jose
	Example S	ub #8		InEic
	Example V	endor 123	•	-
				InEl
				InEig
- 1	Clear Filter	Filter Editor	Close	InEig

NOTE

All new library address book records must be created in Platform.

Vendor and contact ID's that show a blank do not currently have an associated Platform vendor association, as these vendors were originally created in Estimate. These vendors have not been merged into Platform, and therefore have no association with the vendor master data that resides in Platform.

Pi R Pi R Pi E	reviev	v to Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts	Copy			恩 Link 뢵 Unt	: Field .ink Field	Expand / Collapse •	Filter	Clear Filter	View Ver
	Prin	t		Layouts			Edit		Worl	kbook		View		
Addr	essi	book keg	ister 🛛											
-		nshere to or ID <b>T</b>	group Vendor Name	<u> </u>	Vendo	r Type	Tax ID	Tax Jurisd	liction	Address	1			Address 2
-					Vendor	r Type	Tax ID	Tax Jurisd	liction		1 t Street Suite	≥ 9000		Address 2
1			Vendor Name Example Sub	#34 DBE	Vendor Last Name	r Type	Tax ID Company	Tax Jurisd			-		City	Address 2

#### **INACTIVE CONTACTS AND VENDORS**

You can mark a vendor as *Do Not Use* in a contact record, which indicates the status of the contacts associated vendor, and can only be set in Estimate when vendors are disconnected from Platform. The record changes to red to signify it is inactive and cannot be used, but is not deleted from the system.

Address Book Register	Contact Record	Vendor Record	0		
Vendor Details	^	Contacts No	tes		
Vendor ID: 4909	173019474807	Drag columns her	e to g		
Vendor Name: * 51st		brag columns ner	etog		
Vendor Type: Z00	2 -	First Name			
Tax ID: 13					
Tax Jurisdiction: 5th I	.evel				
Address	W, Add				
durese	W, AUU				
Keters					
Quote	Address Book	Register	Contact Record 🛛		
Currency: U.S.	Dollar Contact Detail	s			
Do NotUse: 🗸 🗸	Firs	st Name: Tony		Add	ress 1: 300 Third Street
	Las	st Name: LM		Add	ress 2: 300 Third Street
	Las	st Name: LM	$\sim$		ress 2: 300 Third Street
	Las		$\sim$		
	Las		$\sim$		
	Las				
		anv: *		Office N	Realon
		Title: jr.tL		Office N	umber: off-1
	Language Pre Vendor	Title: jr.tL		Office N Mobile N Security	umber: off-1
	Language Pre Vendor Ven	Title: jr.tL ference: English		Office N Mobile N Security Last Chang	tealant size

To change the *Do Not Use* status, select the Vendor ID Platform link for the vendor record in Estimate. In Platform, the *Do Not Use* flag can be maintained by selecting the Status field in Master Data Libraries > **Vendors**, and automatically integrates with Estimate.

■ A Master data libraries / V	ndors	
Vendor > Edit vendor	VENDOR DETAILS US	SERS CONTACTS
	Q	
	Addresses	PRIMARY REMIT TO ADDITIONAL

#### **STEP BY STEP – MERGE ESTIMATE VENDORS TO PLATFORM**

1. Choose one connected and disconnected vendor, then select Merge Vendors with Platform.

Print Preview Export to Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts	Copy	+ Fill Down	Link Fields	Expand / Collapse ~	Filter	Clear Filter	View Vendors	View Contac	\(∰ Upload	Vendors with Platfo	
Print		Layouts			Edit	Workbook		View			InEi	ght Platform		
Address Book Reg														
	Vendor Nam	e <u>=</u>	Addr	ess 1		City	State	Posta Zip C		Phone Number		Address 2	Vendor Type	Tax
Vendor ID				) Seventh Street			889500			111-131-4321				
+ <u>Ven34</u>	Ven34		700 5	Seventh Street		Hometown		8895	00		4321	700 Seventh		

• Note that the connected Estimate vendor previously exists in Platform, prior to the merge of the two vendor records.

#### 2. Select Merge.

Drag o	columns he	re to group										Sav	ved views: Stand	lard View	-
Primar	ry	Vendor ID	F	Vendor Name	<u>ii.</u>	Vendor Type	Address 1	Address 2	City	Postal / Zip Code	Phone Number	Fax Number	Web Site URL	Currency	Do Not Use
+	$\checkmark$	Ven34		Ven34			700 Seventh	700 Seventh	Hometown	889500	111-131-4	222-134-2		CND Dollar	
+				Ven36			700 Seventh		Hometown	889500	111-131-4	222-134-2		CND Dollar	
4															

- Notice that the primary vendor is checked, as this record already exists in Platform.
- Other records where the Primary field is not checked are records to be merged into the primary record.
- Fields in yellow for the non-primary records are deltas. These deltas will not be merged, and differences will be lost once they are merged, as the data that exists in Platform takes precedence. If you want any of the disconnected data to exist in Platform, you need to manually change the data in Platform. The advantage for this is to allow for the disconnected Estimate vendors to become associated with an already existing Platform vendor, which lets the contact to still be keyed in areas it was used in Estimate, such as in Quotes and RFQs.
- 3. Select **Yes** in the Attention dialogue box to acknowledge that the attributes of the primary contact will exist.

Attention
The attributes of the primary vendor will persist and the default quotes for the other vendors will be removed. This operation will save the Library.
Are you sure you want to continue?
Yes No

#### STEP BY STEP – UPLOAD ESTIMATE VENDORS TO PLATFORM

1. Choose a disconnected vendor with an associated contact, and then select **Upload Vendors to Platform**.

	Print Previ			Vendors and Vendors and					_		Upload Vendors to Platfor						
ð	Ехро	rt to	Excel	Vendors Conta		Vendors ar Default Quo		Contacts	View	Vendors	View Conta	icts					
	Pr	int				Layouts					InE	ight Platfo	rm				
Ado	dres	s Boo	ok Re	gister C													-
Drag	g colu	mns ł	here t	o group										Si	aved views:	Previous View	- J
	Ven ID	Vendor TD Vendor Name 🚊		endor T	ype	Country / Region			City		State	Postal / Zip Code	Phone Number				
8	+	Example Sub #98			3							Hometown		AZ	889050	111-123-12	
8	+ Example Sub 77					United States Of America			ca	Hometown		Arizona	889030	111-232-34			
8	–	- Example Vendor 123				U	nited Sta	States Of America		Hometown		Arizona	889060	111-123-213			
		Vendor ID First Name Last Nar			Last Nam	n	State Postal / Country / Zip Code Region Primary Er			Email		Contact Type					
		8			Pat			Roberts		AZ	8	89060					
		4															+

- 2. Click the **+ symbol** to the left of the Vendor ID to expand all the records. Select **Upload** to sync the vendor shown with the contact in this window to Platform.
  - The preview dialog box opens.
- 3. Select **Yes** in the Attention dialogue box to confirm that the vendor will be uploaded to Platform and synchronized back to the Estimate Address Book library.

City	State	Postal /	Country /	Contact	
Attention					
	be uploaded to s operation will			zed back to	
	you want to cor		ibidiy.		
Are you sure	you want to coi	iunue:			
			Yes	No	

### STEP BY STEP – MERGE CONTACTS TO PLATFORM

1. Choose one connected and one disconnected contact, and then select Merge Contacts with Platform.

Print Preview Export to Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts	Copy		Link Fields	Expand / Collapse -	Clear Filter	View Vendors	View Contacts	ide ∪	erge Contacts with Pl pload Contacts to Pla		
Print		Layouts			1	Workbook	View			InEig	ht Platfo	orm		
Address Book Reg	ister ©													
Drag columns here to	group													Saved views:
8	Larry	Jack E	xample Sub #	#44 DBE		900 First Str	343 Plum st		United States Of	America Alas	ka	Hometown	889009	pt@sub.com
	Larry	Jack E	xample Sub #	4 DBE		900 First Str	900 First Stree	et Su	United States Of	America Arizo	na	Hometown	889009	tc@yahoo.co

• Prior to the merge, note that the connected Estimate contact previously exists in Platform, prior to the merge of the two contact records.

			CONTACTS	CONTACT TYPES						
			CONTACTS	CONTACT TIPES						
ŧ	) 🖪 🛞 🖨 P	romote user					5		<b>(i</b> )	Q
	Full name ↑	Primary email	Mobile number	City	Created on	Address 1		Is Use		
	larry jack		Ţ	<b>T</b>	month/day/		T	All	Ļ	

2. Select Merge.

Last											
Name	Company 🗎	Primary Email	Contact Type	Address 1	Address 2	Country / Region	State	City	Postal / Zip Code	Mobile Number	Office Number
Jack	Example Sub #4 DBE	tc@yahoo.com	Estimate Cont	900 First Stree	900 First Str	United State	Arizona	Hometown	889009	111-565-8	111-332-4
Jack	Example Sub #44 DBE	pt@sub.com		900 First Stree	343 Plum st	United State	Alaska	Hometown	889009		111-332-4
	Jack	Jack Example Sub #4 DBE	Jack Example Sub #4 DBE tc@yahoo.com	Jack Example Sub #4 DBE tc@yahoo.com Estimate Cont	Jack Example Sub #4 DBE tc@yahoo.com Estimate Cont 900 First Stree	Jack Example Sub #4 DBE tc@yahoo.com Estimate Cont 900 First Stre 900 First Str	Jack Example Sub #4 DBE tc@yahoo.com Estimate Cont 900 First Stree 900 First Stre United State	Name         Kegion           Jack         Example Sub #4 DBE         tc@yahoo.com         Estimate Cont         900 First Stree         900 First Stree         100 First Stree         Arizona	Name     Name     Name     Name     Name     Name       Jack     Example Sub #4 DBE     tr@yahoo.com     Estimate Cont     900 First Stre     900 First Stre     United State     Arizona     Hometown	Name     Kegion     Kegion     Lip Cole       Jack     Example Sub #4 DBE     tc@yahoo.com     Estimate Cont     900 First Street.     900 First Street.     United State     Arizona     Hometown     889009	Name     Type     Name     Type     Region     Zip Lobe     Number       Jack     Example Sub #4 DBE     tc@yahoo.com     Estimate Cont     900 First Stre     900 First Stre     United State     Arizona     Hometown     889009     111:565-8

- Notice that the primary contact is checked, as this record already exists in Platform.
- Other records where the Primary field is not checked are records to merge into the primary record.
- Fields in yellow for the non-primary records are deltas. These deltas will not be merged, and differences will be lost after they are merged, as the data that exists in Platform takes precedence. If you want any of the disconnected data to exist in Platform, you need to manually change the data in Platform. The advantage for this is to allow for the disconnected Estimate contact to become associated with an already existing Platform contact, which lets the contact to still be keyed in areas it was used in Estimate, such as in Quotes and RFQs.
- 3. Select **Yes** in the Attention dialogue box to acknowledge that the attributes of the primary contact will exist.

Attention
The attributes of the primary contact will persist. This operation will save the Library.
Are you sure you want to continue?
Yes No

• A message shows it was successful, and the entry is created in Platform.

Atte	ntion		×							
Suco	cessfully merg	ed contacts with primary contac	t							
	Ē	OK Master data librari	es / Contacts				QA-T01-23.8	4 <sup>4</sup> ©	) () :	
	(†				CONTACT	S CONTACT TYPE.	לו		(i) Q	
		Full name 1	Company	Primary email	Address 1	Address 2	Create	-	• •	۵
		larry jack 🝸 🌾	T	T	<b>T</b>		T mon	th/day/year	** <b>T</b>	
		Larry Jack	Example Sub #4 DBE	tc@yahoo.com	900 First Street Suite 9000	900 First Street Suite 901	ietown 09/15	2023 01:07:50	PM	^

#### STEP BY STEP - UPLOAD CONTACTS TO PLATFORM

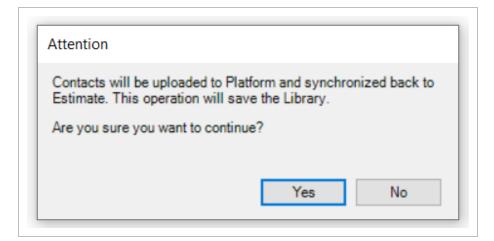
1. Choose a disconnected contact, and then select Upload Contacts to Platform.

Print Preview Export to Excel Print	Vendors and Contacts	Vendors and Default Quotes Layouts	Contacts	E M	View Vendors	" <u> </u>	값 Merge Contact 알 Upload Contact Natform				
Address Book Reg									Saved views:	Previous View	-
Vendor ID 🝸	First Name	Last	Name 🚊	5		Address 1	Address 2	Country / Region	State	City	Post Zip C
8	Keesha	Blank	د ا			700 First St	r	United Arab Emirates	Abu Dhabi	Hometown	8890

- 2. Select **Upload** to send the contact shown in this window to Platform.
  - The purpose of the preview dialog is to let you see what will be created in Platform, and to correct any issues before completing the operation.

)rag columns	here to group					Saved views:	Previous View		•
First Name	Last Name	Company	<u> </u>	Primary Email	Postal / Zip Code	Contact Type	Language Preference	Mobile Number	Of Nu
Keesha	Blank	SUB5		2@gmail.com	889007			000	11

3. Select **Yes** in the Attention dialogue box to upload the contact to Platform, synchronize back to Estimate, and save to the library.



• A message shows it was successful, and the entry is created in Platform.

Attention	×	]					
Successfully	uploaded contacts to Platform.						
	ОК						
	三 🏠 Master data libraries /	Contacts			QA-T01-2	13.8 ⑦ 📫	8 🕲 III
			CONTACTS	CONTACT TYPES			
	🕀 🗹 🛞 🛱 Prom	ote user				D D	(i) <b>Q</b>
	Full name 1	Primary email	Office number	Mobile number		Created on	4 🗆
	<b>T</b>	T	<b>T</b>		<i>7</i>	month/day/year	
	Keesha Blank	2@gmail.com	111-222-3232	000		09/14/2023 01:26:	22 PM

# STEP BY STEP – CREATE VENDORS AND CONTACTS VIA QUOTE RECORD

1. Navigate to the Quote register and open an existing quote.

Drag	columns here to group						
	Description 🚊	Quote Status	Vendor			Vendor Name	Contact
	Asphalt Materials	Invalid	Lewis Concrete AA1			Lewis Concrete	<ad-hoc contact=""></ad-hoc>
ı	Guard Rail Items	Invalid	Les Entreprises Canbec	- 00 1		Les Entrenrises	<ad-hoc contact=""></ad-hoc>
ß	Guard Rail Items	Invalid	SUB4		<u>O</u> pen		SUB4 Harry Belefony
	new J-11	Received	vendor-Nada V206	0	<u>N</u> ew		<ad-hoc contact=""></ad-hoc>
ß	Pipe Materials	Received	Adams Concrete Ven7	×	<u>D</u> elete		<ad-hoc contact=""></ad-hoc>
ß	Pipe Materials	Received	Example Vendor 4 DBE -	*	Cu <u>t</u>		Example Vendor 4 DBE Leste
K	sa	Incomplete	Jose Luis Maldonado (		Сору		Example Prime Contractor 211
13	Sign Items	Invalid	Example Sub #34 DBE	B	<u>P</u> aste		Example Sub #34 DBE Larry
	Sign Items	Invalid	0703172 BC Ltd 0010	+	<u>F</u> ill Down		<ad-hoc contact=""></ad-hoc>
K	Site work	Received	Lewis Concrete V187	A	Link this field t	o Excel	Lewis Concrete Robert Cantor
	test	Received	[Enter Vendor Name] (	A	UnLink from E	cel	<ad-hoc contact=""></ad-hoc>

2. Click the **Vendor Quick Add** icon in the Quote Record register.

Quote Register	Quote Record
Header	
Description:	Guard Rail Items
Vendor:	Les Entreprises 🕒 🔳
Contact:	<ad-hoc conta="" td="" 🔳<="" 🕒=""></ad-hoc>
Primary Email:	
External Ref.:	

3. In the Vendor Record - Library window, enter a new **Vendor ID** and **Vendor Name**. Under the Vendor Name field, enter in the other non-required information such as the Address and Phone Number.

3				Vendor	Record - Library				□ >
endor Details			Contacts	Notes	License / Bond / Insurance	Minori	ity Certifications	Default Quotes	
Vendor ID: 🔺	Ven7869			Tag 1:		•	Last Changed By:	Paul	
Vendor Name: 🔺	Adams Concrete								
Vendor Type:	Z002	•		Tag 2:		•	Last Changed Un:	1/24/2024 2:11:49 PM	
Tax ID:				Tag 3:		•			
Tax Jurisdiction:			Notes:						
Address 1:	1029 King St								
Address 2:									
Country / Region:	United States Of America	-							
City:	Scottsdale								
State:	Arizona	-							
Postal / Zip Code:	85258								
Phone Number:	480 555 6987								
Fax Number:									
Web Site URL:		=							
eference Number:	ABL-3947								
uote		_							
Currency:	U.S. Dollar	•							
Do NotUse:		-							
DO NOLOSE:									

4. On the right side of the window, enter any relevant information in the tabs, such as vendor notes and license, bond and insurance information, and then click **OK**.

Contacts	Notes	License / Bond / Insurance	Min	ority Certifications	Default Quotes	
	Tag 1:	Concrete	•	Last Changed By	r: Paul	
	Tag 2:		Ð -	Last Changed Or	1/24/2024 2:17	:05 PM
	Tag 3:		Ð -	]		
Notes: - Use this v	endor for	project work in the Phoenix met	tro ar	ea.		^
-Reference	e number i	must be included on the work inv	voice	upon project complet	ion.	
		ОК	Cance	el New	< Prev	Next >

The new vendor is now added to the Estimate Address Book Register - Library.

§ -					2	Address	s Book Register -	Library			E	
Actions												
Ų∎ ₽	U.		🕂 New	14	Ţ		VE O					
Vendors an Contacts	d Vendors ar Default Quo	nd	- oop,	Expand / Collapse *	Filter	Clear Filter	View Vendors	View Contacts				
1	Layouts		Edit		View		InEight P	latform			^	
Drag column	ns here to group								× Enter te	xt to search	∧ ✿	
Vendo	r ID 🛒	Vendor	r Name	Ven	dor Type	Ad	ldress 1	Country / Region		City	State	
+ <u>Ver</u>	n7869	Adams	Concrete	Z00	2	10	29 King St	United States O	)f America	Scottsdale	Arizona 🔺	
+ <u>VE</u>	N202	ven 20	)2	_				lanan		city-SAGA	Sage	
+ <u>VE</u>	N202	ven 20	)2	Q	uote Rec	ord ©					Saga	-
+ <u>Ver</u>	n 07	Civilwo	orks Inc.	-H	eader —						Arizon	
+ <u>V3</u>	<u>00</u>	Vendor	r 300		Descrip	tion:	Pipe Materials				Adra	\$246,720.00 \$12,336.00
+ <u>V3</u>		Q2 V3										\$12,550.00
						ntact: 🔤		Firs	r Name: Adams Co t Name: t Name:			\$0.00
					External	Ref.:						\$259,056.00
				R	esources	Cost	Items					×
				Dr	ag column:	s here to	group		Save	ed views:	Previous View	<b>ب</b>
					Code 🛓	-	Quote Group 🖮	Description		No Split		
				1	MPP10		Pipe Materials	Pipe 10" PV	C SDR21	~		
					MPP24		Pipe Materials	Pipe 24" PV	C SDR35	✓	1	
				1	MPR36		Pipe Materials	Pipe RCP 3	6 In	I	/	
				*						•		
				4								
											< Pre	ev Next >

The following steps help to confirm that the vendor was created correctly, and that it can be used to update or maintain the vendor after it has already been created, including steps to create a new contact on the fly. 5. Click the new Vendor ID in the Estimate Address Book Register - Library.

Actions				
\₽ ₽	U.		🖶 New	4
Vendors and Contacts	Vendors ar Default Quo			Expan Collaps
La	youts		Edit	
Drag columns	here to group			
Vendor I	D 🛒	Ven	dor Name	
+ <u>Ven7</u>	<u>869</u>	Ada	ms Concrete	

The new vendor opens in Project Suite > Master data libraries > **Vendors**.

				0 4 <mark>4</mark> 8 🕞	
Vendor > Edit vendor	VENDOR DETAILS USERS	CONTAC	CTS		
				Cancel Save	
	Vendor details				Â
	* ID		* Name		I.
	Ven7869		Adams Concrete		
	Alternate name		Vendor type		
			Z002 ×		
	Vendor tax ID		Vendor tax jurisdiction		
	Status		Default currency		
	Available	•	Select one		
	Default payment terms		Default incoterms		
	Default payment terms	•	Default incoterms 🔹		
	Default incoterms location				
	Addresses	PRI	MARY REMIT TO ADDITIONAL		
	Country / Region		Address 1		-

6. Click the **Contact Quick Add** icon in the Quote Record register.

Quote Register	Quote Record
Header	
Description:	Pipe Materials
Vendor:	Adams Concrete Ven7869
Contact:	<ad-hoc contact=""></ad-hoc>
Primary Email:	
External Ref.:	

7. In the Contact Record - Library window, enter the **First Name**, **Last Name**, **Company**, and **Primary Email**. Under the Primary Email field, enter in the other non-required information such as the Address and Phone Number, and then click **OK**.

Contact Details			
First Name: \star	Tom	Address 1:	123 Maple Dr
Last Name: \star	McHenry	Address 2:	
Company: *	Vendor 1	Country/Region:	United States Of America
Primary Email: \star	Name25@Example.com	State:	Arizona
Contact Type:	Estimate Contact	City:	Scottsdale
Department:	Estimating	Postal/Zip Code:	85259
Position:	Estimator	Fax Number:	
Title:	Lead Estimator	Office Number:	
Language Preference:		Mobile Number:	480 555 3659
'endor		Security	
Vendor ID: Vend	1	Last Changed By: Pa	aul Trippi
Vendor: Vend	lor 1 Vend 1	Last Changed On: 1/2	25/2024 9:11:43 AM
Do NotUse:			

The new contact is now added to the Estimate Address Book Register - Library.

endo Cont	s and acts	Vendors and Default Quote	s	y E	lapse 👻	lter	Clear Filter		View Contacts					~		
ag co		youts	Edit		Vie		views:	Previous View	Platform	- Ent	ter text to sear	:h	^			
V	endor I	D 🛓 🕚	endor Name		Vendor 1	ype	Add	ress 1	Country / Region		City	1	Stat	e		
-	<u>Ven7</u>	869 /	Adams Concre		Z002	Jame	102	9 King St	United States	Of America	Sco Address 2	ttsdale City	Arizo	ona		
	÷	Ven7869	Tom	Qu	ote Record											-
	4				Description	: Pip	e Materia	s						7		\$246,720.0 \$12,336.0
					Vendor	_	ams Conc	rete Ven7869	1	•	Vendor Name		Concrete			
				1	Contac Primary Emai		ams Conc	rete Tom Hen	irys	•	First Name Last Name			$\rightarrow$		\$0.0
					External Ref	.: [										\$259,056.0
				Re	sources	Cost It	ems							(		×
				Dra	g columns he	re to g	roup									^ _ \$
					Code 🖮	C	uote Gro	up 🖮 De	escription		No Split	Free	Awarded	Du		
				4	MPP 10	- 10	ipe Mater		pe 10" PVC SDR21		~					
				A-	MPP24 MPR36		ipe Mater ipe Mater		pe 24" PVC SDR35 pe RCP 36 In	i	✓ ✓			-		
				*	MPROD		ipe mater	iais rij	DE KOP 36 IN							
															_	
				•												

8. Click the new contact **Vendor ID** in the Estimate Address Book Register - Library.

	Ac	tion	s							
	1	Ę	R			Сору	14			
		dors onta	and cts	Contacts			Expand / Collapse 👻	F	ilter *	Clei Filti
		Layouts				Edit		Vie	w	
Dr	Drag columns here to group									Save
		Ver	ndor I	D 🚞	Ve	endor Nan	ne	Ve	endor	Туре
÷	·	-	Ven7	<u>869</u>	Ac	lams Con	crete	Z	002	
		Vendor ID				First Na	me		Last Name	
			$\rightarrow$	<u>Ven7869</u>		Tom			Henr	ys
			•							

The vendor opens in Project Suite > Master data libraries > **Vendors**, and includes the new contact.

				⌀ 4 ⊗ ⊛ Ⅲ			
Vendor > Edit vendor VENDOR DETAIL	S USERS	CONTACTS					
				Cancel Save			
Vendor deta	ils						
* ID Ven7869		* Name Adams Concrete					
Addresses		PRIMARY REMIT TO	ADDITIONAL				
Addresses		PRIMART REMIT TO	ADDITIONAL				
Country / Region		Vendor > Edit vendor	VE	ENDOR DETAILS USERS	CONTACTS		
		Full name	Primary email	Contact type	Office number	Mobile number	City
		Ţ	T		T	<b>T</b>	T
	C	] Tom Henrys	Tomhenry@adamsconcrete.com	Estimate Contact		480 555 2387	Scottsdale
		•					

# 3.4 LIBRARY JOB PROPERTIES PRICING

### 3.4.1 JOB PROPERTIES OVERVIEW

In Job Properties Overview > **Pricing**, there are balanced price and markup options in the bid pricing area which lets you categorize costs, markup various costs in an estimate, and distribute that markup throughout the bid which establishes balanced bid prices.

Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cos	Pricing
Balanced	Price Options					
Calculat	e Balanced P	ay Item Prices u	sing:			
Cost	Amount					
	g Amount					
Distribu	tellossion	ed Cost/Billing A	mounthe			
	-		moune by.			
-	idual Catego					
	evel Categor	ies				
O Total	Cost/Billing	amount				
Markup O	ptions					
Markup	Pay Item by:					
O Using	g Weighted D	istribution				
ОКеер	ing Markup v	ith Assigned Co	sts			
Categor	ize Business	Overhead as:			(	
	ect Cost					
Mark	up					
Calculat	e Proposal R	ecap Forecast M	arkup using:			
Unit I	Markup (curr	ent) x Forecast (	T/O) Quantity			
O Fored	ast Price - T	otal Cost/Billing				

## 3.4.2 BALANCED PRICE OPTIONS

This option determines if a pay item will use the cost or billing amount values of the assigned cost items as the basis for determining a balanced bid price. This also determines if the AutoPrice command will use the cost or billing amount values.

# 3.4.2.1 CALCULATE BALANCED PAY ITEM PRICES USING COST AMOUNT:

Balanced Price Options

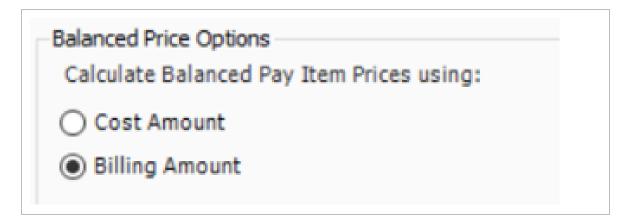
Calculate Balanced Pay Item Prices using:

Cost Amount

Billing Amount

Descrip	tion	Assigned	Unassigned	Total	% of Target	% of Subject	Assigned Billing	Unassigned Billing	Total Billing	% of Target	% of Subject
- 🔺	Price Breakdown Structure										
~ 7	🔺 Target Price	\$5,040,796.20	\$1,222,999.47	\$6,263,795.67	100.00		\$5,164,80	\$1,123,41	\$6,288,21	100.00	
	🗸 🛕 Markup	\$0.00	\$896,159.52	\$896,159.52	14.31		\$0.00	\$755,068.85	\$755,068.85	12.01	
	🗸 🛕 Target Profit		\$594,133.61	\$594,133.61	9.49	11.13	\$0.00	\$447,511.92	\$447,511.92	7.12	8.0
	Indirect Cost Markup		\$14,730.68	\$14,730.68	0.24	5.00	\$0.00	\$27,331.76	\$27,331.76	0.43	8.0
	🛕 Direct Cost Markup		\$579,402.94	\$579,402.94	9.25	11.49	\$0.00	\$420,180.16	\$420, 180. 16	6.68	8.0
	🗸 📥 Business Overhead	\$0.00	\$302,025.90	\$302,025.90	4.82		\$0.00	\$307,556.93	\$307,556.93	4.89	
	Price % Add-On	\$0.00	\$281,870.81	\$281,870.81	4.50		\$0.00	\$281,870.81	\$281,870.81	4.48	
	3 Job Financing	\$0.00	\$5,762.53	\$5,762.53	0.09		\$0.00	\$5,762.53	\$5,762.53	0.09	
	Indirect Cost Escalation	\$0.00	\$2,131.11	\$2,131.11	0.03		\$0.00	\$2,983.55	\$2,983.55	0.05	
	Direct Cost Escalation	\$0.00	\$12,261.46	\$12,261.46	0.20		\$0.00	\$16,940.05	\$16,940.05	0.27	
	Business Overhead Items	\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00	0.00	
	🗸 🔺 Total Cost	\$5,040,796.20	\$326,839.95	\$5,367,636.15	85.69		\$5,164,80	\$368,342.37	\$5,533,14	87.99	
	🗸 🔺 Indirect Cost	\$0.00	\$325,839.95	\$325,839.95	5.20		\$0.00	\$367,342.37	\$367,342.37	5.84	
	🗸 📥 Job Overhead	\$0.00	\$325,839.95	\$325,839.95	5.20		\$0.00	\$367,342.37	\$367,342.37	5.84	
	Prime Bond	\$0.00	\$45,618.98	\$45,618.98	0.73		\$0.00	\$45,618.98	\$45,618.98	0.73	
	Indirect Cost Add-On	\$0.00	\$5,734.95	\$5,734.95	0.09		\$0.00	\$6,640.46	\$6,640.46	0.11	
	Direct Cost Add-On	\$0.00	\$99,189.74	\$99,189.74	1.58		\$0.00	\$103,316.14	\$103,316.14	1.64	
	Job Overhead Items	\$0.00	\$175,296.28	\$175,296.28	2.80		\$0.00	\$211,766.79	\$211,766.79	3.37	
	🗸 📥 Direct Cost	\$5,040,796.20	\$1,000.00	\$5,041,796.20	80.49		\$5,164,80	\$1,000.00	\$5,165,80	82.15	
	Direct Cost Items	\$5,040,796.20	\$1,000.00	\$5,041,796.20	80.49		\$5,164,80	\$1,000.00	\$5,165,80	82.15	

# 3.4.2.2 CALCULATE BALANCED PAY ITEM PRICES USING BILLING AMOUNT:



Price Breakd	own 5	itructure O										
Description			Assigned	Unassigned	Total	% of Target	% of Subject	Assigned Billing	Unassigned Billing	Total Biling	% of Target	% of Subject
🗸 🔺 Price Br	eakdov	wn Structure										
🗸 🔺 Tar	get Pric	ce	\$5,040,796.20	\$1,222,999.47	\$6,263,795.67	100.00		\$5,164,80	\$1,123,41	\$6,288,21	100.00	
✓ ▲	Markup	p	\$0.00	\$896,159.52	\$896,159.52	14.31		\$0.00	\$755,068.85	\$755,068.85	12.01	
¥ .	📩 Ta	rget Profit		\$594,133.61	\$594,133.61	9.49	11.13	\$0.00	\$447,511.92	\$447,511.92	7.12	8.0
		Indirect Cost Markup		\$14,730.68	\$14,730.68	0.24	5.00	\$0.00	\$27,331.76	\$27,331.76	0.43	8.0
		Direct Cost Markup		\$579,402.94	\$579,402.94	9.25	11.49	\$0.00	\$420,180.16	\$420,180.16	6.68	8.0
¥ .	📥 Bu	siness Overhead	\$0.00	\$302,025.90	\$302,025.90	4.82		\$0.00	\$307,556.93	\$307,556.93	4.89	
	88	Price % Add-On	\$0.00	\$281,870.81	\$281,870.81	4.50		\$0.00	\$281,870.81	\$281,870.81	4.48	
	88	Job Financing	\$0.00	\$5,762.53	\$5,762.53	0.09		\$0.00	\$5,762.53	\$5,762.53	0.09	
	88	Indirect Cost Escalation	\$0.00	\$2,131.11	\$2,131.11	0.03		\$0.00	\$2,983.55	\$2,983.55	0.05	
	88	Direct Cost Escalation	\$0.00	\$12,261.46	\$12,261.46	0.20		\$0.00	\$16,940.05	\$16,940.05	0.27	
	- 11	Business Overhead Items	\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00	0.00	
~ 🔺	Total C	Cost	\$5,040,796.20	\$326,839.95	\$5,367,636.15	85.69		\$5,164,80	\$368,342.37	\$5,533,14	87.99	
¥ ]	📥 Inc	direct Cost	\$0.00	\$325,839.95	\$325,839.95	5.20		\$0.00	\$367,342.37	\$367,342.37	5.84	
	~ <u>Å</u>	Job Overhead	\$0.00	\$325,839.95	\$325,839.95	5.20		\$0.00	\$367,342.37	\$367,342.37	5.84	
		Prime Bond	\$0.00	\$45,618.98	\$45,618.98	0.73		\$0.00	\$45,618.98	\$45,618.98	0.73	
		Indirect Cost Add-On	\$0.00	\$5,734.95	\$5,734.95	0.09		\$0.00	\$6,640.46	\$6,640.46	0.11	
		Direct Cost Add-On	\$0.00	\$99,189.74	\$99,189.74	1.58		\$0.00	\$103,316.14	\$103,316.14	1.64	
		Job Overhead Items	\$0.00	\$175,296.28	\$175,296.28	2.80		\$0.00	\$211,766.79	\$211,766.79	3.37	
× ,	📥 Dir	ect Cost	\$5,040,796.20	\$1,000.00	\$5,041,796.20	80.49		\$5,164,80	\$1,000.00	\$5,165,80	82.15	
	-	Direct Cost Items	\$5,040,796.20	\$1,000.00	\$5,041,796.20	80.49		\$5,164,80	\$1,000.00	\$5,165,80	82.15	

#### 3.4.2.3 DISTRIBUTION OF UNASSIGNED COSTS/BILLING AMOUNT BY INDIVIDUAL CATEGORIES

Distribute Unassigned Cost/Billing Amount by:

Individual Categories

O Top level Categories

Total Cost/Billing amount

Any costs in the estimate not assigned to a pay item needs to be proportionally spread back to all pay items to determine a balanced bid price. This option lets the user choose the basis for calculating the weighted distribution of any unassigned costs plus markup.

• Individual Categories - this option uses each individual cost categories as the basis for establishing the weighted distribution amounts.

						Li	abor					
			G	ross Wages	5		Taxes			Fringes		 Balanced
Pay Item	Description	Total Cost	Cost	Weight	Distribution	Cost	Weight	Distribution	Cost	Weight	Distribution	 Price
641 0100	Mobilization	\$13,106	\$1,763	0.9%	\$949	\$588	0.9%	\$290	\$294	0.9%	\$145	
201 0102	Clearing & Grubbing	\$41,346	\$9,994	5.0%	\$5,379	\$3,331	5.0%	\$1,643	\$1,666	5.0%	\$822	
202 0183	Unclassified Excavation	\$90,455	\$20,923	10.4%	\$11,260	\$6,974	10.4%	\$3,441	\$3,487	10.4%	\$1,720	
303 5912	Aggregate Base	\$646,910	\$68,717	34.2%	\$36,981	\$22,906	34.2%	\$11,300	\$11,453	34.2%	\$5,650	
303 4263	Asphalt Concrete Hot Mix Type A	\$1,756,802	\$85,169	42.4%	\$45,835	\$28,390	42.4%	\$14,005	\$14,195	42.4%	\$7,003	
413(B) 0464	36 Inch RCP Culvert Class III	\$73,220	\$14,114	7.0%	\$7,596	\$4,705	7.0%	\$2,321	\$2,352	7.0%	\$1,160	
	Total Direct Costs	\$2,621,839	\$200,681		\$108,000	\$66,894		\$33,000	\$33,447		\$16,500	 \$2,966,839
	Unassigned Cost	\$300,000	\$90,000		1	\$30,000		1	\$15,000		1	
	Markup	\$45,000	\$18,000			\$3,000			\$1,500			
	Total Distribution	\$345,000	\$108,000 -			\$33,000			\$16,500			
	Target Price	\$2,966,839										

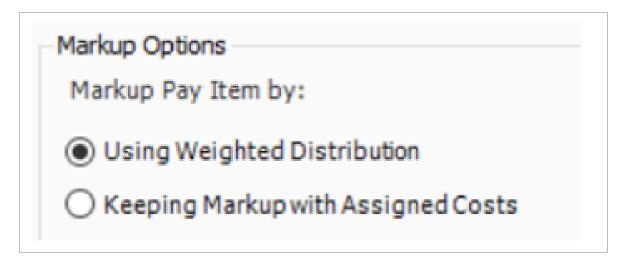
• Top Level Cost Categories - This option uses the ten top level cost categories (labor, owned equipment, rented equipment, supplies, materials, etc.) as the basis for establishing the weighted distribution amounts.

				Labor		Owned	l Equipm	ent	M	laterials		Balanced
Pay Item	Description	Total Cost	Cost	Weight	Distribution	Cost	Weight	Distribution	Cost	Weight	Distribution	Price
641 0100	Mobilization	\$13,106	\$2,939	0.9%	\$1,582	\$9,642	2.1%	\$2,332	\$0	0.0%	\$0	\$17,020
201 0102	Clearing & Grubbing	\$41,346	\$16,657	5.0%	\$8,964	\$23,587	5.2%	\$5,705	\$0	0.0%	\$0	\$56,015
202 0183	Unclassified Excavation	\$90,455	\$34,872	10.4%	\$18,767	\$55,583	12.2%	\$13,443	\$0	0.0%	\$0	\$122,665
303 5912	Aggregate Base	\$646,910	\$114,528	34.2%	\$61,635	\$118,815	26.1%	\$28,736	\$394,728	22.6%	\$12,431	\$749,712
303 4263	Asphalt Concrete Hot Mix Type A	\$1,756,802	\$141,949	42.4%	\$76,392	\$235,310	51.7%	\$56,911	\$1,316,700	75.4%	\$41,465	\$1,931,570
413(B) 0464	36 Inch RCP Culvert Class III	\$73,220	\$23,524	7.0%	\$12,660	\$11,877	2.6%	\$2,873	\$35,078	2.0%	\$1,105	\$89,857
	Total Direct Costs	\$2,621,839	\$334,469		\$180,000	\$454,814		\$110,000	\$1,746,506		\$55,000	\$2,966,839
	Unassigned Cost	\$300,000	\$150,000		1	\$100,000		1	\$50,000		1	
	Markup	\$45,000	\$30,000			\$10,000			\$5,000			
	Total Distribution	\$345,000	\$180,000 -			\$110,000			\$55,000			
	Target Price	\$2,966,839										

• Total Cost[/Billing Amount] - This option uses Total Cost as the basis for establishing the weighted distribution amounts.

Pay Item	Description	Total Cost	Weight	Distribution	Balanced Price
641 0100	Mobilization	\$13,106	0.5%	\$1,725	\$14,831
201 0102	Clearing & Grubbing	\$41,346	1.6%	\$5,441	\$46,787
202 0183	Unclassified Excavation	\$90,455	3.5%	\$11,903	\$102,358
303 5912	Aggregate Base	\$646,910	24.7%	\$85,125	\$732,035
303 4263	Asphalt Concrete Hot Mix Type A	\$1,756,802	67.0%	\$231,172	\$1,987,974
413(B) 0464	36 Inch RCP Culvert Class III	\$73,220	2.8%	\$9,635	\$82,855
	Total Direct Costs	\$2,621,839		\$345,000	\$2,966,839
	Unassigned Cost	\$300,000		1	
	Markup	\$45,000			
	Total Distribution	\$345,000 -			
	Target Price	\$2,966,839			

#### 3.4.2.4 MARKUP OPTIONS



This option determines how markup is applied to pay items when establishing a balanced bid price.

• Using Weighted Distribution. Marking up Pay Items using weighted distribution takes the total markup and proportionally spreads the amount using the chosen weighted distribution method.

			Total	Cost				Balanced
Pay Item	Description	Labor	Equipment	Material	Total	Weight	Distribution	Price
201 0102	Clearing & Grubbing	\$14,000	\$24,000	\$0	\$38,000	4.0%	\$4,556	\$42,556
202 0183	Unclassified Excavation	\$62,000	\$172,000	\$0	\$234,000	24.8%	\$28,055	\$262,055
303 5912	Aggregate Base	\$112,000	\$157,000	\$404,000	\$673,000	71.2%	\$80,689	\$753,689
	Total Direct Costs	\$188,000	\$353,000	\$404,000	\$945,000		\$113,300	\$1,058,300
	Markup						1	
	Markup Percent	20%	10%	10%				
	Markup Amount	\$37,600	\$35,300	\$40,400	\$113,300			
	Target Price				\$1,058,300			

Keeping Markup rates to Assigned Costs. This option uses the cost category amounts of all
assigned cost items and calculates the markup by applying markup percentages as defined in the
direct and indirect cost markup records. Excluding cost items from the dependency tab of the
markup record precludes the application of that markup percentage to the assigned costs on
that pay item.

			Labor		1	Equipment			Material			Total	
Pay Item	Description	Cost	Markup	Price	Cost	Markup	Price	Cost	Markup	Price	Cost	Markup	Price
201 0102	Clearing & Grubbing	\$14,000	\$2,800	\$16,800	\$24,000	\$2,400	\$26,400	\$0	\$0	\$0	\$38,000	\$5,200	\$43,200
202 0183	Unclassified Excavation	\$62,000	\$12,400	\$74,400	\$172,000	\$17,200	\$189,200	\$0	\$0	\$0	\$234,000	\$29,600	\$263,600
303 5912	Aggregate Base	\$112,000	\$22,400	\$134,400	\$157,000	\$15,700	\$172,700	\$404,000	\$40,400	\$444,400	\$673,000	\$78,500	\$751,500
	Total Direct Costs	\$188,000	\$37,600	\$225,600	\$353,000	\$35,300	\$388,300	\$404,000	\$40,400	\$444,400	\$945,000	\$113,300	\$1,058,300
	Markup Percentages												
	Labor	20%											
	Equipment	10%											
	Material	10%											

# 3.4.2.5 CATEGORIZE BUSINESS OVERHEAD AS INDIRECT COST



This option controls where cost Items with a cost segment of business overhead appear in the PBS.

• Indirect Cost - Business Overhead is included as a subcategory of indirect costs in the PBS.

Job Pro	pert	es	Pay Item & Pro	oosal Register		Price Brea	kdown Structu	re O	Cos	t Breakdown S	tructure (
Descriptio	n			Assigned	Una	assigned	Total	% of Target		% of Subject	
~ 🔺 P	ice B	reakdo	own Structure								
- v 🔺	Tar	get Pr	ice	\$5,263,291.67	\$1,	259,783.56	\$6,523,075.24	10	0.00		
¥		Mark	φ.	\$0.00	\$	638,732.42	\$638,732.42		9.79		
	>	Ат	arget Profit		\$	638,732.42	\$638,732.42		9.79	11.52	
~		Total	Cost	\$5,263,291.67	\$	621,051.14	\$5,884,342.81	9	0.21		
	~	🔺 Ir	ndirect Cost	\$0.00	\$	620,051.14	\$620,051.14		9.51		
		> 🔺	Business Overhead	\$0.00	\$	340,453.76	\$340,453.76		5.22		
		> 🔺	Job Overhead	\$0.00	\$	279,597.38	\$279,597.38		4.29		
	$\mathbf{v}$	🔺 D	irect Cost	\$5,263,291.67		\$1,000.00	\$5,264,291.67	8	0.70		
			Direct Cost Items	\$5,263,291.67		\$1,000.00	\$5,264,291.67	8	0.70		

• Markup - Business Overhead is included as a subcategory of Markup in the PBS.

Job Prop	pert	ies	Pay Item	& Proposal Register	Price Brea	akdown Structu	re 🛈 Co	st Breakdown S	tructure (
Descriptio	n			Assigned	Unassigned	Total	% of Target	% of Subject	
🗸 🔺 Pr	ice E	irea	kdown Structure						
~ 🔺	Ta	rget	Price	\$5,263,291.67	\$1,259,783.56	\$6,523,075.24	100.00		
¥		Ma	rkup	\$0.00	\$979,186.18	\$979,186.18	15.01		
	>	۸	Target Profit		\$638,732.42	\$638,732.42	9.79	11.52	
	>	۸	Business Overhead	\$0.00	\$340,453.76	\$340,453.76	5.22		
¥	۸	То	tal Cost	\$5,263,291.67	\$280,597.38	\$5,543,889.05	84.99		
	¥	۸	Indirect Cost	\$0.00	\$279,597.38	\$279,597.38	4.29		
		>	🔺 Job Overhead	\$0.00	\$279,597.38	\$279,597.38	4.29		
	¥	4	Direct Cost	\$5,263,291.67	\$1,000.00	\$5,264,291.67	80.70		
			Direct Cost Iter	ms \$5,263,291.67	\$1,000.00	\$5,264,291.67	80.70		

#### 3.4.2.6 CALCULATE PROPOSAL RECAP FORECAST MARKUP

Calculate Proposal Recap Forecast Markup using:
 Unit Markup (current) x Forecast (T/O) Quantity
 Forecast Price - Total Cost/Billing

This option determines how the Markup is determined in the Forecast column of the Proposal Recap data block on the Pay Item & Proposal form.

 Unit Markup (current) × Forecast (T/O) Quantity - The Forecast Markup amount is determined as the sum of each Pay Items Unit Markup (current) multiplied by the Pay Items Forecast (T/O) Quantity.

	Curr	ant Ta	rget	East	recast	Vari	ance						
Price:	\$6,455,450.	<b>00</b> \$6,523,075	5.24 \$	6,462,8	\$50.00	\$67,62	5.24 AI	DD					
Markup:	\$571,107	.19 \$638,732	2.42	\$631,5	60.32	\$7,17	2.10 AI	DD					
Margin%:	8	.85	9.79		9.77	\$1,41	3.30 <b>A</b> I	DD					
ob Properties	Pay Item & P	roposal Register 🛛 🔘	Price Brea	akdown 9	Structure	Cos	Breakdown	Structure	(CB5)	Register			
ag columns here	to group									Saved view	s: Previous View	•	],
Position :	Pay Item Number	Description			Forecast ( Quantity	T/O)	Unit of Measure	Unit Price (current)		Total Price (current)	Unit Markup (current)	Total Markup (current)	
+ 1	641 0100	Mobilization				1.00	Lump Sum	\$386	800.00	\$386,800.00	\$370,596.05	\$370,596.05	;
+ 2	201 0102	Clearing & Grubbing				10.00	Acre	\$6	120.00	\$61,200.00	\$1,007.30	\$10,072.97	1
+ 3	202 0183	Unclassified Excavatio	n		5	50,000.00	Cubic Yard		\$8.50	\$425,000.00	\$3.04	\$151,909.18	1
+ 4	303 5912	Aggregate Base			4	45,000.00	Ton		\$22.00	\$880,000.00	\$4.64	\$185,711.50	1
+ 5	303 4263	Asphalt Concrete Hot	Mix Type A		3	35,000.00	Ton		\$35.00	\$1,330,000.00	(\$12.23)	(\$464,653.94)	J
+ 6	413(B) 0464	36 Inch RCP Culvert C	lass III			1,024.00	Linear Feet		100.00	\$100,000.00	\$23.17	\$23, 166. 27	r
+ 7	800 0220	10 Inch PVC Force Mai	n (SDR21)		1	12,000.00	Linear Feet		\$28.00	\$336,000.00	\$1.46	\$17,550.62	2
+ 8	800 0330	24 Inch PVC Gravity Se	ewer (SDR.35)			3,000.00	Linear Feet		\$64.00	\$192,000.00	\$7.46	\$22,394.31	L
+ 9	800 0400	4 Foot Diameter Manh	ole			16.00	Each	\$4	,500.00	\$72,000.00	\$448.18	\$7,170.88	1
+ 10	501(A) 1306	Structural Excavation	& Backfill			800.00	Cubic Yard		\$30.00	\$24,000.00	\$5.25	\$4,201.04	ł
+ 11	506(A) 1322	Steel Reinforcement			3	30,000.00	Pound		\$1.60	\$48,000.00	(\$0.01)	(\$363.37)	)
+ 12	503(A) 1313	Retaining Wall				850.00	Cubic Yard		535.00	\$454,750.00	\$60.79	\$51,669.32	2
+ 13	600 0300	Paint Existing Steel Bri	dge Structure			1.00	Lump Sum	\$100	,000.000	\$100,000.00	\$10,918.94	\$10,918.94	ł
+ 14	700	Process Equipment				1.00	Each	\$1,920	,500.00	\$1,920,500.00	\$170,356.68	\$170,356.68	1
+ 15	1000	Removal of Undergrou	nd Storage T	anks		2.00	Each	\$12	,500.00	\$25,000.00	\$1,571.46	\$3,142.91	L
+ 16	1010	Disposal of Contamina	ted Soil			800.00	Cubic Yard		\$25.00	\$20,000.00	\$2.25	\$1,802.45	
+ 17	1200 0100	Toll Booth				1.00	Each	\$30	,000.00	\$30,000.00	\$2,169.15	\$2,169.15	
+ 18	1500 0100	Guardrail Type 2				1,000.00	Linear Feet		\$24.00	\$24,000.00	(\$2.06)	(\$2,059.88)	
+ 19	1500 0200	Guardrail Type 3A				200.00	Linear Feet		\$31.00	\$6,200.00	(\$2.66)	(\$532.14)	
+ 20	1600 0230	Type 4 Signs				1,000.00	Square Feet		\$13.00	\$13,000.00	(\$1.12)	(\$1,115.77)	I
+ 21	C01	Realignment of Water	Line			1.00	Each	\$7	,000.000	\$7,000.00	\$7,000.00	\$7,000.00	1
·													

 Forecast Price Total Price - Total Cost/Billing. The markup amount is determined by subtracting the sum of the total jobs cost based on forecast (T/O) quantities from the forecast bid price, which is the sum of all pay item current unit prices multiplied by the pay items forecast (T/O quantity).

Proposal R	ecap - Training Jo	b			×
	Current	Target	Forecast	Variance	]
Price:	\$6,455,450.00	\$6,523,075.24	\$6,462,850.00	\$67,625.24	ADD
Markup:	\$571,107.19	\$638,732.42	\$627,743.91	\$10,988.51	ADD
Margin%:	8.85	9.79	9.71	\$5,643.97	ADD

rag columns here to	group					Saved views	Previous View	•	ς
Position	Pay Item Number	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Price (current)	Total Price (current)	Unit Markup (current)	Total Markup (current)	L
+ 1	641 0100	Mobilization	1.00	Lump Sum	\$386,800.00	\$386,800.00	\$370,596.05	\$370,596.05	
+ 2	201 0102	Clearing & Grubbing	10.00	Acre	\$6,120.00	\$61,200.00	\$1,007.30	\$10,072.97	
+ 3	202 0183	Unclassified Excavation	50,000.00	Cubic Yard	\$8.50	\$425,000.00	\$3.04	\$151,909.18	
+ 4	303 5912	Aggregate Base	45,000.00	Ton	\$22.00	\$880,000.00	\$4.64	\$185,711.50	
+ 5	303 4263	Asphalt Concrete Hot Mix Type A	35,000.00	Ton	\$35.00	\$1,330,000.00	(\$12.23)	(\$464,653.94)	
+ 6	413(B) 0464	36 Inch RCP Culvert Class III	1,024.00	Linear Feet	\$100.00	\$100,000.00	\$23.17	\$23,166.27	
+ 7	800 0220	10 Inch PVC Force Main (SDR21)	12,000.00	Linear Feet	\$28.00	\$336,000.00	\$1.46	\$17,550.62	
+ 8	800 0330	24 Inch PVC Gravity Sewer (SDR35)	3,000.00	Linear Feet	\$64.00	\$192,000.00	\$7.46	\$22,394.31	
+ 9	800 0400	4 Foot Diameter Manhole	16.00	Each	\$4,500.00	\$72,000.00	\$448.18	\$7,170.88	
+ 10	501(A) 1306	Structural Excavation & Backfill	800.00	Cubic Yard	\$30.00	\$24,000.00	\$5.25	\$4,201.04	
+ 11	506(A) 1322	Steel Reinforcement	30,000.00	Pound	\$1.60	\$48,000.00	(\$0.01)	(\$363.37)	
+ 12	503(A) 1313	Retaining Wall	850.00	Cubic Yard	\$535.00	\$454,750.00	\$60.79	\$51,669.32	
+ 13	600 0300	Paint Existing Steel Bridge Structure	1.00	Lump Sum	\$100,000.00	\$100,000.00	\$10,918.94	\$10,918.94	
+ 14	700	Process Equipment	1.00	Each	\$1,920,500.00	\$1,920,500.00	\$170,356.68	\$170,356.68	
+ 15	1000	Removal of Underground Storage Tanks	2.00	Each	\$12,500.00	\$25,000.00	\$1,571.46	\$3,142.91	
+ 16	1010	Disposal of Contaminated Soil	800.00	Cubic Yard	\$25.00	\$20,000.00	\$2.25	\$1,802.45	
+ 17	1200 0100	Toll Booth	1.00	Each	\$30,000.00	\$30,000.00	\$2,169.15	\$2,169.15	
+ 18	1500 0100	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	\$24,000.00	(\$2.06)	(\$2,059.88)	
+ 19	1500 0200	Guardrail Type 3A	200.00	Linear Feet	\$31.00	\$6,200.00	(\$2.66)	(\$532.14)	
+ 20	1600 0230	Type 4 Signs	1,000.00	Square Feet	\$13.00	\$13,000.00	(\$1.12)	(\$1,115.77)	
+ 21	C01	Realignment of Water Line	1.00	Each	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00	
21			¢c A	62,85	0.00	\$6,455,450.00		\$571,107.19	

				Structure	COSCOTCOROOMI	Structure (CBS)	Keyister 🕹	
rag	columns here to	group						
	CBS Position Code	E. Description	Optional Code	Fore (T/O)	cast ) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
÷	8	зов			20.00	Mile	\$291,755.30	\$5,835,106.09
	+	Prime Bond	PRIME BO	OND	1.00	Lump Sum	\$46,915.38	\$46,915.38
	+	Price % Add-On	PRICE %	ADD	1.00	Lump Sum	\$293,538.39	\$293,538.39
	+	Job Financing	FINANCE	EXPE	1.00	Lump Sum	\$0.00	\$0.00
	+	Indirect Cost Escalation	INDIREC	T COS	1.00	Lump Sum	\$0.00	\$0.00
	+	Direct Cost Escalation	DIRECT (	COST	1.00	Lump Sum	\$0.00	\$0.00
	+	Indirect Cost Add-On	INDIREC	T COS	1.00	Lump Sum	\$0.00	\$0.00
	+	Job Management & Equipme	nt JOB MAN	AGEM	1.00	Lump Sum	\$157,096.28	\$157,096.28
	+	General Expense	GENERAL	EXPE	1.00	Lump Sum	\$4,200.00	\$4,200.0
	+	Direct Cost Add-On	DIRECT (	COST	1.00	Lump Sum	\$104,301.10	\$104,301.10
	+ 1	Mobilization	641 0 100	)	1.00	Lump Sum	\$11,909.51	\$11,909.5
	+ 2	Clearing & Grubbing	201 0 102	2	10.00	Acre	\$3,918.50	\$39,184.97
	<b>3</b>	Unclassified Excavation	202 0183	3	50,000.00	Cubic Yard	\$4.68	\$233,915.8
	+ 3.1	Excavation	3.1		50,000.00	Cubic Yard	\$3.00	\$149,922.88
	+ 3.2	Embankment	3.2		50,000.00	Cubic Yard	\$1.68	\$83,992.94
	□ 4	Aggregate Base	303 5912	2	45,000.00	Ton	\$15.40	\$692,928.99
	+ 4.1	Furnish & Haul Base Material	4.1		45,000.00	Ton	\$11.54	\$519,513.30
	+ 4.2	Finegrade Subgrade	4.2		400,000.00	Square Yard	\$0.19	\$75,848.36
	<b>□</b> 4.3	Install Aggregate Base	4.3		45,000.00	Ton	\$2.17	\$97,567.33
	+ 4.3.1	Place Aggregate Base	4.3.1		45,000.00	Ton	\$1.63	\$73,460.92
	+ 4.3.2	Blue Top Aggregate Base	4.3.2		400,000.00	Square Yard	\$0.06	\$24,106.42
	<b>□</b> 5	Asphalt Concrete Hot Mix Ty	<b>De A</b> 303 4263	3	35,000.00	Ton	\$42.62	\$1,491,580.59
	+ 5.1	Furnish & Haul Hot Mix	5.1		35,000.00	Ton	\$39.27	\$1,374,562.5

# 3.5 LIBRARY FOUNDATION SETUP DATA

Foundation Setup Data is where all drop-down options within Estimate fields are stored. These can serve as category labels, alternate structures or validated tag fields. The different validated fields are organized into tabs on this form.

3	💾 👘						Lit	brary - Estimate							
File	Setup	Estimate	Execu	ution S	ystem	Integrations	Actions							童 🗄	(
	•	-*		由		-	🐔 Labor 🏭 Equipme				-	†4†	<b>I</b>		
Job	Properties	Foundation Setup Data +	Address Book	Trench Calculator	Shift Rate Calculator	Resource Rates *	Materials	Resource		tandard Tables	User Role	s Access Control	Reports		
		Master	Initializatio	n		M	aster Reso	urces	Master Asse	mblies	Roles and	Permissions	Reports		^
Jol	b Properties	5 Four	idation Set	up Data Re	gister ©										*
Ac	count Codes	Tags V	Vork Breakdo	wn Structure	s Quote	Group Tags	Units of Me	asure Currend	ies Resource	/ Assembly	Files Geog	raphic Areas	Wage Zones	Orga 🔄	۲
		re to group										d views: Star	dard View		
Dra	g columns her	re to group							Find: Search F	or]	Save	o views: Star	idard view	•	
Dra	g columns her	Account =	. Desc	cription		Unit of Measure		Secondary Jnit Of Measure	Find: Search f		uantity	Quantity	Auto-Quantity (Secondary)	* Seconda Quantity	
	-	Account _		cription nove insulatio	n			Secondary		Auto-Q	uantity		Auto-Quantity	Seconda	ĺ
	-	Account E	Rem			Measure	Ĺ	Secondary	Currency	Auto-Q	uantity	Quantity	Auto-Quantity	Seconda	ĺ
Dra →	-	Account E	Rem	nove insulatio	ork	Measure Each	Ĺ	Secondary	Currency U.S. Dollar	Auto-Q	uantity	Quantity 0.00	Auto-Quantity	Seconda	

You should be aware of these category labels:

	Category Labels
Name	Definition
Account Codes	These codes will be set up on the back end and will help you compare your cost and production rates to similar cost items in past projects.
Tags	Some tags are already set up for you. Additional tags can be created and used to group and filter your items.
Work Breakdown Structures	Use this format when you need to have multiple variations and summary reports of an estimate. WBS retains the same relationships between items as in the original estimate and only changes the view and how items are arranged in hierarchy.
Units of Measure	These are standardized to relate to one another by a conversion factor. If you need to create a new unit of measure, you will need to reference it to a base unit of measure and can include a conversion factor to allow you to convert back and forth between English and Metric.
Currencies	The default currency is set to U.S. Dollar, but you can also enter the exchange

#### Category Labels

rate for other currencies (such as Canadian) so you can estimate with whatever currency you need. Multiple currencies can be used in the same project. The system base currency can be changed from USD in the backstage view settings, but is a global change for the entire estimate environment.

Currency 🛓	Exchange Rate	Currency Symbol	Positive Currency Format	Negative Currency Format	Decimal Symbol
CND Dollar	1.00000	\$	\$1.1	(\$1.1)	Period (.)
U.S. Dollar	1.00000	\$	\$1.1	(\$1.1)	Period (.)

When you create a new job folder, all category labels defined in the Library Foundation Setup Data Register will be copied to the new job folder automatically.

# 3.6 RESOURCES

#### VIDEO | Create a Unique Resource

InEight Estimate refers to labor, equipment and material items as Resources. You will use these resources as the basic building blocks used to detail the costs in your estimates.

InEight Estimate organizes resources into seven types:

	Resources							
Name	Description							
Labor	The human resources that perform direct or indirect work. Direct labor is typically classified by trade (e.g., pipefitters, electricians, iron workers) and title (e.g., foreman, journeyman, laborer).							
Construction	Owned construction equipment.							

	Resources
Equipment	
Rented Construction Equipment	Construction equipment rented from a third party.
Installed Materials	Materials that will remain installed on site after the project is completed, (e.g., concrete, piping, aggregate).
Installed Equipment	Equipment that will remain installed on site after the project is completed, (e.g., boilers, heat exchangers, vessels, cooling towers).
Supplies	Expendable items that will not be permanently installed (e.g., small tools, consumables).
Unique	Resources that are of a "unique" nature and do not fit well into the other types (e.g., dump fees, hauling charges and equipment rented by the month).

After creating a new job folder, you can import a filtered set of resources from the Library into the new project. This is done on the Cost Basis tab of the Job Properties form.

In the following section, you will learn more about the resources stored in your Library in the Library Resource Rate Register.

# **3.6.1 LIBRARY RESOURCES REGISTER**

To open the Library Resources Register, select Labor from the Master Resources ribbon.

	-											
File Setu	p Estimate	Syste	em Der	veloper Tools	Integra	ations Act	ons					
•	-		圕			🐔 Labor		<b>a</b>		÷	T4t	P
Job Properties	Foundation Setup Data 👻	Address Book	Trench Calculator	Shift Rate Calculator	Resources	Materials	Resource	Cost Item Assemblies	Standard Tables	User Roles	Access Control	Reports
	Master I	nitializatio	on		P	laster Resou	ces	Master As	semblies	Roles and Pe	ermissions	Reports

#### OVERVIEW - LIBRARY RESOURCE RATE REGISTER

	Name	Description				
1	Tabs	<ul> <li>There are tabs along the top of the form for each of the seven resource types, in addition to an <i>All</i> tab that holds the resources of all types.</li> <li>Notice that you are on the Labor Tab</li> </ul>				
2	Resource Code	Each record (or row in the register) represents a single resource.				
3	Description	The Description provides more detail about the resource.				
4	Resource This is the resource cost per unit. Rate per Unit					
5	Utilization Count	Tells you how many units of that resource are being used in the job.				
6	Unit of Measure	Each resource is defined with a Unit of Measure.				
7	Register	This register includes columns for the resource attribute categories so you can filter and group your resources.				

٩II	Labor Con	struction Equipment F	Rented Construction	n Equipment	Installed Material	Installed Equ	ipment Sup	plies Unique		
ag	column 2 to	group 3		4		5 Find	1: [6 For	] ••• Saved vi	ews: 7 jous View	•
	Resource 😑	Description	Unit Cost (Scale 1)	Unit Cost (Scale 2)	Unit Cost (Scale 3)	Utilization Count	Unit of Measure	Resource File Description	Wage Zone	Organizational Category
	+ LC1	Carpenter Apprentice	e \$27.48	\$41.22	\$54.96	594.37	Hour	Standard Labor Rate	Wage Zone A	Carpenter
	+ LC2	Carpenter Journey	\$28.92	\$43.38	\$57.84	1,188.73	Hour	Standard Labor Rate	Wage Zone A	Carpenter
	+ LC3	Carpenter Foreman	\$31.47	\$47.20	\$62.94	594.37	Hour	Standard Labor Rate	Wage Zone A	Carpenter
	+ LF1	Finisher Apprentice	\$26.80	\$40.20	\$53.60	0.00	Hour	Standard Labor Rate	Wage Zone A	Finisher - Concrete
	+ LF2	Finisher	\$28.07	\$42.10	\$56.13	594.37	Hour	Standard Labor Rate	Wage Zone A	Finisher - Concrete
	+ LF3	Finisher Foreman	\$32.32	\$48.48	\$64.64	0.00	Hour	Standard Labor Rate	Wage Zone A	Finisher - Concrete

#### SOURCE JOB AND SOURCE SYSTEM NAME FIELDS

The Source Job field provides visibility into the jobs from which the data may have originated from.

The Source System Name helps to see the source of the data when integrating with other systems.

Resource Type	Resource Code	Source Job	Source System <sub>■</sub> Name
+ Construction Equipment Rate	EMTB	Library	System
+ Installed Material Rate	MDIRTB	Library	System
+ Construction Equipment Rate	ETDT	Library	System
+ Supply Rate	SFM	Library	System
+ Supply Rate	SFH	Library	System
+ Installed Material Rate	MPD 16	Library	System

TIP

Resource rate add and search tips:

- You cannot add new resources on the All tab.
- You can search for resources in the Resource Rate Register using the 'Find' field.

Next you will take a look at the different types of resources and how they differ when we drill into resource rate records from each category.

# 3.6.2 LABOR RESOURCES

Looking at your Labor resources more closely, you will see all the Resource Codes for the Labor resources begin with an L. This is a best practice for naming and organizing your resources, but you can also use another organizational method of your choice.

# 3.6.3 RESOURCE RATE RECORD

If you need to add cost to a resource, adjust a rate, or just view a more detailed breakdown, you can open the resource's rate record. From the Library Resource Rate Register, double click on the row header for the resource you need to view in greater detail.

	click on the der to open				
	rate record		Resource File Description	Unit of Measure	Productivity Factor
+ LC1 Carpenter Apprentic		rentice	Standard Labor Rate	Hour	1.0
+ LC1	Carpenter App	rentice	Standard Labor Rate	Hour	1.0
+ LC2	LC2 Carpenter Journey		Standard Labor Rate	Hour	1.0
+ LC2	Carpenter Jour	ney	Standard Labor Rate	Hour	1.0
+ 1C3	Carpenter Fore	eman	Standard Labor Rate	Hour	1.0

#### OVERVIEW - RESOURCE RATE RECORD

	Name	Description
1	Record	The record references the resource you are editing.
2	Charge Rate	The Charge Rate tab is the tab the record defaults to and is where you define the cost of the resource.
3	Scale Buttons	The Scale buttons only show up on labor resources. They are used for defining regular time, overtime and double time rates for the resource.
4	Cost Category Breakdown	The Cost Category Breakdown is where you enter the costs for the resource. The categories will depend on what type of resource it is (e.g., equipment resources will have equipment cost categories and materials will have material cost categories).
5	Special Instructions / Base Wage Factors	The right side of the record will have additional options to help you define the rate. These options change depending on what type of resource it is.

ode: * Setup	_		tion: Carpenter /	Apprentice				•
Scale 1	-		I Scales					Special Instructions Use the Materials cost category to add additional labor c
Cost Ca	tegory	y Breakdown	Amount	<b>←</b> →	Percent	Is Taxed	Is Insured	formaterials and supplies.
Total     Labor			Varies Varies					Worker's Comp values for this resource can be adjusted automatically when this resource is employed in a job,
	Labor Base		Varies					based on the geographic location of the work, and the Worker's Comp Override listed on the Cost Item on whic
	r La	bor Burden	Varies					the resource is employed.
	>	Labor Fringes	Varies					Standard Worker's Comp Overrides can be defined in th
	>	Labor Insurance	Varies 4					Library's Foundation Setup Data Register.
	>	Labor Taxes	Varies					Base Wage Factors for Overtime
		Undefined Labor B	\$0.00	÷	0.00			Use Base Wage Factors for Scales 2 and 3
	Un	ndefined Labor	\$0.00	÷	0.00			
<ul> <li>Materials</li> </ul>		ials	\$0.00					Scale 2 Factor: 1.50 x Base Wage
l	Jndef	ined	\$0.00					Scale 3 Factor: 2.00 x Base Wage
								This option multiplies the Scale 1 base wage by the fact entered here to automatically calculate the base wage f Scales 2 and 3.

	Name	Description
6	Setup	There is also a Setup tab where you can define the resource's attributes, plus other settings. These attributes are used for filtering which resource rates to load into a new estimate.
7	Cost Driver	Labor resources default Cost Driver is CI Duration which means their costs are driven by time.
8	Default Quantity	The Default Quantity is typically set to 1 for most cases if you are bringing in the resource you are using at least one.

Setup 6 Charg	e Rate	Billing Rate	
Resource File:		d Labor Rate File	-
Geographic Area:	Southwe	est	-
Wage Zone:	Wage Z	one A	•
Org. Category:	Carpent	ter	•
Account Code:			d.
Cost Driver:	CI Dura	tion	•
Cost Curve:	Employe	ed Cost Item	-
Tag 1:	Non Uni	on	-
Tag 2:	Hourly		•
Tag 3:			•
Productivity Factor:		1.00	
Default Quantity:		1.00	
Currency:	U.S. Do	llar	-

The following steps walk you through how to create a new labor resource.

#### 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.

🛛 💾 🕞													ibrary - Estimat
File Setup	Estimate	Exeo	ution	System									
٥		2	山			🐔 Labor 🔐 Equipment		â		÷	†4†	<b>P</b>	
Job Properties	Foundation Setup Data *	Address Book	Trench Calculator		Resource Rates +	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	User Roles	Access Control	Reports	
	Master I	nitializatio	on			Master Resourc	es	Master As	semblies	Roles and Pe	rmissions	Reports	

- 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.

Resou	rce	Rat	e Register	Labor Rate	Record O	
ode:	* [	LME	CHINEIGHT Desc	ription: Mech	anic - Heavy Duty	
Setup		<b>4</b> .	Charge Rate Bill	ing Rate		
Scale	1	Sc	ale 2 Scale 3	All Scales		
Cost C	Cate	gory	Breakdown	Amount	<b>←→</b>	Percent
✓ To	otal			\$57.00		
~	La	oor		\$57.00		
	•	Lab	or Base	\$52.00	)	
		Lab	or Burden	\$5.00	)	
		~	Labor Fringes	\$5.00		
			Travel	\$0.00	<del>(</del>	0.0
			Premium	\$0.00	<del>(</del>	0.0
			Holiday	\$0.00	<del>(</del>	0.0
			Savings	\$0.00	<del>(</del>	0.0
			Pension	\$3.00	÷	5.7
			Vacation	\$0.00	<del>(</del>	0.0
			Subsistence	\$2.00	÷	3.8
			Health & Welfa	re \$0.00	÷	0.0

- 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 Fac	tors for O	vertime
👿 Use Base Wa	age Factors	for Scales 2 and 3
Scale 2 Factor:	1.50	x Base Wage
Scale 3 Factor:	2.00	x Base Wage
	d here to au	ale 1 base wage by tomatically calculate nd 3.

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

### 3.6.4 CONSTRUCTION EQUIPMENT RESOURCES

- Similar to Labor Resources, Construction Equipment Resources are also duration driven resources by default
- They contain cost categories for ownership and operation costs

All	Labor Con	struction Equipment Ren	ted Construction Equipment	Installed Materia	I Installed Equi	ipment Supp	lies Unique					
rag	columns here to	group					Find: Se	arch For]	Saved	views: Previous	View	*
	Resource 🛓	Description	Resource File Description	Unit of Measure	Productivity Factor	Default Quantity	Waste % Add-on	Unit Cost (Scale 1)	Currency	Utilization Count	Organizational Category	Geograp Area
>	+ EAPAV	Asphalt Paver	Standard Equipment Rate	Hour	1.00	1.00		\$53.40	U.S. Dollar	0.00	Asphalt	
	+ EARL	Asphalt Roller	Standard Equipment Rate	Hour	1.00	1.00		\$21.00	U.S. Dollar	0.00	Asphalt	
	+ ECOMP1	Compactor Smooth D	Standard Equipment Rate	Hour	1.00	1.00		\$7.00	U.S. Dollar	0.00	Compactor	
	+ ECOMP2	Compactor Sheeps F	Standard Equipment Rate	Hour	1.00	1.00		\$28.00	U.S. Dollar	0.00	Compactor	
	+ ECR110	Crane 110 Ton	Standard Equipment Rate	Hour	1.00	1.00		\$196.00	U.S. Dollar	0.00	Crane	
	+ ECRBT	Boom Truck 15 Ton	Standard Equipment Rate	Hour	1.00	1.00		\$28.00	U.S. Dollar	0.00	Crane	
	+ ECRHC	Hydraulic Crane 25 Ton	Standard Equipment Rate	Hour	1.00	1.00		\$84.00	U.S. Dollar	0.00	Crane	
	+ ED6	Dozer D6	Standard Equipment Rate	Hour	1.00	1.00		\$84.00	U.S. Dollar	0.00	Dozer	
	+ ED8	Dozer D8	Standard Equipment Rate	Hour	1.00	1.00		\$140.00	U.S. Dollar	0.00	Dozer	
	+ EG14G	Grader 14G	Standard Equipment Rate	Hour	1.00	1.00		\$35.00	U.S. Dollar	0.00	Grader	
	+ EG160H	Grader 160H	Standard Equipment Rate	Hour	1.00	1.00		\$91.00	U.S. Dollar	0.00	Grader	

These resources are the fleet of construction equipment that you own.

# 3.6.5 RENTED EQUIPMENT RESOURCES

These resources represent the construction equipment that you rent.

- Rented Equipment Resources are also duration driven resources by default
- · Contain cost categories for rental and operation cost as well as additional fees
- On the Rental Construction Equipment Record, you will notice a new tab named Quote
  - Quotes will be discussed in detail in Lesson 8 Quote Management
- You will also note the Tax section. You can check the box to Apply Standard Tax, which pulls the Sales Tax percentage defined on the Cost Basis tab in Job Properties, or you can manually specify a unique sales tax rate

Tax Apply Standard Tax		
Apply Standard Tax [ Unique Sales Tax Rate:	0.00 %	
Unique Sales Tax Rate.	0.00 **	

### 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	🔱 Charg	e Rate	🖵 Quote	Billing Rate		
Res	ource File:	Standar	rd Rental Rate	File 🔹	User Defined 1:	
Geogra	aphic Area:			•	User Defined 2:	
w	age Zone:			•	User Defined 3:	
Org.	Category:	Crane		•	User Defined 4:	
Acco	ount Code:				User Defined 5:	
0	oot Driver	CT Dura	tion	-	Lloor Defined &	

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

#### 3.6.6 EQUIPMENT CONSUMPTION RATES

The Construction Equipment and Rented Construction Equipment Resource Rate Records include consumption rates that will factor with the fuel cost you define on the **Library Job Properties** > **Fuel Cost** tab to give a fuel cost for your equipment rate.

Jop I	Prope	erties Constru	iction Equipment Rat	te Record Ø
Code	*	EAPAV Des	cription: Asphalt Pav	er
Setu	ıp	🐈 Charge Rate 🛛 Bi	lling Rate	
Cost	Cate	gory Breakdown	Amount	Fuel
¥ .	Total		\$199.00	Fuel Type Consumption Rate
	r 0	wned Equipment	\$199.00	Gasoline - 12.00 Gallon/Hour
	>	OE Ownership	\$0.00	
	· –	OE Operation	\$199.00	Consumption Rate factored
		OE Repair Parts	\$0.00	with cost per liter gives you a
		OE Repair Labor	\$0.00	fuel cost.
		OE Fuel	\$144.00	Automatically calculate Maintenance Labor
		OE Lube	\$0.00	Man-Hours for this resource

The below figure shows where consumption rates are defined on the Construction Equipment Resource Rate Record.

## 3.6.7 NON-HOURLY RATE CALCULATOR

For owned and rented construction equipment, the rate entered must be hourly. If your rate is weekly or monthly, you can use the Non-Hourly Rate Calculator on the Construction Equipment Resource Record to come up with the hourly rate.

#### 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 Char Calculate Non-Hourly F RE Rental	-	
Period:	Weekly 💌	
Amount Per Period:	\$4,000.00	
Hours Per Period:	20.00	

Cod	e: '	RECR110	Descript	i <mark>on:</mark> [	Crane	110 Ton
Se	tup	🔱 Charge Rate	Qu	ote	Billin	g Rate
Co	st C	ategory Breakdown		Amou	unt	
$\mathbf{\mathbf{v}}$	То	tal		\$20	00.00	
	>	Rented Equipment		\$200.00		
	>	Fees		\$	<b>0.00</b>	
		Undefined		\$	<b>\$0.0</b> 0	

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

# 3.6.8 INSTALLED MATERIALS, INSTALLED EQUIPMENT & SUPPLIES RESOURCES

- Comparing the Installed Material & Equipment resources to those covered so far, you will note that the unit of measure is not Hour for materials, but it is specific to the kind of material. It is a quantity-driven resource, as opposed to duration-driven like your labor and equipment resources
- You will also note the tax field can pull your standard tax settings from the Cost Basis tab in Job Properties, or a unique sales tax rate can be manually entered in each record
- On record for these resource types, you will notice a new tab named Quote. This tab shows up here because you may have to shop around and get quotes for these resources

- Quotes will be discussed in detail in Lesson 8 Quote Management
- In the Setup tab you will see a field named Waste % Add-on. Here you can account for approximate waste percentages

•	Cost categories wil	l differ on each	type of resource record	
---	---------------------	------------------	-------------------------	--

Job	Propertie	s	Resource Rate	Register 🕻					
All	Labor	Const	ruction Equipment	Rented Con	struction Equipm	ent Installe	d Material	Installed Equipment	Supplie
Drag	columns he	re to gr	oup						
	Resource Code	<u> </u>	Description		Unit Cost (Scale 1)	Utilization Count	Unit of Measure	Resource File Description	
→	+ MAAM		Asphalt Mix (Finish	1)	\$32.50	0.00	Ton	Standard Materia	al Rate
ĺ	+ MAC		Asphalt Cement		\$195.00	0.00	Ton	Ton Standard Material F	
	+ MACA1	-1/2	Coarse Aggregate	Coarse Aggregate 1-1/2 In		0.00	Ton	Standard Materia	al Rate
	+ MAFA Fine Aggregate				\$7.80	0.00	Ton	Standard Materia	al Rate
	+ MAHAU	IL	Aggregate Haul Q	uarry to P	\$2.60	0.00	Ton	Standard Materia	al Rate
	+ MAIA3	/4	Intermediate Agg	egate 3/4	\$10.40	0.00	Ton	Standard Materia	al Rate
	+ MASAN	D	Sand		\$7.80	0.00	Ton	Standard Materia	al Rate
	+ MATK		Tack		\$1.30	0.00	Gallon	Standard Materia	al Rate
	+ MBR		Aggregate Base R	ock	\$8.45	0.00	) Ton	Standard Materia	al Rate
	+ MC200	D	Concrete 4000 PS	I	\$110.50	0.00	Cubic Yar	d Standard Materia	al Rate
	+ MC350	D	Concrete 3500 PS	I	\$104.00	0.00	Cubic Yar	d Standard Materia	al Rate
	+ MDIRT	A	Dirt Class A		\$1.30	0.00	Cubic Yar	d Standard Materia	al Rate
	+ MDIRTE	3	Dirt Class B		\$6.50	0.00	Ton	Standard Materia	al Rate

Above is an example of the Installed Material tab in the Library Resource Rate Register.

The following steps walk you through how to create a new material resource in InEight Estimate.

### 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	Descripti	ion: E	Brick F	avers	
Setup	🐈 Charge Rate	Qu	ote	Billing	g Rate	
Cost Ca	tegory Breakdown		Amou			
🗸 Tota	al		\$5.00			
~	Materials		5			
	Installed Materials	\$5.00				
	Undefined Materia	als	\$			
>	Fees		\$0.00			
	Undefined		÷	0.00		

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

## **3.6.9 UNIQUE RESOURCES**

The Unique resource type is a catch-all and can be used for anything from dump fees and security to creating subcontractors as a resource.

- The Unique resources are the only resources that have all cost categories available, as well as all units of measure
- You will also note the tax field which can pull your standard tax settings from the Cost Basis tab in Job Properties, or a unique sales tax rate can be manually entered in each record
- Quotes will be discussed in detail in Lesson 8 Quote Management

Resource Rate Register 0												
Al	Labor Con	struction Equipment Rented Con	d Material	Material Installed Equipment Supplies Unique								
Drag	columns here to	group				Find: Sear	ch For]	··· Saved vie	ws: Previous	View	*	
	Resource 🚋	Description	Resource File Description	Unit of Measure	Productivity Factor	Default Quantity	Waste % Add-on	Unit Cost (Scale 1)	Currency	Utilization Count	Organization Category	
	+ UCRANE	Crane by the Month	Standard Unique Rate	Month		1.00	0.00	\$16,500.00	U.S. Dollar	0.00		
	+ UDFL	Disposal Fee for Liquids	Standard Unique Rate	Gallon		1.00	0.00	\$6.00	U.S. Dollar	0.00	Earthwork	
	+ UDUMP	Dump Fees	Standard Unique Rate	Load		1.00	0.00	\$100.00	U.S. Dollar	0.00	Earthwork	
	+ UHAUL	Haul to Job Site 15-20 Miles	Standard Unique Rate	Ton		1.00	0.00	\$3.00	U.S. Dollar	0.00	Earthwork	
	+ UPD	Per Diem	Standard Unique Rate	Day		1.00	0.00	\$150.00	U.S. Dollar	0.00		
	+ USS	Security Service	Standard Unique Rate	Week		1.00	0.00	\$500.00	U.S. Dollar	0.00		
*												

## 3.7 RESOURCE ASSEMBLIES

A Resource Assembly is a group of resources. You can create an assembly once and then reuse it as needed in multiple cost items whenever the same combination of resources is needed.

Library - Estimate     Library - Esti												
File Setup	Estimate	Exec	ution	System	Integrations	Actions						
•	-		鱼			🐔 Labor 🔐 Equipment		â		÷	†4†	<b>I</b>
Job Properties	Foundation Setup Data 🔻	Address Book	Trench Calculator	Shift Rate Calculator	Resource Rates *	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	User Roles	Access Control	Reports
	Master I	nitializati	on		P	laster Resourc	es	Master As	semblies	Roles and Pe	rmissions	Reports

The most common use for an assembly is to group labor resources into crews (e.g., Pipe Crew, Concrete Crew); however, any resource (equipment, materials, etc.) may be grouped into an assembly. Utilizing assemblies allows you to estimate faster, since you can add and manage an entire group of resources at once.

You can create assemblies in the Library and import them into job folders the same way you import resources.

## 3.7.1 LIBRARY RESOURCE ASSEMBLY REGISTER

To open the Library Resource Assembly Register, select the **Library** icon, then select **Resource Assemblies** from the Master Resources section of the Setup tab.

### OVERVIEW - LIBRARY RESOURCE ASSEMBLY REGISTER

Section	Description
1	Each row in the register represents a single resource assembly and is defined with an Assembly Code and Assembly Description.
2	Each assembly can be expanded by clicking the plus 🗄 icon next to its Assembly Code.
3	<ul> <li>Expanding an assembly reveals the list of resources that make up that assembly.</li> <li>Best practice for creating Assembly codes is to use C for Crew Assemblies, M for Material Assemblies, etc., however you can have labor, equipment, and materials in the same assembly</li> </ul>

:500		ssembly	Regisi	ω																	
ag col	umns	here to gr	oup										Find: [Se	arch For]		Saved	d views:	Standar	d View		-
2	de	<u>=</u>	Descrip	otion		Resou File D	irce escription		Quantit		Unit of Measure	Unit Cost	Total Cost	Currency		Organization Category		Geograph Area		Wage Zone	Mar Cou
-	CCO	NC	Concre	te Crew		Stand	ard Assemb	dy		1.00	Hour	\$330.3	8 \$330.38	U.S. Dolla	ar	Concrete				_	
		Row Number	1	Resource Code	Description		Quantity	Unit o Meas		Init Cost	Currency		Resource File Description		Organi Catego	zational ory	Geogra Area	phic Wa Zon			
	$\rightarrow$		1	LC2	Carpenter Journe	eyman	2.00	Each		\$28.92	U.S. Dollar	CI Dura	Standard Labor Ra	ate File	Carper	nter	Southw	est Wa	ge Zon		
			2	LF2	Finisher		1.00	Each		\$28.07	U.S. Dollar	CI Dura	Standard Labor Ra	ate File	Finishe	r - Conc	Southw	est Wa	ge Zon		
			3	LIW1	Iron Worker		1.00	Each		\$35.55	U.S. Dollar	CI Dura	Standard Labor Ra	ate File	Iron W	orker	Southw	est Wa	ge Zon		
3			4	LL2	Laborer		1.00	Each		\$26.37	U.S. Dollar	CI Dura	Standard Labor Ra	ate File	Labore	r	Southw	est Wa	ge Zon		
-			5	ECRHC	Hydraulic Crane	25 Ton	1.00	Each		\$84.00	U.S. Dollar	CI Dura	Standard Equipment	nt Rate	Crane						
			6	LC1	Carpenter Appre	ntice	1.00	Each		\$27.48	U.S. Dollar	CI Dura	Standard Labor Ra	ate File	Carper	nter	Southw	est Wa	ge Zon		
			7	LO2	Operator Class 2		1.00	Each		\$30.21	U.S. Dollar	CI Dura	Standard Labor Ra	ate File	Opera	tor	Southw	est Wa	ge Zon		
			8	ETFT	Flatbed Truck		1.00	Each		\$7.00	U.S. Dollar	CI Dura	Standard Equipme	nt Rate	Truck						
			9	LC3	Carpenter Forem	ian	1.00	Each		\$33.87	U.S. Dollar	CI Dura	Standard Labor Ra	ate File	Carper	nter	Southw	est Wa	ge Zon		
4	CGR	ADE	Gradin	g Crew		Stand	ard Assemb	ly		1.00	Hour	\$175.0	\$175.06	U.S. Dolla	ar	Earthwork					
+	CMA	INT	Equipm	ent Mainten	ance	Stand	ard Assemb	dy		1.00	Each	\$58.0	0 \$58.00	U.S. Dolla	ar	Mechanic				2	

## 3.7.2 RESOURCE ASSEMBLY RECORD

To open an existing Resource Assembly Record, right click on the row header of an assembly (row) on the Resource Assembly Register and select Open.

#### **OVERVIEW - RESOURCE ASSEMBLY RECORD**

	Name	Description
1	Assembly Code and Description	Each assembly is defined with an assembly Code and an assembly Description.
2	Quantity and Unit of Measure	Each assembly has a quantity and unit of measure. The default is 1 EA. For crew assemblies with all hourly duration driven resources, it is a best practice to change the Qty to Hour, so that when used on a cost item, it will show you the assembly's unit cost per hour.
3	Assembly Details	The rows in the Assembly Details register represent the resources that make up the resource assembly.
4	Notes	An area where the estimators make notes for records related to the resource assemblies for work orders which is commonly performed by a type of crew.

			_										
ode	CCONC		Description:	Concrete Crew								Qty:	
R	esource File:	Standa	ard Assembly File	• • Tag 1:		-						UM: Hour	
ieog	graphic Area:			▼ Tag 2:		•					Unit	Cost:	\$330
	Wage Zone:			▼ Tag 3:		•					Curr	ency: U.S. Doll	ar
Or	g. Category:	Concre	ete	<ul> <li>Man Count:</li> </ul>	8.00					•	Last Change	ed By:	
				Equip Count:	2.00					4	Last Change	d On:	
	Notes:												
ost		Assembl	ly Details										
									Find: [	Search For] Sav	red views: Previous V	/iew	Ţ
rag	Summary	to group	3	Description	Quantity	Unit of Measure	Unit Cost	Currency	Find: [ Cost Driver	Search For] ··· Sav Resource File Description	ed views: Previous V Organizational Category	fiew Geographic Area	
ag	Summary columns here t	to group	Resource Code	Description	Quantity 2.00			Currency U.S. Dollar	Cost	Resource	Organizational	Geographic	Wage Zone
ag	Summary columns here t	to group R C	Resource Code	•		Measure	\$28.92		Cost Driver	Resource File Description	Organizational Category	Geographic Area	Wage Zone Wage
Drag	Summary columns here t	to group R C 1 L	Resource Code C2 F2	Carpenter Journey	2.00	Measure Each	\$28.92 \$28.07	U.S. Dollar	Cost Driver CI Duration	Resource File Description Standard Labor Rate File	Organizational Category Carpenter	Geographic Area Southwest	Wage

# 3.7.2.1 PRODUCTIVITY RATE INDICATOR IN THE CBS REGISTER

The Productivity Indicator shows the field that contains the as-entered value and is driving the estimate for that cost item. This appears as an arrow aligned to the left of the cell as shown below.

Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Currency	(Duration driven)	(Non-Duration driven)	
306	20.00	Mie	\$228,294.37	\$4,565,887.34	U.S. Dollar	5,191.90		15.36
Prime Bond	1.00	Lump Sum	\$39,357.30	\$39,357.30	U.S. Dollar			
Price % Add-On	1.00	Lump Sum	\$225,515.71	\$225,515.71	U.S. Dollar			
Job Financing	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			
Indirect Cost Escalation	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			
Direct Cost Escalation	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			
Indirect Cost Add-On	1.00	Lump Sum	\$0.00	\$0.00	U.S. Dollar			
Job Management & Equipment	1.00	Lump Sum	\$157,096.28	\$157,096.28	U.S. Dollar	800.00		0.0
General Expense	1.00	Lump Sum	\$4,200.00	\$4,200.00	U.S. Dollar	0.00		0.0
Direct Cost Add-On	1.00	Lump Sum	\$80,770.35	\$80,770.35	U.S. Dollar			
Mobilization	1.00	Lump Sum	\$13,335.70	\$13,335.70	U.S. Dollar	90.00		0.0
Clearing & Grubbing	10.00	Acre	\$3,918.50	\$39,184.97	U.S. Dollar	80.00		0.0
Unclassified Excavation	50,000.00	Cubic Yard	\$2.21	\$110,560.40	U.S. Dollar	294.67		0.0
Excavation	50,000.00	Cubic Yard	\$0.66	\$33, 100.80	U.S. Dollar	128.00		0.0
Embankment	50,000.00	Cubic Yard	\$1.55	\$77,459.60	U.S. Dollar	166.67		0.0

Being able to see productivity drivers on the CBS register makes it easier to review and modify the estimate as a whole while reducing the potential to accidentally overwrite a manually entered data.

Follow the step by step below to create a Resource Assembly.

#### 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.



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

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

Re	source Assemb	ly Register 🛛				
Drag	g 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	

#### EXERCISE 3.1 – CREATE RESOURCES & RESOURCE ASSEMBLIES

In this exercise, you will practice creating resources and assemblies in the InEight Estimate Library. In the Library Resource Rate Register, create resources with the following variables:

#### Labor Resource

Resource Code	LSFA	Wage Zone	Wage Zone A
Resource Description	Field Administrator	Organizational Category	Supervision
Geographic Area	Southwest	Scale 1 Labor Base	\$33.45
Scale 1 Premium	2 percent	Scale 1 Subsistence	\$0.47
Resource File		Standard Labor Rate File	)

Select the checkbox for 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.

#### **Rented Construction Equipment Resources**

Rented Construction Equipment Resource							
Resource Code	RPW3000	<b>RE Rental Amount</b>	\$3.40				
Resource Description	Pressure Washer 3000 PSI	Organizational Category	Clean & Insp	ect			
Resource File		Standard Rental Rate	e File				
Installed Material	Installed Material Resource						
Resource Code	МССВ	Installed Materials A	mount	\$300.00			
Resource Description	Pre-Cast Concrete Catch Basin	Organizational Cate	gory	Concrete			
Resource File		Standard Material Ra	ate File				
Unit of Measure		Each					

Uncheck the box for Apply Standard Tax and enter a Unique Sales Tax Rate: 6%

# In the Library Resource Assembly Rate Register, create resource assemblies with the following codes, descriptions, and resources.

Assem	h	v	#1
///////////////////////////////////////		y	TTI

Assembly Code	CBRIDGE
Assembly Description	Bridge Crew
Resource File	Standard Assembly File
Unit of Measure	Hour

Select Wage Zone A Labor Resources for this Assembly.

Resources on Assembly	Resource Description	Resource Quantity
LC3	Carpenter Foreman	1
LL2	Laborer	2
LF2	Finisher	1
LC2	Carpenter Journeyman	2

#### Assembly #2

Assembly Code	CRIPRAP	
Assembly Description	Rip Rap Replacement Crew	
Resource File	Standard Assembly File	
Unite of Measure	Hour	
Select Wage Zone A Labor Resou	rces for this Assembly.	
Resources on Assembly	Resource Description	Resource Quantity
Resources on Assembly	Resource Description Teamster Foreman	<b>Resource Quantity</b> .5
-		-
LT2	Teamster Foreman	.5

#### Assembly #2 (continued)

ETPU	Pickup	1
EL950	Loader 950	1

### You should end up with similar results:

le Co	source de	≞ ▼	Resource File Description	e	Organizationa Category		Geograp Area	hic	Wage Zone	Description	Unit of Measure
_	LSFA		Standard Lat	bor Rate File	Supervision		Southwe	st		Field Administrator	Hour
		Scale 📃	Total	Labor	Labor Base	Labor B	Burden	Labor Fri	nges		
	$\rightarrow$	1	\$33.92	\$33.92	\$33.45		\$0.47	\$	\$0.47		
		2	\$50.18	\$50.18	\$50.18		\$0.00	\$	\$0.00		
		3	\$66.90	\$66.90	\$66.90		\$0.00	\$	\$0.00		

Re Co		rce / 👻	Descri	ption			purce File	Unit of Measure	Unit Cost (Scale 1)	Curr	ency 👻		anizational [ egory	4
-	RP\	W3000	Pressu	re Washer 3000 PSI		Stan	dard Rental Rate File	Hour	\$3.40	U.S.	Dollar	Clea	n & Inspect	
		Total		Rented Equipment	RE Rer	ntal	RE Rent Expense	RE Overhead	RE Finance Expe	ense	RE Insura	ance	RE License	
	Þ		\$3.40	\$3.40	\$3	3.40	\$0.00	\$0.00	\$	0.00	\$	0.00	\$0.00	)

	Res Cod	ource , e	-	Descriptio	n –	Resource File Description	-		Unit Cost (Scale 1)	Currency 👻	Organizationa Category	al 👻
E	- 1	ICCB		Pre-Cast	Concrete Catch Basin	Standard Material R	ate File	Each	\$318.00 U	J.S. Dollar	Concrete	
		Tota	al	Materials	Installed Materials	Undefined Materials	Fees	Sales Taxes	Undefined Fees	Undefined	Billing Rate	Billing Marki
		\$318	8.00	\$300.00	\$0.00	\$300.00	\$18.00	\$18.00	\$0.0	\$0.00	\$318.00	

ag co	Nur	nns here to	group	>							Fin	d: [Search For.	1	Saved view	s: Previous \	/iew
Asse Cod			Asse Desc	mbly ription		Resource File Descriptio	n 💌	Quantity -	Unit of Measure	- Unit Cos	st 👻	Total Cost 👻	Currenc	y v Organization Category	al 🚽 Geog Area	raphic 🖵
- c	BR	IDGE	Bridg	e Crew	5	Standard Asse	embly File	1.0	0 Hour	\$1	70.11	\$170.11	U.S. Dol	ar		
		Row Number	1	Resource Code	Description	Quantity	Unit of Measure	Unit Cost	Currency	Cost Driver	Reso File D	urce escription		Organizational Category	Geographic Area	Wage Zone
	Þ		1	LC2	Carpenter Journeyman	2.00	Each	\$28.92	U.S. Dollar	CI Duration	Stand	lard Labor Rate i	File	Carpenter	Southwest	Wage Zone
			2	LC3	Carpenter Foreman	1.00	Each	\$31.47	U.S. Dollar	CI Duration	Stand	lard Labor Rate I	File	Carpenter	Southwest	Wage Zone
			3	LF2	Finisher	1.00	Each	\$28.07	U.S. Dollar	CI Duration	Stand	lard Labor Rate I	File	Finisher - Concrete	Southwest	Wage Zone
			4	LL2	Laborer	2.00	Each	\$26.37	U.S. Dollar	CI Duration	Stand	lard Labor Rate I	File	Laborer	Southwest	Wage Zone

ode	1	≞ ▼	Descri	ption		Resou File D	urce escription		Quar		Unit of Measure	Unit Cost	Total Cost	Currency		Geographic Area	Wage Zone
a	RIP	RAP	Rip Ra	p Replaceme	ent Crew	Stand	lard Assemb	ły		1.00	Hour	\$152.89	\$152.89	U.S. Dollar			
		Row Number	1	Resource Code	Description		Quantity	Unit o Meas		Unit Cost	Currency	Cost Driver	Resource File Description		Organizational Category	Geographic Area	Wage Zone
	÷		1	LL2	Laborer		2.00	Each		\$26.37	U.S. Dollar	CI Duration	Standard Labor	Rate File	Laborer	Southwest	Wage Zon.
			2	LO3	Operator Class 3		1.00	Each		\$30.62	U.S. Dollar	CI Duration	Standard Labor	Rate File	Operator	Southwest	Wage Zon.
			3	LT2	Teamster Forema	in	0.50	Each		\$32.32	U.S. Dollar	CI Duration	Standard Labor	Rate File	Truck Driver - Teamster	Southwest	Wage Zon.
			4	EL950	Loader 950		1.00	Each		\$14.18	U.S. Dollar	CI Duration	Standard Equip	ment Rate	Loader		
			5	ETPU	Pickup		1.00	Each		\$4.20	U.S. Dollar	CI Duration	Standard Equip	ment Rate	Truck		
			6	EX510	Backhoe JD 510		1.00	Each		\$35.00	U.S. Dollar	CI Duration	Standard Equip	ment Rate	Excavator		

## Congratulations, you have completed this exercise!

# 3.8 IMPORTING RESOURCES

The following procedures inform you how to setup resources in InEight Estimate from an excel sheet.

NOTE Use of this lesson will draw from other sections of InEight Estimating Manual. Basic understanding of the Sort, Group, Filter, Excel integration functionality in InEight Estimate is required.

## 3.8.1 OPEN RESOURCE RATE REGISTER

You can create resources within the Resource Rate Register. This is the location to build out the structure of those resources.

#### STEP BY STEP - OPENING THE LABOR TAB

- 1. Open the Job Folder or Library that you're going to be working in.
- 2. From the Ribbon, select the **Setup** tab.
- 3. Under the Resources section, select **Resource Rates**. The Resource Rate Register opens.
- 4. Select the tab you want to add resources to.

File	Setup	Estimate	Quote	Price	Executio	on S	ystem	Actions				
e e	Print	🕀 New	Сору	🐰 Lir	nk Field	1				urce Utilizat	ion	
ria P	review	🛞 Delete	🖹 Paste	愚ur	nlink Field	~×			The Resol	urce Cost D	etails	-
er :	Export to Excel	}< Cut	+ Fill Down	1		Expand Collapse		Clea Filte				Copy Job to L
	Print	E	dit	Wor	kbook			V	iew			
Job	Properties	Resourc	e Rate Regi	ster Ø								
All	Labor Co	nstruction Equi	pment Rer	nted Constr	ruction Equ	ipment	Installed Ma	terial	Installed Eq	uipment	Supplie	s Uniq
Drag	columns here to	group										
						uctivity	Default		Waste %	Unit Cos		Unit Cost

The layout of this register and excel file is up to the organization and the decisions that are made during the detail design phase. A basic excel file will be provided to your organization as a starting point to work from. If that can't be located, you can easily build one utilizing the views within InEight Estimate.

# 3.8.1.1 CREATING A LABOR SAVED VIEW - RESOURCE RATE REGISTER

You can create a view to mirror both the register and excel sheets to easily bring information back and forth from the two applications.

#### Example of columns:

- User Defined 1
- Resource Code
- Description
- Resource File Description Validated field
- Geographic Area Validated field
- Wage Zone Validated field
- · Organizational Category Validated field
- Tag 1 Validated field
- Tag 2 Validated field
- Currency Validated field
- Default Quantity
- Use Base Wage Factors Scale Factors
- Scale Factor 2 Scale Factors
- Scale Factor 3 Scale Factors

**NOTE** For more information on Validated Tags field, see Validated Tags topic. Scale Factors aren't required if you are manually applying rates to each cost category scale.

The view should appear as shown below with **User Defined 1** in the first column. This field is used for sorting and arranging data accurately moving between Estimate and Excel. You are not limited to UDF 1 and can choose to utilize a field of their choice for sorting.

) 🖬 🔊											- Import De	mo - Estima	ite						Ø :
ile Setup	Estimate	Quote	Price	Execution	System	Actions												童	Ħ
0		Ě	***		🐔 Labor 🖴 Equipment	10	a		P										
ob Properties F * Se	Foundation ietup Data *	Pay Item & Proposal	Bid Wizard	Resource	Materials	Resource Assemblies	Cost Item Assembles	Standard Tables	Reports										
	Initializ	e			Resources		Assen	iblies	Reports										
ost Breakdown	n Structure (	CBS) Regist	er Re	source Rat	e Register 🛛 🔘	Resource	Cost Detail	Register											
Al Labor (	Construction E	quipment	Rented Const	ruction Equipr	nent Installed	Material	Installed Equip	ment S	upplies Unic	ue									
rag columns here	to group														P.	nd: [Search	For]	- Saved views: RB_Resource Labor Upload V	A •
User Defined 1	- Resou Code	rce De	scription		surce File stiption		Organizationa Category		Geogra Area	Wage Zone	Tag 1	Tag 2	Currency	Default Quan	Use Base Wage Factors	Scale 2 Factor	Scale 3 Factor	-	
		_																	

## 3.8.2 SETTING UP THE EXCEL FILE

Go to the Excel sheet and make sure the information in the columns shown in the screenshot are filled out. Basic concepts to keep in mind regarding the excel file:

**Sort Code** - This column needs to have a high sequential number such as **10000**. This is very important to assign as it will help us authenticate all the labor rates.

**Resource Code** - A unique Naming convention to be assigned to every labor resource. In this example we have all labor resource starting with a **L** followed by the letters that represent the resource description.

**Labor Base** - The base wage of the labor resource is entered here. Estimate does not allow \$ sign to be pasted, which is why the cells for the Base column are formatted to **Number**.

K38	٣	I X 🗸	f <sub>x</sub>														
4	A	в	c	D	E	F	G	н	1.1	1	к	L	м	N	0	P	
Requir	red																
Valida	ted Field																
Not Re	quired																
				Co	lumn Headers may differ b	ased on Design De	cision Item #67										
				Resource Ra	te Register										Resource	e Cost Detail	is Reg
UDF1		Resource Code	Description -	Resource File Description	Organizational Category	Geographic Area	Wage Zone	Tag 1	Tag 2 -	Currency ~	Default Quantity	Use Base Wage Factors	*Scale Factor 2 -	*Scale Factor 3 *	Total -	Labor Base	-
	10000	LC2	Carpenter Journeyman	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$28.92		22.1
	10001	LSUPF	Foreman Pipe	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$29.92		23.10
	10002	LSUIW	Foreman Iron	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$30.92		24.10
(	10003	LSUC	Foreman Civil	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$31.92		25.1
	10004	LSUBM	Foreman Boilermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$32.92		26.1
	10005	LPF1	Lead Pipe Fabricator	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$33.92		27.1
	10006	LPF2	Journeyman Pipefitter	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$34.92		28.1
	10007	LPF3	Pipefitter A	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$35.92		29.1
	10008	LPF4	Pipefitter 8	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$36.92		30.1
	10009	LBM1	Lead Boilermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$37.92		31.1
	10010	LBM2	Journeyman Boilermake	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$38.92		32.1

#### **3.8.2.2 CREATING THE RESOURCE**

Follow this procedure once you have information filled out in excel.

#### STEP BY STEP – CREATING THE RESOURCE

- 1. Open the excel file.
- 2. Sort the sheet by sequential number in the **Sort Code** field.
- 3. Highlight the cells you want to bring into the estimate.
- 4. Copy the cells using right click and selecting **Copy** from the context menu.

A	B	C	D	E	F	G	н	1	1	K	L	м	N	0	P	
Required																
alidated Field																
Not Required																
			Co	lumn Headers may differ b	ased on Design Dec	ision Item #67										
			Resource R	ate Register										Resource	e Cost Detail	s Re
Iser Defined 1	Resource Code	Description -	Resource File Description	Organizational Category -	Geographic Area -	Wage Zone	Tag 1 -	Tag 2 -	Currency -	Default Quantity ~	Use Base Waze Factors	Scale Factor 7 -	*Scale Factor 3 -	Total -	Labor Base	
10000	.C2	Carpenter Journeyman	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		1 TRUE	1.50		\$28.92		22
10001	SUPF	Foreman Pipe	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$29.92		23.
10002	SUIW	Foreman Iron	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$30.92		24.
10003	LSUC	Foreman Civil	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$31.92		25
10004 1	SUBM	Foreman Boilermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$32.92		26
10005	PF1	Lead Pipe Fabricator	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$33.92		27.
10006	PF2	Journeyman Pipefitter	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$34.92		28
10007	PF3	Pipefitter A	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$35.92		29
10008	PF4	Pipefitter 8	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$36.92		30.
10009	BM1	Lead Boilermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	1 TRUE	1.50	2.00	\$37.92		31
10010	BM2	Journeyman Boilermak	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		1 TRUE	1.50	2.00	\$38.92		32

- 5. Open Estimate to the **Resource Rate Register**.
- 6. Select the User Defined 1 column in the Labor tab of the Resource Rate Register.

® File	💾 👼 Setup		Estimate	Quote	e Pric	е В	recution	System	Actions				
) 206 F	Properties		ndation Data - Initializ	Pay Item I Proposal	Ed Wiz			A Labor	Resource Assemblie		Standa Table	ard HS	Reports Reports
Cos	t Breakdo	wn St	ructure (	(CBS) Regi	ster	Resour	rce Rate	Register	Resour	ce Cost Detail	ls Regis	ter	
													_
All	Labor	Con	struction E	Equipment	Rented 0	Constructio	on Equipm	nent Instal	ed Material	Installed Equip	ment	Supplie	is Uniq
-	Labor columns h User Defined 1	ere to			Rented C		Reso	urce File	ed Material	Installed Equip Organization Category		Supple Geog Area	ya
-	columns h	ere to :	Resou				Reso	urce File	ed Material	Organization		Geog	ya
Drag	columns h		Resou Code New Delete				Reso	urce File	ed Material	Organization		Geog	ya
Drag	columns h		Resou Code New Delete				Reso	urce File	ed Material	Organization		Geog	ya

- 7. Right click the empty cell and select **Paste** from the context menu. A pop up will appear asking **Are you sure you want to insert the selected values?**
- 8. Select **Yes** to confirm inserting the selected values.
- 9. The cells you copied from the excel sheet are now copied into the Resource Rate Register. The Sort code data is pasted in the User defined 1 column. Resource Code & Resource description data is pasted as well.

9	<b>1</b> 67											Resource -	Import Der	no - Estim	ate							
le	Setup	Estin	vate Quo			ntion 1		Actions														金田
П	้อา	-		***	-	<i>¶</i> ₂ La	bor	10	a		P											
			_				uipment				_											
5 Pr	*	Foundati Setup Dat			Resour		aterials	Resource Assembles	Cost Item Assembles	Standard Tables	Reports											
		Ini	tialize			Res	ources		Assen	ablies	Reports											
ost	Breakdo	wn Struct	ure (CBS) Reg	ister R	Resource	Rate Regi	ster O	Resourc	e Cost Detail	s Register												
u I	Labor	Construct	tion Equipment	Rented Con	eta ution P	a inment	Installed	Material	Installed Equip	ment Sup	vier 1 In	ique										
-	_			Homed Con	00000010	doministri	D D D D D D D D D D D D D D D D D D D		n o tanén égyep	inent oop		doe										
ago	columns he	ere to group															F	ind: [Search	For]	- Saved view	s: RB_Resource I	Labor Upload Vi
	User Defined 1		tesource Tode	Description		Resource Fi Description			Organizationa Category		ogra ea	Wage Zone	Tag 1	Tag 2	Currency	Default Quan	Use Base Wage Factors	Scale 2 Factor	Scale 3 Factor			
Ē	+ 10000		C2	Carpenter Jou	imey	Standard La	bor Rate	File	Carpenter	s	uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00	<b>v</b>	0.00	0.00			
F	+ 10001		SUPF	Foreman Pipe		Standard La	bor Rate	File	Carpenter	s	uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00	<b>v</b>	0.00	0.00			
F	+ 10002	L	SUEW	Foreman Iron		Standard La	bor Rate	file	Carpenter	s	uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00		0.00	0.00			
F	+ 10003	. L	SUC	Foreman Civil		Standard La	bor Rate	File	Carpenter	s	utwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00	1	0.00	0.00			
P	+ 10004	L	SUBM	Foreman Boiler	rmaker	Standard La	bor Rate	File	Carpenter	s	uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00	1	0.00	0.00			
P	+ 10005	L	PF1	Lead Pipe Fab	ricator	Standard La	bor Rate	File	Carpenter	S	uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00		0.00	0.00			
ŀ	+ 10006	. L	PF2	Journeyman P	pefitter	Standard La	bor Rate	File	Carpenter	S	uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00		0.00	0.00			
•	+ 10007	1	PF3	Pipefitter A		Standard La	bor Rate	file	Carpenter	s	uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00		0.00	0.00			
Ŀ	+ 10008	1	PF4	Pipefitter B		Standard La	bor Rate	File	Carpenter	s	utwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00	1	0.00	0.00			
1.	+ 10009	1	BM1	Lead Bollermak	ker	Standard La	bor Rate	File	Carpenter	S	uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00		0.00	0.00			
	+ 10010		BM2	Journeyman B		Standard La			Carpenter		uthwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1.00	1	0.00	0.00			

#### 10.

NOTE For Make sure the sorting is on User Defined 1 column. This allows us to see the information being sorted similar to our data in excel file. Base Wage Factors need to be flagged to turn on with the check box. Your first copy and paste should have activated them. You need to copy and paste again in order to apply the factors.

										Resource	Cost			
						tors	*Scale Factor 2	- *Scale I	Factor 3	Total -	Labor			
							1	.50	2.0	\$28.92				
							1	.50	2.0	\$29.92				
							-	.50	2.0					
							-	.50	2.0					
								.50	2.0					
								.50	2.0					
							-	.50	2.0					
							-	.50	2.0					
								.50 .50	2.0					
								.50	2.0					
									2.10					
		tructure (CBS) Re			rce Cost Details Regis	ster Supplies	Unique							
1		struction Equipment					Unique						Find: (Search I	For] -
0	Labor Cor	struction Equipment						Tag 1	Tag 2	Currency	Default Quan	Use Base Wage Factors	Find: [Search I Scale 2 Factor	For] - Scale 3 Factor
0	Labor Cor columns here to	struction Equipment group Resource	Rented Construction	Equipment Installed Material	Installed Equipment	Supplies Geogra	. Wage Zone	Tag 1 Non Union		Currency U.S. Dollar		Wage Factors	Scale 2	Scale 3 Factor
	Labor Cor columns here to User Defined 1 h.	struction Equipment group Resource Code	Rented Construction	Equipment Installed Material Resource File Description	Installed Equipment Organizational Category	Supplies Geogra Area	Wage Zone st Wage Zone A	-	Hourly		Quan	Wage Factors	Scale 2 Factor	Scale 3 Factor 2.00
	Labor Con columns here to User Defined 1 = + 10000	struction Equipment group Resource Code	Rented Construction Description Carpenter Journey	Equipment Installed Material Resource File Description Standard Labor Rate File	Installed Equipment Organizational Category Carpenter	Supplies Geogra Area Southwe	Wage Zone st Wage Zone A st Wage Zone A	Non Union	Hourly	U.S. Dollar	Quan	Wage Factors	Scale 2 Factor 1.50	Scale 3 Factor 2.00 2.00
	Labor Con columns here to User Defined 1 =- + 10000 + 10001	struction Equipment group Resource Code LG2 LSUPF	Rented Construction Description Carpenter Journey Foreman Pipe	Equipment Installed Material Resource File Description Standard Labor Rate File Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Carpenter	Supplies Geogra Area Southwe	Wage Zone st. Wage Zone A st. Wage Zone A st. Wage Zone A	Non Union Non Union	Hourly Hourly Hourly	U.S. Dollar U.S. Dollar	Quan 1.0	Wage Factors 00 V 00 V 00 V	Scale 2 Factor 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00
	Labor Cor columns here to User Defined 1 = + 10000 + 10001 + 10002	struction Equipment group Resource Code LG2 LSUPF LSUTW	Rented Construction Description Carpenter Journey Foreman Pipe Foreman Iron	Equipment Installed Material Resource File Description Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Carpenter Carpenter Carpenter	Supplies Geogra Area Southwe Southwe Southwe	Wage Zone st. Wage Zone A st. Wage Zone A st. Wage Zone A st. Wage Zone A	Non Union Non Union Non Union	Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar	Quan	Wage Factors           00         ✓           00         ✓           00         ✓           00         ✓	Scale 2 Factor 1.50 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00 2.00
	Labor Con columns here to Defined 1 = + 10000 + 10001 + 10002 + 10003	Resource Code LSUPF LSUTW LSUC	Rented Construction Description Carpenter Journey Foreman Pipe Foreman Iron Foreman Civil	Equipment Installed Material Resource File Description Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter	Supplies  Geogra Area  Southwe Southwe Southwe Southwe	Wage Zone st Wage Zone A st Wage Zone A st Wage Zone A st Wage Zone A st Wage Zone A	Non Union Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly	U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar	Quan	Wage Factors 00 ~ / 00 ~ / 00 ~ / 00 ~ / 00 ~ /	Scale 2 Factor 1.50 1.50 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00 2.00 2.00 2.00
	Labor Cor columns here to Defined 1 = + 10000 + 10001 + 10002 + 10003 + 10004	Resource Code LSUPF LSUFF LSUC LSUEM	Rented Construction Description Carpenter Journey Foreman Pipe Foreman Iron Foreman Civil Foreman Bolermaker	Equipment Installed Material Resource File Description Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter	Supplies Geogra Area Southwe	Wage Zone st Wage Zone A st Wage Zone A st Wage Zone A st Wage Zone A st Wage Zone A	Non Union Non Union Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly Hourly	U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar	Quan	Wape Factors 00 ~ / 00 ~ / 00 ~ / 00 ~ / 00 ~ / 00 ~ / 00 ~ /	Scale 2 Factor 1.50 1.50 1.50 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00 2.00 2.00 2.00 2.00
	Labor Con columns here to User Defined 1 == + 10000 + 10001 + 10002 + 10003 + 10004 + 10004 + 10005	struction Equipment group Resource Code LSUPF LSUPF LSUC LSUBM LSUC LSUBM	Rented Construction Description Carpenter Journey Poreman Pipe Foreman Civil Foreman Bolermaker Lead Pipe Fabricator	Equipment Installed Material Resource File Description Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File	Installed Equipment Criganizational Category Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter	Supples Geogra Area Southwe Southwe Southwe Southwe Southwe	Wage Zone st Wage Zone A st Wage Zone A	Non Union Non Union Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly Hourly Hourly	U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar	Quan	Wage Factors           00         -           00         -           00         -           00         -           00         -           00         -           00         -           00         -           00         -           00         -           00         -           00         -           00         -	Scale 2 Factor 1.50 1.50 1.50 1.50 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00 2.00 2.00 2.00 2.00 2.0
	Labor Con columns here to User Defined 1 = + 10000 + 10001 + 10002 + 10003 + 10004 + 10005 + 10005 + 10006 + 10007	struction Equipment group Resource Code LSUPF LSUTW LSUC LSUBM LSUC LSUBM LSUE LSUBM	Rented Construction Description Carporter Journey. Foreman Pape Foreman Ion Foreman Dolermaker Lead Pape Fabricator Journeyman Apenter Papefitter A	Equipment Installed Material Resource File Description Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Ca	Supples Geogra Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe	t Wage Zone A st Wage Zone A	Non Union Non Union Non Union Non Union Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar	Quan	Wage Factors           00         Image: Comparison of the com	Scale 2 Factor 1.50 1.50 1.50 1.50 1.50 1.50 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00 2.00 2.00 2.00 2.00 2.0
	Labor Con columns here to User Defined 1 + 10000 + 10001 + 10002 + 10003 + 10003 + 10004 + 10005 + 10005 + 10005	struction Equipment group Resource Code LSUPF LSUFW LSUC LSUBM LSUC LSUBM LPF2 LPF2 LPF3 LPF4	Rented Construction Description Carponter Journey. Foreman Dire Foreman Dire Foreman Dire Foreman Dire Foreman Dire Foreman Dire Foreman Pipefiter Pipefiter B	Equipment Installed Material Resource File Description Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Ca	Supples Geogra Area Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe	Wage Zone A st Wage Zone A	Non Union Non Union Non Union Non Union Non Union Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar	Quan	Wage Factors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors	Scale 2 Factor 1.50 1.50 1.50 1.50 1.50 1.50 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00 2.00 2.00 2.00 2.00 2.0
1	Labor Con columns here to User Defined 1 + 10000 + 10001 + 10002 + 10003 + 10003 + 10004 + 10005 + 10005 + 10005	struction Equipment group Resource Code LSUPF LSUFF LSUFW LSUC LSUFW LSUC LSUFW LSUC LSUFM LSUC LSUFM LSUC LSUFM LSUC LSUFF LSUC LSUFF LSUC LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUFF LSUF	Rented Construction Description Carporter Journey. Foreman Pape Foreman Ion Foreman Dolermaker Lead Pape Fabricator Journeyman Apenter Papefitter A	Equipment Installed Material Resource File Description Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Ca	Supples Geogra Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe Southwe	Wage Zone A     Wage Zone A     Wage Zone A     wage Zone A     st Wage Zone A	Non Union Non Union Non Union Non Union Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly Hourly Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar	Quan	Wage Factors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors           00         Image: Comparison of the sectors         Image: Comparison of the sectors	Scale 2 Factor 1.50 1.50 1.50 1.50 1.50 1.50 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00 2.00 2.00 2.00 2.00 2.0

### 3.8.2.3 RESOURCE COST DETAILS

Labor resources are now in the system a user can apply rates to those resources.

#### STEP BY STEP – RESOURCE COST DETAIL

- 1. From the Ribbon, select the Actions tab.
- 2. Under the View section, select the Resource **Cost Details** option. The **Resource Cost Details Register** opens.
- 3. **NOTE** Create a view to mirror the accompanying excel sheet or create one to bring in the associated resource cost in the details register.
- 4. From the Saved views drop down, select the Labor view to filter down to only labor resources.
- 5. Right click a column header and select Column Chooser.
- 6. Drag and drop the columns into the view identified below.

.09	t Breakdown St	ructure (CBS) F	tegister	Resource	e Rate Register	Resource	Cost Details Regis	ter O										
99	columns here to g	proup												Find: [S	earch For]	Saved views: Labor	lev	•
	Resource E	Scale 🖭 🕇	Total	Labor	Labor Base	Labor Burden	Labor Fringes	Travel	Premium	Holiday	Savings	Pension	Vacation	5 🛃 Sort Ascending	Apprenticeship	Undefined Fringe 1	Indefined Fringe2	Unde
1	LBM1	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	21 Sort Descending	\$0.00	\$0.00	\$0.00	
	LBM2	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Clear All Sorting	\$0.00	Customize		×
	LC2	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.~	\$0.00	\$0.00	\$0.00	12 A	\$0.00	Drag a column from	n below to place it into register.	o the
	UPF1	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	1.00	\$0.00	\$0.00	Group By This Column	\$0.00	Custom Caption	Default Caption	
	LPF2	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Hide This Column	\$0.00	Adjustment	Adjustment Allowance	1
	LPF3	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	Remove All Columns	\$0.00	Allowance	Allowance	
	UPF4	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	67.00	Go To Column (Ctrl+G)	\$0.00	Allowance	Allowance	
	LSUBM	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Column Chooser	\$0.00	Apply	Apply	
	LSUC	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	Standard Tax	Standard Tax	
	LSUIW	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	*A* Best Fit	\$0.00	Business Taxes	Business Taxes	
	LSUPF	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Best Fit (all columns)	5	business Taxes	Business Taxes	
														✓ Fixed None		Consumption Rate	Consumption Rate	
														Fixed Left		Contingency	Contingency	
														Fixed Right		Allowance	Allowance	
														Change Caption		Custom Category1	Custom Category1	
														Reset Caption		Fees	Fees	
														Reset All Captions		rees	rees	
															·	Fees Undefined 1	Fees Undefined 1	,

**Example of columns** – The level of detail and utilization of specific cost categories is a decision for each organization:

- User Defined 1 Non editable fields from resource rates register
- Resource Code Non editable fields from resource rates register
- Description Non editable fields from resource rates register
- Resource File Description Non editable fields from resource rates register
- · Geographic Area Non editable fields from resource rates register
- · Wage Zone Non editable fields from resource rates register
- Organizational Category Non editable fields from resource rates register
- · Scale Non editable fields from resource rates register

- Labor Base
- Travel
- Premium
- Holiday
- Savings
- Pension
- Vacation
- Subsistence
- Health & Welfare
- Apprenticeship
- Undefined Fringe 1
- Undefined Fringe 2
- Undefined Labor Fringes
- Bodily Injury & Property Damage
- Workers Compensation
- Undefined Insurance1
- Undefined Insurance2
- Undefined Labor Insurance
- FICA
- FUTA
- SUTA
- Undefined Tax1
- Undefined Labor Taxes
- Undefined Labor Burden
- Undefined Labor
- Construction Supplies
- Undefined Materials
- Undefined
- Billing Rate
- Billing Rate Markup
- Billing Rate Markup %

## 3.8.3 FILTER/SORT/PASTE - RESOURCE COST DETAILS REGISTER

The Labor upload view brings in the columns required to enter Labor base, burdens etc. Every Labor resource has three rows created with Scales 1,2,3. The Scale Column is used to setup Straight time, Over time, Double time.

Co	st Breakdown St	ructure (CBS) R	egister	Resource	ce Rate Register	·	Resource	Cost Details Regis	ter 🕴
)ra	g columns here to g	roup							
	Resource 🛓	Scale 🖭	Total	Labor	Labor Base	Labor	Burden	Labor Fringes	Travel
	LBM1	1	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$
	LBM1	2	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$
	LBM1	3	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$
	LBM2	1	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$

#### STEP BY STEP – FILTER RESOURCE COST DETAIL REGISTER

- 1. From the Scale column header, click the filter icon..
- 2. Set the From and To values to 1.

ao	columns here to	group						-							
	User Defined 1	Resource E	Description		Resource Fil Description	e	Organizational Category		Geographic Area	Wage Zone	Scale 🖭 🍸	Total	Labor Base	Travel	P
•	10009	LBM1	Lead Boilerr	naker	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A	Values Nu	meric Filter	s	\$0.00	
	10010	LBM2	Journeyman	n Boilermaker	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0.00	
	10000	LC2	Carpenter J	lourneyman	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A	From 1		To 1	\$0.00	
	10005	LPF1	Lead Pipe F	abricator	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0.00	
	10006	LPF2	Journeyman	n Pipefitter	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A	••			\$0.00	
	10007	LPF3	Pipefitter A		Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0.00	
	10008	LPE4	Pipefitter B		Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0.00	
	10004	LSUBM	Foreman Bo	ilermaker	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0.00	
	10003	LSUC	Foreman Cir	vil	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0.00	
	10002	LSUIW	Foreman Ire	n	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0.00	
	10001	LSUPF	Foreman Pig	oe.	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0.00	

- 3. Back on the excel spreadsheet, highlight the base rates to bring in.
- 4. Right click and select **Copy** in the context menu.

30		I × √	f <sub>x</sub>														
	A	в	c	M	N	0	P	Q	R	S	т	U	V	w	х	Y	Z
Requ	uired			T.													
Valio	dated Field	_															
Not I	Required	_															
		Resource Rate					Cost Details Re										
User		Resource Code					Labor Base	<ul> <li>Travel</li> </ul>	Y Premium								Undefined Fringe 1
	10000		Carpenter Journeyman	1.50					0.0 0.0				0.44	0.00	0.66	0.00	
	10001		Foreman Pipe	1.50					0.0 0.0				0.44	0.00	0.66	0.00	
	10002		Foreman Iron	1.50					0.0 0.0				0.44	0.00	0.66	0.00	
	10003		Foreman Civil	1.50					0.0 0.0				0.44	0.00	0.66	0.00	
	10004	LSUBM	Foreman Boilermaker	1.50	2.00	\$32.92			0.0 0.0	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10005	LPF1	Lead Pipe Fabricator	1.50	2.00	\$33.92	27	10 0	0.0 0.0	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10006	LPF2	Journeyman Pipefitter	1.50	2.00	\$34.92	28	.10 (	0.0 0.0	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10007	LPF3	Pipefitter A	1.50	2.00	\$35.92	29	.10 0	0.0 0.0	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10008	LPF4	Pipefitter B	1.50	2.00	\$36.92	30	.10 (	0.0 0.0	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10009	LBM1	Lead Boilermaker	1.50	2.00	\$37.92	31	.10 (	0.0 0.0	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10010	LBM2	Journeyman Boilermake	r 1.50	2.00	\$38.92	32	.10 (	0.00 0.0	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
										-	_						

5. Go to Estimate. Right click and select **Paste** from the context menu.

t Breakdown 5	tructure (CBS) R	egister Resource Rate	Register Resource Co	ost Details Register 🛛 🔘	Labor Rate Record												
columns here to	group										_	Find:	[Search For]	s	aved views:	Labor View	
User Defined 1	Resource Code	Description	Resource File Description	Organizational Category	Geographic Area	Wage Zone	Scale	Tot	tal	Labor Base	Travel	Premium	Holiday	Savings	Pension	Vacation	Subsistence
10000	LC2	Carpenter Journeyman	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	(D) No	10.0	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10001	LSUPF	Foreman Pipe	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	O De	lata .		\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10002	LSUIW	Foreman Iron	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	-			\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10003	LSUC	Foreman Civil	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00				\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10004	LSUBM	Foreman Bollermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	Co Co			\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10005	LP#1	Lead Pipe Pabricator	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	E Es			\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10006	LPF2	Journeyman Pipefitter	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	1	Down		\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10007	LPF3	Pipefitter A	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00		ik this field t		\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10008	LPF4	Pipefitter B	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	문 Un	Link from E	icel	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10009	LBM1	Lead Bollermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	\$0.00	\$0.0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10010	LBM2	Journeyman Bollermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.

6. You will be prompted with a **Are you sure you want to insert these values?** message as before. Select **Yes** to continue.

## 3.8.4 MANUAL SET-UP OF SCALES 2 & 3 - OPTIONAL

If the organization wants to have more in-depth cost details for each scale rather than using scale factors the same procedure will be utilized to copy Labor burden, fringes, and other add-ons to setup Scale 2 & Scale 3.

NOTE For Base Wage Factor Columns will not be active if your organization is using method 2.

## 3.8.4.4 RESOURCE RATE REGISTER

t Bri	eakdow	n Structure (CBS) Reg	gister	Resource Rate Reg	pister O Resou	arce Cost Details Regi	ster	Labor Rate	Record								
L	abor	Construction Equipment	Rented Con	struction Equipment	Installed Material	Installed Equipment	Supples	Unique									
colu	mns her	e to group												Fin	d: [Search For	]	Saved views: P
Res Cod	ie is	Resource Type		Descriptio	n	Resource File Description		Unit of Measure		Productivity Factor	Default Quantity	Waste % Add-on	Unit Cost (Scale 1)	Unit Cost (Scale 2)	Unit Cost (Scale 3)	Currency	Use Base Wage Factors
+	LBM1	Labor Rate		Lead Bole	rmaker	Standard Labor Rate Fi	le	Hour		1.00	1.00		\$37.90	\$46.65	\$62.20	U.S. Dollar	
+	LBM2	Labor Rate		Journeym	an Bolermaker	Standard Labor Rate F	le	Hour		1.00	1.00		\$38.90	\$48.15	\$64.20	U.S. Dollar	
+	LC2	Labor Rate		Carpenter	r Journeyman	Standard Labor Rate Fi	le	Hour		1.00	1.00		\$28.90	\$33.15	\$44.20	U.S. Dollar	
+ 1	LPF1	Labor Rate		Lead Pipe	Fabricator	Standard Labor Rate Fi	le	Hour		1.00	1.00		\$33.90	\$40.65	\$54.20	U.S. Dollar	
+	LPF2	Labor Rate		Journeym	an Pipefitter	Standard Labor Rate Fi	le	Hour		1.00	1.00		\$34.90	\$42.15	\$56.20	U.S. Dollar	
+	LPF3	Labor Rate		Pipefitter	A	Standard Labor Rate Fi	le	Hour		1.00	1.00		\$35.90	\$43.65	\$58.20	U.S. Dollar	
+	LPF4	Labor Rate		Pipefitter	в	Standard Labor Rate Fi	le	Hour		1.00	1.00		\$36.90	\$45.15	\$60.20	U.S. Dollar	
+	LSUBM	Labor Rate		Foreman	Bollermaker	Standard Labor Rate F	le	Hour		1.00	1.00		\$32.90	\$39.15	\$52.20	U.S. Dollar	
+	LSUC	Labor Rate		Foreman	Civil	Standard Labor Rate Fi	le	Hour		1.00	1.00		\$31.90	\$37.65	\$50.20	U.S. Dollar	
+ 1	LSUTW	Labor Rate		Foreman	Iron	Standard Labor Rate Fi	le 🛛	Hour		1.00	1.00		\$30.90	\$36.15	\$48.20	U.S. Dollar	
+	LSUPF	Labor Rate		Foreman	Pine	Standard Labor Rate F	le	Hour		1.00	1.00		\$29.90	\$34.65	\$46.20	U.S. Dollar	<ul> <li>Image: A set of the set of the</li></ul>

## **3.8.4.5 RESOURCE COST DETAILS REGISTER**

Со	st Breakdown St	ructure (CBS) Re	gister	Resource Rate R	egister	Resource Cost	t Details Register 🛛 😡	L	abor Rate Record				
Dra	g columns here to g	roup											
	User Defined 1	Resource Code	Descriptio	n	Resource Fil Description	le	Organizational Category		Geographic Area	Wage Zone	Scale	Ŧ	Total
÷	10000	LC2	Carpente	r Journeyman	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A		2	\$33.1
	10001	LSUPF	Foreman	Pipe	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A		2	\$34.6
	10002	LSUIW	Foreman	Iron	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A		2	\$36.1

## STEP BY STEP – MANUAL SETUP OF SCALES

- 1. From the Scale column header, click the filter icon..
- 2. Set the From and To values to 2.

.05	t Breakdown S	tructure (CBS) R	legister	Resource Rate	Register	Resource Co	ost Details Register 🛛 🔘	Labor Rate Record							
rag	columns here to	group				-									
	User Defined 1	Resource Code	Descriptio	on	Resource Fi Description	e	Organizational Category	Geographic Area	Wage Zone	Scale	Ŧ	Total	Labor Base	Tra	vel
•	10000	LC2	Carpente	er Journeyman	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A	Values	Nu	meric Filter	s		\$0
	10001	LSUPF	Foreman	Pipe	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		-		-		\$0
	10002	LSUIW	Foreman	Iron	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A	From	2		To 2		\$0
	10003	LSUC	Foreman	Civil	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A						\$0
	10004	LSUBM	Foreman	Boilermaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A	·		-	•	-	\$0
	10005	LPF1	Lead Pipe	e Fabricator	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A						\$0
	10006	LPF2	Journeyr	nan Pipefitter	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A						\$0
	10007	LPF3	Pipefitter	A	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A						\$0
	10008	LPF4	Pipefitter	в	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A						\$0
	10009	LBM1	Lead Boil	ermaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A						\$0
	10010	LBM2	Journeyr	nan Boilermaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A	_					\$0

- 3. Back on the excel spreadsheet, highlight the base rates to bring in.
- 4. Right click and select **Copy** in the context menu.

/30	*	I × √	fx															
()	A	В	с	м	N	0	P		Q	R	S	Т	U	V	W	х	Y	z
Reg	uired																	
Vali	idated Field	_																
Not	Required	_				_												
_																		
		Resource Rate					e Cost Details											
Use		Resource Code		*Scale Factor 2 ¥			Labor Base	<ul> <li>Trav</li> </ul>										Undefined Fringe 1
	10000		Carpenter Journeyman	1.50		\$28.92		22.10	0.00				0.66	0.44				0.0
		LSUPF	Foreman Pipe	1.50		\$29.93		23.10	0.00				0.66	0.44	0.00			0.0
		LSUIW	Foreman Iron	1.50		\$30.92		24.10	0.00				0.66	0.44				
	10003		Foreman Civil	1.50		\$31.92		25.10	0.00				0.66					0.0
		LSUBM	Foreman Boilermaker	1.50				26.10	0.00				0.66	0.44				0.0
	10005	LPF1	Lead Pipe Fabricator	1.50		\$33.92		27.10	0.00		0.22		0.66	0.44	0.00			0.0
	10006	LPF2	Journeyman Pipefitter	1.50	2.00	\$34.92		28.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10007	LPF3	Pipefitter A	1.50		\$35.92		29.10	0.00	0.00	0.22	0.00	0.66	0.44				
	10008	LPF4	Pipefitter B	1.50	2.00	\$36.92		30.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66		0.0
	10009		Lead Boilermaker	1.50		\$37.92		31.10	0.00				0.66	0.44	0.00			0.0
	10010	LBM2	Journeyman Boilermaker	1.50	2.00	\$38.92		32.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0

5. Go to Estimate. Right click and select Paste from the context menu.

st Breakdown S	tructure (CBS) Re	gister	Resource Rate	Register	Resource Cos	t Details Register 🛛	Labor Rate Record									
g columns here to	group									_					Find:	[Search For.
User Defined 1	Resource Code	Descriptio	n	Resource Fi Description	le	Organizational Category	Geographic Area	Wage Zone	Scale	т	Total	Labor Ba	se	Travel	Premium	Holiday
10000	LC2	Carpente	r Journeyman	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$33.15		\$77.15		\$0.00	\$0
10001	LSUPF	Foreman	Pipe	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$34.65					\$0
10002	LSUTW	Foreman	Iron	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$36.15	G	) <u>D</u> el	ete		\$
10003	LSUC	Foreman	Divil.	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$37.65					\$0
10004	LSUBM	Foreman	Boilermaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$39.15					\$0
10005	LPF1	Lead Pipe	Fabricator	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$40.65	C				\$0
10006	LPF2	Journeym	an Pipefitter	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$42.15	1.4	Eill	Down		\$0
10007	LPF3	Pipefitter	A	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$43.65			k this field to	Excel	\$0
10008	LPF4	Pipefitter	B	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$45.15	8	<u>U</u> nl	ink from Exc	el	\$0
10009	LBM1	Lead Bole	rmaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$46.65		\$46.65	\$0.00	\$0.00	\$0
10010	LBM2	Journeym	an Bollermaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$48.15		\$48.15	\$0.00	\$0.00	\$

- 6. You will be prompted with a **Are you sure you want to insert these values?** message as before. Select **Yes** to continue.
- 7. Follow the same procedure for scale 3.

#### 3.8.4.6 NON LABOR RESOURCE SETUP

The same principles can be applied for the other resource types within InEight Estimate. This procedure covers installed material, but can also be used for the other six resource types.

## 3.8.5 CREATING A MATERIALS SAVED VIEW -RESOURCE RATE REGISTER

Create a view to mirror both the register and excel sheets to easily bring information back and forth from the two applications.

#### Example of columns

- User Defined 1
- Resource Code
- Description
- Resource File Description Validated Tag field
- Geographic Area Validated Tag field
- Wage Zone Validated Tag field
- Organizational Category Validated Tag field
- Tag 1 Validated Tag field
- Tag 2 Validated Tag field
- Currency Validated Tag field
- Apply Standard Tax Validated Tag field
- Unique Sales Tax
- Unit of Measure Validated Tag field

## 3.8.6 CREATING A MATERIAL RESOURCE

Follow the step by step once you have information filled out in excel.

#### STEP BY STEP – CREATING THE RESOURCE

- 1. Open the excel file.
- 2. Sort the sheet by sequential number in the **Sort Code** field.
- 3. Highlight the cells you want to bring into the estimate.
- 4. Copy the cells using right click and selecting **Copy** from the context menu.

	utoSave On	) ຜູ້າ ⊲				InEight Resource	and import of	origineetaita - a	neo to oneo neo	intrigina -				Ray
Fi	le Home	Insert Pag	e Layout Formulas Data	Review View Add-in	s Help	BLUEBEAM		ower Pivot Te	am 🛛 🖓 Tell me	what you w	ant to do			
4 (45) 7	te dipboard	B 7	• 11 • A* A* = <u>U</u> •   ⊞ •   <u>Δ</u> • • <u>A</u> • = Font s	=	& Center 🔹	Sensitivity Sensitivity	ral % * 5 Number	Conditio				∑ AutoSum ~ ↓ Fill ~ ♦ Clear ~ Edit	Z V Sort & Find & Filter v Select v	Create PDF Change Sett Batch PDF Bluebeam
7	~	i X 🗸	f <sub>r</sub> 10000											
4	A	B	С	D	E	F		G	н		J	К	L	М
		Required												
l		Validated Field												
L		Not Required												
L									er based on Design	Decision It	em #67			
Ļ							Rate Register							
		Resource Code -		Resource File Description 💌	Geographic /	Area 👻 Wage Zo				Tag 2 👻		oply Standard Tax		
	10000	MAAM	Asphalt Mix (Finish)	Standard Material Rate File			Aspha		Pave		U.S. Dollar	TRUE		Ton
	10001	MAC	Asphalt Cement	Standard Material Rate File			Aspha		Plant Asphalt		U.S. Dollar	TRUE		Ton
	10002	MACA1-1/2	Coarse Aggregate 1-1/2 In	Standard Material Rate File			Aspha		Plant Asphalt		U.S. Dollar	TRUE		Ton
	10003	MAFA	Fine Aggregate	Standard Material Rate File			Aspha		Plant Asphalt		U.S. Dollar	TRUE		Ton
	10004	MAHAUL	Aggregate Haul Quarry to Plant				Aspha		Plant Asphalt		U.S. Dollar	TRUE		Ton
4	10005	MAIA3/4	Intermediate Aggregate 3/4 In	Standard Material Rate File			Aspha		Plant Asphalt		U.S. Dollar	TRUE		Ton
	10006	MASAND	Sand	Standard Material Rate File			Aspha		Plant Asphalt		U.S. Dollar	TRUE		Ton
	10007	MATK	Tack	Standard Material Rate File			Aspha		Pave		U.S. Dollar	TRUE		Gallon
	10008	MBR	Aggregate Base Rock	Standard Material Rate File			Base S		Aggregate Base		U.S. Dollar	TRUE		Ton
	10009	MC2000	Concrete 4000 PSI	Standard Material Rate File			Concre		Concrete		U.S. Dollar	TRUE		Cubic Yard
	10010	MC3500	Concrete 3500 PSI	Standard Material Rate File			Concre		Concrete		U.S. Dollar	TRUE		Cubic Yard
	10011	MDIRTA	Dirt Class A	Standard Material Rate File			Earthy		Water/Sewer		U.S. Dollar	TRUE		Cubic Yard
	10012	MDIRTB	Dirt Class B	Standard Material Rate File			Earthy		Water/Sewer		U.S. Dollar	TRUE		Ton
L	10013	ММН	Manhole Precast 4 Ft	Standard Material Rate File			Manh	oles	Manhole		U.S. Dollar	TRUE	5	Each
		Labor Owned	Eqp Rental Eqp Perm	anent Equipment Materia	als Suppl	lies (+)				1.4				
												rage: 5005.75 Cou		

- 5. Open Estimate to the Resource Rate Register.
- 6. Select the **User Defined 1** column in the Installed Material tab of the Resource Rate Register.

AL	Labor	Const	ruction Equipment	Rente	ed Construction Equ	pment	Installed Materia
Drag	columns he	re to gr	oup	4			
	User Defined 1		Resource Code	(	Description		esource File escription
÷ [		•	New				
		ø	Delete				
		3<	Cut				
		9	Сору				
		ß	Paste				
		+	Eill Down				
		品	Link this field to I	Excel			
		思	UnLink from Exce	el			
		国	Copy to Besource	e File			

7. Right click the empty cell and select **Paste** from the context menu. A pop up will appear asking **Are you sure you want to insert the selected values?** 

8. You will be prompted with a **Are you sure you want to insert these values?** message. Click **Yes** to continue.

## 3.8.7 CREATE A MATERIAL SAVED VIEW - RESOURCE COST DETAILS REGISTER

Installed Material Resources are now in the system. You can apply rates to those resources. Create a view to mirror the accompanying excel sheet or create one to bring in the associated resource cost in the details register.

#### STEP BY STEP – MATERIAL SAVED VIEW

- 1. From the Ribbon, select the Actions tab.
- 2. Under the View section, select the Resource **Cost Details** option. The **Resource Cost Details Register** opens.
- 3. NOTE Create a view to mirror the accompanying excel sheet or create one to bring in the associated resource cost in the details register.
- 4. From the Saved views drop down, select the **Installed material** view to filter down to only material resources.
- 5. Right click a column header and select **Column Chooser**.
- 6. Drag and drop the columns into the view identified below.

st B	reakdown Str	ucture (CBS) R	egister	Resource	ce Rate Register	Resource	Cost Details Regis	ter O										
g col	umns here to gr	oup						_						Find:	[Search For]	Saved views: Labo	r View	•
Re Co	de 🛌	Scale 📐 🝸	Total	Labor	Labor Base	Labor Burden	Labor Fringes	Travel	Premium	Holday	Savings	Pension	Vacation	Sort Ascending	Apprenticeship	Undefined Fringe 1	Undefined Pringe2	Und
LBR	м1	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	Sort Descending	\$0.00	\$0.00	\$0.00	
LBT	M2	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Clear All Sorting	\$0.00	Customize	m below to place it into	×
LC	2	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.~	\$0.00	\$0.00	\$0.00	Sec. A REAL	\$0.00	Drag a column fro	register.	
LIPF	F1	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	1.00	\$0.00	\$0.00	Group By This Column	\$0.00	Custom Caption	Default Caption A	
LP	F2	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Hide This Column	\$0.00	Adjustment Allowance	Adjustment Allowance	÷.
	13	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	Remove All Columns	\$0.00	Anomarice	Allowance	
	F4	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	67.00	Go To Column (Ctrl+G)	\$0.00	Allowance	Allowance	
	JBM	1	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	E Column Chooser	\$0.00	Apply	Apply	
	UC	1	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	Standard Tax	Standard Tax	
	UIW	1	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	<a+ best="" fit<="" td=""><td>\$0.00</td><td>Business Taxes</td><td>Business Taxes</td><td></td></a+>	\$0.00	Business Taxes	Business Taxes	
LS	UPF	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Best Fit (all columns)	Su		Constructor Constru	
														✓ Fixed None		Consumption	Consumption Rate	
														Fixed Left				
														Fixed Right		Contingency Allowance	Contingency Allowance	
														Change Caption		Custom Category1	Custom Category1	
														Reset Caption		Custom Category 1	Custom Category 1	
																Fees	Fees	
														Reset All Captions				
																Fees Undefined 1	Fees Undefined 1	

**Example of columns** – The level of detail and utilization of specific cost categories is a decision for each organization:

- User Defined 1 Non editable fields from resource rates register
- Resource Code Non editable fields from resource rates register
- Description Non editable fields from resource rates register
- Resource File Description Non editable fields from resource rates register
- Geographic Area Non editable fields from resource rates register
- Wage Zone Non editable fields from resource rates register
- · Organizational Category Non editable fields from resource rates register
- · Unit of Measure Non editable fields from resource rates register
- · Currency Non editable fields from resource rates register
- Total Non editable fields from resource rates register
- Installed Materials
- Undefined Materials
- Sales Taxes
- Undefined Fees
- Undefined
- Billing Rate
- Billing Rate Markup
- Billing Rate Markup %

# 3.9 QUANTITY CHECKING

The Quantity Checking feature allows you to compare the quantity of a superior cost item to the sum of its relevant subordinate cost item quantities. This setting enables the use of the **Quantity Check** and **Quantity Warning** columns in the Cost Breakdown Structure. The use of these columns can assist in confirming whether or not your quantities are correct.

#### NOTE

The subordinate cost item quantities need to have the same unit of measure as the superior cost item before you are able to choose the Quantity Check column.

In the example below, break a concrete pour cost item into four subordinate parts. The Forecast (T/O) Quantity of the superior item will be 156875.00 tons of concrete. Start by dividing each of the four parts into 35000.00 tons each. Once you have broken out this concrete pour, determine if you need a

fifth pour or if you should distribute the remaining quantity to the four pours. The factors you keep in mind are the trips and time involved in the extra pour vs capacity of equipment.

#### STEP BY STEP – QUANTITY CHECKING

- 1. From the Ribbon, select the **Setup** tab.
- 2. Under the section Initialize, select Job Properties. Then select the Cost Basis tab.
  - NOTE Quantity checking starts by turning the feature on in the Job Properties. If you want to have quantity checking turned on for all jobs in Estimate, then this setting needs to be turned on in the **Master Job Properties**. The Master Job Properties is located in the **Library**.
- 3. From the Rules data box, select the Activate Quantity Checking check box.

File Se	tup Est	timate Qu	ote Price	Execution	S	ystem	Integration	s			
0	י≞ [	1	) 🗂		🖈 Lai	bor uipment		<b>a</b>			
ob Propertie	es Founda Setup Da			rd Resource Rates *	Ma		Resource Assemblies	Cost Item Assemblies	Standard Tables	d Reports	
	I	nitialize			Res	ources		Assen	nblies	Reports	
Cost Break	down Strue	cture (CBS) Re	egister	Job Propertie	s Ø						
Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fu	el Cost	Job Tracking	Job Folde	er Tags	Competitors	Pricing
-Standard S	Shift Arrange	ments	Standard W	age Rate Compo	site	Rule	s				
	urs per Shift ırs per Shift:		Scale 1 Scale 2				Lock Cost Item Pay Item Unit F Activate PBS Cl	Price Precisio		2	
	fts per Day:	1.00	Scale 3				Activate Quant Maintain CBS S	-		0	
	s per Week:	5.00	Child	/ Rate Calculato	1r		When man-cou	et changes		hange UM / Ma	n-Hour

- 4. Next bring a couple of columns into your view on the Cost Breakdown Structure (CBS) Register. Right click on the column header and choose **Go To Column**.
- 5. The Go To Column dialog box appears. Have the **Include columns that are not currently in the view** check box selected.

CBS Position ៉ Code	Description	Unit of Measure	Quantity Driver	Cost Source	Cost Segment	Unit Cost	Total Cost (Forecast)	Hours (Duration dri	ven)	Days (Duration driven)	Labor Total C	ost
+ 4.2	Finegrade Subgrade	Square Yard	Superior CI	Detail	Direct Cost	\$0.19	\$75,848.36		320.00	40.00	\$39	9,46
<b>4</b> .3	Install Aggregate Base	Ton	Superior CI	Detail	Direct Cost	\$2.17	\$97,567.33		560.00	70.00	\$50	),75
+ 4.3.1	Place Aggregate Base	Ton	Superior CI	Detail	Direct Cost	\$1.63	\$73,460.92		240.00	30.00	\$33	8,88
+ 4.3.2	Blue Top Aggregate Base	Square Yard	Superior CI	Detail	Direct Cost	\$0.06	\$24, 106.42		320.00	40.00	\$16	,87
<b>■</b> 5	Asphalt Concrete Hot Mix Type A	Ton	Pay Item	Detail	Direct Cost	\$42.62	\$1,491,580.59		466.67	52.50	\$108	3,95
+ 5.1	Furnish & Haul Hot Mix	Ton	Superior CI	Detail	Direct Cost	\$39.27	\$1,374,562.54		233.33	29.17	\$50	,01
+ 5.2	Install Hot Mix Type A	Ton	Superior CI	Detail	Direct Cost	\$3.34	\$117,018.05		233.33	23.33	\$58	,94
= 6	36 Inch RCP Culvert Class III	Linear Feet	Pay Item	Detail	Direct Cost	\$67.54	\$69,159.49	_	149.30	18.66	\$20	,o7
+ 6.1	Furnish RCP Materials	Linear Feet	Superior CI	Detail	D 🛞 Go	To Column	- 0	×	0.00	0.00		\$
+ 6.2	Excavate RCP Trench	Cubic Yard	Superior CI	Detail	Di Column:			¥	37.17	4.65	\$4	1,96
+ 6.3	Install RCP Pipe	Linear Feet	Superior CI	Detail	Di	A Custom C	aption	-	Default Ca	ption	Visi	
+ 6.4	Backfill RCP Pipe	Cubic Yard	Superior CI	Detail	D Include co	Period Count I	Mismatch			nt Mismatch	No	
= 7	Concrete Pour	Ton	Superior CI	Detail	Di	Phase Code			Phase Cod	e	No	
+ 7.1	Concrete Batch One	Ton	Fixed	Detail	Discussion	Plug Days			Plug Days		No	
+ 7.2	Concrete Batch Two	Ton	Fixed	Detail	La cur uni	Quantity Chee	sk -		Quantity C	heck	No	
+ 7.3	Concrete Batch Three	Ton	Fixed	Detail	Direct Cost	Quantity Drive	Br		Quantity D	river	Yes	
+ 7.4	Concrete Batch Four	Ton	Fixed	Detail	Circuit Curi	Quantity Warr	ning		Quantity V	/arning	No	
8	10 Inch PVC Force Main (SDR21)	Linear Feet	Pay Item	Detail	Direct Cost	Quote Group			Quote Gro	up	No	۳

6. Click **OK** when you have selected your preferred columns.

Next, toggle the check box for the Quantity Check column.

□ 7	Concrete Pour	156,875.00	Ton	✓		Superior CI
+ 7.1	Concrete Batch One	35,000.00	Ton 🥢			Fived
+ 7.2	Concrete Batch Two	35,000.00	Ton		Remaining Quant	ity: 16,875.00 Ton
+ 7.3	Concrete Batch Three	35,000.00	Ton		$\checkmark$	Fixed
+ 7.4	Concrete Batch Four	35,000.00	Ton		$\checkmark$	Fixed

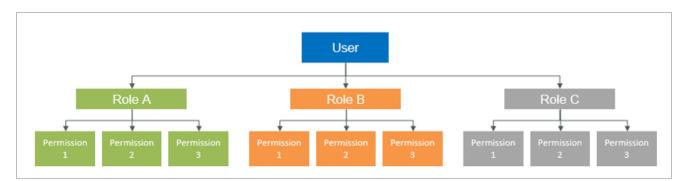
- 7. NOTE As you check Quantity Check for the four batches of Concrete, the superior cost item Quantity Warning turns yellow. This is indicating a quantity warning. Hover your mouse over the superior cost item Quantity Warning column. Then, an overlay message appears showing the quantity discrepancy. Apply this discrepancy to the Subordinate cost items. That way, the superior cost item with be the sum of the parts.
- 8. The remaining quantity is 16875.00 tons which does not warrant a fifth pour.

## 3.10 SECURITY IN ESTIMATE

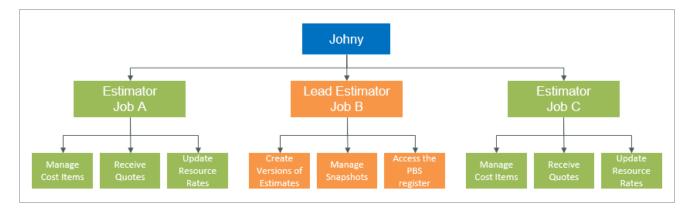
## 3.10.1 ROLE BASED PERMISSIONS

Estimate uses a role-based security model, where users can be assigned to a role on a project. A role identifies if a user has been granted access for various permissions to perform defined functions in Estimate.

A role is a collection of permissions that defines a user's responsibilities on a project or in an organization.



For example, Johny can be an Estimator on Job A and a Lead Estimator on Job B, giving him elevated permissions to perform actions that a less responsible estimator may not permitted to perform.



Roles are created and managed in the Roles and Permissions page in the Suite Administration section of InEight Platform (Suite Administration > **Roles and permissions**).

œ	) 🗹 🛞 🖬 🏌		0 🗇 🗘	Q
	Name 🕇 📃 🛨	Description	Administrator level	
	Account Administrator	Account Administrator	Level 3 - Account Admin	
	Account Administrator- All Roles	Account Administrator	Level 3 - Account Admin	
	Account Administrator- Copy	Account Administrator	Level 3 - Account Admin	
	AJL New Role LIV	testing synch of roles to estimate	Level 3 - Account Admin	
	AJL Role Z	test role to do something somewhere	Level 1 - Project Admin	
	AJL Role ZZ	maybe this is the last roled	Level 2 - Organization Admin	
	AL - NoEditRole	Role cannot edit library	Level 3 - Account Admin	
	AL - YesEditRole	Role can edit library	Level 3 - Account Admin	
	AL Role A	Role A for use in test cases	Level 3 - Account Admin	
	AL Role B	can delete snapshots	Level 3 - Account Admin	
	AL Role C	Role to test more stuff	Level 3 - Account Admin	
	AL-no Templates, No Library	user cannot access Library or Templates	Level 3 - Account Admin	
	Default Role	Default Role	Level 0 - Base	
	Dev/Ops Administrator	Dev/Ops Administrator	Level 3 - Account Admin	
	Estimate-AddJob-noViewSnapshot	Testing Estimate permissions scenario	Level 3 - Account Admin	
	Estimate-AddJob-ViewSnapshot	Testing Estimate permissions scenario	Level 3 - Account Admin	
	Estimate-AddSnapshot	Testing Estimate permissions scenario	Level 3 - Account Admin	
	Estimate-noAddJob-ViewSnapshot	Testing Estimate permissions scenario	Level 3 - Account Admin	
	Estimate-ViewSnapshot	Testing Estimate permissions scenario	Level 3 - Account Admin	
	Estimator	Estimator	Level 1 - Project Admin	
	Foreman	Foreman	Level 1 - Project Admin	
	Integration Settings	Integration Settings	Level 3 - Account Admin	

The following image shows how the Estimator role has been defined with permissions to launch Estimate, add and edit jobs, and view snapshots, but it does not have permissions to delete jobs or add and edit snapshots.

	oles and permissions					
oles and permissions > Edit role					Cancel	Save
ole details						
ame	Description		* Administrator level			
stimator	Estimator		Level 1 - Project Admin			
ermissions						
Suite administration						~
Organization and project						~
Master data libraries						~
Model						~
Document						~
stimate						^
Select all				Sear	ch	Q
Jobs	Select all	Snapshots	Select all			
<ul> <li>Launch Estimate</li> </ul>		🗹 🐵 View snapshots 📐				
🗹 🕀 Add jobs		Add snapshots				
🗹 💽 Edit jobs		🗌 🖻 Edit snapshots 🕦				
🗌 🛞 Delete jobs		□ ⊗ Delete snapshots				
Sahadula						

For more information on setting up roles in InEight Platform, see <u>Roles & Permissions</u> in the Knowledge Library.

## 3.10.2 SECURITY IN ESTIMATE

The capacity to grant permissions in a job and what can be performed is accomplished with a combination of permissions that exist in both Platform and Estimate.

Generally, permissions managed in Platform determine which users can launch Estimate and who can manage jobs, snapshots, templates and access the Estimate library. Permissions managed in the Estimate determine which users are granted permissions to specific commands and destinations solely in Estimate.

For any user to use Estimate, they need to have a role that has been granted the Launch Estimate permission, which is found in the Estimate blade of the Roles and permissions page when editing the details of a role.

lole details					
Name	Description	* Administrator level			
Estimator	Estimator	Level 1 - Project Admin	· ()		
Permissions					
Suite administration					~
Organization and project					~
Master data libraries					~
Model					~
Document					~
Estimate					^
Select all			(	rch	Q
Jobs	Select all	Snapshots			
Launch Estimate		🗹 💿 View snapshots 📐			
✓   Add jobs		□   Add snapshots			
🗹 💽 Edit jobs		<ul> <li>Edit snapshots ()</li> <li>⊗ Delete snapshots</li> </ul>			

## 3.10.3 GRANTING PERMISSIONS TO ACCESS JOBS AND SNAPSHOTS

When creating jobs in Estimate, it is required to associate new estimates with existing Platform projects and all the related OBS contents.

NOTE Multiple estimates can be assigned to a single Platform project. In this case, permissions granted to users on a project will be the same permissions for all the estimates belonging to that project.

Saved Views *      Colors *     Saved Views *     Colors *     Saved Views *     Colors *     Saved Views *     Colors *     Saved Views *     Saved *     Saved Views *	Estimate Help	.com University		
6 New Job		Platform	projec	ts
Core Project: * Project A4998  Code: * A4998 Description: Clemson Creek Restoration project Auto-Update Job in Connected Analytics OK Cancel	Project A4997 Project A4998 Project A4999	Project Name Project A4997 Project A4998 Project A4999 Project A5 Project A50 Project A500 Project A500	Status New New New New New New	Created Date 4/1/2020 3:56: 4/1/2020 3:56: 4/1/2020 3:56: 4/1/2020 3:52: 4/1/2020 3:52: 4/1/2020 3:52: 4/1/2020 3:56:

This Platform project is used to assign roles for the purposes of granting various permissions.

To grant permissions to a particular user on a Job, go to the User Management page in InEight Platform, edit the user, and then assign the user a role on a project on the Roles tab of the Add or Edit User slide-out panel.

G			Edit user				
+) Add u	users 🗹 🛞				1 DETAILS 2	ROLES	
	First name 1	Lr Statu:	<sup>s</sup> Roles (10)			(+) A	dd role
	<b>T</b>		* Role		* Organization/Project		
	Partner i 9	ACTIV	Estimator		· · · · · · · · · · · · · · · · · · ·	Θ	(i)
	Partner2	Activ	e			1	-
	Partner20	Activ	e		۹.		
	Partner21	F Activ	e Dev/Ops Administrator			Θ	()
	Partner22	Pa Activ	e		2023 Clow Creek Shoreline Restoratio		
	Partner23	Pe Activ			2020 Concrete Repairs Program   499		
	Partner24	F Activ	Superintendant	*	Bridge Deck Repairs and Shoulder Re-	Θ	()
	Partner25	Activ	8		Springbrook Golf Course Dynamic Sig		
	Partner26	Activ	Superintendant	*	Retaining and Noise Wall Rehabilitation	Θ	()
	Partner27	Activ			2020 Clow Creek Shoreline Restoratio		U
	Partner28	Activ	e				
	Partner29	P Activ	Superintendant	*	Steel Structure Training Job   105091 × •	Θ	()
	Partner3	Pa	e				
	Partner30	Pa Activ	e				
	Partner4	r Activ	Superintendant	*	Steel Structure Partner Job   105094 🛛 🗙 🔹	Θ	()
	Partner5	Activ	2				
	Partner6	Activ			Steel Structure Training Job 21 105002		~
	Partner7	Activ	Foreman	*	Steel Structure Training Job 3   105093 🛛 🗙 🔹	Θ	<b>i</b>
	Partner8	Activ	2				
	Partner9	P. Activ	Foreman	*	Steel Structure Training Job 2   105092 × 🔹	Θ	()
	Patrick	Sa	2		-	- (	
	Paul	br Activ	8				
1	Paul	Activ	2				
	Pavan	Not re	29				
	Pavithra	Activ	e		Back Cancel	Sav	

For more information on managing users, see the User Management section in <u>Roles & Permissions</u> in the Knowledge Library.

NOTE In Estimate on-premise, roles are created and managed in the User Roles register. After the role is created, users can be assigned to the role from the list in the Windows Active Directory Users and Groups in Estimate. The Users assigned role as determined by the currently logged in user is used to grant permissions at the application level. Because Estimate on-premise uses the computer's logged in user in determining the user's role, roles cannot be segregated by job. To enforce job-level security in Estimate on-premise, populate the list of users allowed in the job on the Security tab of the Job Properties form.

### 3.10.3.1 ORGANIZATIONAL BREAKDOWN STRUCTURE

Projects in Platform are required to have an Organizational Breakdown Structure (OBS) assignment. The OBS assignments can be utilized for assigning roles and granting permissions to all jobs belonging to a node in the OBS.

In the following example, Johny has been assigned as the Lead Estimator for the Site Work node of the OBS, which grants him the permissions assigned to the Lead Estimator role for every estimate created that belongs to the Site Work node in the OBS.

Email Roles (1)	Roles (1)								
* Role		* Organization/Project							
Lead Estimator	•	Site Work X	<ul> <li>• • • •</li> </ul>						
			a						
			~						
		Site Work	<u>^</u>						
		2023 Clow Creek Shoreline Restoration	49						
		2020 Concrete Repairs Program   4992	404						
		Bridge Deck Repairs and Shoulder Rec	onst						
		Springbrook Golf Course Dynamic Sign	Ins						
		Retaining and Noise Wall Rehabilitation	n ani 🖕						
		4							

**NOTE** Permissions are cumulative, so if a user is assigned multiple roles on a single project, the role with the most permissions is applied when attempting to access various functions.

## 3.10.4 GRANTING PERMISSIONS TO DESTINATIONS AND COMMANDS

Estimate can grant permissions at a deep-rooted level by assigning which roles can access specific forms. You can also assign certain roles that can perform specific commands or actions that can be performed within those forms.

e Setup Estimate	System	Tools Integr	ations Actio	ns												- 0
Print New	Сору	Link Field	14		Ţ		Ö									
Preview 💿 Delete	🚡 Paste + Fill Down	🖑 UnLink Field	Expand / S Collapse	how Clas Accessi	sic Navi ble Obje											
Print	Edit	Workbook		View			Tools									
er Roles Register O					Acce	ss Co	ntrol Register	0								
g columns here to group	Saved views	s: Standard View			Туре	. i.,	- Category	h	]					Saved views:	Standard View	
Role Name 🚊	Description			-	1,100		concyon y									
Estimator	Estimator				Т	Type	h	Categ	pry	h.	Subcategory	'n.	Ribbon Name			
Foreman	Foreman			-		a Co	mmand									
Integration Settings	Integration Se	ettings				1 De	stination									
IS Role	IS Role						Access Contro	ol Regis	iter							
KN ROLE1	KN ROLE1						Account Code	e Utiliza	tion Register							
Lead Estimator	Lead Estimato	r division		-			Account Reco	ord								
MLQ-0	test-level 0						Address Book	Recon	đ							
MLQ-1	test-level 1						Address Book	k Regist	er							
MLQ-2	test-level 2			14			Attachments	Regist	er							
MLQ-3	test-level 3						Bond Cost Ite	m Reco	ord							
MLQ-3- Copy w/Add Projects	test-level 3						Cash Flow									
NP 1	Estimate Full A	Access					Competitor R	ecord								
NP-2	NP-2						Competitors									
Role 01-Engineer	Role 01-Engin	neer					Connected Ar	nalytics								
Role 1 - Engineerr	Role 1-Engine	ber			->		Cost Breakdo	wn Stru	cture (CBS) Register							
Role 2 - Estimatorr	Role 2- Estima	ator				+	Destination	Cost	Breakdown Structure (CBS) R	legister	Form		Cost Breakdo	wn Structure (CE	IS) Register	
Role 3 - Lead Estimator	Role 3-Lead E	Estimator					Cost Curve Re	ecord								
Role 4 - Regional Admin	Role 4- Region	nal Admin					Cost Item As	sembly	Inputs							
Role 5 - Adminn	Role 5- Admin						Cost Item As	sembly	Record							
Role 6 - Settings Admin	Role 6- Setting	gs Admin					Cost Item As									
Role 7 - Engineer @ Root	Role 7- Engine	eer @ Root					Cost Item Re		-							
Role 8- Admin 2	Role 8- Admin	2					Custom Auto	Price R	ecord							
SJ- Role3-Snapshots-Add, vi.	SJ-Role3						Customize									
5		1	time a Li	-			Default Quote	e Recor	d b							
				•	4											

Permissions are managed in the Access Control Register in the Setup tab of the Library.

This register is a list of accessible objects, which can be used to grant or restrict permissions to various roles. By default, the register is organized by type, then by category. Removing the grouping lets you search for key words using the search capabilities of the register.

Access Control Regist	er O					•
ag columns here to grou	qu		×	PBS	1/18 🛛 🔿	× 1
Туре	Category	Ribbon Name				
+ Destination	Fuel Cost Record	Fuel Cost Record				
+ Destination	Geographic Area Record	Geographic Area Record				
+ Destination	Haul Calculator Record	Haul Calculator Record				
+ Destination	Job Properties	Job Properties				
+ Destination	Job Register	Job Register				
+ Destination	Job Snapshots	Job Snapshots				
+ Destination	Job Status Register	Job Status Register				
+ Destination	Main Form	Main Form				
+ Destination	Microsoft Excel	Microsoft Excel				
+ Destination	Organizational Category Record	Organizational Category Record				
+ Destination	Pay Item & Proposal Register	Pay Item & Proposal Register				
+ Destination	Pay Item Record	Pay Item Record				
+ Destination	PBS Change Record	PBS Change Record				
+ Destination	PBS Changes Register	PBS Changes Register				
+ Destination	Period Resource Quantities	Period Resource Quantities				
+ Destination	Price % Add-On Record	Price % Add-On Record				
+ Destination	Price Breakdown Structure	Price Breakdown Structure				
+ Destination	Price Category Record	Price Category Record				
+ Destination	Quantity Roll-Up Record	Quantity Roll-Up Record				
+ Destination	Quote Comparison & Award - Cost items	Quote Comparison & Award - Cost items				
+ Destination	Quote Comparison & Award - Resources	Quote Comparison & Award - Resources				

The Type of the accessible object is one of the following:

• **Command:** Actions that are in the main ribbon navigation.

• **Destination:** A form or location within the application. Restricting this type of permission means that all the actions that are available in the form are unavailable.

• **Register Command:** These are the commands that appear for the specified register and are commonly accessed either by using the actions menu in the navigation ribbon when the register is active or using the right-click context menu commands on the records in a register.

Categories and subcategories can be used to further group and identify various accessible objects.

The Ribbon Name column provides the navigation path and name of the object as it appears in the ribbon navigation. The Show Classic Navigation Accessible Objects button on the Actions tab of the Access Control register can be used to identify accessible objects as they might have existed in the legacy version of Estimate, and are still available to assist users who may have set up Access Control prior to the newer ribbon navigation.

Follow these steps to set up Access Control on an Accessible object:

- 1. Identify the role or roles in the User Roles register, then right-click to copy.
  - In the Access Control register, you can filter on the Role Assigned field to help you see the associated roles with Access Controllable objects.

) - User Roles Reg	ister - Library 🖽 — 🗆	×   (												
lictions			Actions											
Print Copen	Link Field	1	🔤 Print	New C	🖥 Сору	🛱 Link Field	10	<b>—</b>		$\sim$				
Preview 🖥 Copy	JunLink Field		Preview	🙁 Delete 🥤	Paste	JunLink Field	× 1							
Export to Excel			Export to Excel	% Cut	+ Fill Down		Expand / Collapse *	Show Classic Na Accessible Ob		Refresh List of Accessible Objects				
Print Edit	Workbook	^	Print	Edi	t	Workbook		View		Tools				
g columns here to group	Saved views: Standard View -	D	rag columns here to	group							Saved views:	Standard View	N	•
Role Name 🚊	Description		Subcategory	1	Ribbon Name			<u>1</u>	Role As	signed				
1 MR	1 MR		+ Work Breakd		Actions > Edit	t > Copy								
Account Administrator		E.,	+ Work Breakd	own Structur	Actions > Edit	t > Cut								
Account Administrator-	Open		+ Work Breakd	own Structur	Actions > Edit	t > Delete								
Account Administrator-	Сору		+ Work Breakd	own Structur	Actions > Edit	t > Fill Down								
Account Administrator-	Link this field to Excel		+ Work Breakd	own Structur	Actions > Edit	t > New								
Account Administrator-	UnLink from Excel		+ Work Breakd	own Structur	Actions > Edit	t > Open								
Account Administrator- Cop	Account Administrator		+ Work Breakd	own Structur	Actions > Edit	t > Paste								
Account Administrator - Cop	Account Administrator		+ Work Breakd	own Structures	Actions > Edit	t > Copy								
Account Administrator- Jay	Account Administrator		+ Work Breakd	own Structures	Actions > Edit	t > Delete								
Account Administrator - Josh	Account Administrator		+ Work Breakd	own Structures	Actions > Edit > Fill Down									
Account Administrator-KS	Account Administrator		+ Work Breakdown Structures		Actions > Edit > New									
Account Administrator-Lav	Account Administrator-Lav		+ Work Breakd	own Structures	Actions > Edit	t > Open								
Account Administrator- Shu	Account Administrator	-	+ Work Breakd	own Structures	Actions > Edit	t > Paste								
Account Administrator- sree.	Account Administrator		+ Work Breakd	own Structures	Actions > View	w > Clear Filter								
Account Administrator- Sri	Account Administrator		+ Work Breakd	own Structures	Actions > View	w > Default Data Bl	ocks							
ACS Admin	Kiewit ACS Admin		+ Work Breakd	own Structures	Actions > View	w > Filter > Filter to	WBS Level							
22	1		+ Workers Con	np Overrides	Actions > Edit	t > Copy								
			+ Workers Con	np Overrides	Actions > Edit	t > Cut								

2. Select one or more accessible objects in the Access Control register and right-click to paste.

Drag	columns here to group	Saved views: Standard View -		Type 🗽		× Enter text to search						
	Role Name 😐	Description										
÷	Estimator	Estimator	- A	Type iii.	Category	Ribbon Name						
	Foreman	Foreman		+ Destination	Job Status Register	Job Status Register						
	Integration Settings	Integration Settings		+ Destination	Main Form	Main Form						
	IS Role	IS Role		+ Destination	Microsoft Excel	Microsoft Excel						
	KN ROLE1	KN ROLE1		+ Destination	Organizational Category Record	Organizational Category Record						
	Lead Estimator	Lead Estimator division		+ Destination	Pay Item & Proposal Register	Pay Item & Proposal Register						
	MLQ-0	test-level 0		+ Destination	Pay Item Record	Pay Item Record						
	MLQ-1	test-level 1	→	+ Destination	PBS Change Record	PBS Change Record						
	MLO-2	test-level 2	- H.	+ Destination	PBS Changes Register	PBS Changes Register						
	MLQ-3	test-level 3		+ Destination	Period Resource Quantities	Period Resource Quantite						
	MLQ-3- Copy w/Add Projects	test-level 3		+ Destination	Price % Add-On Record	Price % Add-On Record						
	NP 1	Estimate Full Access		+ Destination	Price Breakdown Structure	Price Breakdown Structure Paste						
				+ Destination	Price Category Record	Price Category Record						
	NP-2	NP-2		+ Destination	Quantity Roll-Up Record	Quantity Roll-Up Record						
	Role 01- Engineer	Role 01- Engineer		+ Destination	Quote Comparison & Award - Cost items	Quote Comparison & Awa						
	Role 1 - Engineerr	Role 1-Engineer		+ Destination	Quote Comparison & Award - Resources	Quote Comparison & Awa						
	Role 2 - Estimatorr	Role 2- Estimator		+ Destination	Quote Cost Item Record	Quote Cost Item Record						
	Role 3 - Lead Estimator	Role 3-Lead Estimator		+ Destination	Quote Group Tag Record	Quote Group Tag Record						
	Role 4 - Regional Admin	Role 4- Regional Admin		+ Destination	Quote Group Tags Register	Quote Group Tags Register						
	Role 5 - Adminn	Role 5- Admin		+ Destination	Quote Record	Quote Record						
	Role 6 - Settings Admin	Role 6- Settings Admin		+ Destination	Ouote Register	Ouote Register						
	Role 7 - Engineer @ Root	Role 7-Engineer @ Root		+ Destination	Quote Resource Item Record	Quote Resource Item Record						
	Role 8- Admin 2	Role 8- Admin 2		+ Destination	Reports	Reports						
	SJ- Role3-Snapshots-Add,vi	SJ-Role3										
	55	ALAT II III NATING ALI	•	+ Destination + Destination	Request for Quote (RFQ) Record Request for Quote (RFQ) Register	Request for Quote (RFQ) Record Request for Quote (RFQ) Register						

3. Expand the detail records of the accessible objects to verify the role assignments have been correctly made.

columns here to group	Saved views: Standard View -		Type is					× Enter text to search
Role Name 🚊	Description		Typ	e is.	C	Category	Ribbon Name	
Estimator	Estimator			Destination		lob Status Register	Job Status Register	
Foreman	Foreman		+	Destination		fain Form	Main Form	
Integration Settings	Integration Settings		+	Destination	N	ficrosoft Excel	Microsoft Excel	
IS Role	IS Role			Destination	0	Organizational Category Record	Organizational Category Record	
KN ROLE1	KN ROLE1			Destination		ay Item & Proposal Register	Pay Item & Proposal Register	
Lead Estimator	Lead Estimator division			Destination		Pay Item Record	Pay Item Record	
MLQ-0	test-level 0		_	Destination		BS Change Record	PBS Change Record	
MLQ-1	test-level 1		-	Role		os change Record	POS Cilalige Record	
MLQ-2	test-level 2							
MLQ-3	test-level 3			→ Lead Estin				
MLQ-3- Copy w/Add Projects	test-level 3			Estimator				
NP 1	Estimate Full Access			Destination	P	'BS Changes Register	PBS Changes Register	
NP-2	NP-2			Role				
Role 01-Engineer	Role 01-Engineer			→ Estimator				
Role 1 - Engineerr	Role 1-Engineer			Lead Estin				
Role 2 - Estimatorr	Role 2- Estimator		+	Destination	P	Period Resource Quantities	Period Resource Quantities	
Role 3 - Lead Estimator	Role 3- Lead Estimator		+	Destination	P	rice % Add-On Record	Price % Add-On Record	
Role 4 - Regional Admin	Role 4- Regional Admin		+	Destination	P	rice Breakdown Structure	Price Breakdown Structure	
Role 5 - Adminn	Role 5- Admin		+	Destination	P	rice Category Record	Price Category Record	
Role 6 - Settings Admin	Role 6- Settings Admin		+	Destination	¢	Quantity Roll-Up Record	Quantity Roll-Up Record	
Role 7 - Engineer @ Root	Role 7- Engineer @ Root		+	Destination	0	Quote Comparison & Award - Cost items	Quote Comparison & Award - Cost items	
Role 8- Admin 2	Role 8- Admin 2		+	Destination	0	Quote Comparison & Award - Resources	Quote Comparison & Award - Resources	
SJ- Role3-Snapshots-Add,vi	SJ-Role3		+	Destination	¢	Quote Cost Item Record	Quote Cost Item Record	
	analis is all batting all	Ŧ	+	Destination	0	Quote Group Tag Record	Quote Group Tag Record	
55			+	Destination	0	Quote Group Tags Register	Quote Group Tags Register	

#### NOTE

You can drag and drop the Roles onto the accessible objects in these two registers.

If no roles are assigned to an accessible object, no restrictions are applied to the accessible object, and anyone with access to the application will be able to access that destination or command. When setting up Access Control, be sure to identify the commands and destinations in Estimate that you want to restrict permissions to, and then assign the roles to explicitly grant permissions to those accessible objects.

In the following example, both Estimators and Lead Estimators are permitted to invoke any of the actions on the records in the PBS Changes Register, but only the Lead Estimator is permitted to activate or deactivate the PBS Changes Log. Because no roles have been assigned to the *Activate 'View Change Record'* prompt, anyone with access to the application will be able to perform that action.

ser Roles Register O		-	Acce	ss Co	ntrol Registe	er C	0		-
ag columns here to group	Saved views: Standard View -		Type	<u>.</u>				× PBS 17/18 🔘 🗸	\\¢
Role Name 😐	Description		T	ype	i.,		Category	Ribbon Name	
Estimator	Estimator				gister Comman		PBS Changes Register	Actions > Edit > Copy	
Foreman	Foreman				gister Comman		PBS Changes Register	Actions > Edit > Cut	
Integration Settings	Integration Settings		+		gister Comman		PBS Changes Register	Actions > Edit > Delete	
IS Role	IS Role				gister Comman		PBS Changes Register	Actions > Edit > Fill Down	
KN ROLE1	KN ROLE1				gister Comman		PBS Changes Register	Actions > Edit > New	
Lead Estimator	Lead Estimator division			-	Role	- I	Changes register	Reading 2 care 2 men	
MLQ-0	test-level 0				Lead Estima				
MLQ-1	test-level 1			17	Estimator	NUOR			
MLQ-2	test-level 2								
MLQ-3	test-level 3			Re	gister Comman		PBS Changes Register	Actions > Edit > Open	
MLQ-3- Copy w/Add Project	s test-level 3				Role				
NP 1	Estimate Full Access			17	Lead Estima	ator			
NP-2	NP-2				Estimator	_			
Role 01-Engineer	Role 01- Engineer			Re	gister Comman	d	PBS Changes Register	Actions > Edit > Paste	
Role 1 - Engineerr	Role 1-Engineer				Role				
Role 2 - Estimatorr	Role 2- Estimator			-	Lead Estima	stor			
Role 3 - Lead Estimator	Role 3- Lead Estimator				Estimator				
Role 4 - Regional Admin	Role 4- Regional Admin		-	Re	gister Comman	d	PBS Changes Register	Actions > Tools > Activate Changes Log	
Role 5 - Adminn	Role 5- Admin				Role				
Role 6 - Settings Admin	Role 6- Settings Admin			-)	Lead Estima	stor			
Role 7 - Engineer @ Root	Role 7- Engineer @ Root		→ <sup>+</sup>	Re	gister Comman	d I	PBS Changes Register	Actions > Tools > Activate 'View Change Record' Prompt	
Role 8- Admin 2	Role 8- Admin 2		-	Re	gister Comman	d I	PBS Changes Register	Actions > Tools > Deactivate Changes Log	
SJ- Role3-Snapshots-Add,vi	SJ- Role3				Role				
				-	Lead Estima	stor			
5	5			De	nieter Comman	a   1	Droiante	(Contact Manual > Conv	

#### 3.10.4.2 ACCESS CONTROL REPORT

You can use the Access Control report to audit user permissions, command access, and various restrictions without having to search through the Access Control register for this information.

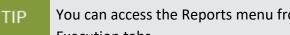
Re	eports A											
l o	Job Properties	File	name C:\Users\Paul	\Downloads\AccessContro	Export.xlsx							
	Foundation Setup Data		AutoSave 💽 Off 🗗	<u>_</u>	A	Export.xlsx ⑦ No Label 〜	م	Paul Trippi   🙆		- 0	×	1
> 🛓	Resources				AccessControl	iexportixisx () No Label ~	~ ~	Paul Inppl 👹		- 0	^	
> 🗄	Resource Assemblies	F	ile Home Ir	nsert Page Layout F	ormulas Data	Review View Auton	nate Help		🖓 Comn	ents 🛛 🖻 Share	~	
> =	Cost Breakdown Structure										-	
> 🔍	Quotes	C	L Y E	$\times \checkmark f_x$ Ribb	on Name						×	
	Price Breakdown Structure		A		R		c	D	F	F		
> 🖺	Pay Item & Proposal	1	Туре	Category	-	Ribbon Name	-		719-R1	Account Admini	str	
> 📅	Billing Rate Reports	2	Command									
	Estimate Comparison Report	3	Command									
	Audit	4	Command									
	Job Register	5	Command	Bond Cost Item Record	-	Actions > View > Default	Data Blocks					
	InEight Schedule Cost Risk (xlsx)	-	Command	Bond Cost Item Record								
×	Library Module	-	Command	Cash Flow		Actions > Print > Page Se						
	Master Job Properties		Command	Cash Flow		Actions > Print > Preview	/				- 11	
	Master Foundation Setup Data		Command	Cash Flow		Actions > Print > Print					- 11	
	Master Resources		Command	Cash Flow		Actions > Tools > Cash F		No	No	No	- 11	
,	Master Resource Assembly Rec	· ·	Command	Cash Flow		Actions > Tools > Display		No	No	No	- 11	
			Command	Cash Flow		Actions > Tools > Works	heet	No	No	No	- 11	
	Access Control (Excel)		Command	Cash Flow		N/A					- 11	
>	Saved Views (Library)	-	Command	Cash Flow		N/A		No	No	No	- 11	
0.	ustom Reports	_	Command	Column Captions		(Context Menu) > Chang					- 11	
Sa	wed Views		Command	Column Captions		(Context Menu) > Reset					- 11	
	•	-	Command	Column Captions		(Context Menu) > Reset					-	
_		18	Command	Connected Analytics		Actions > Tools > Auto-U	Jpdate					

The report makes it easier to find the role names along with their associated Yes and No access permissions to each form in Estimate.

1	A	B	C	D	E	F	G	н
				Account	Account Administrator-		-	
1	Туре	Category	Ribbon Name	Administrator	All permission	Design - Eng - Admin	Design - Eng - Project Admin	Design - Eng - Project Team
2	Command							
3	Command							
4	Command							
5	Command	Bond Cost Item Record	Actions > View > Default Data Blocks					
6	Command	Bond Cost Item Record	N/A					
7	Command	Cash Flow	Actions > Print > Page Setup					
8	Command	Cash Flow	Actions > Print > Preview					
9	Command	Cash Flow	Actions > Print > Print					
10	Command	Cash Flow	Actions > Tools > Cash Flow Options	No	No	Yes	No	No
11	Command	Cash Flow	Actions > Tools > Display Settings	No	No	Yes	No	No
12	Command	Cash Flow	Actions > Tools > Worksheet	No	No	Yes	No	No
13	Command	Cash Flow	N/A					
14	Command	Cash Flow	N/A	No	No	No	No	No

### STEP BY STEP – ACCESS CONTROL REPORT

- 1. Open a job, and then select the **Setup** tab.
- 2. Click the **Reports** icon.



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

File	Setup	Estimate	Quote	Price	System	Integrations				
٦ م	1			***	<b>4</b>	🕵 Labor		3		Π
		100 C				🛗 Equipment	ă A	8		
Job Prop	erties	Foundation Setup Data 🔻	Pay Item & Proposal	Bid Wizard	Resources *	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	Reports
		Initializ	ze			Resources		Assen	nblies 🦯	Reports

- 3. Expand Library Module, and then select Access Control (Excel).
- 4. Select a file name, or choose another file name path.

🜐 Save As		×				
← → ~ ↑ ↓ >	This PC > Downloads	ٽ ~	> Search Download	5		
Organize 🔻 New fo	lder		- 😮			
🔛 OSDisk (C:) 🖈 🖌	Name	Date modified	Туре	Size ^		
📙 Git Projects  🖈	✓ Last week (1)					
Compliance1	InEight Control Columns List (1).xlsx	11/7/2023 2:08 PM	Microsoft Excel Work	47		
Control	<ul> <li>Last month (5)</li> </ul>	1777202521001111	MICIOSOTE EXCEL WORKIN			
EstimateCloud						
Schedule	館 AccessControlExport.xlsx 印 Excel import.xlsx	10/26/2023 8:57 AM 10/23/2023 5:32 PM	Microsoft Excel Work Microsoft Excel Work	40		
OneDrive - InEight	Suite Administration PT.xlsx	10/23/2023 3:32 PM	Microsoft Excel Work	41		
-	Platform topics.xlsx	10/9/2023 9:42 AM	Microsoft Excel Work	38		
💻 This PC	Roles-and-Permissions-Workbook.xlsx	10/6/2023 9:25 AM	Microsoft Excel Work	57		
3D Objects	✓ Earlier this year (9)					
Desktop	InEight Control Columns List.xlsx	9/20/2023 3:49 PM	Microsoft Excel Work	47		
🔮 Documents		9/20/2023 5:49 PM	Microsoft Excel Work	16 🗸		
👆 Downloads	<	5, 25, 2023 12,101101	THE COULD BE LACE WORKING	>		
File name: 🗔	Users\Downloads\AccessControlExport.xlsx			~		
Save as type: xlsx				~		
save as type: XISX	111C2 ( 18128 )					
∧ Hide Folders			Save	Cancel		

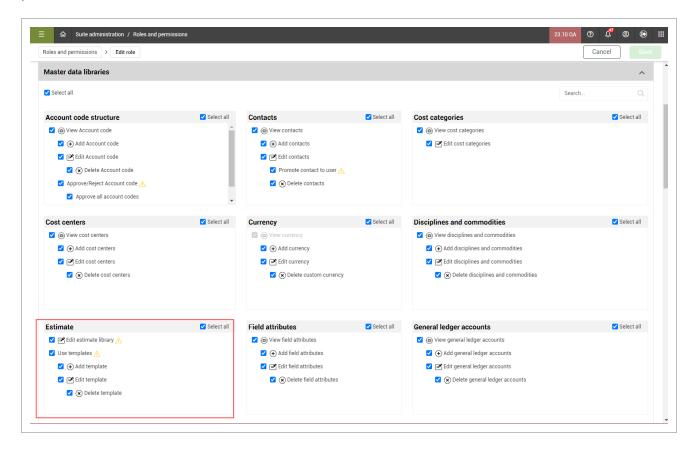
5. Click Save, and then click Run.

B Save As				×
← → ~ ↑ ↓ → T	his PC → Downloads	ٽ ~	🔎 Search Download	is
Organize 👻 New fol	der		8	≡ <b>•</b> •
🛀 OSDisk (C:) 💉 ^	Name	Date modified	Туре	Size ^
Git Projects 🖈	✓ Last week (1)			
Compliance1	InEight Control Columns List (1).xlsx	11/7/2023 2:08 PM	Microsoft Excel Work	47
Control		11/1/2023 2:00 PWI	WICTOSOTE EXCEL WORK	47
EstimateCloud	V Last month (5)			_
Schedule	AccessControlExport.xlsx	10/26/2023 8:57 AM	Microsoft Excel Work	40
	Excel import.xlsx	10/23/2023 5:32 PM	Microsoft Excel Work	9
OneDrive - InEight	Suite Administration PT.xlsx Platform topics.xlsx	10/11/2023 10:41 AM	Microsoft Excel Work Microsoft Excel Work	41
💻 This PC	Roles-and-Permissions-Workbook.xlsx	10/9/2023 9:42 AM 10/6/2023 9:25 AM	Microsoft Excel Work Microsoft Excel Work	38
3D Objects		10/0/2025 9:25 AIVI	WICTOSOTE EXCEL WOTK	57
Desktop	✓ Earlier this year (9)			_
Documents	InEight Control Columns List.xlsx	9/20/2023 3:49 PM	Microsoft Excel Work	47
Downloads	improved.xlsx	9/20/2023 12:10 PM	Microsoft Excel Work	16 🗸
•				>
File name: C:\U	Jsers\Downloads\AccessControlExport.xlsx			~
Save as type: xlsx	files (*.xlsx)			~
			- 1	
<ul> <li>Hide Folders</li> </ul>			Save	Cancel

What's Next: Open the Access Control Excel file to filter, sort, or perform any type of audit to help you determine user or role access.

# 3.10.5 GRANTING PERMISSIONS TO THE ESTIMATE LIBRARY

In Platform, permissions relating to the Estimate library are found in the Master data libraries permission section.



To grant Estimate library permissions to a role, the role must be an Administrator Level 3 - Account Admin. If not, the permissions are not selectable on the Add/Edit Role setup page.

Roles and permissions > Add role			
Role details			
• Name Estimate Administrator	Description	* Administrator level Level 3 - Account Admin	• (i)
Permissions		Level 0 - Base Level 1 - Project Admin Level 2 - Organization Admin	
Suite administration		Level 3 - Account Admin	ka Is
Organization and project			
Master data libraries			

The Master data libraries permission section is also where the permissions controlling which roles can manage templates are found.

# 3.10.6 COMMON ROLES USED WHEN SECURING AN ESTIMATE

The process of creating an estimate for a bidding opportunity commonly requires unrestricted access to the capabilities of Estimate so that estimators can work efficiently. However, depending on the level of data governance within an organization, you might want to preclude certain users from accessing some of the more sensitive parts of Estimate. If changes were made, either accidentally or otherwise, it could impose detrimental impacts on the organization.

Estimate's security model is very detailed and robust. When designing a security model that restricts certain features and functionality of Estimate, each company must weigh the benefit of the protection of such restrictions which could bring unwanted or uncontrolled changes and negatively impact the productivity of the estimating process. While it is possible to create a very detailed and robust security model with many different roles for individuals within an organization, it is not necessary to set up and maintain roles for all of Estimates accessible objects. It is likely a company can effectively secure their sensitive data with no more than a couple roles granting permissions to a few commands and destinations.

A common way to implement security on the Estimate application is to restrict access to certain system level settings, such as who can modify data in the library, or who can change any company specified custom column captions.

The following are some of the more common Roles a company may set up, describing the purpose of the role and typical permissions:

- Lead Estimator: Lead Estimators are commonly assigned to estimates based on their knowledge and experience. They may be precluded from creating or deleting estimates themselves or changing any system level settings, but commonly have full access to all the capabilities needed to create and maintain the estimates they are assigned to.
- Estimate Manager: Estimate Managers are commonly responsible for identifying bidding opportunities and determining which opportunities to pursue. Once it has been determined that the company will pursue an opportunity, the Estimate Manager creates the estimate and assign it to a Lead Estimator based on resource availability relative to all the bidding opportunities the company will be pursuing. These roles manage the creation of estimates and assist in ensuring all the necessary supporting data is available, such as assigning appropriate project attributes or including needed resource libraries.
- Administrator: Administrators ensure accessibility and availability of the solutions utilized by estimators. Typically, they control system level settings and activities that would affect company standards, such as changing column captions, ability to define corporate views, list of job statuses and ribbon settings. Other typical permissions restricted to only the Administrator level roles are the ability to access the User Roles register and the Access Control register.

#### **LESSON 3 REVIEW**

- 1. When you create a new job folder, all category labels defined in the Library Foundation Setup Data Register will be copied to the new job folder automatically.
  - a. True
  - b. False
- 2. This resource type is a catch-all and can be used for anything from dump fees and security to creating subcontractors as a resource.
  - a. Installed Materials
  - b. Unique
  - C. Labor
  - d. Construction Equipment
- 3. The Construction Equipment and Rented Construction Equipment Resource Rate Records include consumption rates that will factor with the fuel cost you define where?
  - a. Library Foundation Setup Data
  - b. Library Resource Rates
  - C. Job Properties
  - d. Cost Breakdown Structure

#### **LESSON 3 SUMMARY**

As a result of this lesson, you can define, adjust and explain:

- Library Job Properties
- Library Foundation Setup Data Register
- Library Resource Rate Register
- Library Assembly Register



# **LESSON 4 – PROJECT SETUP**

### **LESSON DURATION: 45 MINUTES**

### LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a new project
- Enter Job Properties
- Create pay items in the Pay Item & Proposal Register

### **LESSON TOPICS**

# 4.1 JOB CREATION

### 4.1.0.1 PLATFORM PROJECT ASSOCIATION

You can associate your estimates with additional master data, such as project data from the Project details page in Platform. Associating Platform projects lets you organize estimates directly from Platform's Organizational Breakdown Structure (OBS). Your location assignment in the OBS determines the access you inherit and the visibility you have to other areas of the OBS.

Extracting Platform project master data directly into Estimate promotes data consistency and helps ensure that the data is being pulled from a single source of truth.

File   System	• Developer Te	ools Integrations				InEigi	ht Estimate
Customize		Colors - Dutput Settings - External	References - Esti	About Es anate kelp Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance Balance	Notes InEight com University		
	8	New Job			Platform	oroject	ts
	Core Project:	* Project A4998		A Project ID	Project Name	Status	Created Date
	Code:			Project A4997 Project A4998 Project A4999	Project A4997 Project A4998 Project A4999	New New	4/1/2020 3:56:14 4/1/2020 3:56:14 4/1/2020 3:56:14
	Description:	Clemson Creek Restoration proj	iect ^	Project A5 Project A50	Project A5 Project A5	New	4/1/2020 3:52:36 4/1/2020 3:52:37
		Auto-Update Job in Connect	ed Analytics	Project A500 Project A5000	Project A500 Project A5000	New New	4/1/2020 3:52:41 4/1/2020 3:56:14
		ОК	Cancel	×		_	

Platform project specific master data can be maintained in one place, then it can flow directly into Estimate in the Cloud. Certain project data such as location and forecast start and finish dates are now maintained in Platform which helps to enforce data consistency and reduce duplicate entries.

The fields that are located in Setup > Job Properties > **Overview** that are maintained in Platform and integrate into Estimate consist of: Project ID, Organization, and Notes. The fields on the Estimate Cover Sheet tab include Location, State, City, Country, and Latitude and Longitude, Forecast Start and Finish, and Duration.

Overview Co	over Sheet	Cost Basis	Minority Setup	Fuel Cost						
Code:	4985362 v	ersion 1								
Project ID:	<u>4985362</u>									
Description:	2020 Clow	2020 Clow Creek Shoreline Restoration Project								
			Overview	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Folder Tags	Pri	
			Identificat	ion						
Notes:	Shoreline F	Restoration pro	ject Loc	ation: Scottsda	ale, AZ					
				City: Scottsda	ale					
			C	ounty:						
			Co	untry: United S	tates O 👻					
				State: Arizona	Ŧ	]				
			Lat	itude:				41.	77287	
			Long	jitude:				.00	14793	

The Project ID field in Estimate is a hyperlink field that takes you directly to the project Details page in Platform.

verview	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Folder Tags				
Cod	le: 4985362-1	/1							
Project I	D: 4985362								
			e Restoration Proje						
	The proje			ek Shoreline		62 / Project details	`	0 ¢ <sup>6</sup> 8 (	٢
						(		Project settings Cancel S	
		Projec	t details				_		
					×	* Project ID		Notes	
						4985362		The project includes shoreline stabilization and revegetation native turf grasses in designated areas to restore impaired ecological function to the impacted area	of
		-	and a state		the second second	* Name			
				2020 Clow Creek Shoreline F					
		C.	2 10 100	WHELE	100	* Phase 🕜			

When modifications are made to any of the integrated fields in Platform, then saved, the changes automatically show in Estimate. For example, if you need to change the name of the project in Platform to show the year 2023 instead of 2020, this change is reflected in the in the Job Properties > **Project Name** field form in Estimate.

Project details	
(	* Project ID
	4985362
	* Name 2023 Clow Creek Shoreline Restoration
	* Phase Job Properties O Pre-E Overview Cover Sheet Cost Basis Minogli e Cash Flow Equipment Maintenance Benchmarking
	Code: 4985362-v1
	Project ID: 4985362 Project Name: 2023 Clow Creek Shoreline Restoration
	Description: 2020 Clow Creek Shoreline Re

#### 4.1.0.2 JOB REGISTER MANAGEMENT

An advantage to associating Estimate with Platform project data is the capacity to manage multiple versions of Estimates from one source project.

For example, if you have multiple addendums issued for the same project, you can maintain a version of the estimate for each addendum you've received.

Jol	b Register 🛛							
Dra	g columns here to	group						
	Project ID	Description	<u>.</u>	Country	State	City	Latitude	Longitude
	4985362	2020 Clow Creek Shoreline Restoration - Per Addendum 1		United Stat	Illinois	Naperville	41.77287	-88.1479
	4985362	2023 Clow Creek Shoreline Restoration - Per Addendum 2		United Stat	Illinois	Naperville	41.77287	-88.1479
	<u>4985362</u>	2023 Clow Creek Shoreline Restoration - Per Addendum 3		United Stat	Illinois	Naperville	41.77287	-88.1479
	<u>4985362</u>	2023 Clow Creek Shoreline Restoration - Per Addendum 4		United Stat	Illinois	Naperville	41.77287	-88.1479
	4985362	2023 Clow Creek Shoreline Restoration - Per Addendum 5		United Stat	Illinois	Naperville	41.77287	-88.1479

Grouping estimates together using a common project means there is no need to structure and enforce a job coding schema in Estimate on the Job Code, or use tag fields or user defined fields to identify and manage different versions of a project in the Job register.

_	Register O						
Pro	oject ID 🖮						
	Proj ID ≞	Description	Country	State	City	Latitude	Longitude
	🛛 Unassigned						
÷	<b>4985362</b>						
	<u>4985362</u>	2020 Clow Creek Shoreline Restoration - Per Addendum 1	United Stat	Illinois	Naperville	41.77287	-88, 14793
	<u>4985362</u>	2020 Clow Creek Shoreline Restoration Project - Original Estimate	United Stat	Illinois	Naperville	41.77287	-88, 14793
	<u>4985362</u>	2020 Clow Creek Shoreline Restoration Project - Per Addendum 1	United Stat	Illinois	Naperville	41.77287	-88, 14793
	<u>4985362</u>	2023 Clow Creek Shoreline Restoration - Per Addendum 2	United Stat	Illinois	Naperville	41.77287	-88, 14793
	<u>4985362</u>	2023 Clow Creek Shoreline Restoration - Per Addendum 3	United Stat	Illinois	Naperville	41.77287	-88, 14793
	4985362	2023 Clow Creek Shoreline Restoration - Per Addendum 4	United Stat	Illinois	Naperville	41.77287	-88, 14793
	4985362	2023 Clow Creek Shoreline Restoration - Per Addendum 5	United Stat	Illinois	Naperville	41.77287	-88, 14793
	<b>4985922</b>						
	<b>4992404</b>						
	4996059						

#### JOB REGISTER GROUPED BY PLATFORM PROJECT

Grouping by organization lets you see projects batched in an organizational breakdown level, and lets you see a listing of projects in an organizational breakdown format and projects derived in Platform.

Organization 🖮					FIE	vious View	- 2	
	Organization	<u>1</u>	Source Job	Project Name	Description	de	Status	Schedule
÷	Unassigned							
	Estimate Infrastructure							
	Estimate Mining							
٠	Estimate Power							
	Estimate Power		נד	SR-2023FEB	restored tj	.00000	Bidding	Microsoft Proj
	Estimate Power		SaaS-FullImport232	SR-DBt		2.07414	Bidding	Primavera
	Estimate Power		DWH-2	SR-2023FEB	SR-2023FEB	00000	Bidding	Microsoft Proj
	Estimate Power		SR-Job2	SR-2023FEB	from existing	0000	Bidding	Microsoft Proj
	Estimate_Infrastructure_So	uth Central						
٠	■ S100000 - PKS Inc							
	S100000 - PKS Inc			Rail	Rail	.00000	Bidding	Microsoft Proj
	S100000 - PKS Inc			S1201name	S1201	0.00000	Bidding	Microsoft Proj
	S100000 - PKS Inc		SR-Job3	03102022	03102022	.00000	Bidding	Microsoft Proj
	S100000 - PKS Inc		KwtSaaS2212-Sel	226-SR		0000	Bidding	Primavera
	S100000 - PKS Inc		DB-0209	New project name: 2:38	SR-TEST API-123	000	Bidding	Manual
	S100000 - PKS Inc			new proj	API Job from Import	000	Bidding	Microsoft Proj
	_							

### OBS FILTER TREE

You can use the organization tree filter to see where estimates exist in the OBS.

When the Organization Tree Filter is enabled, you can see the jobs that are associated with an organization tree node in the new OBS filter tree. This helps you locate and organize estimates to more quickly inside of an organization hierarchy.

File	Setup	Estimate	System	Integra		Actions				
📑 Pri		🕂 New				1.5	E			
Q Pre		-	Paste	+ Fill Do	wn	Job Status	Organization			
🗗 Ex	port to Excel	}< Cut	🤤 Load			500 510105	Tree Filter			
	Print		Edit			Tools	View			
Job R	egister ©						/			
Orga	nization			×	Dra	g columna nere	e to group			
Name						Code		<u> </u>	In Use	Description
~ S1	100000 - PKS I	nc			÷	100657				Clark/K
	-					101515				India
	-					101898				WCAD
~	SA1000 -	Corporatio	n			101924				Waterloo
	✓ SB2000 ·	Energy				101979				East Rail
	> SC20	02 - Oil, Gas &	Chemical			102447				Border W
	> SC20	03 - Power				190001				190001
		04 - Industrial				190002				190002
		Infrastructure	2			190003				19000
	> SB4000 -	-				190004				19000
	<ul> <li>&gt; SB5000 ·</li> <li>&gt; SB6000 ·</li> </ul>	- Other - Home Office				24-5 FullImp	ort T01			24-5 Ful:
	> 300000	- nome office				24-5 Selectiv	eImport T01			NP1-245
						245-BC2				BC2
						Σ		c	)	
								120	D	
4				•	4					/

If you group by Project ID, and then select a node in the organization, you can see all the projects and their associated estimates belonging to that part of the organization. For example, there are three estimates associated with project 4985362 and one estimate associated with projects 4992404, 5013592 and 5013787. This view shows you the relationship between all the project and estimate associations.

Organizat	tion	×	Project ID 🖮				
lame			Project to E				
InEight	Demo Inc.		Proj	Code		Description	<u> </u>
Con	mmercial		ID =				—
DBS	Sol		<b>4985362</b>		3		
EQ	W		<u>4985362</u>	4985362		2020 Clow Creek Shoreline Restoration	
Ind	ustrial		<u>4985362</u>	4985362-v2		2020 Clow Creek Shoreline Restoration -	revised per Addendum #1
Infr	rastructure		4985362	4985362-v3		2020 Clow Creek Shoreline Restoration -	revised per Addendum #2
Mini	ing		■ 4992404		1		
Oil a	and Gas		4992404	4992404		2020 Concrete Repairs Program	
RSI	Means		<b>5013592</b>		1		
TS			= 3013372		-		

#### DATA VERSION AND UPGRADE REQUIRED COLUMNS

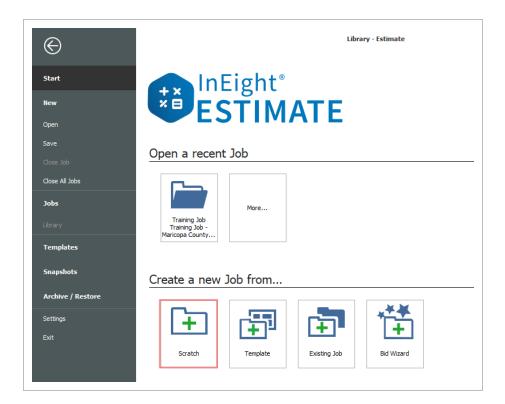
There are two columns in the Job Register that help you identify a job's current data version and whether an upgrade is required for the job:

- **Data Version** Identifies the current data version of the job which might be different from the Estimate application version.
- **Upgrade Required** identifies jobs that require an upgrade to match the current database version before they can be used in the application. The jobs that require an upgrade have the check box selected.

= 8 -								Library	/ - Estimate					œ –	□ ×
ile Setup	Estimate	System	Develo	per Too	ols Integrations	A	ctions								盒 田 (
Print	C Open	° Cut	ें: Load		312 3	1	E								
Preview	New	🕒 Сору	Close		11 1	~									
Export to Excel	😣 Delete	Paste	+ Fill Do	wn		ite Jobs oject	Organization Tree Filter								
Print		Edit			Tools		View								
ob Register 🛛															
Organization			×	Drag	columns here to grou	ip						Saveo	views: Previo	us View	- )
Name					Code		1	Project ID	Project Name	Data Version	Upgrade Required	Organization	Is Template	Notes	Project Note
S100000 - InEigh	nt Inc				823-11			8232024	EST - SCH TP 1	24.7.0.3		S100000 - InEig		B	D
> MR ORG B1												-			
MR ORG B2					08072024			08072024	08072024	24.5.0.1	✓	S100000 - InEig			D
> nandy child o	rg1				08112024			08112024	08112024	24.5.0.1	$\checkmark$	S100000 - InEig			Ð
> SA1000 - Kie	wit Corporatio	n		$\rightarrow$	08122024			08122024	08122024	24.5.0.1	$\checkmark$	S100000 - InEig			B
Testing Ora				11	08122024-1			08122024	08122024	24.7.0.3		S100000 - InEig		D	D
<ul> <li>Testing Org</li> </ul>															

### STEP BY STEP – CREATE A NEW JOB

 From the InEight Estimate Backstage view, under the Create a new Job from... section, select Scratch, or select New > Scratch from the left sidebar menu.



- 2. On the New Job dialog, select a **Core Project** from the drop-down.
- 3. Modify the **Code** field.
- 4. Type in a **description** of the job in the Description field.
- 5. Determine if you want to check the "Auto-Update Job in Connected Analytics" box.
- 6. Click **OK** to create the new project.

## 4.2 PROJECT CREATION

You can create new projects in InEight Platform's root and sub-organizations to which you can then associate Estimates jobs. For example, you can create new projects in a node of the organization dedicated to estimating, permitting estimators to create and manage projects for the opportunities

they are pursuing while allowing the rest of the organization to maintain a higher level of security over active projects.

For more information about project creation, see **<u>Project Initiation</u>** in Platform.

### 4.2.1 CONSIDERATIONS

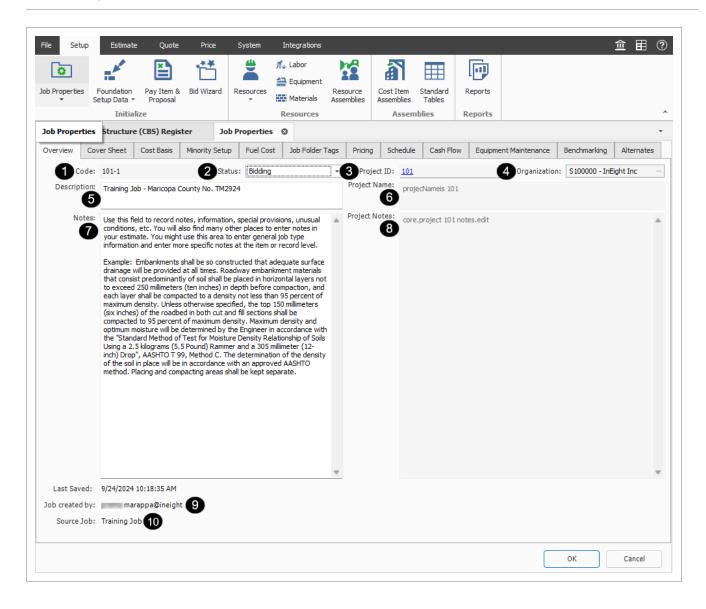
You must have a Level 3-Account Admin role or the Add projects permission in your role.

## 4.3 JOB PROPERTIES

When you create a new project, the Job Properties form automatically shows. This is where you can enter basic information about the project. You can access Job Properties on the InEight Estimate landing page > Setup > Job Properties.

### 4.3.1 OVERVIEW TAB

The Job Properties form opens to the Overview tab. The image and table below show the Overview options:



#### **Overview Tab**

	Name	Description
1	Code	The name of the Estimate job. The name cannot be changed.
2	Status	<ul> <li>Current state of the job, such as Bidding, Awarded, or Completed.</li> <li>When searching for jobs in the Job Folders list, you can filter and sort jobs by their</li> </ul>

### Overview Tab (continued)

	Name	Description
		<ul> <li>status.</li> <li>You can set statuses for jobs to fit your company requirements in the Jobs Register &gt; Actions &gt; Tools &gt; Job Status.</li> </ul>
3	Project ID	Information in this field originates from the Platform project the estimate is associated with and cannot be changed. You can click the Project ID link to navigate to the project in Platform.
4	Organization	Information in this field originates from Platform.
5	Description	You can enter a job description. You can edit the description any time.
6	Project name	Information in this field originates from the Platform project the estimate is associated with and cannot be changed.
7	Notes	Add estimate related information, such as when creating multiple versions of an estimate for the same Platform project. For example, you can enter <i>This</i> <i>version is per addendum #1</i> or <i>This</i> <i>version is per a specified design</i> <i>change</i> , or <i>This version of the</i> <i>estimate is incorporating last</i> <i>minute changes</i> .

#### Overview Tab (continued)

	Name	Description
8	Project Notes	Information in this field originates from the Platform project the estimate is associated with. The notes can be added and edited at any time in Platform to document specific project-level details.
9	Job created by	Indicates the user or entity that initially created the job.
10	Source job	The name of the original job that the job was copied from.

NOTE When you copy a job, the new job shows the name of the person who created the copied job, and the name of the source job the job was copied from.

### 4.3.2 COVER SHEET TAB

The Cover Sheet tab is where you can define much of the general information about the project. It includes fields to identify the job's location, contacts, and bid details.

The following fields are available:

- Job Location
- City, County, Country, Province/State
- Job Type
- Engineer
- Owner
- Architect
- Forecast Start and Forecast Finish
- Bid Date and Bid Time
- Bid Location
- Estimator
- Opening Type and Proposal Type

• Liquidated Damages (if applicable)

ost Break	down Stru	cture (CBS) Reg	jister	Job Propert	ies ©									
verview	Security	Cover Sheet	Cost Basis	Minority Set	tup Fuel Cos	t Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipmen	¥ 4	
Identificat	ion	_												
Loc	ation: I-1	0 MP 100 to MP 12	20	Type:	Highway and (	General Engineerin	g		Contra	act Duration:				16
	City: Pho	enix		Engineer:	Example Engin	eer Fred Jones			1 Tir	ne Measure:	Contract Day	s +		
C	ounty: Ma	ricopa		Owner:	Example Owne	r Jerry Slate			E Fo	recast Start:	1/6/2014	-		
Co	untry: Un	ited States	•	Architect:	Example Archit	ect Robert Frost			E For	ecast Finish:	6/5/2014	•		
	State: Ari	zona ,	-							Duration:				15
Lat	itude:		0.00000	]										
Long	jitude:		0.00000	]										
roposal														
В	id Date: 1	2/23/2013 -	·				Opening Type:	Public						_
	id Time: 1	0:00:00 PM					Proposal Type:	Unit Price						
Bi						1	Plan Holders:							

The fields on this tab can be helpful for historical reference and job classification. It is good practice to complete as many of these fields as possible, so you can reference and find the project later. These fields can be updated as needed at any time.

### 4.3.3 COST BASIS TAB

The Cost Basis tab has some important settings that will affect how costs are calculated in your estimate. The settings reviewed below are the ones you need to consider.

	Name	Description
1	Standard Shift Arrangements	The default standard shift arrangements are set up as 8 hours per shift, 1 shift per day, and 5 days per week; this can be changed if a project requires a different standard shift arrangement.
2	Standard Wage Rate Composite:	Allows you to indicate what percentage of your labor hours will be regular time (Scale 1), overtime (Scale 2) or double time (Scale 3). You can enter these percentages manually, or you can use the Shift Rate Calculator to obtain a more accurate figure.
3	Lock Cost Items to Pay Items:	For this sample job, you will check this box. When Cost Items are locked to Pay Items, your level 1 estimate structure is controlled by your list of pay items.
4	Default Currency:	The default will be set to U.S. Dollar, but this can be changed if needed.

	Name	Description
5	Sales Tax Rate:	This field is not required but may be used to automatically apply a sales tax to all your material and rental items. The default is set to zero.

#### Cost Basis Tab Overview

Overview Secure Cover Shee	Cost Basis	Min 2 etup	Fuel Cost	Job Tracking	Job Folder Tag	3 Competitors	Pricing	Schedule	Cash Flow	Equipmen <sup>*</sup>	
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 Currency Default Currency: U.S. Dollar	Scale 1 Scale 2 Scale 3	: 0.00 %		es Lock Cost Items Pay Item Unit Pr Activate PBS Chi Activate Quantit Maintain CBS St When man-coun ndard Rates Sales Tax Rate:	ice Precision:	2 0 0 Change UM / I 0 Change Days 5.00 %	1an-Hour	Preserv Data Sc	e Original Cos urce	t Item	
Labor Rate Construction Equipment R	Resource / Asser	, ,	Geographic A		Wage Zone				egory	Import Filt Resourc	es

### 4.3.4 SHIFT RATE CALCULATOR

Take a closer look at calculating your shift rates using the Shift Rate Calculator. For this example, you will walk through setting up 2 shifts for your project.

#### STEP BY STEP – SHIFT RATE CALCULATOR

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

verview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment	4
Work Ho Pay Ho Sh	Shift Arrange urs per Shift urs per Shift: ifts per Day: /s per Week:	8.00 8.00 1.00	Scale 1 Scale 2 Scale 3	: 0.00 %		es   Lock Cost Items Pay Item Unit Pr   Activate PBS Cha   Activate Quantit   Maintain CBS Str When man-coun	ice Precision: anges Log y Checking ucture at Level: t changes:	2 0 Change UM / M. Change Days	an-Hour	Preserv Data So	e Original Cos urce	it Item	
Currency Default	Currency:	U.S. Dollar			• Sta	ndard 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

Acti	<b>*</b>		Shift / Rate	Calculator Re	cord - Training	g Job		<b>⊡</b> –	• •
	opy Calculator from Library								
-	opy Calculator to Library								
	lear All								
	Tools								
	Shift Rate Calculator Nam	e: [Enter Name]							
		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
	Shift 1								
	Work Hours	10.00	10.00	10.00	10.00	10.00	0	0.00	50.00
ı			0.00	0.00	0.00	0.00	0.00	0.00	0.00
/	Scale 1	0.00	0.00	0.00					
/	Scale 1 Scale 2	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.

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 Proper	ties 🛛				
Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fu
-Standard S	Shift Arrange	ments	-Standard Wa	ge Rate Composite	•
Work Hou	ırs per Shift	11.17	Scale 1:	64.18 %	
Pay Hou	rs per Shift:	11.17	Scale 2:	35.82 %	
Shif	fts per Day:	1.71	Scale 3:	0.00 %	
Days	s per Week:	7.00	Shift /	Rate Calculator	

### 4.3.5 IMPORT FILTERED RESOURCES

You may have noticed the bottom portion of your Cost Basis tab called the Resource Filter.

		Select your filters to right		Iron Worker Finisher - Concrete
Resource / Assembly Type Labor Rate Construction Equipment R Rented Construction Equi Installed Material Rate Installed Equipment Rate Supply Rate Unique Rate Resource Assembly Cost Item Assembly Standard Table	Resource / Assembly File [ [Al] [ [Vone] [ [Non-Blanks] ] Standard Labor Rate File	Geographic Area          [AI]         [None]         [Non-Blanks]         Southwest	Wage Zone [ [Al] [ [Vone] [ [Von-Blanks] ] Wage Zone A ] Wage Zone B	Organizational Category  [All] [None] [Non-Blanks] Truck Driver - Teamster Supervision Carpenter Welder Mechanic Operator Remediation Laborer

The Resource Filter portion of the Cost Basis tab is the most important part of Job Properties. You use it to import your labor, equipment, and materials from the Library. Until you import filtered resources, you have no resources (labor, equipment, materials) in your project.

Updated resource rates can be imported into the Library on a regular basis. It is important to update and have the "Latest & Greatest" rates available to import into your estimates.

You will import the rates you need using a set of four filters called Resource Attributes. Especially for labor rates, filtering by these attributes allows you to pare down the master list to just the resources you need.

Each of the resource filter categories are open for use as determined best by your business. The following are examples of common uses:

	Resource Attribute Filters
Name	Description
Resource File Description	This attribute can be used to designate the rate type or the year to which the rates pertain.
Geographic Area	This attribute is used to designate regions, cities, or provinces based on geographical location of a project.
Wage Zone	This attribute is typically used specifically for labor resources. For example, it may designate the trade and union agreements your labor resources belong to.
Organizational Category	This attribute can be used to designate what trade or work type your resources pertain to.

Resource filters become more specific from left to right, so it makes sense to start with Resource File Description and end with Organizational Category. The geographic area, wage zone and organizational category attribute titles can be changed to meet your business needs for filtering resources.

TIP You can sort the filter lists by clicking on the filter category titles.

The following steps walk through using the Resource Filter to import resources.

#### 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 Type	Resource / Assembly File	Geographic Area	Wage Zone	Organizational Category
abor Rate	[AI]			[AI]
onstruction Equipment R	[None]	[None]	None]	[None]
ented Construction Equi	[Non-Blanks]	[Non-Blanks]	[Non-Blanks]	[Non-Blanks]
nstalled Material Rate	Standard Labor Rate File	Southwest	☑ Wage Zone A	Truck Driver - Teamst
istalled Equipment Rate			Wage Zone B	Supervision
upply Rate				Carpenter
I Inimue Date				Welder

NOTE You must select "Import Filtered Resources" to import your resources. Clicking **OK** on the Job Properties form will not import your resources.

### 4.3.6 FUEL COST TAB

On this tab you can enter the cost for fuel (or other energy sources). These unit cost will be multiplied by the consumption rates entered on each equipment record to define the fuel operating cost of each piece of equipment. The Cost per UM fields default to \$0.00.

#### 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

Overview       Security       Cover Sheet       Cost Basis       Minority Setup       Fuel Cost         Drag columns here to group       Fuel $Fuel$	Job	Proper	ties 🛛								
Fuel TypeCost Per UMCurreAccount CodeDiesel\$4.20U.S. DollarGallonGas\$3.90U.S. DollarGallonGasoline\$3.90U.S. DollarGallonOff Road Diesel\$3.20U.S. DollarGallon	Ov	Overview Security Cover S		Sheet Cost Basis Mino			rity Setup	Fuel Cost	Jo		
Fuel Type     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	Drag	g columns	here to gro	up							
Gas\$3.90U.S. DollarGallonGasoline\$3.90U.S. DollarGallonOff Road Diesel\$3.20U.S. DollarGallon				1	Per		Curre				
Gasoline     \$3.90     U.S. Dollar     Gallon       Off Road Diesel     \$3.20     U.S. Dollar     Gallon		Diesel			\$	4.20	U.S. Do	lar	Gallon		
Off Road Diesel \$3.20 U.S. Dollar Gallon		Gas			\$	3.90	U.S. Do	lar	Gallon		
		Gasolin	e		\$	3.90	U.S. Do	lar	Gallon		
		Off Roa	ad Diesel		\$	3.20	U.S. Do	lar	Gallon		
	$\rightarrow$										

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

### 4.3.7 JOB FOLDER TAGS TAB

On this tab, you can enter tag fields to label your project, so you can reference it later.

verview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Pricing	Schedule	Cash Flow	Equipment Maintenance	Benchmarking	Alternates
ob Folder	Tag Assignm	ents											
	Tag	1:		•		Tag 13:			-				
	Tag	2:				Tag 14:			•				
	Tag	3:				Tag 15:			•				
	Tag	4:		•		Tag 16:			-				
	Tag	5:				Tag 17:			-				
	Tag	6:				Tag 18:			-				
	Tag	7:				Tag 19:			-				
	Tag	8:		•		Tag 20:			•				
	Tag	9:		-		Tag 21:			0.00				
	Tag 1	0:		•		Tag 22:			•				
	Tag 1	1:		-		Tag 23:			-				
	Tag 1	2:		•		Tag 24:							

Many of these fields are validated fields, meaning you can choose from options in a drop-down list. The names of these tags and the drop-down values are defined at a master level within the Library Foundation Setup Data. Some job folder tags are setup to be date fields or numerical fields. These tags are used to sort and filter the job register as well as for selecting which past estimates to utilize for benchmarking.

### 4.3.8 SCHEDULE TAB

The Schedule tab is used to define the scheduling options for the integration of Estimate with InEight Schedule, Microsoft Project, or Primavera. The settings you define determine what information is sent to your scheduling application or tool, and how it's structured.

lown Structure	e (CBS) Regi	ster Job P	roperties	0							1
Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Folder Tags	Pricing	Schedule	Cash Flow	Equipment Maintenance	Benchmar	-	
Schedule:	In	Eight Schedule	-	🗌 Always use	Plug Days	when updatir	- ng Estimate fro	om the schedule			
rrency:	U.	S. Dollar	~								
toll Up											
atically calculat	e Plug Days w	/hen rolling up cost	items for sci	heduling purposes							
ngest schedule	d days among	g all rolled up cost i	tems								
tal scheduled d	avs for all rol	ed up cost items									
	a, o ror an ron										
e recalculated w	hen a change ecalculation of te Plug Days.	is made to the sch f Plug Days for sup	eduled days	ng Days of the super of a subordinate. ems, use the 'Recalcu u in the CBS Registe	ulate Plug D						
e recalculated w ce immediate re n or the 'Calcula	hen a change ecalculation of te Plug Days.	is made to the sch f Plug Days for sup	eduled days	of a subordinate. ems, use the 'Recalcu	ulate Plug D						
e recalculated w ce immediate re n or the 'Calcula	hen a change ecalculation of te Plug Days.	is made to the sch f Plug Days for sup	eduled days	of a subordinate. ems, use the 'Recalcu	ulate Plug D						
e recalculated w ce immediate re n or the 'Calcula	hen a change ecalculation of te Plug Days.	is made to the sch f Plug Days for sup	eduled days	of a subordinate. ems, use the 'Recalcu	ulate Plug D						
	chedule: rency: oll Up atically calculat	chedule: In rrency: U. oll Up atically calculate Plug Days w ngest scheduled days among	chedule: rency: InEight Schedule U.S. Dollar oll Up atically calculate Plug Days when rolling up cost	chedule: InEight Schedule - rency: U.S. Dollar - oll Up atically calculate Plug Days when rolling up cost items for scheduled days among all rolled up cost items	chedule: InEight Schedule   rency: U.S. Dollar  oll Up  atically calculate Plug Days when rolling up cost items for scheduling purposes ngest scheduled days among all rolled up cost items	chedule: InEight Schedule  Chedule: InEight Schedule Chedule: InEight Schedule Chedule: InEight Schedule Chedule: InEight Schedule Chedule: InEight Schedule Chedule: InEight Schedule Chedule: InEight Schedule:	chedule: InEight Schedule  Always use Plug Days when updating rency: U.S. Dollar Oll Up atically calculate Plug Days when rolling up cost items for scheduling purposes ngest scheduled days among all rolled up cost items	chedule: InEight Schedule	chedule: InEight Schedule Always use Plug Days when updating Estimate from the schedule rency: U.S. Dollar oll Up atically calculate Plug Days when rolling up cost items for scheduling purposes ngest scheduled days among all rolled up cost items	chedule: InEight Schedule  Always use Plug Days when updating Estimate from the schedule U.S. Dollar	chedule: InEight Schedule  InEight Schedule IU.S. Dollar III Up III Up III Up IIII Up IIII Up IIII Up IIII Up IIII Up IIIII Up IIIIIIIII Up IIIIIIIIII

- Integrated Schedule Select your integrated schedule from InEight Schedule, Microsoft Project, Primavera, or Manual.
- Schedule Currency When you use Microsoft Project or Primavera, you can select the currency type used for the integration. The InEight Schedule and Manual option is set to U.S. Dollar by default.
- Plug Days You can select Always use Plug Days when updating Estimate from schedule.
- Cost Item Roll Up You can select to automatically calculate plug days when rolling up cost items for scheduling purposes.

### 4.3.9 OTHER JOB PROPERTIES TABS

There are several additional tabs on the Job Properties form. The other tabs will not be discussed here because they are either used for project controls, or they will be covered at another time.

	Other Job Properties Tabs
Name	Function
Minority Setup	Used to set up minority participation goals (for example, DBE or MBE) and you want to track minority participation goal attainment status during the bid process,
Job Tracking	Used to select the code that will be used when tracking job progress, define the planned production calculation, define the percent complete calculation, define the forecast methods, and define markup rates for calculating earned revenue on Time and Expense pay items.
Pricing	Used to define how you want the Balanced Unit Price for each of the job's pay items to be calculated when using the AutoPrice feature. You can also choose form several options in determining how markup is defined.
Cash Flow	Defines the cash flow rules (payment terms) that are used in the calculation of Job Financing and cost/revenue realization to generate the curves that display on the Cash Flow form.
Equipment Maintenance	Used to define the calculation of maintenance labor man-hours based on equipment utilization, to capture the impact on total man-hours when changes are made that affect the job's total value.
Benchmarking	Used to establish the historical data to be used for benchmarking the current job, and to define the default benchmark graph display and calculations.
Alternates	Used to define Alternate Scenarios, to assess the impact of those scenarios.

### EXERCISE 4.1 – DEFINE JOB PROPERTIES

In this exercise, you will continue to define your Job Properties from the job you have created in two parts. Complete the following steps:

1. On the Cover Sheet tab, fill out the following fields:

Job Location	90 <sup>th</sup> Street & Shea
City	Scottsdale
County	Maricopa
Country	United States
State	Arizona
Туре	Infrastructure
Engineer	Fred Jones
Owner	Jerry Slate
Architect	Robert Frost
Contract Duration	80
Time Measure	Calendar Days
Forecast Start	October 15, 2019
Duration (days)	70
Bid Date and Bid Time	10/1/2019 2:00 PM
Estimator	Jim Sly
Bid Location	123 Main Street
Owner's Estimate	\$500,000.00
Opening Type	Public
Proposal Type	Unit Price
Plan Holders	10
Liquidated Damages	\$1000.00 Per Day
RFQ Contact	Jim Sly

In this part 2 of this exercise, you will continue to define your Job Properties from the Job you have created. Complete the following steps:

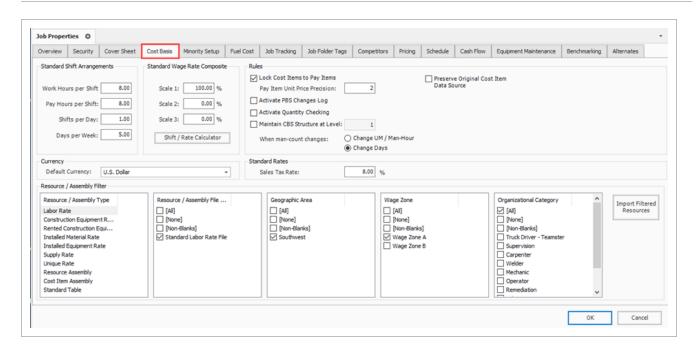
- 2. On the Cost Basis tab:
  - Ensure the Shift Arrangement is 8 hours a day, 5 days a week
  - Ensure the Wage Composite is set to 100% Scale 1
  - Ensure the **Sales Tax** is set to 8%

#### You should end up with similar results

The following Cover Sheet properties are defined:

Verview Secur	rity Cover Sheet	Cost Basis	Minority S	etup F	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment Mainte	enance	Benchmarking	Alternates	
Identification																
Location:	Scottsdale			Тури	e: infrastr	ucture						Contract Duration:				8
City:	Scottsdale			Engineer	er: Example	e Engineer Fre	ed Jones				1	Time Measure:	Calenda	r Days 👻		
County:	Maricopa Owner: Example Owner Jerry Slate						Slate					Forecast Start:	10/15/20	019 -		
Country:	US	•		Archited	t: Example	e Architect Rol	bert Frost					Forecast Finish:	12/24/20	019 -		
State:	AZ	•										Duration:				7
Latitude:	[		0.00000													
	[															
Longitude:			0.00000													
Longitude: Proposal																
Longitude: Proposal	: 10/1/2019	•						Opening Ty	/pe: publ	lic						
Longitude: Proposal		•						Opening Ty Proposal Ty								
Longitude: Proposal Bid Date: Bid Time:			0.00000	n Sly					vpe: Unit							1
Longitude: Proposal Bid Date: Bid Time: Estimator:			0.00000	n Sły				Proposal Ty	ers:						\$1,	1
Longitude: Proposal Bid Date: Bid Time: Estimator:	Hard Dollar Corpor		0.00000	n Sly				Proposal Ty Plan Hold	rpe: Unit ers: ges:	Price			•		\$1,	
Longitude: Proposal Bid Date: Bid Time: Estimator: Bid Location:	Hard Dollar Corpor		0.00000	n Siy			\$500,000.00	Proposal Ty Plan Hold Liquidated Damag	pe: Unit ers: ges: Per: Day	Price			•		\$1,	

The following Cost Basis settings are defined:



#### Congratulations, you have completed this exercise!

# 4.4 PAY ITEM CREATION

Pay items typically represent the owner required deliverables a contractor must submit pricing for. Within InEight Estimate, pay items are used to distribute the cost calculated in the Cost Breakdown Structure and all markup, fees or contingency calculated in the Price Breakdown Structure to a list of defined items. This allows the total estimate value to be distributed to a structure that is different then the CBS. Pay Items are predominantly used by Contractors to prepare a bid sheet. Owners may use pay items to identify funding sources or for various reporting needs.

Many Bid Forms are organized by grouping bid items for related scopes of work. Pay items within the Pay Item and Proposal screen can be grouped in a hierarchy by utilizing the Position Code column.

You can create pay items in the Pay Item & Proposal Register. Access this form by selecting the **Setup** tab > **Pay Item & Proposal**.



	Name	Description
1	Proposal and Item Recaps	Related to pricing during bid close-out. You can disregard them at this time.
2	Pay Item Number	Represents the bid item number from the client (if they give you one) or can be a number you specify. This field is alpha-numeric
3	Position Code	Controls the way pay items can be grouped, and provide you with an efficient way to sort.
4	Description	You can enter a pay item description.
5	Pay Quantity and Forecast (T/O) Quantity	The Pay Quantity is the quantity provided by the client. The Forecast (T/O) Quantity is your measured quantity for the item.

### 4.4.1 OVERVIEW - PAY ITEM & PROPOSAL REGISTER

Proposal R	ecap - Training	Job						×	Item Reca	p - 200 SITEW	ORK & ROADW	AY						×
	Curre	nt	Target	Forecast	Variance				Description			Unit Price	Total Pr					
Price:	\$6,569,735.0	0 \$5,8	97,950.68	\$6,577,223.80	\$671,784.32	сит						(balanced)	(balance \$2,834		(current) \$3,402,700.			
Markup:	\$987,477.	27 \$3	15,692.95	\$1,044,716.27	\$729,023.32	сит			V A Price	istribution			\$2,834		\$3,402,700.			- 1
Margin%:	15.	)3	5.35	15.88	\$731,836.84	сит			Ŭ , 🛓				\$150.1		\$718,760.4			
									· · ·		rkup records)		<i>4100</i> ,	\$0.00	\$568,618.5			
										A Business (	Overhead		\$150,1	141.93	\$150,141.9	3		
																		_
rag columns	2 group	-0				-0	6								Saved vie	ews: Standard	View	٠
Pay Item Number	Posit	on . 🗢	Lock Quantity	Lock Price	Description	•	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Currency	Unit Price (current)	Total Price (current)		Unit Markup (balanced)	Total Markup (balanced)	Unit Distribution	Total Distribution	Un (ci
= 200	1				SITEWORK & R	OADWAY				U.S. Dollar		\$3,402,	700.00		\$150,141.93		\$319,521.54	
+ 6410	1.1				Mobilization		1.00	1.00	Lump Sum	U.S. Dollar	\$395,600	.00 \$395,	600.00	\$737.74	\$737.74	\$4,435.45	\$4,435.45	
+ 2010	1.2				Clearing & G	ubbing	10.00	10.00	Acre	U.S. Dollar	\$5,900	.00 \$59,	000.00	\$257.19	\$2,571.93	\$1,251.61	\$12,516.08	
+ 202.0	183 1.3				Undassified	Excavation	50,000.00	50,000.00	Cubic Yard	U.S. Dollar	\$	i.50 \$275,	000.000	\$0.30	\$14,840.72	\$0.83	\$41,414.20	
+ 303 5	912 1.4				Aggregate B	ase	40,000.00	45,000.00	Ton	U.S. Dollar	\$20	i.50 \$1,060,	000.000	\$0.94	\$37,486.40	\$2.05	\$82,054.63	
+ 303 4	1263 1.5				Asphalt Con	rete Hot Mix Type A	38,000.00	35,000.00	Ton	U.S. Dollar	\$43	.45 \$1,613,	100.00	\$2.49	\$94,505.14	\$4.71	\$179,101.18	
<b>400</b>	2				WATER & SEW	ER				U.S. Dollar		\$718,	550.00		\$34,584.99		\$76,228.25	
+ 413(8	3) 0464 2.1				36 Inch RCP	Culvert Class III	1,000.00	1,024.00	Linear Feet	U.S. Dollar	\$93	.45 \$97,	450.00	\$4.33	\$4,325.59	\$9.94	\$9,944.34	
+ 800 0	2.2				10 Inch PVC	Force Main (SDR21)	12,000.00	12,000.00	Linear Feet	U.S. Dollar	\$2	\$354,	000.00	\$1.43	\$17,165.84	\$3.04	\$36,531.54	1
+ 800 0	1330 2.3				24 Inch PVC	Gravity Sewer (SDR35)	3,000.00	3,000.00	Linear Feet	U.S. Dollar	\$64	k.50 \$193,	500.00	\$3.16	\$9,484.48	\$7.32	\$21,965.47	
+ 800 0	2.4				4 Foot Diame	ter Manhole	16.00	16.00	Each	U.S. Dollar	\$4,600	.00 \$73,	600.00	\$225.57	\$3,609.08	\$485.68	\$7,786.90	
<b>500</b>	3				STRUCTURAL O	ONCRETE & BRIDGES				U.S. Dollar		\$631,	895.00		\$32,304.21		\$78,703.66	
+ 501(4	A) 1306 3.1				Structural Ex	cavation & Backfill	800.00	800.00	Cubic Yard	U.S. Dollar	\$20	.00 \$22,	400.00	\$1.39	\$1,111.52	\$3.16	\$2,525.23	
+ 506()	A) 1322 3.2				Steel Reinfor	cement	30,000.00	30,000.00	Pound	U.S. Dollar	\$	.70 \$51,	000.000	\$0.08	\$2,536.15	\$0.13	\$4,011.30	
+ 5030	1313 3.3				Retaining Wa	N.	850.00	850.00	Cubic Yard	U.S. Dollar	\$54	.00 \$463.	250.00	\$27.45		\$67.68	\$57.526.49	
		20	5									\$6,569,	735.00		\$315,692.95		\$645,755.99	

#### 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

ag	columns here	oup				EI.	nd: Search Fo	···	Saved views:	Simple View	
	Pay Iten Number	.ock Price	Row Number 🖦	Line Number	Description 3	Pay Quantity	Unit of Measure	4 Icy	Unit Price (current)	Total Price (current)	% Margin
	+ 1000		1	1	Mobilization	1.00	LS	ors. Dollar	\$0.00	\$0.00	0.00
									[		

### 4.4.2 PAY ITEM PRICES BY CATEGORY

Owners are increasingly requiring more information from contractors as part of their bid submissions. Many times, this is a further breakdown of a bid price such as separating the price of an item based on its labor cost, material cost or man-hours. Select columns in the Pay Item & Proposal register enable users to summarize their pay item prices by up to 10 price categories.

In addition to seeing the price by category, these additional columns also give users better visibility into how the price is established, including columns for the total cost, total distribution, total markup and markup percent. These new columns make it easier to verify that the distribution of unassigned cost and markup are calculated as intended by the estimator.

Pay Item Number	Position 🚋	Lock Quantity	Lock Price	Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Currency	LABOR Cost	LABOR Cost Distribution	LABOR Markup	LABOR Price (balanced)	LABOR Price (current)	LABOR Markup %	Unit Price (current)
200	1			SITEWORK & ROADWAY				U.S. Dollar	\$291,828.52	\$51,472.21	\$7,224.74	\$350,525.47	\$394,902.06	2.48	
+ 641 0 100	1.1			Mobilization	1.00	1.00	Lump Sum	U.S. Dollar	\$2,449.51	\$386.80	\$60.85	\$2,897.16	\$81,365.80	2,48	\$395,600.00
+ 201 0102	1.2			Clearing & Grubbing	10.00	10.00	Acre	U.S. Dollar	\$14,880.57	\$7,301.27	\$344.82	\$22,526.66	\$22,405.37	2.32	\$5,900.00
+ 202 0 183	1.3			Unclassified Excavation	50,000.00	50,000.00	Cubic Yard	U.S. Dollar	\$62,230.08	\$9,800.01	\$1,545.91	\$73,576.00	\$73,159.96	2.48	\$5.5
+ 303 5912	1.4			Aggregate Base	40,000.00	45,000.00	Ton	U.S. Dollar	\$99,794.93	\$15,809.26	\$2,479.10	\$118,083.29	\$171,742.65	2.48	\$26.5
+ 303 4263	1.5			Asphalt Concrete Hot Mix Type A	38,000.00	35,000.00	Ton	U.S. Dollar	\$112,473.43	\$18,174.87	\$2,794.06	\$133,442.35	\$112,437.69	2.48	\$42.4
400	2			WATER & SEWER				U.S. Dollar	\$128,895.90	\$20,324.84	\$3,202.02	\$152,422.76	\$167,735.34	2.48	
+ 413(B) 0464	2.1			36 Inch RCP Culvert Class III	1,000.00	1,024.00	Linear Feet	U.S. Dollar	\$19,602.99	\$3,084.69	\$486.98	\$23,174.66	\$28,284.74	2,48	\$97.4

### 4.4.3 STANDARD PROPOSAL REPORT

The Pay Item Standard Proposal report is located in Execution > Reports > Pay Item & Proposal > **Standard Proposal**, and is intended to be used as a bid form, and distributed to other clients, partners, and contractors. In the Details box below, you can determine which key fields you want included and shown on your standard proposal report.

Reports A	Settings: Default	*									
Job Properties		_									
Foundation Setup Data	Print Details Layout Header/Footer	r									
Resources	Show the below Pay item details			,							
Resource Assemblies			Filter by currency:	No Filter	*						
Cost Breakdown Structure	Line Number		Show the below Proposal								
Quotes Price Breakdown Structure	Pay Item Number		Job Code	Job City							
Pay Item & Proposal	Position Code		Job Description	Job County							
Standard Proposal	Subtotals		Bid Date	Job State							
DOT Proposal	Running Totals		Bid Time	Job Country							
Pay Item Summary	Suspended Items		JobLocation								
Pay Item Currency Comparison	Include Additional Proposal pages		Term for Document								
Pay Item Price Breakdown	Cover Sheet		Proposal/Bid								
Biling Rate Reports	Preferences Sheet		() Tender								
Job Tracking			O Custom								
Estimate Comparison Report Audit	Unit Price precision		Custom								
Job Register	Truncate values based on decimal precis										
Library Module	O Do not truncate values (show decimal pr	precision)									
Custom Reports	Contribution Tests										
iaved Views	Certification Text: O Nor	one	m								
ludget Exports		Settings: Pre-	evious	-							
A Systems		Print Details	is Layout Header/F	ooter Proposal							
American Contractor (versions 4.1)		Print Details	is Layout Header/P	ooter Proposal							
Bidtek Vision					<u> </u>						
Budget File Worksheet	Signature Block:				4						
Budget File Worksheet CGC (version 34.3)	Signature Block:				·						
Budget File Worksheet CGC (version 34.3) CGC (version 35.0)	Signature Block:				Proposal INFIGHT	PAUL TRIP	PI K Training J	Job			
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INFIGHT	PAUL TRIP Job Code Description	PI r: Training J r: Training J	lob Job - Maricopa County No. TM2924			
Budget File Worksheet CGC (version 34.3) CGC (version 35.0)					Proposal INEIGHT - Job Co	Job Code Description de	PI r: Training J r: Training J	Training Job			
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co	Job Code Description	PI : Training J : Training J				
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job De	Job Code Description de scription	PI :: Training J :: Training J	Training Job Training Job - Maricopa County No. TM2524 Phoenix			
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job De Job Ci Job Co	Job Code Description de scription ly unty	Pi r: Training J r: Training J	Training Job Training Job - Maricopa County No. TM2394 Phoenix Maricopa			
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job De	Job Code Description de encription ly unty te	PI r: Training J r: Training J	Training Job Training Job - Maricopa County No. TM2524 Phoenix			
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Ca Job Da Job Ca Bid Da Bid Tin	Job Code Description de scription V unty te ne	r: Training J 1: Training J	Training Jab Training Jab - Mancopa County No: TM204 Pilosetit Mancopa S do: 00 PM 9 do: 00 PM Proposal			
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job De Job Ci Job Co Bid Da	Job Code Description de scription V unty te ne	r: Training J 1: Training J	Training Jdb Training Jdb - Maricopa County No TM28/4 Phoenix Maricopa 5-Jan-2020 3:00:00 PM	Quantly Unit of Measure	Unit Price	Total Price
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Ca Job Da Job Ca Bid Da Bid Tin	Job Code Description de scription V unty te ne	r: Training J 1: Training J	Training Jab Training Jab - Maricopa County No TM204 Pitoetik Manicaa 5-Jah-200 5-000 PM Picepeel Description	Quantity Unit of Measure	Unit Price	Total Price 3,402,700.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Ca Job Da Job Ca Bid Da Bid Tin	Job Code Description de scription V writy te te te Line No.	r: Training J I: Training J Pay Item No.	Trening Job Trening Job - Marcopa County No TU0054 Process S-Jan-200 3-00:00 PM - Proposal Description Description	Quantity Unit of Measure 1.00 Lump Sum	Unit Price 395,500	
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job Do Job Co Bid Da Bid Tin Position Co 1	Job Code Description de scription y winty le sc 22 10	<ul> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> </ul>	Training Jab. Training Jab. Marcage Jacobia Marcage County No. 11.0254 Marcage Jacobia Marcage County No. 11.0254 Marcage County No. 11.0254 Michild Response County No. 11.0254 Michild Res	1.00 Lump Sum	395,600	3,402,700.00 395,600.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job Do Job Ci Job Ci Job Ci Bid Da Bid Da Bid Da Bid Ta Position Co	Job Code Description de scription y winty te se de Line No. 22 10 20	<ul> <li>Payltem No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> </ul>	Training Ab Training Job. Marcoga Marcoga Job 00 RM Description Science A GADINARY Extended Revergion Science A GADINARY Description	1.00 Lump Sum 10.00 Acre	395,600 5,900.00	3,402,700.00 395,600.00 59,000.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Ce Job De Job Ce Bid Da Bid Tin Position Co 1 1.1 1.2 1.3	Job Code Description de escription V winty de Line No. 22 10 20 30	<ul> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> </ul>	Training Jab Training Jab Mantoga County No 110254 Manoga Jab do 30 PM Description School Despring School And	1.00 Lump Sum 10.00 Acre 50,000 00 Cubic Yard	395,600 5,900.00 5.50	3,402,700.00 395,600.00 59,000.00 275,000.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC		-			Proposal INEIGHT - Job Co Job Do Job Ci Job Ci Job Ci Bid Da Bid Da Bid Da Bid Ta Position Co	Job Code Description de scription y winty te se de Line No. 22 10 20	<ul> <li>Payltem No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> </ul>	Training Ab Training Job. Marcoga Marcoga Job 00 RM Description Science A GADINARY Extended Revergion Science A GADINARY Description	1.00 Lump Sum 10.00 Acre	395,600 5,900.00 5.50	3,402,700.00 395,600.00 59,000.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Ce Job De Job Ce Bid Da Bid Tin Position Co 1 1.1 1.2 1.3	Job Code Description de escription V winty de Line No. 22 10 20 30	<ul> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> </ul>	Training Jab Training Jab Mantoga County No 110254 Manoga Jab do 30 PM Description School Despring School And	1.00 Lump Sum 10.00 Acre 50,000 00 Cubic Yard	395,600 5,900.00 5.50 26.50	3,402,700.00 395,600.00 59,000.00 275,000.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC		-			Proposal INEIGHT - Job Co Job Do Job Co Job Co Bid Da Bid Tim Position Co 1 1.1 1.2 1.3 1.4	Job Code Description de escription V v mnty le e 22 10 20 30 40	<ul> <li>Training J</li> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> <li>303 5912</li> </ul>	Training Jab. Training Jab. Mancaga Jabo da Mancaga County No 110254 Jabo da Mancaga Jabo da Benzeptan Sector San Benzeptan Description County	1.00 Lump Sum 10.00 Acre 50,000 00 Cubic Yard 40,000 00 Ton	395,600 5,900.00 5.50 26.50	3,402,700.00 395,600.00 59,000.00 275,000.00 1,060,000.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job Dr Job C Bid Da Bid Tin Position Co 1 1.1 1.2 1.3 1.4 1.5 2	Job Code Description decription wanty de Line No. 22 10 20 30 40 50 18	<ul> <li>Training J</li> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> <li>303 5912</li> <li>303 4263</li> <li>400</li> </ul>	Training Jab Training Jab. Martogra Courty No TU2054 Marcoga 3:00:00 PM Decorption School 2007 STEN Crick A GUCUNY Unclassified Schooling Unclassified Schooling Unclassified Schooling Unclassified Schooling Appropriate State	1.00 Lump Sum 10.00 Acre 59,000 00 Cubic Yard 40,000 00 Tan 38,000 00 Tan	395,600 5,900.00 5.50 26.50 42.45	3,402,700.00 385,600.00 59,000.00 1,060,000.00 1,613,100.00 718,550.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job Do Bid Da Bid Da Bid Ta Position Co 1 1 1.1 1.2 1.3 1.4 1.5 2 2.1	Job Code Description de cription wurty de Line No. 22 10 20 30 40 50 18 50	<ul> <li>Training J</li> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> <li>303 5912</li> <li>303 4283</li> <li>400</li> <li>413(8) 0464</li> </ul>	Training Jab Training Jab. Mantoga Courty No 110254 Manoga Jab do Tab. Description Salational Description Salational Contempo Salational Contempo Unclassified Excatation Apprend Each Apprend Each Appr	1 00 Lump Sum 10 00 Acte 50,000 00 Cullic Yad 40,000 00 Tor 30,000 00 Tor 1,000 00 Linear Part	395,600 5,900.00 5.50 26.50 42.45 97.45	3,402,70000 395,600.00 59,000.00 1,060,00000 1,060,00000 1,613,10000 718,550.00 97,450.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job Dr Job C Bid Da Bid Tin Position Co 1 1.1 1.2 1.3 1.4 1.5 2	Job Code Description decription wanty de Line No. 22 10 20 30 40 50 18	<ul> <li>Training J</li> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> <li>303 5912</li> <li>303 4263</li> <li>400</li> </ul>	Training Jab Training Jab Minorga Jabo 200 Ministropa County No TM2524 Jabo 200 Ministropa Jabo 200 Minist	1.00 Lump Sum 10.00 Acre 59,000 00 Cubic Yard 40,000 00 Tan 38,000 00 Tan	395,600 5,900.00 5.50 26.50 42.45	3,402,700.00 385,600.00 59,000.00 1,060,000.00 1,613,100.00 718,550.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job Do Bid Da Bid Da Bid Ta Position Co 1 1 1.1 1.2 1.3 1.4 1.5 2 2.1	Job Code Description de cription wurty de Line No. 22 10 20 30 40 50 18 50	<ul> <li>Training J</li> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> <li>303 5912</li> <li>303 4283</li> <li>400</li> <li>413(8) 0464</li> </ul>	Training Jab Training Jab. Mantoga Courty No 110254 Manoga Jab do Tab. Description Salational Description Salational Contempo Salational Contempo Unclassified Excatation Apprend Each Apprend Each Appr	1 00 Lump Sum 10 00 Acte 50,000 00 Cullic Yad 40,000 00 Tor 30,000 00 Tor 1,000 00 Linear Part	395,600 5,900.00 5.50 26.50 42.45 97.45	3,402,70000 395,600.00 59,000.00 1,060,00000 1,060,00000 1,613,10000 718,550.00 97,450.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Cc Job Dc Job Cc Bid Da Bid Ta Position Co 1 1 1.1 1.2 1.3 1.4 1.5 2 2.1 2.2	Jobs Cook Description de scription y writy te to 22 10 20 30 40 50 18 50 70	<ul> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> <li>303 5912</li> <li>303 4263</li> <li>400</li> <li>413(8) 0464</li> <li>800 0220</li> </ul>	Training Jab Training Jab Minorga Jabo 200 Ministropa County No TM2524 Jabo 200 Ministropa Jabo 200 Minist	1.00 Lumo Sum 10.00 Acce 50,000 00 Data: Yad 40,000 00 Tor 30,000.00 Tor 1,000 00 Linear Feet 12,000 00 Linear Feet	385,600 5,900.00 5.50 28.50 42.45 97.45 29.50	3,402,70000 395,600.00 275,000.00 1,060,00000 1,613,10000 718,550.00 97,450.00 354,000.00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT - Job Co Job Co Bid Da Bid Da Bid Da Bid Da Co 1 1 1.1 1.2 1.3 1.4 1.5 2 2.1 2.1 2.2 2.3	Job Code Description de scription y de Line No. 22 10 20 30 40 50 18 50 70 50 90	<ul> <li>Training J</li> <li>Training J</li> <li>Pay Item No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> <li>303 5912</li> <li>303 4263</li> <li>400</li> <li>413(8) 0464</li> <li>800 0220</li> <li>800 0330</li> <li>800 0400</li> </ul>	Training Jab Training Jab. Markoga Courty No TU2054 Marcaga 30:00 TPM Society Society Society No TU2054 Society Society Societ	1.00 Lump Sum 10.00 Acm 50,000 00 Cube Yasi 40,000 00 Tor 30,000 00 Tor 1,000 00 Linear Feet 3,000 00 Linear Feet 3,000 00 Linear Feet	395,600 5,900.00 5.50 26.50 42.45 97.45 29.50 64.50	3,402,700,00 395,600,00 59,000,00 1,060,000,00 1,613,100,00 97,450,00 97,450,00 193,500,00 73,600,00
Budget File Worksheet CGC (version 34.3) CGC (version 35.0) CMIC					Proposal INEIGHT	JobsCroke Description de scription y wrnty te to te Line No. 22 10 20 30 40 50 18 50 70 80	<ul> <li>Training J</li> <li>Training J</li> <li>Payttem No.</li> <li>200</li> <li>641 0100</li> <li>201 0102</li> <li>202 0183</li> <li>303 4263</li> <li>400</li> <li>413(8) 0464</li> <li>800 0220</li> <li>800 0330</li> <li>800 0400</li> <li>500</li> </ul>	Training 40 Training 40 Minitogia Courty No TU2024 Manoga 30 00 Mini Straining Annual Courty No TU2024 Straining Annual Court Straining Annual Court Courts An OCCIVITY Unclassified Scattering Appropriate Date Appropriate Date Appropriate Date Appropriate Date Appropriate Date Straining A Courter Har Mar Type A Anat Tel A Straining A Mart Tel	1.00 Lump Sum 10.00 Acm 50,000 00 Cube Yasi 40,000 00 Tor 30,000 00 Tor 1,000 00 Linear Feet 3,000 00 Linear Feet 3,000 00 Linear Feet	395,600 5,900.00 5.50 26.50 42.45 97.45 29.50 64.50	3,402,700,00 395,600,00 59,000,00 275,000,00 1,613,100,00 718,550,00 97,450,00 354,000,00

### EXERCISE 4.2 – CREATE PAY ITEMS

In this exercise, you will practice creating pay items in the Pay Item & Proposal Register. Complete the following steps, using a job of your own.

Position Code	Pay Item Number	Description	Pay Quantity	Unit of Measure
1	200	SITEWORK & ROADWAY		
1.1	641 0100	Mobilization	1	LS
1.2	201 0102	Clearing & Grubbing	10	Acre
1.3	202 0183	Excavation	50,000	CY
2	400	WATER & SEWER		
2.1	800 0220	10 PVC Pipe	1,000	LF

#### You should end up with the following results:

Position E Pay Item Code Number		Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure
1	200	SITEWORK & ROADWAY			
+ 1.1	641 0 100	Mobilization	1.00	1.00	LS
+ 1.2	201 0 102	Clearing & Grubbing	10.00	10.00	Acre
+ 1.3	202 0 183	Excavation	50,000.00	50,000.00	CY
<b>2</b>	400	WATER & SEWER			
+ 2.1	800 0220	10 PVC Pipe	1,000.00	1,000.00	LF

### Congratulations, you have completed this exercise!

#### **LESSON 4 REVIEW**

- 1. This is where you enter basic information about the job as well as define your cost basis.
  - a. Pay Item & Proposal
  - b. Job Properties
  - C. Library
  - d. Job Folder
- 2. On the Job Properties form, this tab is where you enter information such as the start date, bid date, job type and location.
  - a. Overview
  - b. Cover Sheet
  - C. Cost Basis
  - d. Foundation Setup Data
- 3. These are the project deliverables; anything the owner agrees to measure and pay for.
  - a. Cost Items
  - b. Resources
  - C. Target Price
  - d. Pay Items

#### **LESSON 4 SUMMARY**

As a result of this lesson, you can:

- Create a new job
- Enter Job Properties
- Create pay items in the Pay Item & Proposal Register

This page intentionally left blank.



# **LESSON 5 – DIRECT COSTS**

## **LESSON DURATION: 30 MINUTES**

## LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Explain the Cost Breakdown Structure and its purpose
- Create cost items
- Add costs and production
- Manage cost item details

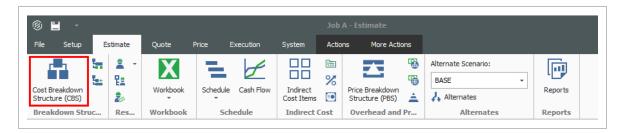
## LESSON TOPICS

# **5.1 COST BREAKDOWN STRUCTURES**

The Cost Breakdown Structure (CBS) is the main form where you will do your cost estimating.

- It is the hierarchy of work activities that make up the estimate
- Each row in the CBS represents a work activity or organizing category and is called a cost item

To access the Cost Breakdown Structure, from the InEight Estimate landing page select the **Estimate** tab, then under the Breakdown Structure section select **Cost Breakdown Structure (CBS)**.



#### Overview - Cost Breakdown Structure (CBS) Register

	Name	Description
1	Actions Menu	Shortcut icons allow you to edit cost items and import items from other sources such as Excel.
2A	CBS Tree Filter Mode (drop- down)	The CBS Tree filter shows the CBS hierarchy and is used to quickly help filter cost items, instead of scrolling the CBS to locate certain cost items. The CBS Tree Filter lets you choose between a filter mode or a new navigation mode.
2B	CBS Tree Filter or Navigation Mode	Both Filter and Navigation modes on the left side of the page provides you with the visibility of your entire CBS structure, as well as giving you the option to navigate and filter throughout the CBS estimate. The Cost Item record can also be tiled next to the tree to make navigating and filtering possible, while viewing all the cost item record details at the same time.
3	Left CBS register	This side of the register contains all of the estimate activities (cost items) that you create or import, organized into a parent-child hierarchy.
4	Right CBS register	This side of the register contains numerous columns for cost detail, production values, and user-defined tags and fields.

					Training Job						œ –	
File Setup			Execution System	Integrations	Actions More Actions							童臣
Print	-	Copy 🔀 Split	Indent 🖚	Link Field	Cost Item	Assembly	2. Resource		8 <b>- 1</b> - 1	ZE.	CBS Tree Filter Mo	de:
Review	🛞 Delete		y Cost Type 🛛 🖛 Outdent	🖑 Unlink Field	E Subordinate Cost Item	🔁 Subordinate Assembly	Resource /	Assembly Expa	nd / Filter (	lear CBS Tree	Filter	*
Export to E	xcel 🔀 Cut	+ Fill Down 🐴 Toggle	Suspended		🕂 Dependent Cost Item			Collap		ilter Filter	Navigation	
Print		Edit		Workbook		Insert				View	Travigatori	20
Cost Breakdo	wn Structure (CBS	) Register 🛛		6					•		C C	96
	ter Mode) 🛛 🗙	Drag columns here to gro	цр	0			6			Saved views: Sta	andard View	
B	Description	CBS .			Optional	Forecast	Unit of		Total Cost		Subject Cost	
v ∎	JOB	Position Code	Description		Code	(T/O) Quantity	Measure	Unit Cost	(Forecast)	Subject Cost	Rate	Allocat
88	Prime Bond	→ ■	JOB			20.00	Mile	\$294,138.13	\$5,882,762.51			
88	Price % Add-On	+	Prime Bond		PRIME BOND	1.00	Lump Sum	\$47,148.68	\$47,148.68			
	Job Financing	+	Price % Add-On		PRICE % ADD-ON	1.00	Lump Sum	\$295,638.13	\$295,638.13			
88	Indirect Cost Esca	+	Job Financing		FINANCE EXPENSE	1.00	Lump Sum	\$33,105.26	\$33,105.26			
88	Direct Cost Escala	+	Indirect Cost Escala	tion	INDIRECT COST ESCALA	TION 1.00	Lump Sum	\$2,131.11	\$2,131.11			
88	Indirect Cost Add	+	Direct Cost Escalatio	on	DIRECT COST ESCALATI	ON 1.00	Lump Sum	\$15,048.80	\$15,048.80			
88	Direct Cost Add-C	+	Indirect Cost Add-0	n		1.00	Lump Sum	\$5,888.67	\$5,888.67	\$294,433.42	2.00	
	SITEWORK & RO	+	Direct Cost Add-On		DIRECT COST ADD-ON	1.00	Lump Sum	\$104,088.34	\$104,088.34	\$5,204,417.24	2.00	
→ 📫 2 → 📫 3	WATER & SEWER STRUCTURAL CO	<b>□</b> 1	SITEWORK & ROADW	VAY	200	1.00	Each	\$2,464,161.56	\$2,464,161.56			
) 3 ) 1	INDUSTRIAL & RE	+ 1.1	Mobilization		641 0 100	1.00	Lump Sum	\$11,909.51	\$11,909.51			
> 📥 5	COMMERCIAL	+ 1.2	Clearing & Grubbing		201 0 102	10.00	Acre	\$3,918.50	\$39,184.97			
> 🗖 6	GUARDRAIL & SIG	■ 1.3	Unclassified Excavati	on	202 0 183	50,000.00	Cubic Yard	\$4.68	\$233,915.81			
> 🗖 7	Indirect Costs	+ 1.3.1	Excavation		1.3.1	50,000.00	Cubic Yard	\$3.00	\$149,922.88			
<b>B</b> 8	Special Risk Allow	+ 1.3.2	Embankment		1.3.2	50,000.00	Cubic Yard	\$1.68	\$83,992.94			
		□ 1.4	Aggregate Base		303 5912	45,000.00	Ton	\$15.40	\$692,928.99			
		+ 1.4.1	Furnish & Haul Bas	e Material	1.4.1	45,000.00	Ton	\$11.54	\$519,513.30			
		+ 1.4.2	Finegrade Subgrad	le	1.4.2	400,000.00	Square Yard	\$0.19	\$75,848.36			
		<b>1.4.3</b>	Install Aggregate E	Base	1.4.3	45,000.00	Ton	\$2.17	\$97,567.33			
		+ 1.4.3.1	Place Accrecate	Base	1.4.3.1	45.000.00	Ton	\$1.63	\$73.460.92			
		1	07						\$5,882,762.51			

# 5.1.1 COST ITEM TERMINOLOGY

The CBS contains both direct and indirect costs.

- **Direct Cost Items** contain costs that pertain directly to the deliverables of the project. Therefore, direct cost items are typically assigned to pay items
- Indirect Cost Items contain overhead costs that are not directly associated with particular deliverable items but contribute to the total cost of the project (e.g., supervision, site office, safety supplies, bid securities). Occasionally an indirect cost item may be assigned to a pay item (e.g., Mobilization costs that are indirect but assigned to a Mobilization pay item).

InEight Estimate uses various terms to describe the parent-child relationships of the multiple levels in the CBS:

Terms	Description
Superior	A Superior cost item has subordinate (child) items below it that determine hours and costs.
Subordinate	A Subordinate cost item is a child to a Superior cost item.
Terminal	A Terminal cost item has no subordinate items. Resources, costs, and production can only be added at the terminal cost item level.

TIP

#### NOTE A Terminal cost item may or may not be a subordinate.

The levels of the CBS are referred to as Level 1, Level 2, etc., as you drill down in the structure. As costs are defined on the terminal items, the sum of the terminal cost items roll up to the superior cost items.

A superior cost item can have no costs of its own; its costs are strictly the rolled-up total from the subordinate cost items below it.

You can use superior cost items as buckets for organizing your work.

As hours and costs are defined on the terminal items, the sum of the terminal cost items roll up to the superior cost items.

## 5.1.2 WORK BREAKDOWN STRUCTURES

The Work Breakdown Structure (WBS) allows you to reorganize the estimate using different formats such as Construction Specifications Institute (CSI) MasterFormat or UniFormat. WBS formats are used when you need multiple variations and summary reports of an estimate. The WBS retains the same relationships between items as in the original estimate while only changing the view and items arrangement in the WBS hierarchy.

To view the Work Breakdown Structure View Register, in the Ribbon select the tab **Estimate > Work Breakdown Structures**.

1	Name	Description
1	WBS Tree	Use the WBS Tree to filter to a particular WBS item.
2	WBS Grid	When a specific WBS item is selected in the WBS Tree, all subordinate WBS items display in the WBS grid.
3	Cost Items	The Cost Items associated with the WBS subordinate in the WBS Grid displays in this data block.

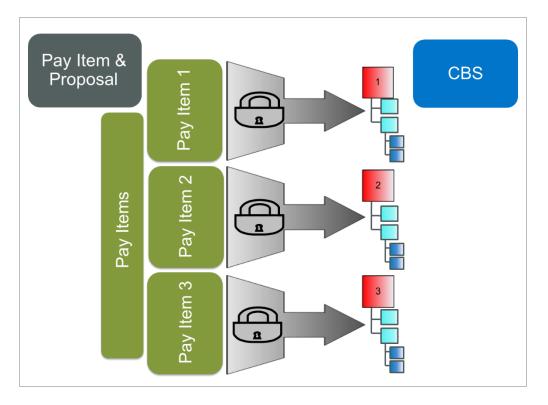
#### Overview - Work Breakdown Structure (WBS) View Register

WBS Tree	×	Dra	g columns here to group	2			F	ind: [Search	For] …	Saved views:	Standard View	*
WBS: CEAS	•	1	Code 🛓	Description				Quantity	Unit of Measure	Currency	Unit Cost	Total Cost (Forecast)
Code	Description		E CEAS	<b>Civil Engineering Account</b>	Code System			1.00	Each	U.S. Dollar	\$2,494,088.	\$2,494,088.07
	Civil Engineering Account Code System		<b>□</b> 10	GENERAL PROVISIONS				1.00	Lump Sum	U.S. Dollar	\$35,054.5	\$35,054.51
	GENERAL PROVISIONS		□ 10.10	PROJECT SETUP				1.00	Each	U.S. Dollar	\$14,000.0	\$14,000.00
> 11	EARTH WORK	→	10.10.100	YARD				1.00	Each	U.S. Dollar	\$4,000.0	\$4,000.00
> 12	PAVEMENT WORK		10.10.200	OFFICE FACILITIES				1.00	Each	U.S. Dollar	\$2,000.0	\$2,000.00
> 13	BRIDGE WORK		10.10.500	UTILITIES				1.00	Each	U.S. Dollar	\$8,000.0	\$8,000.00
> 14	CONCRETE STRUCTURES		■ 10.20	EQUIPMENT SETUP				1.00	Each	U.S. Dollar	\$14,624.3	\$14,624.39
> 17	PIPE WORK		0 10.20.100	MOBILIZATION				1.00	Load	U.S. Dollar	\$11,909.5	\$11,909.51
Cost Items												×
trag columns here to youp							Fi	nd: [Search F	ior]	Saved views:	Standard View	•
CBS Position Code	Description		otional ode	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Allocated	Allocation Source	Currency		Resource Assembly Quantity
	Setup Yard	10	NASSIGNED	1.00	Lump Sum	\$4,000.00	\$4,000.00			U.S. Dollar		

## 5.1.3 LOCKED VS. UNLOCKED APPROACH

There are two basic approaches to structuring your cost items and pay items. You can choose to work in a "locked approach" or an "unlocked approach."

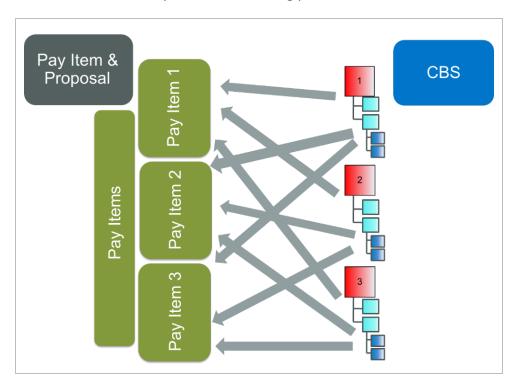
In a locked approach, level one cost items are automatically created and assigned to pay items. This locked approach works well when pay items adequately represent the work plan. Subordinate cost items inherit the pay item assignment of superior cost items.



#### NOTE

If the Lock Cost Items to Pay Item rule is checked in Job Properties, InEight Estimate will automatically create level 1 cost items in the CBS Register for each of your pay items.

The unlocked approach may work better when the pay items do not adequately represent the work plan. You can then assign your cost items to your pay items in any arrangement. Companies looking to standardize the way they estimate and use templates will want to use this approach as it allows you to dictate the cost breakdown structure. Owners will also typically use the unlocked approach since pay items are not necessary to their estimating process.



The option of working in a locked approach vs. an unlocked approach is available in the Job Properties Form, on the Cost Basis tab under the Rules section. By selecting the checkbox for Lock Cost items to Pay Item, you are choosing to work in a locked approach.

Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tag	s Competitors	Pricing	:
Standard S	hift Arrange	ments	Standard Wa	age Rate Composite	Rule	s				
Pay Hou	ırs per Shift rs per Shift: fts per Day:	8.00	Scale 1: Scale 2: Scale 3:	0.00 %		Lock Cost Items Pay Item Unit Pri Activate PBS Cha Activate Quantity Maintain CBS Str	ice Precision: anges Log y Checking	2		
Day	s per Week:	5.00	Shift	Rate Calculator		When man-count	t changes:	Change UM / M	an-Hour	

## 5.1.4 TAKE-OFF QUANTITIES

In the Cost Breakdown Structure, estimated quantities are entered into the Forecast (T/O) Quantity field with a corresponding unit of measure. The quantity will default to 1 each when you create a new cost item and should be updated to reflect the work being estimated.

	is sition ៉ 📃 de	Description	Forecast (T/O) Quantity
+	1	Mobilization	1.00
+	2	Clearing & Grubbing	10.00
=	3	Unclassified Excavation	50,000.00
+	3.1	Excavation	50,000.00
+	3.2	Embankment	50,000.00
-	4	Aggregate Base	45,000.00
+	4.1	Furnish & Haul Base Material	45,000.00
+	4.2	Finegrade Subgrade	400,000.00
=	4.3	Install Aggregate Base	45,000.00
+	4.3.1	Place Aggregate Base	45,000.00
+	4.3.2	Blue Top Aggregate Base	400.000.00

NOTE

Forecast (T/O) Quantities are only used for your cost items in the CBS Register. Pay Quantities are used for final pricing in the PBS and Pay Item & Proposal forms.

Because the training project is a "locked" job, you already have level 1 cost items, and their default take-off quantities are populated from their corresponding pay item quantities.

The following step by step walks you through adjusting the default take-off quantities on a couple of your cost items.

#### STEP BY STEP – ADJUST TAKE-OFF QUANTITIES

- 1. From the Estimate tab, select Cost Breakdown Structure (CBS).
- 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

# **5.2 COST ITEM CREATION**

During estimate development, you will create new cost items to break down your work into specific activities. You can create superior and subordinate cost items as needed to organize your work.

## 5.2.1 INSERT SUBORDINATE COST ITEM

You can add subordinate cost items in two different ways:

#### **OPTION 1**

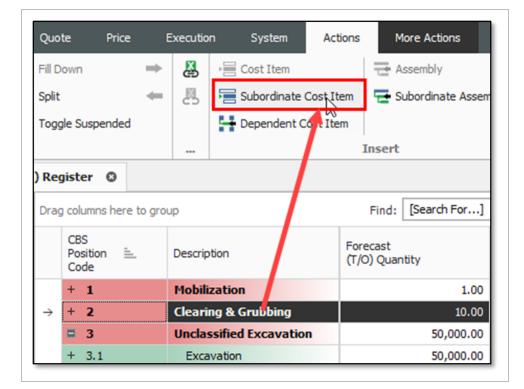
Right-click on the row header of the superior cost item and select Insert Subordinate.

- ay	g columns here to gro	op	- B	Paste
	CBS Position Code	Description	+	<u>F</u> ill Down
	•	JOB	R R	Link this field to Excel
	+	Prime Bond		UnLink from Excel
	+	Price % Add-On	18	
	+	Job Financing	$\rightarrow$	Indent
	+	Job Management & Eq	u 🔶	Outdent
	+	General Expense		
	+ 1	Mobilization		<u>I</u> nsert
	+ 2	Clearing & Grubbing		Insert Su <u>b</u> ordinate
	+ 3	Excavation	-+	Insert Dependent <u>C</u> ost Item
÷ •	· 4	10" PVC Pipe	-	
ĸ			1	

The row header is considered the far left edge of the CBS row where the small arrow appear appears above. It is used to open records and perform actions on items instead of clicking on cells within the row which will allow you to directly type into the selected cell.

#### **OPTION 2**

Click on the Subordinate Cost Item icon on the Cost Breakdown Structure (CBS) Register toolbar.



# 5.2.2 INSERT COST ITEM

You can add cost items at the same level in two different ways.

## **OPTION 1**

Right click on the row header of the superior cost item and select Insert.

	CBS Position Code	Description	Ē	Copy Paste
	+ 1	Mobilization	+	<u>F</u> ill Down
	+ 2	Clearing & Grubbing	8	Link this field to Excel
	<b>3</b>	Unclassified Excavation	B	UnLink from Excel
	+ 3.1	Excavation	-	Indent
	+ 3.2	Embankment	-	Outdent
	<b>4</b>	Aggregate Base		
	+ 4.1	Furnish & Haul Base Material		Insert
<b>-</b>	÷ 4.2	Finegrade Subgrade		Insert Su <u>b</u> ordinate
	<b>□</b> 4.3	Install Aggregate Base		Insert Dependent <u>C</u> ost Item
	+ 4.3.1	Place Aggregate Base	12	Insert Cost Item Assembly
	+ 4.3.2	Blue Top Aggregate Base	1.4	Insert Cost Item Assembly as Subordinate
	<b>5</b>	Asphalt Concrete Hot Mix T	yı 🖄	Split
	+ 5.1	Furnish & Haul Hot Mix	ż.	Insert <u>R</u> esource
,	4 60	Install Hot Mix Type A	10	

#### **OPTION 2**

Click on the Cost Item icon on the Cost Breakdown Structure (CBS) Register toolbar.

2
2
t of asure
np Su
e
oic Ya
oic Ya
oic Ya
t o asu np e bic

Because the project you are working in is a "locked" job (where cost items are locked to pay items), your CBS Register will already have level 1 cost items representing each of your pay items, and each cost item will be assigned to its corresponding pay item.

The following step by step walks you through creating a subordinate (child) cost item for one of your level-one cost items.

#### 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 equallevel cost item and selecting **Insert**.

## 5.2.3 MOVE COST ITEMS

As you develop your estimate, you may need to move cost items around in the Cost Breakdown Structure. To move a cost item:

- 1. Select the row header of the cost item you wish to move. If you select a superior cost item, it will bring the subordinates along with it.
- 2. Drag and drop the cost item to the right place in your structure. Notice one of two cursor symbols appears:

The symbol with three equal bars will drop the cost item at the same level as the cost item you drop it on.

The symbol with a subordinate bar will make the cost item become a subordinate to the one you drop it on.



## EXERCISE 5.1 - CREATE COST ITEMS

In this exercise, you will practice creating additional cost items. Create the following cost items, using your own job.

Code	Description	Forecast (T/O) Quantity	Unit of Measure
1.2.2	Grading	10	Acre
1.3.1	Excavate	40,000	CY
1.3.2	Haul	40,000	CY
4.1	Furnish Pipe Materials	1,000	LF
4.2	Excavate-Install-Backfill Pipe	1,000	LF

#### You should end up with similar results:

	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
+	1.2.2	Grading	10.00	Acre
	1.3	Excavation	40,000.00	CY
+	1.3.1	Excavate	40,000.00	CY
+	1.3.2	Haul	40,000.00	CY
	2	WATER & SEWER	1.00	Each
	2.1	10 PVC Pipe	1,000.00	LF
+	2.1.1	Furnish Pipe Materials	1,000.00	LF
+	2.1.2	Excavate-Install-Backfill Pipe	1,000.00	LF

#### Congratulations, you have completed this Exercise!

# **5.3 COSTS AND PRODUCTION**

For the cost items you've created, you can now add their costs and production. All information for a cost item is contained in a Cost Item Record.

## 5.3.1 COST ITEM RECORD

You can open the Cost Item Record by either double clicking on a cost item row header, or right clicking and selecting **Open**.

Cost Item Record Overview

	Name	Description
1	Cost Item Header Information	Provides general information about the cost item. It displays the cost item's take-off quantity, Unit of Measure, and Cost. It also indicates what Cost Source is being used. The Cost Segment drop-down is used to differentiate estimated costs in the Direct Costs, Job Overhead or Business overhead categories.
2	Costing Area	Section where costs are defined. There are three ways to enter costs: Detail, Plug, and Quote. The Cost Summary tab summarizes whatever costs are defined. Under the Cost Segment drop down, you can choose
3	Data Blocks	Contains a set of tabs for entering additional information including production, shift arrangements, man-hour factors, notes, and scheduling information.

BS Co	de:	Optional Code:	Description:					Fore	cast (T/O) Qty:	Unit of Measure	e:	Unit Cost:	Total Cost:	Currency:	
3		202 0183	Unclassified Ex	cavation					50,000.00	Cubic Yard		\$4.68	\$233,915.81	U.S. Dollar	
3.1	L	3.1	Excavation						50,000.00	Cubic Yard	-	\$3.00	\$149,922.88	U.S. Dollar	
Assi	gnment:	PI Line Number:	PI Description:							Cost Segment:		Pay Quantity:	Cost Source:	Alternate:	
202 01	183 -	30	Unclassified Ex	cavation						Direct Cost		50,000.00	Detail -	BASE	
	'										-				
C <u>o</u> st I	tem Summar	y 🍃 <u>D</u> etail : \$3	3.00 🛱 Plug	: \$0.00 💭	Quote : \$0.00	Allocation					E	mployment Setup			>
ost C	ategory		Unit Cost	Total Cost	Unadjusted Total Cost	Cost Adjustment Percent	÷٠	Cost Adjustment Amount	Billing Unit	Total Ur Billing Bil Amount Ar			ype: Construction Ec	uipment Rate	
Tot	tal		\$3.00	\$149,922.88	\$149,922.88	0.00		\$0.00	\$3.28	\$163,881.06		Description: Water Tr			
>	Labor		\$0.66	\$33,170.48	\$33,170.48	0.00		\$0.00	\$0.93	\$46,438.66 \$		Quantity (Less Waste):	Wast	e % I-on:	
	Owned Equ		\$2.34		\$116,752.40	0.00		\$0.00		\$117,442.40		waste).			
	Rented Equ	ipment	\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00		Quantity:	1.00 Producti Fa	ctor:	1
	Supplies Materials		\$0.00	\$0.00	\$0.00 \$0.00	0.00		\$0.00	\$0.00	\$0.00		Cost Driver: Sd	nedule -		
	Subcontrac		\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00	0.00		\$0.00 \$0.00	\$0.00 \$0.00	\$0.00 \$0.00		cost birteri bu	reduiter in the		
1	Fees	t .	\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00	L C	Employment Cost			
Ś	Allowance		\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00		Unit Cost: \$29	.60 Total Cost:	\$1,302.40	
	Custom Cat	tegory1	\$0.00	\$0.00	\$0.00	0.00	<b>→</b>	\$0.00	\$0.00	\$0.00		Maintenance Labor Cost			
	Undefined		\$0.00	\$0.00	\$0.00	0.00	<b>→</b>	\$0.00	\$0.00	\$0.00			.00 Total Cost:	40.00	
	-											Unit Cost: \$0	.00 Total Cost:	\$0.00	

## **5.3.2 COST SEGMENTS**

The Direct Costs, Job Overhead, and Business Overhead cost segments helps to classify the scope of work so you can report on direct vs indirect costs, and accurately control how markup is spread throughout your bid. This differentiation is necessary to effectively price work based on the risk profile of each segment of cost.

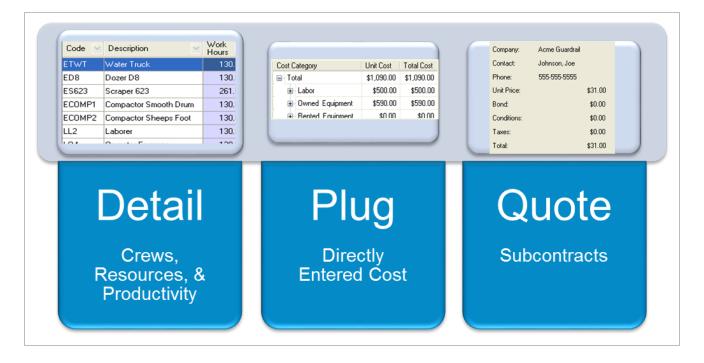
CBS Code: Optional Code: Description: Forecast (T/O) Qty: Unit of Measure: Unit Cost:   2 400 WATER & SEWER 1.00 Each \$496,284.83   2.1 413(B) 0464 36 Inch RCP Culvert Class III 1,024.00 Linear Feet \$67,54   PI Assignment: PI Line Number: PI Description: Cost Segment: Pay Quantity:   413(B) 0464 60 36 Inch RCP Culvert Class III Direct Cost 1,000.00   Model I 60 36 Inch RCP Culvert Class III Ince Teet Pay Quantity:   Cgst Item Summary Spetal : \$67.54 Plug : \$0.00 Allocation Business Overhead   This cost item has subordinate cost item and enter Details. Direct Cost Incert Cost	Cost Item Recor	d ©								
Image: Second state of the second s	CBS Code:	Optional Code:	Descri	ption:			Forecast (T/O) Qty:	Unit of Measure:	Unit Cost:	Tot
Image: Second state of the second s									·	
PI Assignment:       PI Line Number:       PI Description:       Cost Segment:       Pay Quantity:         413(B) 0464       60       36 Inch RCP Culvert Class III       Direct Cost       1,000.00         Cost Item Summary       2 Detail : \$67.54       Plug : \$0.00       Quote : \$0.00       Allocation         This cost item has subordinate cost items.       Oirect Cost       Direct Cost       Oirect Cost	2	400	WATE	R & SEWER			1.00	Each	\$496,284.83	
413(B) 0464        60       36 Inch RCP Culvert Class III       Direct Cost       1,000.00         A13(B) 0464        60       36 Inch RCP Culvert Class III       Direct Cost       1,000.00         Cost Item Summary       Spetail: \$67.54       Plug: \$0.00       Spetail: \$0.00       Allocation       Business Overhead         This cost item has subordinate cost items.       Direct Cost       Direct Cost       Direct Cost	2.1	413(B) 0464	36 Inc	h RCP Culvert Class	; III		1,024.00	Linear Feet	\$67.54	
Cost Item Summary       Detail : \$67.54       Plug : \$0.00       Quote : \$0.00       Allocation       Business Overhead         This cost item has subordinate cost items.       Direct Cost       Direct Cost       Direct Cost	PI Assignment:	PI Line Number:	PI Des	cription:				Cost Segment:	Pay Quantity:	Cos
Cost Item Summary       Detail: \$67.54       Plug: \$0.00       Quote: \$0.00       Allocation       Business Overhead         This cost item has subordinate cost items.       Direct Cost       Cost       Cost	413(B) 0464 🗎	60	36 Inc	h RCP Culvert Class	; III			Direct Cost	- 1,000.00	De
This cost item has subordinate cost items.	Cost Itom Summer	v 🚔 . Dotail . či	7 54	H Dhug x \$0,00		Allection		A Description		
Click the Next by the region of the region o	Cost Item Summar	y <u>D</u> etail ; şo	57.54	Y Plug : \$0.00	<u>O</u> uote : \$0.00	Allocation				
				ate cost item and e	otar Dataila					
Job Overnead	Click the Next Du	con to move to a s	uborun	late cost item and e	alter Details.			Job Overhead		
								×	.:	
×										

## 5.3.3 COST SOURCES

You can define costs on a cost item in one of three ways, called Cost Sources:

Tab	Description
Detail	This is the recommended costing method, where labor, equipment, and material resources are defined, along with productivity, to determine costs.
Plug	This method allows you to enter a unit or total cost directly, without needing to enter resources or production. This should rarely be used, but does have a couple of use cases:
	<ul> <li>Place holder value until you get more information (from subcontractors or designers)</li> <li>For preliminary estimates when limited information is available</li> </ul>
Quote	The Quote cost source is for contractors, subcontractors or vendor quotes.

• Creating and managing quotes is covered in Lesson - Quote Management



On each Cost Item Record, InEight Estimate gives you the option to define both Plug and Detail values on each respective tab.

#### 5.3.3.1 PLUG TAB

The Plug tab allows user to input unit or total cost to any of the listed cost categories which can be customized based on company requirements.

st Breakd	own Structure (CB	5) Register	Cost Item Rec	ord 🖸								
S Code:	Optional Code:	Description:			Forecast (T/O)	Qty:	Unit of Measures		Unit Cost:	Total Cost:	Currency:	
17	1200 0100	Toll Booth				1.00	Each	~	\$25,264.55	\$25,264.55	U.S. Dollar	
17.1	0220	Site Preparati	on			1.00	Lump Sum	•	\$3,664.55	\$3,664.55	U.S. Dollar	
Assignment	: PI Line Number	: PI Description	:				Cost Segment:		Pay Quantity:	Cost Source:	Alternate:	
200 0 100	- 170	Toll Booth					Direct Cost	~	1.00	Detail -	BASE	-
				-								_
ost Item Sun	nmary 💁 Detail :	\$3,664.55	Plug: \$2,500.00	Quote : \$	0.00 <u>A</u> llocation			Co	st Item Setup			
st Category		Unit Cost	Total Cost					D	efault Pay Rules			
Total		\$2,500.00	\$2,500.00							Scale 1: Scale	2: Scale 3:	
> Labor		\$0.00	\$0.00						Composite Wage Sc	ale: 100.00 0.	00 0.00	
> Owned	Equipment	\$0.00	\$0.00						For every 8.00 ho	urs worked, pay 8.0	0 hours	
> Rented	Equipment	\$0.00	\$0.00									
> Supplie	s	\$0.00	\$0.00						efault Shift Arrangeme			
> Materia	ls	\$0.00	\$0.00					N	/ork Hours per Shift:	Shifts per Day: D	ays per Week:	:
> Subcor	tract	\$2,500.00	\$2,500.00						8.00	1.00	5.00	
> Fees		\$0.00	\$0.00					D	efault Properties			
> Allowar	nce	\$0.00	\$0.00						Account Co	de: 8000	1	
Custon	Category1	\$0.00	\$0.00									
Undefin	ned	\$0.00	\$0.00						Cost Cu	ve: Linear	•	
Billing Rate		\$0.00	\$0.00					•				
Billing Rate	Markun	\$0.00	\$0.00						🚉 P 🕵	📚 📜 S		$\gtrsim$

## 5.3.3.2 DETAIL TAB

031	Code:	Op	otional Co	de: D	escription:			Forec	ast (T/O) Qty:	Unit of Measur	e:	Unit Cost:	Total Cost:	Currency:	
	17	12	00 0100	Т	Foll Booth				1.00	Each	~	\$25,264.55	\$25,264.55	U.S. Dollar	
	17.1	02	20	s	Site Preparatio	n			1.00	Lump Sum	-	\$3,664.55	\$3,664.55	U.S. Dollar	
I As	signment:	PI	Line Num	ber: P	I Description:					Cost Segment:		Pay Quantity:	Cost Source:	Alternate:	
1200	0 0 1 0 0 -	17	0	Т	foll Booth					Direct Cost	~	1.00	Detail +	BASE	
C <u>o</u> st	t Item Summa	ary	🏂 <u>D</u> eta	ail : \$3,60	64.55 🗳	Plu <u>a</u> : \$2,500.00	🖵 <u>Q</u> uote : \$0.	00	Allocation		Co	st Item Setup			×
rag	columns here	e to g	roup	Fin	nd: [Search F	For] S	aved views:	Previou	is View	-	D	efault Pay Rules	Scale 1: Scale	2: Scale 3:	
	Row Nu =	c	2	Resourc Assembl		Description	Quantity (Less Waste)		Waste % Add-on	Qua		Composite Wage Sci For every 8.00 hos	ale: 100.00 0.	00 0.00	
÷	+	1 L	.L2			Laborer				3.00 E					
- [	+	2 L	.01			Operator Class 1				1.00 E		efault Shift Arrangeme /ork Hours per Shift:		ays per Week:	
	+	3 E	EG 14G			Grader 14G				1.00 E		8.00	1.00	5.00	
	+	4 E	TWT			Water Truck				1.00 E					
	+	5 L	.T1			Teamster				1.00 E		efault Properties	day 0000		
*												Account Co		2	
												Cost Cur	ve: Linear	•	

Entering both a detailed and plug cost allows you to define costs at a higher summary level initially (Plug tab), and then define more detail as the estimating process progresses (Detail tab). You can

review and compare your plug and detail values by toggling between tabs, but your cost item will only contribute the total cost from one of the tabs based on which cost source is selected.

You control which cost is used by selecting **Detail** or **Plug** in the Cost Source field on the Cost Item Record.

Quote : \$0.00     Allocation       aved views:     Previous View       Quantity     Waste       % Description       Default Pay Rules       Plug       Quantity     Waste       % Add-on       3.00       E       1.00       E       1.00       E       1.00       E       1.00       E							
1.00       Each       \$24,100.00       \$24,100.00       U.S. Dollar         1.00       Lump Sum       \$2,500.00       \$2,500.00       U.S. Dollar         Cost Segment:       Pay Quantity:       Cost Source:       Alternate:         Direct Cost       1.00       Plug       BASE         Quote : \$0.00       Allocation       Cost Item Setup       Default Pay Rules         Quantity       Waste       Qua       N         Quantity       Waste       Qua       N         Image: State of the setup       Default Pay Rules       Plug         Composite Wage Sca       For every 8.00 hou       Default Shift Arrangemer         Work Hours per Shift:       8.00       :       ×         Image: State of the setup       Default Shift Arrangemer       State of the setup	i ©						•
1.00       Lump Sum       \$2,500.00       \$2,500.00       Us. Dollar         Cost Segment:       Pay Quantity:       Cost Source:       Alternate:         Direct Cost       1.00       Plug       BASE         Quote : \$0.00       Allocation       Cost Item Setup       Default Pay Rules         Quantity       Waste       Qua       N         Quantity       Waste       Qua       N         Add-on       3.00       E       For every       8.00         Default Shift Arrangemer       Work Hours per Shift:       8.00       E         0       1.00       E       0.00       E		Forecast (T/O) Qty:	Unit of Measure	•	Unit Cost:	Total Cost:	Currency:
1.00       Lump Sum       \$2,500.00       \$2,500.00       Us. Dollar         Cost Segment:       Pay Quantity:       Cost Source:       Alternate:         Direct Cost       1.00       Plug       BASE         Quote : \$0.00       Allocation       Cost Item Setup       Default Pay Rules         Quantity       Waste       Qua       N         Quantity       Waste       Qua       N         Add-on       3.00       E       For every       8.00         Default Shift Arrangemer       Work Hours per Shift:       8.00       E         0       1.00       E       0.00       E				~			~
Cost Segment:       Pay Quantity:       Cost Source:       Alternate:         Direct Cost       1.00       Plug       BASE       •         Quote : \$0.00       Allocation       Cost Item Setup       Detail         aved views:       Previous View       •       Default Pay Rules       Plug         Quantity       Waste       %       Qua       N         Quantity       Waste)       Add-on       3.00       E         Indication       Indication       Default Pay Rules       Plug         Quantity       Waste       Qua       N       Default Pay Rules         Default Shift Arrangemer       Work Hours per Shift:       8.00       E         Internation       Internation       Internation       Internation		1.00	Each	~	\$24,100.00	\$24,100.00	U.S. Dollar
Direct Cost     1.00     Plug     BASE       Quote : \$0.00     Allocation     Cost Item Setup     Default Pay Rules       aved views:     Previous View     Image: Cost Item Setup     Detail       Quantity     Waste     Qua     Image: Cost Item Setup     Detail       Quantity     Waste     Qua     Image: Composite Wage Sce     Plug       Quantity     Waste     Qua     Image: Composite Wage Sce     Plug       Quote     State     State     Image: Composite Wage Sce     Plug       Default Shift Arrangemer     Work Hours per Shift:     Image: Composite Wage Sce     Image: Composite Wage Sce       Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce       Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce       Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce       Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce       Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage Sce       Image: Composite Wage Sce     Image: Composite Wage Sce     Image: Composite Wage		1.00	Lump Sum	Ŧ	\$2,500.00	\$2,500.00	U.S. Dollar 🚽
Quote: \$0.00       Allocation         aved views:       Previous View         Quantity (Less Waste)       Waste %         Quantity (Less Madd-on       Qua         1.00       E			Cost Segment:		Pay Quantity:	Cost Source:	Alternate:
Quote : \$0.00       Allocation       Cost Item Setup       Detail         aved views:       Previous View       Image: Cost Item Setup       Default Pay Rules       Plug         Quantity (Less Waste)       Waste % Add-on       Qua       N       Plug       Quote         Image: Cost Item Setup       Composite Wage Sca       Plug       Quote       Quote       Plug         Image: Cost Item Setup       Default Pay Rules       Plug       Quote       Quote       Quote         Image: Cost Item Setup       Madeon       Root Item Setup       Quote       Quote       Quote         Image: Cost Item Setup       Image: Cost Item Setup       Default Shift Arrangement       Quote       Quote         Image: Cost Item Setup       Image: Cost Item Setup       Default Shift Arrangement       Quote       Default Shift Arrangement         Image: Cost Item Setup         Image: Cost Item Setup       Image: Cost Item Setup       Image: Cost Item Setup       Image: Cost Item Setup         Image: Cost Item Setup       Image: Cost Item Setup       Image: Cost Item Setup       Image: Cost Item Setup         Image: Cost Item Setup       Image: Cost Item Setup       Image: Cost Item Setup			Direct Cost	~	1.00	Plug	BASE -
Add-on     Add-on     Default Pay Rules     Plug       Quantity     Waste     %     Qua     N       Maste     %     Qua     N     N       Image: Composite Wage Sca     %     Quote     Quote       Image: Composite Wage Sca     For every     8.00     hou       Image: Composite Wage Sca     Plug     Quote       Image: Composite Wage Sca     Por every     8.00       Image: Composite Wage Sca     Por every     8.00				_		め Description	
Quantity (Less Waste)     Waste % Add-on     Qua     L N     Composite Wage Sca For every     Quote       0     3.00 E     1.00 E     0     0     0     0       1.00 E     1.00 E     8.00     1.00 E     0     0	<u>Q</u> uote : \$0.	.00 <u>A</u> llocation				Detail	
Quantity (Less Waste)       Waste % Add-on       Qua       I N         Madd-on       3.00       E         Image: Second Sec	aved views:	Previous View	•	D	efault Pay Rules	-	
Waste)     Add-on     For every     8.00     hot       Image: State of the state of th			L		Composite Wage Sc	Quote	
1.00         E         Default Shift Arrangemer           1.00         E         Work Hours per Shift:         8.00           1.00         E         8.00         E			Qua N		For every 8.00 ho		
1.00         E           1.00         E           1.00         E           1.00         E           1.00         E			3.00 E				
1.00 E				v	-		
Defe # Deres Ker					8.00	[:	×
1.00 E Derdakt roperaes			1.00 E		efault Properties		
Account Code: 8000			100 1		Account Co	de: 8000	d.
Cost Curve: Linear -					Cost Cur	ve: Linear	• •
4				4			•
🕞 🕞 📩 🎰 P 😫 🗮 S 🛓 😒 B			۱.	-	•••• 🔹 P••• 😫 •	😫 📃 S.	🛓 🔀 В

TIP The Quote Cost Source can only be selected from the Quote Comparison & Award form. See Lesson 8 – Quote Comparison.

## 5.3.4 PLUG COSTS

The following steps walk you through defining a plug cost on a cost item.

## 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.

٢	11		200	SITE	WORK & R	OADWAY		
C	1.	1	641 0100	Mob	ilization			
PI	Ass	ignment:	PI Line Number:	PID	escription:			
64	ŧ1 0	100 🗎	1.1	Mob	ilization			
Q	ost 1	Item Summar	y 🚊 Detail : \$0	.00	🐥 Plug	: \$20,000.00	Quote : \$0.00	Allocation
Co	st C	Category		Uni	t Cost	Total Cost		
¥	То	tal		\$	20,000.00	\$20,000.00		
	>	Labor		\$	10,000.00	\$10,000.00		
	>	Owned Equ	ipment	\$	10,000.00	\$10,000.00		
		Dopted Equ			60.00	60.00		

## 5.3.5 DETAIL COSTS

The **Detail** cost method is also defined on the Cost Item Record. On the Detail tab, you can add resources (labor, equipment, and material) and define production.

On the Production tab (right side of screen), define production by entering one of the following:

- A duration, or
- A unit per duration, or
- A duration per unit

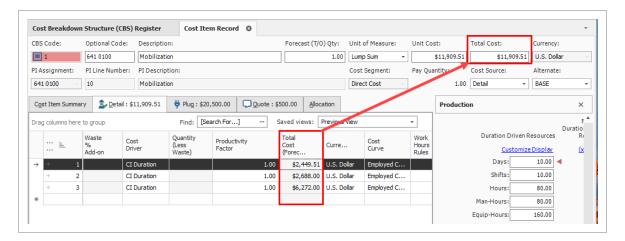
When you enter a production value, all the other production fields will auto-fill based on what you entered.

rag	columns here	to	group				Find:	Search For]	··· Sa	ved views: Previ	ous View		-		Prod	uction	Qty Driven Hourly	1
	Row 🛌		c	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Mea	Product Factor	W H	Pay H	Unit Cost			ven Resources omize Display	Resources	
	+ 1	1	LT1		Teamster			1.00	Each	1.00	80.00	80.00	\$30		Days:	10.00 ┥	0.00	
>	+ 2	2	ETLT		Lowboy Trailer			1.00	Each	1.00	80.00	80.00	\$33		Shifts:	10.00	0.00	
	+ 3	3	ETTT		Tractor Truck			1.00	Each	1.00	80.00	80.00	\$78		Hours:	80.00	0.00	
F															Man-Hours:	80.00	0.00	
							Resou	rces							Equip-Hours:	160.00	0.00	
														4	_			•

The hours defined on the Production tab drive the labor and equipment resources you employ on the left, multiplying their unit costs by the production hours.

When you employ material resources, their costs are driven by the quantity you enter into the quantity field.

The Total Cost of each resource is added together to give you the Total Cost for the cost item.



#### STEP BY STEP – DETAIL COSTS

- 1. On the Detail tab, add resources (labor, equipment, and material).
- 2. On the Production tab, define production (duration, unit per duration, or duration per unit).
- 3. The hours defined on the Production tab drive the labor and equipment resources on the left, multiplying their unit costs by the production hours.
- With material resources, their costs are driven by the quantity entered in the quantity field.

12	g columns here t	o group			Saved views:	Previous View		P				PRODUC	TION		
	Row Number	Cod	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit Mea			Duration Driven Resources		Qty Driven Hourly Resources	Cost Item Summary	
•	+	1 LT1		Teamster			2.00	Each	$\rightarrow$	Days	45.00	45.00	0.00	45.00	
	+	2 ETD		Dump Truck			2.00	Each		Shifts	45.00	45.00	0.00	45.00	
	+	3 MBF		Aggregate Base Rock	45,500.00	5.00	47,775.00	Ton		Hours	360.00	360.00	0.00	360.00	
										Man-Hours	720.00	720.00	0.00	720.00	
				RESO	URCES					Equip-Hours	720.00	720.00	0.00	720.00	

#### 5.3.5.3 ADD COST DETAIL

The following steps walk you through adding resources and production on a cost item.

#### 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	

## 5.3.5.4 ADD ASSEMBLY

#### 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.

1.2	.2				Grading						10.00	Acre		•	\$1,397.01	\$13,970.0	9 U	I.S. Dollar
l Assig	gnme	nt:	PI Line	Number:	PI Descrip	tion:						Cost Seg	ment:		Pay Quantity:	Cost Source:	A	ternate:
20101	02		1.2		Clearing 8	Grubbing						Direct Co	st	•	6.67	Detail	• B	ASE
C <u>o</u> st It	em S	ummai	ry 🍮	<u>D</u> etail : \$1	,397.01	<b>₽</b> Plug : \$0.00		e:\$0.00	Alo	cation				Pre	oduction			×
rag co	lumns	here	to group					Save	d views	: Previo	ous View	-	ρ					Ó
Ro Nu	w mber	<u>in.</u>		Resource Assembly		cription	Quantity (Less Was	ste)	Waste Add-o		Quantity	Unit of Measure	8			Duration D Resources		Factored Durati Driven Resource
-			1	CGRADE	Gra	ding Crew					1.00	Hour			Days		10.00	1( 4
		Rov	v nber ≞	Code	Resource	Description		Quantit		Waste %	Quantity	Unit of	Proc		Shifts		10.00	10
		Nun	nber —		Assembly			(Less V	(aste)	Add-on		Measure	Fac		Hours	4	30.00	8(
	>		1	ETWT	CGRADE	Water Truck					0.50		-		Man-Hours	3	20.00	32(
			2		CGRADE	Laborer					1.00				Equip-Hours	2	00.00	20(
			3	LO3	CGRADE	Operator Class	3				2.00	Each						
			4	EG14G	CGRADE	Grader 14G					1.00	Each		,	Acre/Day		1	
			5	ECOMP1	CGRADE	Compactor Smo	oth Drum				1.00	Each		1	Acre/Shift		1.00	
			6	LO4	CGRADE	Operator Forem	an				1.00	Each						
	4												•		Acre/Hour		0.13	
				T											Acre/Man-Hr		0.03	C
			1											4	A		r	

## **EXERCISE 5.2 – DEFINE COST DETAIL**

For cost items you create in InEight Estimate, you need to add resources, assemblies and production to define their costs. In this exercise, you will practice defining cost details. Complete the following steps, using your job:

Add the following or similar resources and production to your 1.3.1 Excavate cost item.

Code	Description	Quantity
LO1	Operator Class 1	1
LL2	Laborer	2
LL3	Labor Foreman	1
EX225	Excavator 225	1
CY/Hour	400	

#### Add the following resources and production to the 1.3.2 Haul cost item.

Code	Description	Quantity
LO1	Operator Class 1	1
LL2	Laborer	2
LL3	Labor Foreman	1
LT1	Teamster	1
EL950	Loader 950	1
ETDT	Dump Truck	1
EX225	Excavator 225	1
CY/Hour	400	

# Add the following resource and quantity to the 2.1.1. Furnish Pipe Materials cost item.

Code	Description	Quantity
MPP10	Pipe 10" PVC SDR21	1,000 with 5% Waste % Add-on = 1,050 LF

#### Add the following assembly to the 2.1.2 Excavate-Install-Backfill Pipe cost item.

Code	Description	Quantity
CPIPE	Pipe Crew	1

#### Add the following production value to cost item.

Days	3
------	---

#### You should end up with the similar results:

	1	SITEWORK & ROADWAY	1.00	Each	\$87,021.21	\$87,021.21
+	1.1	Mobilization	1.00	LS	\$20,000.00	\$20,000.00
	1.2	Clearing & Grubbing	15.00	Acre	\$1,399.82	\$20,997.25
+	1.2.1	Clearing	15.00	Acre	\$468.48	\$7,027.16
+	1.2.2	Grading	10.00	Acre	\$1,397.01	\$13,970.09
	1.3	Excavation	40,000.00	CY	\$1.15	\$46,023.96
+	1.3.1	Excavate	40,000.00	CY	\$0.43	\$17,227.04
+	1.3.2	Haul	40,000.00	CY	\$0.72	\$28,796.93
	2	WATER & SEWER	1.00	Each	\$9,603.73	\$9,603.73
	2.1	10 PVC Pipe	1,000.00	LF	\$9.60	\$9,603.73
+	2.1.1	Furnish Pipe Materials	1,000.00	LF	\$3.54	\$3,538.08
+	2.1.2	Excavate-Install-Backfill Pipe	1,000.00	LF	\$6.07	\$6,065.65

#### Congratulations, you have completed this exercise!

# 5.4 COST ITEM DETAILS

The Cost Item Record contains other tabs (called Data Blocks) in addition to the Production tab, for storing and calculating information specific to that cost item.

Cost Item Setup es		Period Quantities			
Scale 1:         Scale 2:           Composite Wage Scale:         100.00         0.00           For every         8.00         hours worked, pay         8.00	Scale 3: 0.00 urs	Use Period Quantiti	es Edit		
Default Shift Arrangements		Execution			
Work Hours per Shift: Shifts per Day: Days per 8.00 1.00	er Week: 5.00	Allow As-Built:	None	•	
Default Properties					
Account Code: 1020	2	Tag 1:	Estimator 1	•	
Cost Curve: Linear	•	Tag 2:	Roadway	•	
Worker's Comp Override:	•	Tag 3:		•	
Quantity Driver: Pay Item	~	Tag 4:		-	
Quantity Roll-Up:	<u>it</u>	Tag 5:		•	
Quote Group Tag:	-	Tag 6:		•	
					•

You can add to or adjust the information on these tabs as needed, based on the cost item's circumstances. In this section, you will review three of the tabs (in addition to the Production tab) you will likely use most often: Cost Item Setup, Notes, and Man-Hour Factors.

## 5.4.1 COST ITEM SETUP

On the data block where the Production tab was found, there is also a Cost Item Setup tab where you can adjust wage scale and shift arrangements for a specific cost item.

Default Pay Rules Composite Wage Scale: For every 8.00 hours v	Scale 1:         Scale 2:         Scale 3:           100.00         0.00         0.00           vorked, pay         8.00         hours	Period Quantities	es Edit	
Default Shift Arrangements –		Execution		
Work Hours per Shift: Shif	ts per Day: Days per Week:	Allow As-Built:	None 👻	
Default Properties				
Account Code:	1020 💉	Tag 1:	Estimator 1 🔹	
Cost Curve:	Linear -	Tag 2:	Roadway 👻	
Worker's Comp Override:	<b>•</b>	Tag 3:	•	
Quantity Driver:	Pay Item -	Tag 4:	•	
Quantity Roll-Up:	L	Tag 5:	•	
Quote Group Tag:		Tag 6:	•	
Minority Goal Allowance:	100.00	Tag 7:	•	
Phase Code:		Tag 8:		
	L	Tag 9:	•	
When man-count changes:	Change UM / Man-Hour	- Tag 10:	<b>.</b>	
_	Change Days	Tag 11:	•	
		Tag 12:	<b>.</b>	
Suspend:		Tag 13:		
,	_	Tag 14:		
		Tag 15:		
		10g 15.		

The composite wage scale and work and pay hours are used in the calculation of the cost of employed labor resources. The data reported on the Default Pay Rules tab is, by default, the composite wage scale and work and pay hours defined on the Job Properties - Cost Basis tab for the current job.

These settings can be modified from the default on a cost item-by-cost item basis.

The Pay Rules for cost items can also be defined or modified on the Cost Breakdown Structure (CBS) Register in the Scale 1, Scale 2, Scale 3, Work Hours Rules, and/or Pay Hours Rules columns in the row of the subject cost item.

#### 5.4.1.1 COST CURVES

Cost curves are used to determine how the cost of a cost item is distributed over time. The main benefit of defining the cost curve for a cost item is to create a more accurate estimation of the cash flow over the life of a project.

The schedule dates entered on a Cost Item are used to define the periods across which a cost item will incur its costs. A cost item's start and finish dates can be entered manually by the user or established using Schedule Integration, and the time periods (day, week, month, quarter, year) are determined in

the Cash Flow settings in Job Properties. For more information on scheduling, see topics <u>Microsoft</u> <u>Project</u> and <u>Primavera</u>.

By default, Cost Items have a linear cost curve, which distributes the cost of the cost item equally across all periods for the Cost Item. There are 5 different types of cost curves that can be selected from in the Cost Item Record > **Cost Item Setup** page.

Default Pay Rules		Period Quantities
Composite Wage Scale: For every 8.00 hours v	Scale 1:         Scale 2:         Scale 3:           100.00         0.00         0.00           vorked, pay         8.00         hours	Use Period Quantities
Default Shift Arrangements		Execution
Work Hours per Shift: Shif	fts per Day: Days per Week: 1.00 5.00	Allow As-Built: None
Default Properties		
Account Code:	1110 💉	Tag 1: Estima
Cost Curve:	Linear 🔹 🔹	Tag 2: Roadw
Worker's Comp Override:	A Description	Tag 3:
Quantity Driver:	Back Loaded	Tag 4:
Quartity Roll-Up:	Bell Shaped	Tag 5:
Quote Group Tag:	Front Loaded	Tag 6:
Minority Goal Allowance:	Linear	Tag 7:
Phase Code:		Tag 8:
		Tag 9:
When man-count changes:	×	.:: Tag 10:

Cost curve type	Definition
Back Loaded	Costs are low for most of an activity's timeline, but then increase towards the end. This curve type starts out with a lower slope and gradually becomes steeper as the work progresses. Most resources are assumed to be consumed later in the activity and may be more characteristic of subcontracted work

## (continued)

Cost curve type	Definition				
	where costs are incurred as the work nears completion.				
Bell Shaped	Expenses are low at the start of an activity, increase during construction, and decrease as the project approaches completion. Bell shaped cost curves incur the majority of their costs towards the mid-point of the work and exponentially increase and decrease from the beginning to the end of the activity. This type of curve can be characteristic of larger portions of work that start with a few resources, ramp up to a peak, incurring more costs during the ramp up, then ramp back down as the work nears completion.				
Front Loaded	A front-loaded cost curve is when costs are incurred early in a activity. This can happen for several reasons such as early procurement of materials to take advantage of lower prices or to address long lead times.				
Linear	Linear cost curves take the total cost of the activity and spreads it equally amongst the specified periods.				
Cost Item Periods	Invoked by using the Period Quantities feature (described below). Cost Item Periods are used to customize cost curves based on the quantities consumed in various periods. In comparison to the other curves which spread the items total cost proportionally based the chosen cost curve, the Cost Item Periods option can generate a more precise distribution of costs to specific periods because the user can simply define how much quantity of work is getting completed in each specific period.				

You can also choose to create your own custom cost curve by clicking on the **add button** in the Cost Curve drop-down menu.

Account Code:	1110	
Account Code:	1110	8°
Cost Curve:	Linear	• •
Comp Override:	A Description	
Quantity Driver:	Back Loaded	
Jantity Roll-Up:	Bell Shaped	
ote Group Tag:	Front Loaded	
	Linear	

Custom cost curves let you define your own from and to durations along with their associated values, which need to add up to 100%.

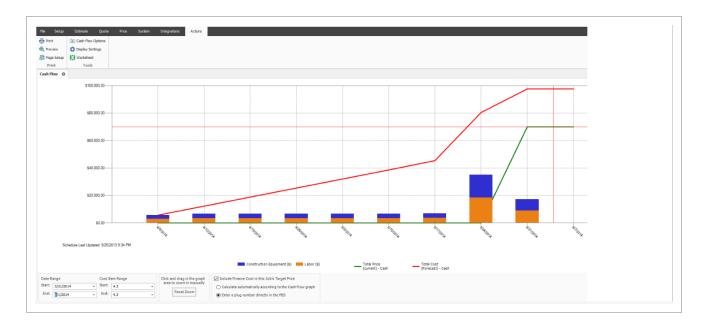
-	From Duration %	To Duration %	Value %
÷	0		Value 78
2	50	50	5
	50	50	10
	50	50	10
	50	100	30
	100	100	10
	100	100	10
	100	100	20
			100.00

## CASH FLOW

All cost curves, regardless of type, impact the generation of the cash flow graph. The <u>Cash Flow</u> form provides a graphical representation of the cash flow and resource utilization of your project, so you can quickly assess financing and resource needs.

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

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



## CASH FLOW OPTIONS

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

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

Overview       Cover Sheet       Cost Basis       Minority Setup       Fuel Cost       Job Folder Tags       Pricing       Schedule       Cash Flow       Equip.         Revenue timing       Bills are submitted to the owner:       Average calendar days elapsed from billing to collection:       30       days         At the end of the job       Amount of each billing that is withheld by owner as retainage:       5.00       %         @ Every month on this day:       25       Retainage is released:       Image: At the end of the job       0 on a specific date:       Image: Cost Items         Oct timing       Average calendar days elapsed from receipt of invoice to payment:       35       days         Bills are received from subcontractors and vendors:       Average calendar days elapsed from receipt of invoice to payment:       35       days         At the end of the job       Average calendar days elapsed from receipt of invoice to payment:       35       days         A to the end of the job       Average calendar days elapsed from receipt of invoice to payment:       35       days         @ Every month on this day:       25       On a specific date:       Image: Stainage is released to subcontractors and vendors:       Image: Stainage	File Setu	ip Estimat	e Quote	Price	System	Integrations				
Initialize       Resources       Assemblies       Report         Cash Flow       Job Properties       O         Overview       Cover Sheet       Cost Basis       Minority Setup       Fuel Cost       Job Folder Tags       Pricing       Schedule       Cash Flow       Equip         Revenue timing       Average calendar days elapsed from billing to collection:       S0       days         At the end of the job       Amount of each billing that is withheld by owner as retainage:       5.00       %         Overview       Cover y I       weeks       On a specific date:       •         Every I       days       Spread revenue using the same Cost Curves as the contributing Cost Items         Cost timing       Average calendar days elapsed from receipt of invoice to payment:       35       days         At the end of the job       Average calendar days elapsed from receipt of invoice to payment:       35       days         At the end of the job       Average calendar days elapsed from receipt of invoice to payment:       35       days         Bills are received from subcontractors and vendors:       Average calendar days elapsed from receipt of invoice to payment:       35       days         O the end of the job       Subcontractors and vendors:       Average and vendors:       On a specific date:       •         Eve	ob Properties			Bid Wizard	Resources	Equipment				
Overview       Cover Sheet       Cost Basis       Minority Setup       Fuel Cost       Job Folder Tags       Pricing       Schedule       Cash Flow       Equip.         Revenue timing       Bills are submitted to the owner:       Average calendar days elapsed from billing to collection:       30       days         At the end of the job       Amount of each billing that is withheld by owner as retainage:       5.00       %         @ Every month on this day:       25       Retainage is released:       Image: At the end of the job       0 on a specific date:       Image: Cost timing         Bills are received from subcontractors and vendors:       Average calendar days elapsed from receipt of invoice to payment:       35       days         At the end of the job       Average calendar days elapsed from receipt of invoice to payment:       35       days         Bills are received from subcontractors and vendors:       Average calendar days elapsed from receipt of invoice to payment:       35       days         At the end of the job       Retainage is released to subcontractors and vendors:       Image: At the end of the job       30       30       %         @ Every 1       weeks       Image: Solon of each invoice received that is withheld by you as retainage:       5.00       %         @ Every 1       days       Apply cash timing rules for all procurable cost categories (non labor and equipment	÷				÷ i		Assemblies			Reports
Revenue timing       30 days         Bills are submitted to the owner:       Average calendar days elapsed from billing to collection:       30 days         At the end of the job       Amount of each billing that is withheld by owner as retainage:       5.00 %	Cash Flow	Job Prop	erties ©							
Bills are submitted to the owner:       Average calendar days elapsed from billing to collection:       30       days         At the end of the job       Amount of each billing that is withheld by owner as retainage:       5.00       %	Overview	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Folder	Tags Pricir	ng Schedule	Cash Flo	w Equip
Average annual interest rate paid to borrow money (when cost exceeds revenue):       8.00 %       O Pay Quantity         Average annual interest rate earned (when revenue exceeds cost):       3.00 %       Image: Source of the sourc	Bills are su At the Every Every Cost timing Bills are re and vendo At the Every Every Every Devery Every Every Devery Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Every Ev	ubmitted to the end of the job month on this of 1 week 1 days ceived from sub rs: end of the job month on this of 1 week	day: 25 is bcontractors day: 25 is	Average Amount Retainag Sprea Average Amount Retainag subcont	e calendar day: of each billing ge is released: ad revenue usi calendar day: of each invoic ge is released i ractors and ve	s elapsed from g that is withhe @ A ing the same C s elapsed from te received that to endors: 0 On	a billing to col eld by owner a at the end of t on a specific of a specific of a specific da a specific da	lection: as retainage: he job date: the contributir voice to paymer by you as retain e job te:	nt: 35 hage: 5	days 5.00 %
	Average a Average a Reporting Pe	nnual interest ra nnual interest ra riods	ate earned (wh	en revenue exce		ds revenue):		% Pa	ay Quantity precast (T/O	

#### CASH FLOW DISPLAY SETTINGS

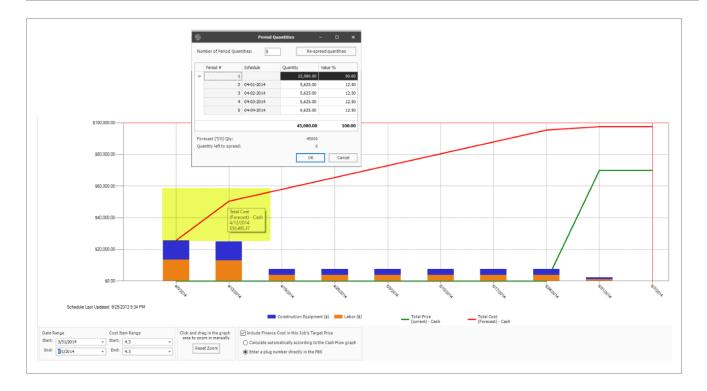
The <u>Cash Flow Display Settings</u> allow you to control what information displays on the Cash Flow graph.

Settings: Previous	•	Cost Categories				Resources			
Display this text as a cust		Estimated	As-Built	Planned To Date	Resource Utilization			_	
Example cash flow	^	Labor				Summarize resources by:	Resource Type		$\sim$
	v	Owned Equipment				_	This job's utilized i All Library resource		
Period Week	$\sim$	Rented Equipment				Value	Qty Cost	AB Qtv	AB Cost
Cost Items		Supplies				Labor			
Total Cost (Forecast)		Materials				Construction Equipment Rented Construction Eq			
Total Price (current)		Subcontract				Installed Equipment			
Total Cost (Forecast) - Cash		Fees				Supply			
Total Price (current) - Cash		Allowance							
Cash Flow		Custom Category1							
Finance Cost		Undefined				Quantity:	Cost		
As-Built Total Cost						None ~	Stacked Bar As-Built Cost	$\sim$	
CE-Total Cost Earned (to-date)						As-Built Quantity: None ~	As-Built Cost None	~	

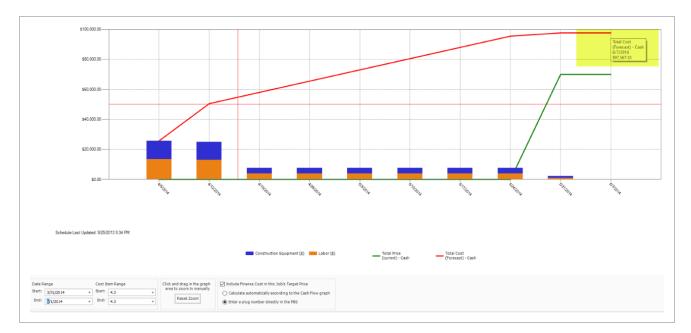
#### CASH FLOW EXAMPLE

Using the Period Quantities cost curve type as an example, on the Cash Flow graph, you can see that 50% of the total cost for this cost item, represented by the red line, is incurred in the first period of the project. Half of the project's cost is incurred during the first period of the project's lifespan as determined by what is entered in the cost item's period quantities.

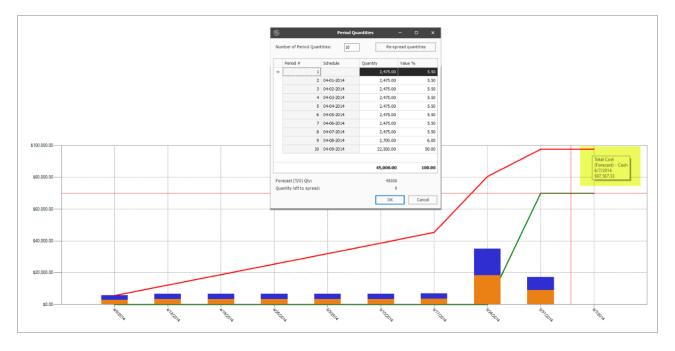
A reason why half of the project's cost is being used during the first period could be that resources available to perform the project happen to be mostly available during the front end of the project.



After the first period, the project incurs the remaining balance of the total project cost of \$95,000. This is spread equally with quantities of \$5,625 amongst the last three periods. This information helps you to better understand when the owner provides payment, in addition to deciding if more project funding or financing is needed.



Perhaps most costs on this one item will be incurred at the end of the activity, such as a subcontractor billing for most of his work as it nears completion. If it's determined costs are incurred towards the end of the activity, you can attribute most of the cost items quantity in the last period. You can add any number of additional periods to a custom cost curve or to a cost curve defined by period quantities curve and the costs will be proportionally spread across the actual number of periods defined by the Cost Items start and finish dates and cash flow settings. Be aware reducing the number of periods in a front or back end loaded curve may show a steeper total cost in some periods.



Using period quantities as the cost curve helps you determine how much of a cost item's cost is going to be spread in different durations of time.

#### PERIOD QUANTITIES

Like the other four cost curves, Period Quantities are used to customize cost curves, which show you a graphical representation of the cash flow and resource utilization so you can assess the proper financing and resource project needs. When the Period Quantities check box is selected, the Cost Curve automatically changes to Cost Item Periods.

Cost Item Setup				>
Default Pay Rules		Period Quantities		
Composite Wass Contac	Scale 1: Scale 2: Scale 3: 100.00 0.00 0.00	Use Period Quantit	ies Edit	
Composite Wage Scale:		C osci cinto quante	con	
For every 8.00 hours v	worked, pay 8.00 hours			
Default Shift Arrangements		Execution		
Work Hours per Shift: Shift		Allow As-Built:	None -	
8.00	1.00 5.00			
Default Properties		/		
Account Code:	1122.100	Tag 1:	Estimator 1 -	Tag 16:
Cost Curve:	Cost Item Periods -	Tag 2:	Roadway -	Tag 17:
Worker's Comp Override:	-	Tag 3:	•	Tag 18:
Quantity Driver:	Superior CI +	Tag 4:	•	Tag 19:
Quantity Roll-Up:	110.20	Tag 5:	•	Tag 20:
Quote Group Tag:	•	Tag 6:	•	Tag 21:
Minority Goal Allowance:	100.00	Tag 7:		Tag 22:
Phase Code:		Tag 8:		Tag 23:
		Tag 9:		Tag 24:
When man-count changes:	Change UM / Man-Hour	Tag 10:		Tag 25:
	○ Change Days	Tag 11:	•	
		Tag 12:		
Suspend:		Tag 13:	•	
		Tag 14:		
		Tag 15:	•	
				•

The Period Quantity calculator uses the cost item quantity assigned to various periods to calculate the specific percentages attributable to each range of periods covered by the cost item. The purpose of using period quantities is to spread costs via the cost curve in the cash flow analysis. For example, if you have an item where 50% of the cost is incurred when you start the work because you have to buy all the material first, then you would want a customized cost curve to reflect that this is how the costs will be incurred over time when building that work.

In the example below, since 50% of the cost is incurred when the project starts, period one's quantity is 50% of 45,000 Forecast (T/O) Qty which is 22,500. The remaining costs are then spread equally across the remaining three periods.

CBS Position Cod	e ៉	Description		Start	Finish	Fore (T/O)	cast ) Quantity
<b>4</b> .3		Install Aggre	egate Base	3/31/2	014 5/26/2	014	45,000.00
	8		Period Q	uantities	- 0	×	
	Numb	er of Period Quant	ities: 5	Re-s;	pread quantiti	es	
	P	Period #	Schedule	Quantity	Value %		
		1	03-31-2014	22,500.00		50.00	
		2	04-01-2014	5,625.00		12.50	
		3	04-02-2014	5,625.00		12.50	
		4	04-03-2014	5,625.00		12.50	
	/			5,625.00		12.5	
				45,000.00	)	100.00	
	Forec	ast (T/O) Qty:		45000			
	Quant	ity left to spread:		0			
				ОК	Ca	incel	

You can also choose to select the Re-spread quantities button to spread the quantities equally among the periods entered in the Number of Period Quantities field.

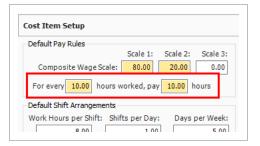
9		Period	Quantities	- • ×
Nun	nber of Period Quant	tities: 5	Re-sp	oread quantities
	Period #	Schedule	Quantity	Value %
÷			9,000.00	20.00
	2		9,000.00	20.00
	3		9,000.00	20.00
	4		9,000.00	20.00
	5		9,000.00	20.00
			45,000.00	100.00
For	ecast (T/O) Qty:		45000	)
Qua	antity left to spread:		0	)
			ОК	Cancel

#### 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.

15.00 Acre	* \$1,079.93 \$16,198.97 U.S. Dollar	•
Cost Segment:	Pay Quantity: Cost Source: Alternate:	
Direct Cost	10.00 Detail - BASE	-
	Cost Item Setup	×
•	Default Pay Rules Scale 1: Scale 2: Scale 3:	-P 4
Quantity (Less	Composite Wage Scale: 80.00 20 0.00	[
Waste)	For every 8.00 hours worked, pay 8.00 hours	
	Default Shift Arrangements	З
	Work Hours per Shift: Shifts per Day: Days per Week:	
	8.00 1.00 5.00	
	Default Properties	

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



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

lost Item Setup		
Default Pay Rules		
	Scale 1: S	Scale 2: Scale 3:
Composite Wage S	cale: 80.00	20.00 0.00
For every 10.00 ho	ours worked, pay	10.00 hours
Default Shift Arrangem	ents	
Work Hours per Shift:	Shifts per Day:	Days per Week:

- 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.

Default Pay Rules	
	Scale 1: Scale 2: Scale 3:
Composite Wage Scale:	100.00 0.00 0.00
For every 8.00 hours	worked, pay 8.00 hours
Default Shift Arrangements	
Work Hours per Shift: Shi	ifts per Day: Days per Week:
8.00	1.00 5.00

## 5.4.2 NOTES

On the Cost Item Record, you can enter any cost item-specific instructions, parameters, or general information on the Notes tab. Below are a few examples of the kinds of notes you might enter:

- For a Hauling cost item: There should be very little waste. If so, we can spread it out in the right of way at MP 111
- For a Structural Excavation and Backfill item: The backfill cannot be the native material. Have to use clean base rock
- For an Underground Pipe cost item: The average depth is close to 10 ft.

TIP You can use the Notes tab to reference cost item changes (e.g., changing shift arrangements, changing a resource rate).

## 5.4.3 MAN-HOUR FACTORS

For items that have known risks or potential resource concerns, you can apply a Man-Hour Factor to take those risks into consideration.

Man-Hour factors are applied on the Man-Hour Factors tab on the Cost Item Record. Factors are applied in relation to 1, where slower production is greater than 1 and faster production is less than 1.

TIP Man-Hour Factors affect both Labor and Equipment Hours.

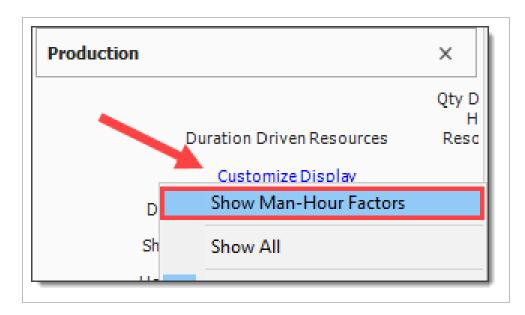
For example, if you predict production to be 20% slower due to weather concerns, you would type 1.2 in the weather factor field.

an-Hour Factors	
Factor Name:	Factor:
Factor 1:	1.20
Factor 2:	1
Factor 3:	1.00
Factor 4:	1.00
Factor 5:	1.00
Factor 6:	1.00
Factor 7:	1.00
Factor 8:	1.00
Factor 9:	1.00
Factor 10:	1.00
FactorComposite:	1.2000

Even after defining a Man-Hour Factor, the Production tab will still display the original Production values.

- To see the factored Production values, click the **Customize Display** link on the **Production** tab and select **Show Man-Hour Factors**
- Both original and factored production are then displayed on the Production tab

TIP



You can apply Man-Hour Factors to multiple cost items at once by Multi-Editing selected cost items on the CBS Register.

## 5.4.4 UNIQUE IDENTIFIER

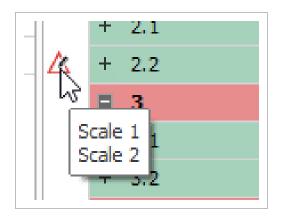
You may have noticed when you made changes on the Cost Item Setup tab, that the fields you changed and the Cost Item Setup tab became highlighted, indicating they were altered from their original state.

efault Pay Rules			
	Scale 1:	Scale 2:	Scale 3:
Composite Wage Scale:	80.00	20.00	0.00
For every 8.00 hours	worked, pay	/ 8.00 ho	ours
efault Shift Arrangements			
Vork Hours per Shift: Shi	ifts per Day	: Days p	er Week:
8.00	1.00		5.00
efault Properties			
Account Code:			d d
Cost Curve:	Linear		•
Worker's Comp Override:			-
Tag 1:			•
Tag 2:			•
Tag 3:			•
Tag 4:			*
Tag 5:			•
Quantity Driver:	Superior C	I	-
Quote Group Tag:			-
Minority Goal Allowance:	100.00		
Phase Code:			
Vhen man-count changes:	Change	e UM / Man-	Hour
Suspend:	O Change	e Days	

On the CBS Register, the cost item you edited now has a Unique Identifier in the row header indicating the cost item was altered from the default values set in the project job properties or in the project library of resources rates.

			JOR	
d		+	Prime Bond	PRIME
dd-On		+	Price % Add-On	PRICE
cing		+	Job Financing	FINAM
gement		+	Job Management & Equipment	JOB M
xpense		+	General Expense	GENE
on	- 1	+ 1	Mobilization	1000
& Grubb		<b>2</b>	Clearing & Grubbing	2000
n	_	+ 2.1	Clearing	
ipe	&	+ 2.2	Grading	
	-	<b>3</b>	Excavation	3000
		+ 3.1	Excavate	
		+ 3.2	Haul	
			a oll purc pr	4000

If you hover over the identifier, a pop-up menu appears indicating what data points were changed.



This same identifier will show up for resources as well, if you make changes to the employed resource's cost to be different than the original resource rate imported from the Resource Rate Register.

) Fil	getol [Search Fo	r] ··· Saved v	iews: Previous View	-	Cos	st C	Category	Scale 1	Scale 2
					~	To	tal	\$28.00	\$40.
	Row Nu ⊨	Code	Resource Assembly	Description	1	>	Labor	\$28.00	\$40.
	INU		Assembly			>	Owned Equipment	\$0.00	\$0.
	+ 1	LL2		Laborer		>	Rented Equipment	\$0.00	\$0.
Ą	+ 2	LO1		Operator Class 1		>	Supplies	\$0.00	\$0.
	3	EL988		Loader 988	1	>	Materials	\$0.00	\$0.
*						>	Subcontract	\$0.00	\$0.
						>	Fees	\$0.00	\$0.
						>	Allowance	\$0.00	\$0.
							Custom Category1	\$0.00	\$0.
							Undefined	\$0.00	\$0.
						Billi	ing Rate	\$28.00	\$40.
						Billi	ling Rate Markup	\$0.00	\$0.
					1	Rilli	linn Rate Markun %	0.00	0

## 5.4.4.2 HIGHLIGHT UNIQUE (DELTA) TOGGLE

You can turn the highlighting of unique resource and cost item fields off and on from the Actions menu of the Cost Item Record, under the View section.

6 💾	Ŧ						Training Jo	ob - Estimate	
File	Setup	Estimate	Quote P	rice	Execution	System	Actions		
$\mathbb{N}$		😑 Display F	Parent Informat	tion 🍰	Highlight Unique	e (Delta) Reso	ource Fields	🛓 Edit Resou	rce F
_	1111	🧰 Display B	Billing Rate	122	Highlight Unique	e (Delta) Cost	t Item Fields	🔚 Insert Sub	ordir
Split	Default Data Block	s						🔏 Break Cost	: Allo
Edit				View					
Cost Br	eakdown S	structure (CBS	) Register	Cos	t Item Record	0			
CBS Cod	de: (	Optional Code:	Description				Foreca	st (T/0) Qty:	Unit
r - E		202 4262	Apphalt Co	noroto H	at Mix Type A			25,000,00	Tor

## 5.4.5 COST DRIVERS

Each type of resource has a default cost driver. For example, Labor resources are duration driven so the cost driver is CI Duration, meaning their costs are driven by the duration of the cost item. If you want an Operator to only be assigned to a specific cost item or work activity for half the time, you can change its quantity to .5 and it will be driven by half of the cost item's hours.

Row			Resource			Unit of	Unit	Waste	Qua
Number	<u>=</u>	Code	Assembly	Description	Quantity	Mea	Cost	% Add-on	(Le Wa
+	1	LL2		Laborer	0.50	Each	\$29.00		
+	2	LO1		Operator Clas	1.00	Each	\$29.94		
+	3	EL988	N	Loader 988	1.00	Each	\$73.75		

To enter work hours manually for the employed resource, you can change the Cost Driver option to CI Quantity or Fixed.

										Waste	Quantity	Driv
	Row Number	1	Code	Resource Assembly	Description	Quantity	Unit of Mea	Unit Cost	Cost Driver	% Add-on	(Less Waste)	sto
1	+	1	LL2		Laborer	0.50	Each	\$29.00	CI Duration 👻			
	+	2	LO1		Operator Clas	1.00	Each	\$29.94	A Description		Í	
	+	3	EL988		Loader 988	1.00	Each	\$73.75	CI Duration			
									CI Quantity			
									Fixed 😡			
									Scheduled Perio	ods		
									×			

With CI Quantity as your cost driver for the Operator, you can adjust the Work Hours manually, where previously that column was read-only.

Let's say you want your Operator to work specifically 80 hours.

g	columns her	e to group							Find:	[Search For]	5	Saved views:
	Row Number	<u>=</u>	Code	Resource Assembly	Description	Quantity	Unit of Mea	Unit Cost	Work Hours	Pay Hours	Waste % Add-on	Cost Driver
I	+	1	LL2		Laborer	0.50	Each	\$29.00	80	60.00		CI Quantity
ſ	+	2	LO1		Operator Clas	1.00	Each	\$29.94	120.00	120.00		CI Duration
	+	3	EL988		Loader 988	1.00	Each	\$73.75	120.00	120.00		CI Duration

However, since the resource is now quantity driven, if you change the Forecast (T/O) Quantity to 50 you will see that the work hours will still adjust from 12 to 40.

	Code:	Optic	onal Code:	Description:						Forecast (T/O	i) Qty: Un	it of Mea	sure: Unit Cost:	Total Cost:	c	urrency:
	2.2			Clearing							50.00 O	bic Yard	* \$1,156.7	5	57,835.17	J.S. Dollar
PI A:	ssignment:	PILin	ne Number:	PIDescription	1:						Co	st Segme	ent: Pay Quantity:	Cost Source	e: A	lternate:
201	0102 -	20		Clearing & Gr	ubbing						Di	rect Cost	- 50.0	0 Detail	-	BASE
Cos	t Item Summar	у		.156.70 <b></b>	Plug : \$0.00	Quote : \$0.00	Allocation					F	Production			×
Drag	columns here	to grou	up			Find: Sea	ch For]	Saved	views: Previo	us View	•				Facto Duration Dr	
	Row L		Code	Resource Assembly	Description	Quantity	Unit of Mea		Work Hours	Pay Hours	Waste % Add-on	C) D)	Duration Drive		Resou (x 1.20	rces Resour
	+	1	LL2		Laborer	0.50	Each	\$29.00	240.00	240.00	Add-on	c	Days:	40.00 ◄		1.00 48.
19		2	LO1		Operator Clas	1.00	Each	\$29.94	480.00	480.00		с	Shifts:	40.00	4	.00 48.
<u>u</u>	+		EL988		Loader 988	1.00	Each	\$73.75	480.00	480.00		C	Hours:	400.00	48	.00 480.
<u>g</u>	+ +	3	LL 900													

If you want it set at 80 hours no matter what changes you make to your quantity, you can change the cost driver to Fixed. Then when you change the Forecast Quantity to 500, the work hours for the Operator will not change and will remain at 80 hours as shown below.

CBS	Code:		Optional Cod	e: Descripti	ion:						F	orecast (T/O) Qty	<ul> <li>Unit of M</li> </ul>	easu
	2.2			Clearing								500.	.00 Cubic Ya	ď
PI A	ssignment		PI Line Numb	er: PI Descri	ption:								Cost Seg	ment
201	0102	~	20	Clearing	& Grubbing								Direct Co	st
Co	st Item Sun	mar	/ 🏂 Detai	: \$106.39	<b>⇔</b> Plug : \$0.00	🖵 Quote : \$0.00	Allocation	1						
Drag	; columns h	ere t	o group					Find: [S	Search For]	Save	d views: P	revious View		
	=		Code	Resource Assembly	Description	Quantity	Unit of Mea	Unit Cost	Work Hours	Pay Hours	Waste % Add-on	Cost Driver	Quantity (Less Waste)	
4	+	1	LL2		Laborer	0.50	Each	\$29.00	80.00	80.00		Fixed		
	+	2	LO1		Operator Clas	1.00	Each	\$29.94	480.00	480.00		CI Duration		
	+	3	EL988		Loader 988	1.00	Each	\$73.75	480.00	480.00		CI Duration		
*														

If you followed along and made any adjustments to cost item 2.1 Clearing, change the Cost Driver for the Operator resource back to **CI Duration** and the Work Hours back to **100**.

## 5.4.6 SUSPEND COST ITEMS

The Suspend feature allows you to turn cost items on and off in order to perform "what-if?" analysis or evaluate alternative approaches to the work.

A cost item can be suspended in InEight Estimate for various reasons including the following:

- Manually suspended cost items
- Suspended parent
- Parent with cost source that is not Detail (plugged or quoted)
- Parent cost item with a zero quantity
- Pay item is suspended
- Allocated cost items
- Alternate scenarios:

- Overridden by another alternate
- Alternative is not active

Suspended cost items do not contribute any cost to the job's total value. Suspended items can be unsuspended at anytime in order to be included in the total project value.

#### 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 CT
+ 3.2	Haul	40,000.00 CY
<b>4</b>	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

## 5.4.6.3 EDITABLE MAN-HOUR FACTORS IN SUSPENDED COST ITEMS

You can edit Man-Hour Factors for a suspended cost item by creating and maintaining cost items, including Man-Hour Factors. This can be accomplished in a suspended state while having the scope of work included in your estimate. The cost to contribute is excluded from the scope of work until you are ready to make it part of your estimate.

Cast	Breakdown (	More	schare (OB)	) Register	Quote Compar	son & Award - Cost	forms	Cost Item Rec	0 100											1
385 0	Code	Opt	ional Code:	Description						Ponecesit (1)(3) Qty	1	Unit of 1	feasure.		Unit Cents	Tutal C	Ceatu	Current	91	
	_	_	0100	Habilaria										•		-	\$23,309.02			2
		-								L		Long S.	_	-	\$25,318.02	_				-
/[Au	signnerb	PIL	ine Number:	PI Descript	lem:							Cost Se	phents		Pay Quantity:	Cost 5	ounce	Alterna	6e:	
642)	100 +	H		Hobilatio	n in the second s						1	Deach C	ent .		1.00	Detail		8432		
Cpr	Ten Sunnary	,	2- Details	\$23,318.42	🏺 /%g : \$500.00	Quete : \$500.00	Blocation							-	n-Hour Factors					×
ing i	columns here t	- pr	нр						Sevel views:	Previous tiese			90				Factor Name		Facto	e.
	Row Number		Code	Resource Assenbly	Description	Quartity (Less Waste)	Viarie % Add-on	Qe-h-	Unit of Heasure	Productivity Factor	Tite Pour	di es	Pay				Factor 1 Factor 2		1.0	ļ
. 1		3	ETTT		Tractor Truck			1.00	Each	1.00		160.00	16					_		=
- 1		20	EU.T		Lookey Trafer	_		L.00	Each	1.00		100.00	10				Fador 3		1.0	A
- 1		1			Teamster.			1.00	Each	1.00		180.00	28				Feder		1.0	6
. 1		-							_		_	_	_				Federal		1.0	Ű.
													_				Fector		1.0	ã.
													-					-		-
														2	- 8 - 8 - 1	b	8.2	Υ.	4 - 3	
_											_		_	Г	0K (4	nori	< Prev	7.0	Not>	

## 5.4.6.4 UNSUSPEND A COST ITEM

Follow the step by step below to unsuspend a cost item.

#### 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

#### 5.4.6.5 SUSPEND COLUMN

Within the CBS Register, the Suspend column indicates which cost items are suspended.

#### 5.4 Cost Item Details

CBS Position Code	Description	Suspend Forecas (T/O) Q
+ 1	Mobilization	
<b>2</b>	Clearing & Grubbing	
+ 2.1	Clearing	
+ 2.2	Grading	
<b>3</b>	Excavation	
+ 3.1	Excavate	
+ 3.2	Haul	
<b>4</b>	10" PVC Pipe	✓
+ 4.1	Furnish Pipe Materials	✓
+ 4.2	Excavate-Install-Backfill	✓

• Hover over the checkmarks to see why the cost item is suspended

+ .	3.2	Haui	
	4	10" PVC Pipe	$\checkmark$
+	4.1	Furnish Pipe Materials	×
+	4.2	Excavate-Install-Backfill	35
			Parent is Suspended

• You can suspend and unsuspend cost items by checking and unchecking the checkboxes in the Suspend column as well

## 5.4.7 ADDING COST ADJUSTMENTS

Total Cost and Billing Adjustments can now be made in the CBS register which can be viewed either from the Standard view of the CBS register, or a saved view affiliated with change.

ost Breakdown Strue	ture (CBS) Register 🛛									
ag columns here to grou	p						Find:	[Search For] ····	Saved views: Cost Iten	n Adjustment View 👻
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Total Cost (Forecast)	Cost Adjustment	Total Cost Adjustment Amount	Total Cost Adjustment Percent	Labor Cost Adjustment Amount	Labor Cost Adjustment Percent	Owned Equipment Cost Adjustment Amount
□ 3.5	REBAR	1.00	Lump Sum	\$2,618,414.00						
+ 3.5.1	Rebar	1.00	Lump Sum	\$2,512,724.00		\$0.00	0.00	\$0.00	0.00	\$0.0
+ 3.5.2	Post Tension Tendons	1.00	Lump Sum	\$0.00		\$0.00	0.00	\$0.00	0.00	\$0.0
+ 3.5.3	Crane	1.00	Lump Sum	\$105,690.00		\$0.00	0.00	\$0.00	0.00	\$0.0
■ 3.6	034100 - Precast Structural Concrete	2,800.00	SQFT	\$128,640.00						
+ 3.6.1	Precast Panels	27.00	EA	\$64,320.00		\$0.00	0.00	\$0.00	0.00	\$0.0
+ 3.6.2	Crane	1.00	Lump Sum	\$64,320.00		\$0.00	0.00	\$0.00	0.00	\$0.0
₽ 4	DIV 04 - MASONRY	1.00	Lump Sum	\$2,326,834.67						
□ 4.1	042000 - Unit Masonry	1.00	Lump Sum	\$2,326,834.67						
+ 4.1.1	CMU Walls	1.00	Lump Sum	\$1,879,709.33	✓	\$1,708,826.67	1000.00	\$0.00	0.00	\$0.0
+ 4.1.2	Precast Concrete Caps	1.00	Lump Sum	\$170,882.67		\$0.00	0.00	\$0.00	0.00	\$0.0
+ 4.1.3	Steel Embeds	1.00	Lump Sum	\$170,882.67		\$0.00	þ	\$0.00	0.00	\$0.0
■ 4.1.4	Scaffolding	1.00	Lump Sum	\$105,360.00						
+ 4.1.4.1	Setup & Maintain Scaffolding	2.00	Month	\$105,360.00		\$0.00	0.00	\$0.00	0.00	\$0.0
+ 4.1.4.2	Additional Month	0.00	Month	\$0.00		\$0.00	0.00	\$0.00	0.00	\$0.0
+ 4.1.4.3	Netting on Exterior	0.00	Lump Sum	\$0.00		\$0.00	0.00	\$0.00	0.00	\$0.0
¤ 5	DIV 05 - METALS		Lump Sum	\$854,880.00						
26				\$20,381,473.74		\$1,733,328.68		\$17,567.79		\$176.7

Adjustment fields have been added to the CBS to view and modify the adjustment amount and adjustment percent without going into each individual cost item.

Any adjustment made to the Adjustment Amount fields on the CBS register will then have the Adjustment Percent field automatically calculated. Changes made to those fields will be highlighted in yellow signifying an adjustment has been made.

	261			\$20,381,473.74		\$1,733,328.68		\$17,567.79	
= 5	DIV 05 - METALS	1.00	Lump Sum	\$854,880.00					
+ 4.1.4.3	Netting on Exterior	0.00	Lump Sum	\$0.00		\$0.00	0.00	\$0.00	0.1
+ 4.1.4.2	Additional Month	0.00	Month	\$0.00		\$0.00	0.00	\$0.00	0.0
+ 4.1.4.1	Setup & Maintain Scaffolding	2.00	Month	\$105,360.00		\$0.00	0.00	\$0.00	0.
■ 4.1.4	Scaffolding	1.00	Lump Sum	\$105,360.00					
+ 4.1.3	Steel Embeds	1.00	Lump Sum	\$170,882.67		\$0.00	þ	\$0.00	0.
+ 4.1.2	Precast Concrete Caps	1.00	Lump Sum	\$170,882.67		\$0.00	0.00	\$0.00	0.
+ 4.1.1	CMU Walls	1.00	Lump Sum	\$1,879,709.33	✓	\$1,708,826.67	1000.00	\$0.00	0.
■ 4.1	042000 - Unit Masonry	1.00	Lump Sum	\$2,326,834.67					
□ 4	DIV 04 - MASONRY	1.00	Lump Sum	\$2,326,834.67					
+ 3.6.2	Crane	1.00	Lump Sum	\$64,320.00		\$0.00	0.00	\$0.00	0.0
+ 3.6.1	Precast Panels	27.00	EA	\$64,320.00		\$0.00	0.00	\$0.00	0.0

Other adjustments fields in the CBS register include the many adjustments fields that have been added to the **Billing Rates View**.

A new Saved view called **Cost Item Adjustment View** has been added to the Cost Breakdown Structure.

#### EXERCISE 5.3 – MANAGE COST ITEM DETAILS

In this exercise, practice adjusting your cost item details. Complete the following steps, using your Job:

- 1. Open the Cost Item record for cost item **2.2 Grading**.
- From the Cost Item Setup tab, change the Composite Wage Scale to 80% Scale 1, 20%Scale 2. Also adjust for every10 hours worked, pay 10 hours.
- 3. Change the Default Shift Arrangements to **10** Work Hours per Shift, **1** Shift per Day, **5**Days per Week.
- 4. From the Man-Hour Factors tab, apply a Man-Hour Factor of **1.1** to the same cost item.
- 5. On the Notes tab, type Added man-hour factor due to hard soil conditions.

#### You should end up with similar results.

	Pro	duction			
Cost Item Setup			Duration Driven Resources	Factored Duration Driven Resources	
Default Pay Rules	$\rightarrow$	Days	8.00	8.80	
Scale 1: Scale 2: Scale 3:		Shifts	8.00	8.80	
Composite Wage Scale: 80.00 20.00 0.00		Hours	80.00	88.00	Notes
For every 10.00 hours worked, pay 10.00 hours		Man-Hours	320.00	352.00	Added man-hour factor due to hard soil conditions.
Default Shift Arrangements		Equip-Hours	200.00	220.00	Added manyhour factor due to hard soil conditions.
Work Hours per Shift: Shifts per Day: Days per Week:		Acre/Day	1.25	1.14	
10.00 1.00 5.00		Acre/Shift	1.25	1.14	
		Acre/Hour	0.13	0.11	
		Acre/Man-Hr	0.03	0.03	
		Acre/Equip-Hr	0.05	0.05	

#### Congratulations, you have completed this exercise!

#### **LESSON 5 REVIEW**

- 1. Resources, costs, and production can only be added to what type of cost item?
  - a. Superior
  - b. Terminal
  - C. Parent
- 2. What Cost Source is used for defining resources and production?
  - a. Plug
  - b. Detail
  - c. Quote
- 3. On the Cost Item Record, what tab is used for changing the cost item's Default Shift Arrangements?
  - a. Cost Item Setup
  - b. Production
  - C. Man-Hour Factors
  - d. Notes

#### **LESSON 5 SUMMARY**

As a result of this lesson, you can:

- Explain the Cost Breakdown Structure and its purpose
- Create cost items
- Add costs and production
- Manage cost item details

This page intentionally left blank.



# LESSON 6 – INDIRECT COSTS

## **LESSON DURATION: 45 MINUTES**

## LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Explain how indirect costs are defined in InEight Estimate
- Estimate default indirect cost items
- Estimate user-defined indirect cost items

## **LESSON TOPICS**

# 6.1 INDIRECT COSTS OVERVIEW

Indirect costs such as the cost of prime bond, mobilization, or site supplies are typically overhead costs that are not directly associated with a particular project deliverable but contribute to the total cost of the project. However, indirect costs can be assigned to a pay items. This gives you the flexibility to more accurately control the cost basis of bid items and strategically price the work to maximize cost recovery and profit.

Once your direct costs are defined, you can add indirect project costs. Estimate provides two ways you can create indirect costs:

1. **Default Indirect Cost Items**: These are pre-built cost items created by InEight Estimate, located at the top of the CBS Register.

CBS Position ៉	Description
	JOB
+	Prime Bond
+	Price % Add-On
+	Job Financing
+	Indirect Cost Escalation
+	Direct Cost Escalation
+	Indirect Cost Add-On
+	Job Management & Equip
+	General Expense
+	Direct Cost Add-On

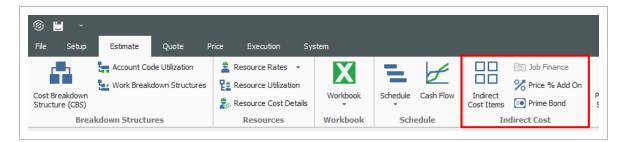
2. User-Defined Indirect Cost Items: Any cost item you create in the CBS Register that is not assigned to a pay item is considered indirect cost.

23	Job Overhead - Indirect
+ 23.1	Setup Yard
+ 23.2	Trailer Rent
+ 23.3	Utilities

TIP The Cost Breakdown Structure (CBS) located in the Library under the Estimate tab, Master Breakdown Structures section, controls which of the default indirect cost items to copy into new job folders.

## 6.1.1 NAVIGATION TO INDIRECT COSTS

From the Estimate tab of the InEight Estimate landing page, you can quickly access indirect costs from the Indirect Cost section.



- Select Indirect Cost Items to open the Cost Breakdown Structure Register filtered to only your indirect costs
- You can select Prime Bond, Price % Add On, and Job Financing to access those indirects

The following section takes a closer look at the default indirect cost items.

# 6.2 DEFAULT INDIRECT COST ITEMS

InEight Estimate contains various default cost items to help you calculate your indirect costs.

## 6.2.1 INDEPENDENT INDIRECT COST ITEMS

Independent indirect cost items function very much like the direct cost items you defined previously:

- Job Management & Equipment
- General Expense

#### 6.2.1.1 JOB MANAGEMENT & EQUIPMENT

The sample Job Management & Equipment Record below shows that you can add resources and production just like in your direct cost items. Supervisory staff resources were added, and the production duration is set to 100 days.

	t Breakdown	Stru	ucture (CB	S) Register	Cost Item Reco	rd ©													
CBS	Code:	Opti	ional Code	: Description:						Forecast (T/	0) Qty:	Unit of M	easure:	Unit Co	st:	Total Cost:		Currency:	
														*					
														*					
		JOB	B MANAGER	ME Job Managemer	t & Equipment						1.00	Lump Sur	n	-	\$157,096.28	\$157,	096.28	U.S. Dollar	
PI A	ssignment:	PI Li	ine Numbe	r: PI Description:								Cost Seg	ment:	Pay Qu	antity:	Cost Source:		Alternate:	
	Ψ.											Job Over	head	-	1.00	Detail	•	BASE	
~	st Item Summar		🗘 Detail	: \$157,096.28	Plug : \$0.00	Quote : \$0.0	0 Allocation	1						Production					×
Co	st Item Summar	Y	- Dettai	· • • • • • • • • • • • • • • • • • • •	, agreened ,									Production	•				~
_	g columns here		_	¥107/000120 ¥	nagr (oldo )		[Search For]	··· 5	aved views:	Previous View		•	]	Production			Dur	Factored ration Driven	
Drag		to gro	_	Description	Quantity			··· S Work Hours	Pay	Previous View Waste % Add-on	Quantity (Less Wa	,	Produ Facto	Production	Duration	Driven Resourc	es	Resources	
Drag	g columns here	to gro	oup		Quantity	Find: Unit of	[Search For]	Work	Pay	Waste %		,	Produ		Duration Custo	omize Display	es	ration Driven Resources (x 1.0000)	
Drag	g columns here	to gro	oup Code	Description	Quantity 1.00	Find: Unit of Measure	[Search For] Unit Cost	Work Hours	Pay Hours	Waste %		,	Produ	D	Duration Custo	100.00	es	ration Driven Resources ( <u>x 1.0000)</u> 100.0	
Drag	g columns here Row Number ≞. +	to gro 1   2	oup Code LSS 1	Description Project Superintend	Quantity 1.00	Find: Unit of Measure Each Each	[Search For] Unit Cost \$42.53	Work Hours 800.00	Pay Hours 800.00	Waste %		,	Produ	D	Duration Custo ays:	00000 100.00	es	ration Driven Resources ( <u>x 1.0000</u> ) 100.0 100.0	
Drag	Row Number = +	to gro 1 1 2 1 3 1	Code LSS 1 LSSEC	Description Project Superintend Secretary	Quantity 1.00 1.00	Find: Unit of Measure Each Each Each	[Search For] Unit Cost \$42.53 \$20.41	Work Hours 800.00 800.00	Pay Hours 800.00 800.00	Waste %		,	Produ	D Sh Ho	Duration Custo ays: ifts: urs:	100.00 100.00 100.00 800.00	es	ration Driven Resources (x 1.0000) 100.0 100.0 800.0	
Drag	Row Number = + +	to gro 1 1 2 1 3 1 4 1	oup Code LSS 2 LSSEC LSPE	Description Project Superintend Secretary Project Engineer	Quantity 1.00 1.00 1.00	Find: Unit of Measure Each Each Each	[Search For] Unit Cost \$42.53 \$20.41 \$51.03	Work Hours 800.00 800.00 800.00	Pay Hours 800.00 800.00 800.00	Waste %		,	Produ	D	Duration Custo ays: ifts: urs: urs:	00000 100.00	es	ration Driven Resources ( <u>x 1.0000</u> ) 100.0 100.0	

The following Step by Step walks you through defining resources and costs for your Job Management & Equipment indirect cost item.

## 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.

		-	ERAL EXPE	General Exp							1.00	Lump S			\$1,000.00	***	U.S. D
ΊA	ssignment:	PI Li	ne Number:	: PI Descripti	on:							Cost Se	gment	t:	Pay Quantity:	Cost Source:	Alterna
	D											Job Ov	erhead	d -	1.00	Detail	<ul> <li>BASE</li> </ul>
Cœ	st Item Summary	1	🛃 Detail :	\$1,000.00	₩ Plug : \$0.00	20	uote : \$0.00	Allocation					Res	source	e Employment Break	down	
raç	columns here t	o gro	up				Sa	ved views:	Previo	ous View		· ,	Cost	Categ	jory		Scale 1
	Row -	Т		Resource			Quantity	Wast	. 9/.		Unit of		¥ 1	Total			\$1,000.00
	Number iii.	0		Assembly	Description		(Less Waste)	Add-		Quantity	Measur		)	> Lab	or		\$0.00
÷	+	1			General Office Sup	p	1.	00	0.00	1.00	Lump S	um +	)	> Ow	ned Equipment		\$0.00
*		т											)	Rer	nted Equipment		\$0.00
		-											- ·	- Sup	plies		\$1,000.00
															Undefined Supplies		1000

## 6.2.2 DEPENDENT INDIRECT COST ITEMS

The other default indirect cost items are **dependent indirect cost items**, meaning their costs depend on other costs, prices or hours. They include:

- Direct and Indirect Cost Add-On
- Direct and Indirect Cost Escalation
- Prime Bond
- Price % Add-On
- Job Financing

#### • Man-Hour Add-On

Actio	ns More Actio	ons	
uspended	🛃 Link Field	E Cost Item	1
	📇 Unlink Field	Subordinate Cost Item	5
		📑 Dependent Cost Item	
	Workbook		

It's possible to assign any assigned or dependent cost Item to any of the 3 cost segments and provides greater control over where costs exist in the Price Breakdown Structure (PBS).

os	t Breakdown Strue	cture (CBS) Register O Pay Item	& Proposal Register		
rag	columns here to grou	qu			
	CBS Position Code 😐	Description	Cost Segment	Pay Item Assignment	Pay Item Position Code
		308			
٠I	+	Prime Bond	Business Over	•	
1	+	Price % Add-On	A Description		
	+	Job Financing	Business Overhea	d	
	+	Indirect Cost Escalation	Direct Cost		
	+	Direct Cost Escalation	Job Overhead		
	+	Indirect Cost Add-On			
	+	Mobilization			
	□ 1	SITEWORK & ROADWAY			
	+ 1.1	Mobilization	×		
	+ 1.2	Clearing & Grubbing	Direct Cost	201 0102	1.2
	■ 1.3	Unclassified Excavation	Direct Cost	202 0 183	1.3
	+ 1.3.1	Excavation	Direct Cost	202 0 183	1.3

#### 6.2.2.2 DEFAULT DEPENDENT COST ITEM DELETION

NOTE

If you need to use additional dependent cost items, you can create your own, but you must delete all the existing default dependent cost items first.

The following steps walk you through deleting your existing default indirect costs so you can create your own.

#### 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.

#### 6.2.2.3 PRIME BOND

The following steps walk you through adding and defining your prime bond for the job.

#### 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.

#### MULTIPLE BOND RATE DEPENDENT ITEMS

For certain projects, it may be desirable to calculate costs for bond or insurance premiums based upon multiple different rate tables. It is now possible to add multiple bond/rate table based dependent items in the CBS.

For example, in addition to having a prime bond, the job may also require insurance coverage where the premium is calculated using a rate table-based approach. This can now be accomplished by adding another Bond/Rate-table based dependent cost item to the job.

st oreakoowin Struc	ture (CBS) Register O								
g columns here to grou	P								
CBS Position Code ill.	Description	Optional Code	Forecast (11/0) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Allocated	Currency	Hours (Duration driven)
	308		20.00	Mie	\$277,616.11	\$5,552,322.14		U.S. Dollar	5,492.2
+	Prime Bond	PRIME BOND	1.00	Lump Sum	\$42,305.50	\$42,305.50		U.S. Dolar	
+	Insurance	INSURANCE	1.00	Lump Sum	\$140,027.49	\$140,027.49		U.S. Dollar	
+	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$29,842.32	\$29,842.32		U.S. Dollar	
+	Indirect Cost Escalation	INDIRECT COST ESCALATION	1.00	Lump Sum	\$2,131.11	\$2,131.11		U.S. Dollar	
+	Direct Cost Escalation	DIRECT COST ESCALATION	1.00	Lump Sum	\$15,048.80	\$15,048.80		U.S. Dollar	
+	Indirect Cost Add-On		1.00	Lump Sum	\$5,823.31	\$5,823.31		U.S. Dollar	
+	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$100,820.54	\$100,820.54		U.S. Dollar	
□ <u>1</u>	SITEWORK & ROADWAY	200	1.00	Each	\$2,464,161.56	\$2,464,161.56		U.S. Dollar	2,158.3
+ 1.1	Mobilization	6410100	1.00	Lump Sum	\$11,909.51	\$11,909.51		U.S. Dollar	80.0
+ 1.2	Clearing & Grubbing	2010102	30.00	Acre	\$3,918.50	\$39,184.97		U.S. Dollar	80.0
II 1.3	Unclassified Excavation	202 0 183	50,000.00	Cubic Yard	\$4.68	\$233,915.81		U.S. Dollar	291.6

### DELETING BOND TABLES

Delete bond tables that are not applicable to your estimate by selecting them and then clicking the **Delete** button. You can customize the Bond Table window to only view the tables that are relevant to your estimate from the Table Name drop-down list.

Ide	ntification					_
	Table Name:	EXAMPLE: GENERAL CON	STRUCTION O	<ul> <li>Edit Name</li> </ul>	Delete	
las	t Maintenance:	A Table Name		1		-
Las	criancenance.	EXAMPLE: EARTHWORK				
Bon	d Rate Layers	EXAMPLE: GENERAL CON	STRUCTION			
	From	EXAMPLE: PAVING		\$1,000		
→	EXAMPLE: PIPE			10.80000		
		EXAMPLE: UNDERGROUN		8.20000		
		No Bond Required			7.00000	
					5.00000	
		\$10,000,000.01	\$20,000,000.00	.:	4.80000	
		\$20,000,000.01	\$40,000,000.00		3.50000	
		\$40,000,000.01	\$80,000,000.00		3.00000	

## 6.2.2.4 PRICE % ADD-ON

The following steps walk you through defining the Price % Add-On.

## 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
O Based on Job's Finance Cost
O Based on Bond Table
O Based on Direct Costs
◯ Based on Indirect Costs
O Based on CBSMan Hours
O Based on CBSEquipment Hours
O Based on Resource Utilization
O 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
	ЈОВ	
+	Job Management & Equipment	JOB MANAGEMENT & E
+	General Expense	GENERAL EXPENSE
+	Prime Bond	PRIME BOND
<b>F</b>	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.

CBS Code:	Descrip Price %	otion: Add-On			
Description	Dependenc <u>v</u>				
Drag columns	here to group				
Descript	on		Rate	Account Code	
Ø Office O	verhead		4.00	e.	

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

## 6.2.2.5 DIRECT COST ADD-ON

The following steps walk you through creating a Direct Cost Add-On dependent cost item.

#### STEP BY STEP – DEFINE A DIRECT COST ADD-ON

- 1. From the Cost Breakdown Structure (CBS) Register, right-click on the **row heade**r 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.

BS Position Code:		· · ·	ion: ost Add-On			
<u>D</u> escription	Depe	ndenc <u>y</u>	Cost Categorization	Allocation		
Drag columns l	nere to	group				
Descripti	on		/	Curre	Total Cost (Forecast)	

- 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.

(Affects displayed items only)  Optime the Subject Cost using column filtering (all current and future items that match the filter will be included automatically)	Toggle Include All	O Define the Subject Cost by viewing all available items and clicking the Include boxfor the desired items	
	(Affects displayed items only)	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	IS Position Code: Description:					Total Cost:		Currenc	y:	Alter	nate:
	Direct Cost Add-On					\$5,7	01.36	U.S. Do	ilar +	BASE	
PIA	Assignment: PI Line Number: PI Descriptio	n:						Cost Se	gment:	Pay (	Quantity:
								Job Ov	erhead 🔹		1.0
De	escription Dependency Cost Categorization	Allocation		Cos	t Breakdown						×
ra	ag columns here to group Saved v	iews: Standa	rd View 👻	Cost	Category		Subj Cost		Rate		Cost
	Description	Currency	Total Cost (Forecast)	¥ 1	Total		\$99	,107.22	5.75		\$5,701.36
,	Small Tools	U.S. Dollar	\$5,701.36		Labor		\$57	,013.62	10.00		\$5,701.36
*				1	<ul> <li>Owned Equipment</li> </ul>		\$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		4	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

#### 6.2.2.6 REPOSITIONING DEPENDENT COST ITEMS

Repositioning dependent cost items creates a simpler way to manage the hierarchy of your project by placing items of more importance ahead of other line items.

Since dependent cost items can now be repositioned, a Position Code field has been added with the functionality similar to column remaining the same. The below listed dependent cost item fields are now exposed in the CBS register so you can more easily see the various percentages used in dependent items.

- Subject Cost
- Subject Cost Rate
- Subject Billing Amount
- Subject Billing Rate

These columns can also be found in the new saved view **Bid Review**.

CBS Position Code 📒	Description	Optional Code
3	ЈОВ	
+	Prime Bond	PRIME BOND
+	Price % Add-On	PRICE % ADD-ON
+	Job Financing	FINANCE EXPENSE
+	Indirect Cost Escalation	INDIRECT COST ESCALATION
+	Direct Cost Escalation	DIRECT COST ESCALATION
+	Indirect Cost Add-On	INDIRECT COST ADD-ON
+	Job Management & Equipment	JOB MANAGEMENT & EQUIPMENT
+	General Expense	GENERAL EXPENSE
+	Direct Cost Add-On	DIRECT COST ADD-ON
	Direct Cost Add-On Mobilization	DIRECT COST ADD-ON 641 0100
+ 1		
+ <b>1</b> + 24.1.2	Mobilization	
+ 1 + 24.1.2 + 25	Mobilization Day Two	641 0 100
+ 1 + 24.1.2 + 25 + 26	Mobilization       Day Two       Prime Bond	641 0100 PRIME BOND
+ 1 + 24.1.2 + 25 + 26 + 27	Mobilization Day Two Prime Bond Price % Add-On	641 0100 PRIME BOND PRICE % ADD-ON
+ 1 + 24.1.2 + 25 + 26 + 27 + 28 + 29	Mobilization         Day Two         Prime Bond         Price % Add-On         Job Financing	641 0100 PRIME BOND PRICE % ADD-ON FINANCE EXPENSE
+ 1 + 24.1.2 + 25 + 26 + 27 + 28	Mobilization         Day Two         Prime Bond         Price % Add-On         Job Financing         Indirect Cost Escalation	641 0100 PRIME BOND PRICE % ADD-ON FINANCE EXPENSE INDIRECT COST ESCALATION
+ 1 + 24.1.2 + 25 + 26 + 27 + 28 + 29 + 30	Mobilization         Day Two         Prime Bond         Price % Add-On         Job Financing         Indirect Cost Escalation         Direct Cost Escalation	641 0100 PRIME BOND PRICE % ADD-ON FINANCE EXPENSE INDIRECT COST ESCALATION DIRECT COST ESCALATION
+ 1 + 24.1.2 + 25 + 26 + 27 + 28 + 29	Day Two         Prime Bond         Price % Add-On         Job Financing         Indirect Cost Escalation         Direct Cost Escalation         Indirect Cost Add-On	641 0100 PRIME BOND PRICE % ADD-ON FINANCE EXPENSE INDIRECT COST ESCALATION DIRECT COST ESCALATION INDIRECT COST ADD-ON

# 6.3 USER-DEFINED INDIRECT COST ITEMS

You may prefer to create your own indirect cost items. You create user-defined indirect cost items the same way you create direct cost items. The only difference is that your indirect cost items will not be assigned to pay items. One advantage of creating your own indirect cost items is the ability to create a parent-child structure for your indirect costs.

Here is an example of user-defined indirect cost items, expanded to show their employed resources:

CB Po:	S sition (	Code	1		Description			orecast 70) Quantit	y	Unit of Measur		Un	it Cost	Total Cost (Forecast)
2	5				Indirect Cost				1.00	Each			\$10,584.36	\$10,584.36
-	5.1				Head Office				1.00	Each			\$370.32	\$370.32
			1	Desc	ription	Quanti	ity	Unit of Measure	Work Hours	Pay Hours	Unit Co	st	Total Cost (Forecast)	
	$\rightarrow$	+	1	Head	d Office Project	1.	00	Each	8.00	8.00	\$46.	29	\$370.32	
-	5.2				Field Office				1.00	Each			\$1,775.04	\$1,775.04
			1	Desc	ription	Quanti	ity	Unit of Measure	Work Hours	Pay Hours	Unit Co	st	Total Cost (Forecast)	
	ل	+	1	Field	Office Clerk	1.	00	Each	4.00	4.00	\$38.	00	\$152.00	
	<u>&amp;</u>	+	2	Field	Office Safety M	1.	00	Each	8.00	8.00	\$62.	38	\$499.04	
		+	3	Field	Office Site Supe	1.	00	Each	16.00	16.00	\$70.	25	\$1,124.00	
-	5.3				Site Facilities				1.00	Each			\$905.00	\$905.0
			1	Desc	ription	Quant	ity	Unit of Measure	Work Hours	Pay Hours	Unit Co	st	Total Cost (Forecast)	
	$\rightarrow$	+	1	Field	Office Telephone	0.	50	Month			\$250.	00	\$125.00	
		+	2	Field	Office Trailer	1.	00	Each	0.00	0.00	\$5.	94	\$0.00	
		+	3	Pick	Up Truck	1.	00	Each	80.00	80.00	\$9.	75	\$780.00	
ł	5.4				Misc. Expenses				1.00	Each			\$2,765.00	\$2,765.0
⊢	5.5				Supervision				1.00	Each			\$4,769.00	\$4,769.0

#### 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**.
- 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		Jop O	verhead				1.00	Each		4	\$31,740.0	0 \$3	1,740.00
-	3.1		Job	Trailer				1.00	Each		4	\$30,240.0	0 \$30	0,240.00
		Row Number ≞	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Qua	ntity	Unit of Measure	Work Hours	Pay Hours	Unit Cost	Total Cost (Forecast)
	$\rightarrow$	+ 1	RJT		Job Trailer				2.00	Each	1,1	1,1	\$27.00	\$30,240
-	3.2		Utilit	ies			:	1.00	Lump	Sum		\$1,500.0	0 \$	1,500.00
		Row Number ≞	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Qua	ntity	Unit of Measure	Work Hours	Pay Hours	Unit Cost	Total Cost (Forecast)
	$\rightarrow$	+ 1			Electricity	1.00	0.00		1.00	Lump			\$1,500	\$1,500.00

## 6.4 COST ALLOCATION

The **Cost Item Record - Allocation** tab lets you to spread costs from a single Cost Item Record to one or more other cost items in the Cost Breakdown Structure (CBS) Register.

- Allocation Item The cost item to be allocated, where you define the quantities, resource employments and the logic that determines how to allocate the item throughout the bid.
- Allocation Target A cost item to be the recipient of allocated cost, as defined within the Allocation Item. There may be one or many Allocation Targets for one Allocation Item.

• **Distribution** - A read-only cost item in the CBS representing an Allocation Target's proportional share of the Allocation Item.

You can choose from several methods to determine specifically where and how much cost to spread:

- Quantity Specify the amount of the Allocation Item to be spread to each Allocation Target.
- **Proportionately based on another field** Allocate proportionately by one of many available cost item values, usually based on time or cost.
- **Percentage** Specify the percentage of the Allocation Item to spread to each Allocation Target.
- Unit Cost Use the unit cost from the Allocation Item and the quantity of each Allocation Target to drive the Forecast (T/O) Quantity of the Allocation Item.

Cost Item Allocation is a good means of spreading costs throughout a bid for the purpose of determining appropriate bid prices.

NOTE Only Level 1 cost items can be allocated, including Add-On and Escalation dependent cost items. A subordinate cost item cannot be allocated, and a cost item that is assigned to a pay item cannot be allocated.

## 6.4.1 COST ALLOCATION

With Cost Item Allocation, you can track the cost of one broad cost item by distributing the cost of that item to other cost items, so that the cost can be tracked on a more detailed level. This gives better visibility into the cost that makes up an item. For example, you can spread ST&S from one cost item to multiple cost items that will use ST&S.

Imagine that a large portion of your scope of work for the job you are bidding has concrete. You face the options of batching your own raw materials or purchasing the materials from a supplier. You can use cost allocation to create the cost of a batch plant and allocate it to different items, and then compare this unit cost to the unit cost of purchasing the materials from a supplier.

The Allocation tab allows you to spread costs from an Allocation Item to one or more Allocation Target (s).

**NOTE** In the Allocation Target list, the **[Unit of Measure] Quantity** column caption displays the Unit of Measure of the Allocation Item. For instance, if the Allocation Item's Unit of Measure is **Cubic Yards (CY)**, then the caption displayed for this column is **CY** Quantity.

A Distribution cost item is created as a read-only subordinate cost item under each Allocation Target. It is copied proportionally with the quantity/cost defined to each different item in CBS.

## 6.4.2 VIEW FILTER EXCLUDES COST ITEM ALLOCATION DETAILS

A View Filter option is added to show only the level 1 cost item distribution in the allocation destinations to provide you with a clear and comprehensive view of the CBS register, especially when there are many allocations. When you are allocating cost items, the allocations are created in the destination cost item by creating a copy of the entire allocated cost items structure. This filter allows you to simplify the view by displaying only the parent level allocation cost item.

-	Print	Cut + Fil Down		-		ost Item	- Assembly		2 Resource	14	CBS Tree Filter Mode:		
	Preview	🕀 New 🛛 🖶 Copy 🔀 Split	Indent 🔿	Junlink I		ubordinate Cost Iter		te Assembly	Resource Asse	mbly Expand /	Filter Clear CBS Tree Common CBS Tree		
ð	Export to Excel	😢 Delete  💼 Paste  素 Split by C	ost Type 🛛 🖛 Outdent		De De	ependent Cost Item				Collapse *	Filter Filter Expand CBS Tree		
	Print	Edit		Workbo	ok		Inser	t			Filter to CBS Level		
Job	Properties	Cost Breakdown Structure (CBS)	Register O								Filter to Terminal Cost Items		
rad	columns here to	group									Filter to Direct Cost Items		
				Forecast									WBS: 0
	CBS Position Code	Description	Optional Code	(T/O)	Unit of Measure	Unit Cost	Total Cost (Forecast)	Allocated		Hours (Duration driven)	Filter to Indirect Cost Items	Subject Cost	(Civil E
				Quantity							Filter by Cost Source Plug		System
	8	JOB Prime Bond		20.00		\$3,996,575.15	\$79,931,503.08	•	U.S. Dollar	527,454.2	Filter by Cost Source Quote		
		Prine Bond Price % Add-On	PRIME BOND		Lump Sum	\$312,587.53	\$312,587.53		U.S. Dollar U.S. Dollar		Filter by Cost Source Detail		BOND
	-	Job Financing	PRICE % ADD-ON FINANCE EXPENSE		Lump Sum	\$3,785,175.55	\$3,785,175.55		U.S. Dollar		Filter to Schedule Relations		FFFS
		Indirect Cost Escalation	INDIRECT COST ESCALAT		Lump Sum	\$9/4,/98.08	\$974,798.08		U.S. Dollar		Filter by Resource		LABOR
	-	Direct Cost Escalation	DIRECT COST ESCALATION		Lump Sum	\$2,131.11	\$687,306.87		U.S. Dollar		- · ·		LABOR
	+	Indirect Cost Add-On	DIRECT COST ESCREATION		Lump Sum	\$46,251,26	\$46,251,26		U.S. Dollar		Filter by Resource Assembly	2.00	LABOR
	+	Direct Cost Add-On	DIRECT COST ADD-ON		Lump Sum	\$46,251.26	\$46,251.26		U.S. Dollar		Filter by Resource Account		LABOR
	<b>=</b> 1	SITEWORK & ROADWAY	200		Each	\$68,690,789	\$68,690,789.87		U.S. Dollar	520,482.3	Filter by Resource Type	2.00	PAVEM
	+ 1.1	Mobilization	641 0 100		Lump Sum	\$11,909.51	\$11,909.51		U.S. Dollar	520, 102.5			MOBIL
1	+ 1.2	Clearing & Grubbing	201 0102	10.00		\$3,918.50	\$39,184.97		U.S. Dollar	80.0			CLEAR
	= 1.3	Unclassified Excavation	202 0 183		Cubic Yard	\$4.68	\$233.915.81		U.S. Dollar	291.6	, The by binque (bend) cost nems		COMM
	+ 1.3.1	Excavation	1.3.1		Cubic Yard	\$3.00	\$149,922,88		U.S. Dollar	125.0	Filter Cost Items with Excel Links		COMM
	+ 1.3.2	Embankment	1.3.2		Cubic Yard	\$1.68	\$83,992,94		U.S. Dollar	166.6	Filter Allocation Distributions Subordinates		EMBAN
	□ 1.4	Aggregate Base	303 5912	45,000.00	Ton	\$1.487.10	\$66,919,557.30		U.S. Dollar	519,564.0	Filter Resources with Waste Percentage		UNTRE
	+ 1.4.1	Furnish & Haul Base Material	1.4.1	45,000.00	Ton	\$11.54	\$519,513.30		U.S. Dollar	360.0	0 12.20.090		BUY M
	+ 1.4.2	Finegrade Subgrade	1.4.2	400,000.00	Square Yard	\$100.00	\$40,000,000.00		U.S. Dollar	168,757.7	77 11.70.300		FINEG
r.	_	-											

## STEP BY STEP – COST ALLOCATION

- 1. From the Ribbon, select the Estimate tab.
- 2. Under the Breakdown Structures section, select **Cost Breakdown Structure (CBS)**. The Cost Breakdown Structure Register opens.
- 3. Select the Concrete Batch Plant cost item.

	8	Project Indirect Costs	1.00	Lump Sum
+	8.1	Crane Service	30.00	Day
	9	Concrete Batch Plant	1,000.00	CY
+	9.1	Buy Raw Materials	1,000.00	CY
+	9.2	Batch/Mix/Haul Concrete	18.00	Day
	10	Equipment Related Indirects	1.00	Each
+	10.1	Maintenence	1.00	Each

- 4. From the Ribbon, select the Actions tab. Under the Edit section, select **Open**. The Cost Item Record opens.
- 5. Select the Allocation tab.
- 6. Check the box for Allocate this Item's Cost. Keep the By Quantity option selected.

Allocate this Item's Cost	
Allocation distributions inhe	rit target Pay Item Assignment
How do you want to determine	allocation percentages?
O by Quantity	
O proportionately based on	~
🔵 by Percentage	
O by Unit Cost (drives the Al	location Item's Forecast (T/O) Quantity)

7. Check the Include box for the cost item Box Culvert Footing to allocate cost to it.

CBS Position Code	Description	Include	Unit of Measure	Forecast (T/O) Quantity
1	Roadway Excavation		CY	344,820.2
1.1	Short Haul Excavation		CY	74,883.2
1.2	Medium Haul Excavation		CY	109,740.7
1.3	Long Haul Excavation		CY	160, 196.2
2	Structural Concrete (Class S) (FC=3,.	-	CY	229.8
2.1	Box Culvert Footing	$\checkmark$	CY	52.8
2.1.1	Erect & Strip Footer		SFCA	597.0

NOTE Take note of the Allocation Percentage and Total Cost to be Allocated columns. This shows the percent of the total allocation qty allocated to that cost item and the total cost to be allocated to that item (notice that is the total cost of the Concrete Batch Plant).

CBS Position Code	Description	Include	Unit of Measure	Forecast (T/O) Quantity	CY Quantity	Allocation Percentage	Percent of Total Cost	Total Cost to be Allocated
1	Roadway Excavation		CY	344,820.24	0.00	0.00	0.00	\$0.00
1.1	Short Haul Excavation		CY	74,883.28	0.00	0.00	0.00	\$0.00
1.2	Medium Haul Excavation		CY	109,740.72	0.00	0.00	0.00	\$0.00
1.3	Long Haul Excavation		CY	160, 196. 24	0.00	0.00	0.00	\$0.00
2	Structural Concrete (Class S) (FC=3,		CY	229.87	0.00	0.00	0.00	\$0.00
2.1	Box Culvert Footing	✓	CY	52.84	52.84	5.28	100.00	\$81,895.53
2.1.1	Erect & Strip Footer		SFCA	597.00	0.00	0.00	0.00	\$0.00

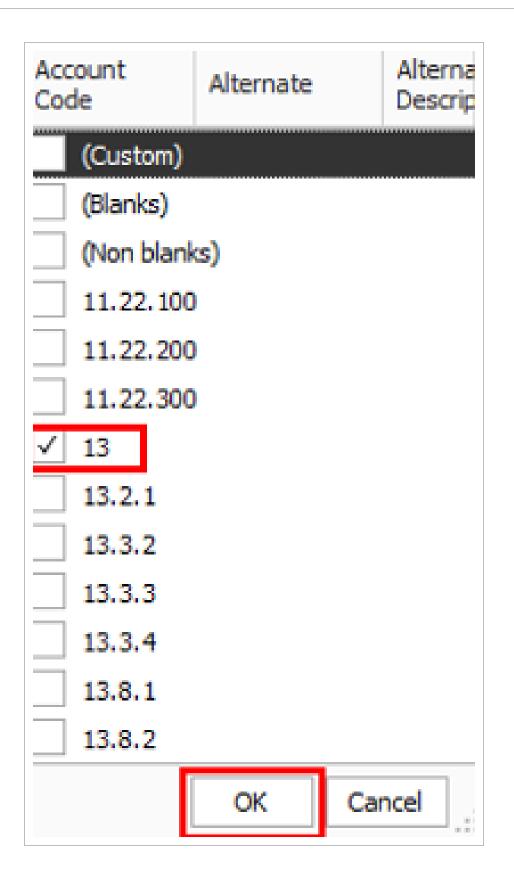
8. The **Box Culvert Footing** item just gained all of the **Concrete Batch Plant's** distribution cost items (highlighted in purple). Navigate back to the **CBS Register**.

	CBS Position Code 😑	Description	Indude	Unit of Measure	Forecast (T/O) Quantity	CY Quantity	Allocation Percentage
	1.3	Long Haul Excavation		CY	160, 196.24	0.00	0.0
	2	Structural Concrete (Class S) (FC=3,		CY	229.87	0.00	0.0
•	2.1	Box Culvert Footing	✓	CY	52.84	52.84	5.2
	2.1.1	Erect & Strip Footer		SECA	597.00	0.00	0.0
	2.1.2	Place Footer Concrete		CY	52.84	0.00	0.0
	2.1.3	Concrete Batch Plant		CY	52.84	0.00	0.0
	2.1.3.1	Buy Raw Materials		CY	52.84	0.00	0.0
	2.1.3.2	Batch/Mix/Haul Concrete		Day	0.95	0.00	0.0
	2.2	Box Culvert Walls		CY	87.86	0.00	0.0
	2.2.1	Erect & Strip Wall		SECA	5,757.00	0.00	0.0
	2.2.2	Erect & Strip Bulkheads		SECA	131.79	0.00	0.0
				<b>C</b> 14	07.00	0.00	

9. Find the **Box Culvert** Footing cost item. The distribution cost items are added as its subordinates.

	CBS Position Code	Description	Forecast (T/O) Quantity
÷		JOB	1.00
	<b>1</b>	Roadway Excavation	344,820.24
	+ 1.1	Short Haul Excavation	74,883.28
	+ 1.2	Medium Haul Excavation	109,740.72
	+ 1.3	Long Haul Excavation	160,196.24
	<b>□</b> 2	Structural Concrete (Class S) (FC=3,00	229.87
	■ 2.1	Box Culvert Footing	52.84
	+ 2.1.1	Erect & Strip Footer	597.00
	+ 2.1.2	Place Footer Concrete	52.84
	2.1.3	Concrete Batch Plant	52.84
	+ 2.1.3.1	Buy Raw Materials	52.84
	+ 2.1.3.2	Batch/Mix/Haul Concrete	0.95

- 10. In the Cost Item Record, check the **Include** box for the cost items, **Box Culvert Walls** and **Box Culvert Deck**.
- 11. In the Account Code column, click on the **Filter** icon. Filter to account code **13** for all of the concrete items. Once done, click OK.



- 12. Select the **Erect and Strip Deck** code, hold **<Shift>**, and select the Footer code to muliselect all of the codes in between. Then, tight click and select **Toggle Included**.
- Check the Include box in the Include column for the cost item Column, round. The CY Quantity is now highlighted yellow. This is because this cost item's UoM is Each and not CY.

CBS Position Code	Description	Include	Unit of Measure	Forecast (T/O) Quantity	CY Quantity
4.2.4	East Wing Wall	✓	CY	4.22	4.22
4.2.5	West Wing Wall	$\checkmark$	CY	4.93	4.93
4.3.1	Footer	$\checkmark$	CY	41.67	41.67
4.3.2	Column, round		Each	3.00	0.00
4.3.3	Pier cap		CY	18.67	0.00
4.4.1	Footer		CY	41.67	0.00
4.4.2	Column, round		Each	3.00	0.00

- 14. Right click on the Account Code column, and select Clear Filter from the context menu.
- 15. Under the cost item **Column, round**, the subordinate cost item **Place Column Concrete** has a UoM of **CY**. Manually enter that cost item's Forecast (T/O) Quantity into the Column, round's **CY Quantity** field.

	CBS Position Code	Description	Include	Unit of Measure	Forecast (T/O) Quantity	CY Quantity
ı	4.3.2	Column, round	✓	Each	3.00	60.51
	4.3.2.1	Erect & Strip column forms		SFCA	508.94	1 0.00
	4.3.2.2	Install embeds		EA	9.00	0.00
	4.3.2.3	Place Column Concrete		CY	60.51	0.00
	4.3.2.4	Rub & Patch		SF	508.94	0.00
	4.3.3	Pier cap		CY	18.67	0.00

- 16. Select the Account Code filter and reselect the option **13**.
- 17. In the Include column, check the **Include** box for all of the remaining cost items with this filter. Then, remove the Account Code filter.

CBS Position Code	Description	Include	Unit of Measure
4.2.5	West Wing Wall	$\checkmark$	CY
4.3.1	Footer	$\checkmark$	CY
4.3.2	Column, round	$\checkmark$	Each
4.3.3	Pier cap	$\checkmark$	CY
4.4.1	Footer	$\checkmark$	CY
4.4.2	Column, round	$\checkmark$	Each
4.4.3	Pier cap	$\checkmark$	CY
6	Drilled Shaft Foundation (60") (Structure # 2929 - Drilled Shaft Foundation)	$\checkmark$	LF
7	Drilled Shaft Foundation (72") (Structure # 2929 - Drilled Shaft Foundation)		LF

18. Fix the CY quantity for the other **Column, round** cost item.

CBS Position Code	Description	Include	Unit of Measure	Forecast (T/O) Quantity	CY Quantity
4.4.1.3.1	Buy Raw Materials		CY	41.67	0.00
4.4.1.3.2	Batch/Mix/Haul Concrete		Day	0.75	0.00
4.4.2	Column, round	✓	Each	3.00	60.51
4.4.2.1	Erect & Strip column forms		SFCA	508.94	0.00
4.4.2.2	Install embeds		EA	9.00	0.00
4.4.2.3	Place Column Concrete		CY	60.51	0.00
4.4.2.4	Rub & Patch		SF	508.94	0.00
4.4.3	Pier cap	✓	CY	18.67	18.67
4.4.3.1	Erect & Strip Pier		SFCA	382.50	0.00
4.4.3.2	Erect & Strip Bulkheads		SECA	28.00	0.00
4.4.3.3	Install embeds		EA	6.00	0.00

19. Fix the CY quantity for the Drilled Shaft Foundation (60") cost item.

CBS Position Code	Description	Include	Unit of Measure	Forecast (T/O) Quantity	CY Quantity
5	Reinforcing Steel (Structure #2929)		b	175,235.00	0.00
5.1	Reinforcing Steel		b	175,235.00	0.0
6	Drilled Shaft Foundation (60") (Structure # 2929 - Drilled Shaft Foundation)	$\checkmark$	LF	306.00	222.5
6.1	Buy Reinforcing Steel		b	47,482.52	0.00
6.2	Drill Abutment Shafts		LF	306.00	0.00
6.3	Erect Rebar Cage		EA	4.00	0.00
6.4	Place Rebar Cage		EA	4.90	0.00
6.5	Pour Concrete		CY	222.53	0.0
7	Drilled Shaft Foundation (72") (Structure # 2929 - Drilled Shaft Foundation)	$\checkmark$	LF	300.00	0.0
7.1	Buy Reinforcing Steel		b	58,189.36	0.00

20. 20. Fix the CY quantity for the **Drilled Shaft Foundation (72")** cost item.

7.5	Pour Concrete		СҮ	314.16	0.00
7.4	Place Rebar Cage		EA	4.00	0.00
7.3	Erect Rebar Cage		EA	4,90	0.00
7.2	Drill Abutment Shafts		LF	300.00	0.00
7.1	Buy Reinforcing Steel		lb	58,189.36	0.00
7	Drilled Shaft Foundation (72") (Structure # 2929 - Drilled Shaft Foundation)	$\checkmark$	LF	300.00	314.16
6.5	Pour Concrete		CY	222.53	0.00
CBS Position Code	Description	Indude	Unit of Measure	Forecast (T/O) Quantity	CY Quantity

21. Notice in the Allocation Details section, that we have over-allocated this cost item. The Concrete Batch Plant quantity is 1,000 CY, whereas we have allocated 1,172.59 CY.

Allocation Details					
<u>To Be Allocated</u> \$81,895.53 ÷ 1,000.00 CY = \$81.90/CY					
<u>Current Allocation</u> \$81,895.53 ÷ 1,172.59 CY = \$69.84/CY					
Over-Allocation of 172.5939369 CY					

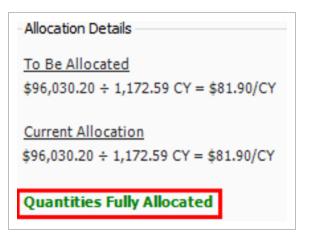
## 6.4.3 COST ALLOCATION TO BY UNIT COST

Having an under allocation or over allocation is ok, but it can be fixed by updating the Forecast (T/O) Quantity of the **Concrete Batch Plant**. To do this, change the cost allocation to **by Unit Cost**.

How do you want to determine allocation percentages?					
O by Quantity					
O proportionately based on					
O by Percentage					
by Unit Cost (drives the Allocation Item's Forecast (T/O) Quantity)					

#### STEP BY STEP - COST ALLOCATION BY UNIT COST

- 1. Change the cost allocation to **by Unit Cost**. When the Attention dialog box appears, click **Yes** to continue.
- 2. Now the Allocation Details warning states the quantities are fully allocated.



3. Notice also that the Forecast (T/O) Quantity of the **Concrete Batch Plant** has updated to 1,172.59 CY to match the allocated quantity, and the Total Cost has updated to \$96,030.20 to keep the unit cost at the original \$81.90/CY.

Forecast (T/O) Qty:	Unit of Measure:		Unit Cost:	Total Cost:
		Υ.		
		Ψ.		
1,172.59	CY	•	\$81.90	\$96,030.20
	Cost Segment:		Pay Quantity:	Cost Source:
	Job Overhead	•	1,172.59	Detail 🔹

4. Return to the CBS Register. The distributed cost items all have a unit cost of \$81.90.

CBS Positi	ion Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
		ЈОВ	1.00	Lump Sum	\$1,121,620	\$1,121,620.97
= 1		Roadway Excavation	344,820.24	CY	\$1.55	\$535,419.74
+ 1	.1	Short Haul Excavation	74,883.28	CY	\$0.58	\$43,695.89
+ 1	.2	Medium Haul Excavation	109,740.72	CY	\$0.81	\$88,620.58
+ 1	.3	Long Haul Excavation	160, 196. 24	CY	\$2.52	\$403,103.26
= 2	1	Structural Concrete (Class 5) (FC=3,00	229.87	CY	\$377.25	\$86,719.63
⊒ 2	.1	Box Culvert Footing	52.84	CY	\$209.15	\$11,051.67
+ 2	.1.1	Erect & Strip Footer	597.00	SECA	\$10.26	\$6,123.68
+ 2	.1.2	Place Footer Concrete	52.84	CY	\$11.37	\$600.65
2	.1.3	Concrete Batch Plant	52.84	CY	\$81.90	\$4,327.33
+ 2	.1.3.1	Buy Raw Materials	52.84	CY	\$35.62	\$1,882.06

5. The original "Concrete Batch Plant" cost item has a total cost of \$96,030.20.

8.1	Crane Service	30.00	Day	\$1,871.89	\$56,156.73	U.S. Dollar
9	Concrete Batch Plant	1,172.59	CY	\$81.90	\$96,030.20	U.S. Dollar
⊦ 9.1	Buy Raw Materials	1,172.59	CY	\$35.62	\$41,765.74	U.S. Dollar
+ 9.2	Batch/Mix/Haul Concrete	21.11	Day	\$2,570.96	\$54,264.46	U.S. Dollar

- 6. Navigate to the CBS Register. Double click the Project Indirect Costs cost item to open it.
- 7. Select the Allocation tab. Check the box for Allocate this Item's Cost.

[	Allocate this Item's Cost Allocation distributions inherit target Pay Item Assignment
	How do you want to determine allocation percentages?
	by Quantity
	O proportionately based on
	O by Percentage
	O by Unit Cost (drives the Allocation Item's Forecast (T/O) Quantity)

8. Select the **proportionately based on** radio button. From the drop down, select **Shifts** (Total).

How do you want to	determine a	allocation percentages?		
O by Quantity				
proportionately b	ased on		*	
<ul> <li>by Percentage</li> <li>by Unit Cost (drives the Allo</li> </ul>		Shifts (Duration driven)	*	1
		Shifts (Non-Duration driven)		
		Shifts (Total)		
		Subcontract Total Billing Amount		
ag columns here to gro	up	Subcontract Total Cost		J
		Supplies Total Billing Amount		ł
CBS	Descriptio	Supplies Total Cost	*	
Position Code			.:	:

9. Filter the Account Code column to 13. Once done, click OK.

Account Code	Alternate		ernate scriptic
(Custom)			
(Blanks)			
(Non blank	s)		- 1
11.22.100	)		- 1
11.22.200	)		
11.22.300			- 1
✓ 13			- 1
13.2.1			- 1
13.3.2			
13.3.3			- 1
13.3.4			
13.8.1			
13.8.2			
[	OK	Cancel	].::

10. Select all of the cost items. Then, right click on the selected cost items and select **Toggle included**. Ensure that all of the **Included** boxes are checked.

7	Drilled Shaft Foundation (72") (Structure # 2929 - Drilled Shaft Foundation)		LF
6	Drilled Shaft Foundation (60") (Structure # 2929 - Drilled Shaft Foundation)	<ul><li>✓</li></ul>	LF
4.4.3	Pier cap	$\checkmark$	CY
4.4.2	Column, round	$\checkmark$	Each
4.4.1	Footer	$\checkmark$	CY
4.3.3	Pier cap	$\checkmark$	CY
4.3.2	Column, round	<ul><li>✓</li></ul>	Each
4.3.1	Footer	$\checkmark$	CY
4.2.5	West Wing Wall	<ul> <li>Image: A set of the set of the</li></ul>	CY
CBS Position Code	Description	Include	Unit of Measure

11. On the CBS Register, verify that all of the items have cost items distributed proportionately by shifts.

CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure
+ 2.2.3	Place Wall Concrete	87.86	CY
+ 2.2.4	Rub & Patch	922.51	SF
2.2.5	Project Indirect Costs	0.29	Lump Sum
+ 2.2.5.1	Crane Service	8.67	Day
2.3	Box Culvert Deck	48.53	CY
+ 2.3.1	Erect & Strip Deck	1,310.21	SFCA
+ 2.3.2	Place Deck Concrete	48.53	CY
2.3.3	Project Indirect Costs	0.06	Lump Sum
+ 2.3.3.1	Crane Service	1.87	Day
■ 2.4	Box Culvert Wing Walls	40.65	CY
+ 2.4.1	Erect & Strip Footings	563.67	SFCA
+ 2.4.2	Erect & Strip Wingwalls	1,067.56	SFCA
+ 2.4.3	Place Wing Wall Concrete	40.65	CY
2.4.4	Project Indirect Costs	0.16	Lump Sum
+ 2.4.4.1	Crane Service	4.82	Day
3	Reinforcing Steel (CBC Extn at STA 395	35,372.00	lb
+ 3.1	Reinforcing Steel	35,372.00	lb
□ 4	Structural Concrete (Class S) (FC=3,50	306.00	CY
<b>■</b> 4.1	Abutment 1 (south)	84.00	CY
■ 4.1.1	Footer	44.44	CY
+ 4.1.1.1	Erect & Strip Footer	300.00	SFCA
+ 4.1.1.2	Place Footer Concrete	48.88	CY
4.1.1.3	Project Indirect Costs	0.03	Lump Sum
+ 4.1.1.3.1	Crane Service	0.91	Day

## 6.5 DEPENDENT COST ITEM ALLOCATION

#### STEP BY STEP – DEPENDENT COST ITEM ALLOCATION

- 1. From the CBS Register, right click on the first cost item and select **Insert Dependent Cost Item** from the context menu.
- 2. When the Attention dialog box shows, select **Based on Direct Costs**. Once done, click **OK**.

Attention
Choose what type of Dependent Cost Item to add:
○ Based on Job's Price
O Based on Job's Finance Cost
O Based on Bond Table
Based on Direct Costs
O Based on Indirect Costs
O Based on CBS Man Hours
O Based on CBS Equipment Hours
O Based on Resource Utilization
O Based on Assembly Utilization
OK Cancel

3. Find your new cost item. Then double click to open the cost item record.

- 10.1	Maintenence Direct Cost Add-On	1.00	Each Lump Sum	\$76,467.24 \$0.00	\$76,467.24 \$0.00
10	Equipment Related Indirects	1.00	Each	\$76,467.24	\$76,467.24
10	Fault much Dalated Talling to	1.00	r.	470 407 04	ATC 467 D
9.2	Batch/Mix/Haul Concrete	21.11	Day	\$2,570.96	\$54,264.4
9.1	Buy Raw Materials	1,172.59	CY	\$35.62	\$41,765.7
9	Concrete Batch Plant	1,172.59	CY	\$81.90	\$96,030.2
8.1	Crane Service	30.00	Day	\$1,871.89	\$56,156.7
8	Project Indirect Costs	1.00	Lump Sum	\$56,156.73	\$56,156.73

- 4. In the CBS Position Code Description, enter the description Small Tools & Supplies.
- 5. Enter in the cost item, "ST&S".

rag	columns here to group		
	Description	Currency	Total Cost (Forecast)
→ [	ST&S	U.S. Dollar	\$0.0
*			

6. In the Cost Breakdown default data block, set the labor rate as 5%.

Cost Breakdown							
Cos	st C	ategory	Subject Cost	Rate	Cost		
✓ Total		tal	\$1,003,3	0.00	\$0.00		
	>	Labor	\$217,258	5	\$0.00	)	
	>	Owned Equipment	\$545,478	0.00	\$0.00		
	>	Rented Equipment	\$0.00	0.00	\$0.00		

- 7. In the Cost Item Record, select the Cost Categorization tab.
- 8. Under the Cost Categorization Method, select the **Use Custom Categorization** radio button.

Cost Segment:	Job Overhead	•
Cost Categorization Method:	O Use Default Categorization	
	Use Custom Categorization	

- 9. Find the **Supplies** Cost Category and check the box next to **Supplies**.
- 10. Select the Allocation tab. Then, check the box for Allocate this Item's Cost.
- 11. Select the **proportionately based on** radio button. From the drop down, select **Labor Total Cost**.

Description	Depende	nc <u>y</u> Co	st Categorization	✓ <u>A</u> llocation			
Allocate	this Item's	Cost					
Allocation distributions inherit target Pay Item Assignment							
How do yo	u want to d	letermine a	llocation percentag	es?			
🔿 by Qua	ntity						
propor	tionately b	ased on			*		
O by Perc	entage		Forecast (T/O) Qu	1			
O by Unit	Cost (driv	es the Allo	Hours (Duration dr	-			
			Hours (Non-Duration Hours (Total)	on driven)			
			Labor Total Billing A	Amount			
Drag columns l	here to grou	up	Labor Total Cost				
CBS	Ta da	Descriptio	Man Count		•		
Position (	Lode				:		

12. In the Cost Item Record, filter the **Account Code** column to **13**. Once you are done selecting the filter, click **OK**.

Account Code	Alternate	Alternat Descript
(Custom)		
(Blanks)		
(Non blan	ks)	
11.22.10	0	
11.22.20	D	
11.22.30	D	
✓ 13		
13.2.1		
13.3.2		
13.3.3		
13.3.4		
13.8.1		
13.8.2		
	ОК	Cancel:

- 13. In the Cost Item Record, check the **Include** box in the Include column for every cost item.
- 14. Return to the CBS Register. The ST&S is distributed to all of the selected cost items.

CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Currency	
	ЗОВ	1.00	Lump Sum	\$1,132,483	\$1,132,483.91	U.S. Dolla	
+	Small Tools & Supplies	1.00	Lump Sum	\$10,862.95	\$10,862.95	U.S. Dollar	
= 1	Roadway Excavation	344,820.24	CY	\$1.55	\$535,419.74	U.S. Dolla	
+ 1.1	Short Haul Excavation	74,883.28	CY	\$0.58	\$43,695.89	U.S. Dolla	
+ 1.2	Medium Haul Excavation	109,740.72	CY	\$0.81	\$88,620.58	U.S. Dolla	
+ 1.3	Long Haul Excavation	160,196.24	CY	\$2.52	\$403,103.26	U.S. Dolla	
<b>2</b>	Structural Concrete (Class S) (FC=3,00	229.87	CY	\$429.05	\$98,628.03	U.S. Dolla	
□ 2.1	Box Culvert Footing	52.84	CY	\$136.60	\$7,218.11	U.S. Dolla	
+ 2.1.1	Erect & Strip Footer	597.00	SFCA	\$10.26	\$6,123.68	U.S. Dolla	
+ 2.1.2	Place Footer Concrete	52.84	CY	\$11.37	\$600.65	U.S. Dolla	
+ 2.1.3	Small Tools & Supplies	0.05	Lump Sum	\$10,862.95	\$493.77	U.S. Dolla	
□ 2.2	Box Culvert Walls	87.86	CY	\$572.99	\$50,341.83	U.S. Dolla	
+ 2.2.1	Erect & Strip Wall	5,757.00	SFCA	\$5.13	\$29,525.99	U.S. Dolla	
+ 2.2.2	Erect & Strip Bulkheads	131.79	SFCA	\$15.39	\$2,027.69	U.S. Dolla	
+ 2.2.3	Place Wall Concrete	87.86	CY	\$17.05	\$1,498.08	U.S. Dolk	
+ 2.2.4	Rub & Patch	922.51	SF	\$0.61	\$561.08	U.S. Dolla	
2.2.5	Project Indirect Costs	0.29	Lump Sum	\$56,156.73	\$16,235.20	U.S. Dolla	
+ 2.2.5.1	Crane Service	8.67	Day	\$1,871.89	\$16,235.20	U.S. Dolla	
+ 2.2.6	Small Tools & Supplies	0.05	Lump Sum	\$10,862.95	\$493.77	U.S. Dolla	
■ 2.3	Box Culvert Deck	48.53	CY	\$237.72	\$11,535.59	U.S. Dolla	
+ 2.3.1	Erect & Strip Deck	1,310.21	SFCA	\$5.13	\$6,719.68	U.S. Dolla	
+ 2.3.2	Place Deck Concrete	48.53	CY	\$17.05	\$827.43	U.S. Dolk	
2.3.3	Project Indirect Costs	0.06	Lump Sum	\$56,156.73	\$3,494.71	U.S. Dolla	
+ 2.3.3.1	Crane Service	1.87	Day	\$1,871.89	\$3,494.71	U.S. Dolla	
+ 2.3.4	Small Tools & Supplies	0.05	Lump Sum	\$10,862.95	\$493.77	U.S. Dolla	
2.4	Box Culvert Wing Walls	40.65	CY	\$726.51	\$29,532.50	U.S. Dolla	
+ 2.4.1	Erect & Strip Footings	563.67	SFCA	\$5.13	\$2,890.88	U.S. Dolla	
+ 2.4.2	Erect & Strip Wingwalls	1,067.56	SFCA	\$15.39	\$16,425.66	U.S. Dolla	
+ 2.4.3	Place Wing Wall Concrete	40.65	CY	\$17.05	\$693.13	U.S. Dolla	
2.4.4	Project Indirect Costs	0.16	Lump Sum	\$56,156.73	\$9,029.05	U.S. Dolla	
+ 2.4.4.1	Crane Service	4.82	Day	\$1,871.89	\$9,029.05	U.S. Dolla	
+ 2.4.5	Small Tools & Supplies	0.05	Lump Sum	\$10,862.95	\$493.77	U.S. Dolla	
<b>3</b>	Reinforcing Steel (CBC Extn at STA 395	35,372.00	b	\$0.73	\$25,750.82	U.S. Dolla	

## 6.5.1 TURNING OFF COST ALLOCATION

If you determine that you no longer want to spread the cost of an Allocation Item, you can turn off cost allocation for that cost item. The logic that you created to spread the costs are retained, so you can easily turn it back on later.

NOTE Distributions cannot exist in the CBS when a job is published for Job Tracking. To remove Distributions, either break the Cost Allocation link or uncheck the Allocate this Item's Cost check box on the Cost Item Record - Allocation tab.

#### STEP BY STEP – TURNING OFF COST ALLOCATION

- 1. From the CBS Register, select the Concrete Batch Plant Cost Item Record.
- 2. From the Ribbon, select the **Actions** tab. Under the Edit section, select **Open**. The Cost Item Record opens.
- 3. Select the Allocation tab. Uncheck the box for Allocate this Item's Cost.

Allocate this Item's Cost	
Allocation distributions inherit target Pay Item Assignment	
How do you want to determine allocation percentages?	
<ul> <li>by Quantity</li> </ul>	
O proportionately based on	
O by Percentage	
by Unit Cost (drives the Allocation Item's Forecast (T/O) Quantity)	
by onic cost (drives the Anotation Item's Forecast (1/0) Quantity)	

4. Once done, click **OK** to return to the CBS Register.

ОК	Cancel	< Prev	Next >

5. All of the distribution cost items are gone, but the quantity and the total cost of the **Concrete Batch Plant** has not changed.

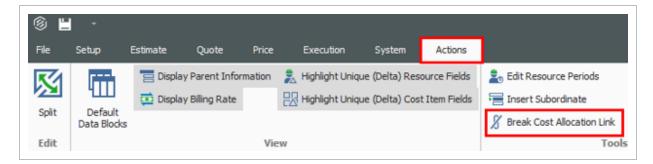
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Currency
8	Project Indirect Costs	1.00	Lump Sum	\$56,156.73	\$56,156.73	U.S. Dollar
+ 8.1	Crane Service	30.00	Day	\$1,871.89	\$56,156.73	U.S. Dollar
<b>9</b>	Concrete Batch Plant	1,172.59	СҮ	\$81.90	\$96,030.20	U.S. Dollar
+ 9.1	Buy Raw Materials	1,172.59	CY	\$35.62	\$41,765.74	U.S. Dollar
+ 9.2	Batch/Mix/Haul Concrete	21.11	Day	\$2,570.96	\$54,264.46	U.S. Dollar
<b>10</b>	Equipment Related Indirects	1.00	Each	\$76,467.24	\$76,467.24	U.S. Dollar
+ 10.1	Maintenence	1.00	Each	\$76,467.24	\$76,467.24	U.S. Dollar

## 6.5.2 BREAKING A COST ALLOCATION LINK

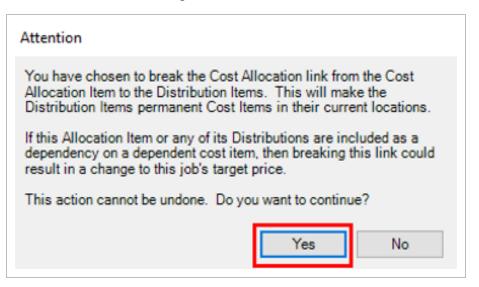
To make a Distribution a permanent part of the CBS, and permit its costs and quantities to be directly editable under the cost item(s) to which it has been distributed, break the Cost Allocation link.

#### STEP BY STEP – BREAKING A COST ALLOCATION LINK

- 1. From the CBS Register, select the **Project Indirect Costs** Cost Item Record.
- 2. From the Ribbon, select the **Actions** tab. Under the Edit section, select **Open**. The Cost Item Record opens.
- 3. Select the Allocation tab. Then go to the CBS Register in the record.
- 4. Select the cost item with a Cost Allocation Link. Then from the Ribbon, select the **Actions** tab.
- 5. Under Tools, select Break Cost Allocation Link.



6. When the Attention dialog box shows, click **Yes** to continue.



7. The original cost item still exists and is now becomes editable. All the distribution cost items are now editable as well. They are now permanent items and are no longer highlighted in purple either.

2	6	Drilled Shaft Foundation (60") (Struct	306.00	LF
ŀ	6.1	Buy Reinforcing Steel	47,482.52	Ь
+	6.2	Drill Abutment Shafts	306.00	LF
+	6.3	Erect Rebar Cage	4.00	EA
+	6.4	Place Rebar Cage	4.00	EA
+	6.5	Pour Concrete	222.53	CY
	6.6	Project Indirect Costs	0.03	Lump Sum
+	6.6.1	Crane Service	0.82	Day
	7	Drilled Shaft Foundation (72") (Struct	300.00	LF
+	7.1	Buy Reinforcing Steel	58,189.36	lb
+	7.2	Drill Abutment Shafts	300.00	LF
+	7.3	Erect Rebar Cage	4.00	EA
+	7.4	Place Rebar Cage	4.00	EA
+	7.5	Pour Concrete	314.16	CY
	7.6	Project Indirect Costs	0.04	Lump Sum
+	7.6.1	Crane Service	1.15	Day
	8	Project Indirect Costs	1.00	Lump Sum
+	8.1	Crane Service	30	Day
	9	Concrete Batch Plant	1,172.59	CY
+	9.1	Buy Raw Materials	1,172.59	CY

# 6.5.3 PAY ITEM ASSIGNMENT FOR ALLOCATION DISTRIBUTION IN AN UNLOCKED JOB

In the **Cost Item Record - Allocation** tab, the check box **Allocation distributions inherit target Pay Item Assignment** was added. When the check box is selected in an unlocked job, the system uses the same allocation distribution for the cost item's costs anytime the cost item is copied and added to a job. For a locked job, this is the normal system behavior. This option is always selected and cannot be edited.

Cost Breakdowr	Structure (CBS)	Register	Cost Iten	n Record	0	
CBS Code:	Optional Code:	Description:				
9		Concrete Bato	h Plant			
PI Assignment:	PI Line Number:	PIDescription	:			
-						
Cost Item Summa	ry 🍃 <u>D</u> etail : \$	81.90 🗳 Plu	ig : \$0.00	Quote :	\$0.00	Allocation
Allocate this	Item's Cost					
Allocation di	istributions inherit t	arget Pay Item A	ssignment			
How do you wa	ant to determine allo	cation percentag	jes?	•		
O by Quantity	/					
	ately based on			~		
O by Percenta	age					
by Unit Cos	st (drives the Alloca	ation Item's Fore	ecast (T/O) Q	uantity)		

#### EXERCISE 6.1 – DEFINE INDIRECT COSTS

In this exercise, you will practice entering Indirect Costs. Complete the following steps, using your Job:

- 1. Double click on the **Price % Add On** row header.
- 2. You already have Office Overhead as your first line item. In the next blank row type **Corporate Insurance** in the Description field and enter a rate of **.10**.
- 3. Click **OK** to close the record.
- 4. Double click on the Direct Cost Add-On row header.
- 5. You already have Small Tools as your first line item. On the Description tab, type **Safety & Training** in the next blank row's Description field, then press **Tab**.
- 6. The Dependency Cost Breakdown appears on the right. Enter a rate of **5** for Labor Costs only.
- 7. Click **OK** to close the record.

#### You should end up with similar results like below:

.05	st Breakdown Structure (CBS) Reg	jister P	rice % Add-0	n Record 0				
8	S Code: Description: Price % Add-On							Total Cos \$9,082.8
e	scripton Dependency					Cost Item Setup		:
a	g columns here t <mark>6igd</mark> au <b>(Search For)</b>	Sa	ved views: P	evious View	-	Properties		
			Account			Currency:	U.S. Dollar	•
	Description	Rote	Code			Account Code:		4
	Office Overhead	4.00				Cost Cupue:	Lines	
÷		4.00				Cost Curve:	Linear	•

			-									
BS Posi	ition Code: Desc	ription:									Total C	ost:
	Dire	ct CostAdd	-On								\$8,845	.47 BASE
escrip	tion Dependent	Cost C	Categorization	Allocation			Cos	t Breakdown				
ag dBin	iden [Search For	]	Saved views	Previous Vi	iew	•	Cost	Category	Subject Cos	t Rate		Cost
			_		Total Cost	F	▼ 1	otal	\$130,759	.83 2.25		\$2,948.49
De	scription		ll.	Curre	(Forecast)	Ċ	>	Labor	\$58,969	.83 5.00		\$2,948.49
Sm	all Tools			U.S. Dollar	\$5,	896.98	>	Owned Equipment	\$68,251	.92 0.00		\$0.00
Saf	fety & Training			U.S. Dollar	\$2,0	948.49	>	Rented Equipment	\$0	.00 0.00		\$0.00
-								Supples	\$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 Category1	\$0	.00 0.00	<b>→</b>	\$0.00
								Undefined	\$0	.00 0.00	<b>→</b>	\$0.00

#### Congratulations, you have completed this exercise!

#### **LESSON 6 REVIEW**

- 1. Default indirect costs are pre-built \_\_\_\_\_ created by InEight Estimate, located within the CBS Register.
  - a. billing rates
  - b. cost items
  - C. pay items
- 2. By default, any cost item you create in the CBS Register that is not assigned to a pay item is considered indirect cost.
  - a. True
  - b. False
- 3. The cost segment field in the CBS is used to indicate:
  - a. Whether your costs will be considered job overhead, business overhead, or direct cost.
  - b. The source of your costs (Detail, Plug or Quote).
  - c. What pay item your cost item is assigned to.

#### **LESSON 6 SUMMARY**

As a result of this lesson, you can:

- Explain how indirect costs are defined in InEight Estimate
- Estimate default indirect cost items
- Estimate user-defined indirect cost items



## **LESSON 8 – QUOTE MANAGEMENT**

### **LESSON DURATION: 60 MINUTES**

## LESSON OBJECTIVES

After completing this lesson, you will be able to:

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

## LESSON TOPICS

## 8.1 QUOTE MANAGEMENT OVERVIEW

## 8.1.1 QUOTE MANAGEMENT WORKFLOW

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

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

## TIP

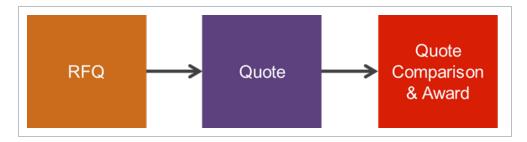
Awarding a quote in InEight Estimate does not mean the vendor is awarded the contract, but rather that their price is selected as the carrying cost in the bid.

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

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

InEight Estimate has a separate form to manage each step:

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



## 8.1.2 QUOTES AND QUOTE GROUPS

Typically, an estimate contains two types of quotes:

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

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

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

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

#### 8.1.2.1 RESOURCE LEVEL QUOTE GROUPS

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

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

Reso	ource Rat	e Register 🛛					
All	Labor	Construction Equipment	Rented Construction Equipment	Installed Material	Installed Equipment	Supplies	Unique

Drag	g columns here to	group			
	Resource	-	Description	Quote	Resource File

	Resource 🚊	Description	Quote Group	Resource File Description	Unit of Measure
-	+ IECT	Cooling Towers	Process Equipment Install	Standard Installed Equipment Rate	Each
-	+ IEFC	Feeder Controls	Landscaping Work	Standard Installed Equipment Rate	Each
-	+ IEHS	Heating System	Process Equipment Install	Standard Installed Equipment Rate	Each
-	+ IEPHP	Pump High Pressure	Commercial Work	Standard Installed Equipment Rate	Each
-	+ IERMT	Raw Material Tank	Concrete Materials	Standard Installed Equipment Rate	Each
-	+ IERS	Recovery System	Process Materials	Standard Installed Equipment Rate	Each
-	+ IEST	Separator Tank	Process Materials	Standard Installed Equipment Rate	Each

8.1.2.2 CBS LEVEL QUOTE GROUPS

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

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

## 8.2 REQUESTS FOR QUOTE

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

## 8.2.1 REQUEST FOR QUOTE (RFQ) REGISTER OVERVIEW

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

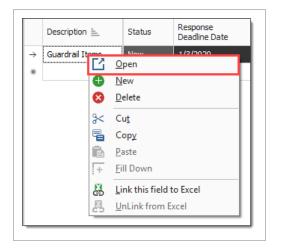


 The RFQ register lists all of the RFQs you've created, with a Description, a Status, and a Response Deadline Date

st	Breakdown Struc	ture (CBS)	) Register	Resource Rate Reg	ister Re	equest for Quote	(RFQ) Register 🛭 🕻	3			
g o	olumns here to grou	ıp									
C	Description 🛓	Status	Response Deadline Date	Response Deadline Time	Published Date	RFQ Instructions	Buyer's Special Terms	Tag 1	Tag 2	Tag 3	Notes
0	Guardrail Items	New	1/3/2020	11:00 AM			D				D
Γ						D	D				D

## 8.2.2 REQUEST FOR QUOTE (RFQ) RECORD

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



#### Overview - Request for Quote (RFQ) Record

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

Guardra	ail Items							
							New     Published Date	
espons ine Item	nse Deadline Date:			e Deadline Time				
esource	ces Cost Items							
ag colu	umns here to group						Saved views: Standard View	- }
CBS Posi	s iition Code 🖳	RFQ ID	Quote Group	Optional Code	Description	Quantity		
6.1		6.1	Guardrail Work	1500 0 100	Guardrail Typ	1,000.00		
6.2	!	6.2	Guardrail Work	1500 0200	Guardrail Typ	200.00		
							1	

### 8.2.3 CREATE AN RFQ

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

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

#### materials in the job

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

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

#### 8.2.3.1 LINE ITEMS

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

Line	e Items	Terms & Con	ditions	Vendor Companies	Attachments	Setup		
Res	sources	Cost Items						
лас	) columns	here to group						
-	CBS	Code 🚊	RFQ ID	Quote Group Tag	Optional Code	Description	Quantity	Unit of Measure
-	CBS		RFQ ID	Quote Group Tag Guardrail Wor	Code			Measure

#### 8.2.3.2 TERMS & CONDITIONS

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

Response Deadline Date: 7/29/2	009 - Response Dead	ine Time: 11:00 AM	]			
Line Items Terms & Conditions	Vendor Companies Attachments	Setup				
Buyer's Special Terms & Conditions						
Any penalites assessed by the own	er due to quality control compliance dev	iations by the supplier will be o	deducted from the supplier's paymer	ıt.		* v
RFQ Instructions						
Please contact site super John Smit	n @ 623-555-6982 for delivery instruct	ons.				< >
1				OK Can	cel New	< Prev Next >

#### 8.2.3.3 VENDOR COMPANIES

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

ĸe	sponseD	eadline Date: 7/29/2	009 <del>-</del> R	esponse Dea	dline Time: 11:00 A	AM
Lin	e Items	Terms & Conditions	Vendor Companies	Attachment	s Setup	
ra	g columns	here to group				
	Vendor	Contact	<u>=</u>	Status	Publish Item Quantities	Vendor Phone
÷	SUB 18	SUB18 Mel Bla	ank	New	$\checkmark$	111-222-3232
	SUB4	SUB4 Harry B	elefony	New	$\checkmark$	111-222-1111
	Ven 18	Ven 18 CARRI	E Matty	New	$\checkmark$	111-333-3434
*						

The following options are particularly noteworthy:

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

### 8.2.4 ATTACHMENTS

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

ine Items.	Terms & Cor	nditions Vendor	Companies	Attachments S	etup					
rag columns	here to group							Saved views:	Previous View	- )
File Name 🚊 Description Location File Type File Size Attached By Date Attached										
File Nan	ne 😑	Description	Location	File Type	File Size	Attached By	Date Attached			

## 8.2.5 SETUP

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

Guardrail Ite	ems					
Response D	eadline Date: 7	7/29/2009 👻	Re	sponse Deadlin	ie Time: 1	L1:00 AM
ine Items.	Terms & Condit	tions Vendor Comp	anies	Attachments	Setup	
	Tag 1:		•	Notes		
	Tag 2:		•			
	Tag 3:		-			
RFQ Publica	ation Settings					
Cost Item I	dentifier: C	BS Position Code	•			
☑ Include ☑ Include		s Terms & Conditions				
✓ Publish ✓ Publish ✓ Publish						

## 8.2.6 PUBLISH AN RFQ

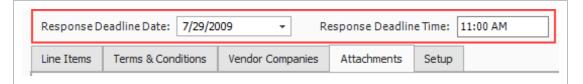
Once created, InEight Estimate allows you to generate a Microsoft Word RFQ template that can be faxed or manually sent via email to the supplier or subcontractor.

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

#### STEP BY STEP – CREATE AND PUBLISH AN RFQ

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).



- 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	e Items	Terms & Conditions	Vendor Companies	Attachmen	ts Setup	
Drag	g columns	here to group				
	Vendor	Contact	<u>=</u>	Status	Publish Item Quantities	Vendor Phone
	SUB18	SUB 18 Mel Bla	nk	New	✓	111-222-3232
	SUB4	SUB4 Harry Be	elefony	New	~	111-222-1111
	Ven 18	Ven 18 CARRI	E Matty	New	~	111-333-3434
ı				~		

- 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

		TFORQU	
Job: Training Job	Training Job - Maricopa County	r No. TM2924	
TO:		FROM:	
Name: Company:	Pat Roberts Example Vendor 1 100 Tenth Street Hometown, AZ 889060	Name: Company:	Tom Cross Example Prime Contractor 1 400 First Street Suite 4000 Hometown, AZ 889004
Phone: Mobile Phone: Fax: Email:	222-123-1234	Phone: Mobile Phone: Fax: Email:	111-122-1111 222-112-2211
Job Information	Training Jo	b - Maricopa County No. TM2924	
Owner:	Example O	wher nd General Engineering	
Job Type: Job Location:		0 to MP 120	
Job Location: City:	Phoenix	0.0 MF 120	
City: County:	Maricopa		
State / Province:	Arizona		
	United Stat	es	
Country:	Engineer's		
Country: Bid Location:	1/8/2020		
Bid Location:	10:00 PM		

- 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.

## 8.2.7 RFQ EMAIL DRAFT

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

ile <u>Message</u>	Times New Ro	RFQ from InEight C Options Format 12 V B Charlie Bravo	Text Review	for Training Job - Infrastructure: Training Job - Maricopa County No. TM2924 - Message (HTML)       Image: County No. TM2924 - Message (HTML)         w       Help       Q       Tell me what you want to do $\mathcal{C}$ $\mathcal{A}$ $\checkmark$ $\exists =$ $\blacksquare$ $\mathcal{C}$ $\overset{\circ}{=}$ $\overset{\circ}{=}$ $\overset{\circ}{=}$ $\overset{\circ}{=}$ $\mathcal{C}$ $\overset{\circ}{=}$ $\overset{\circ}{=}$ $\overset{\circ}{=}$ $\overset{\circ}{=}$ $\overset{\circ}{=}$ $\mathcal{C}$ $\overset{\circ}{=}$ $\overset$
	Times New Ro	• 12 • B		
	To O C		I U 🖌	₂ · ▲ · ≔ · ≔ · ≔ · = · = · · <sub>№</sub> ❷ ∞ ● · ⊠ · ┃ · ₩ · № ·
		Charlie Bravo		
Jena				
Su	ubject RFQ f	from InEight Corporati	ion - SKIP for	r Training Job - Infrastructure: Training Job - Maricopa County No. TM2924
			RE	EQUEST FOR QUOTATION
lob: Training Job-	-1 Training Job - Ma	aricopa County No. TM2	2924	
ro:			FROM:	
Company:	Harry Belefony Example Sub #1 600 First Street S Hometown, AZ 88		Name: Company:	
Phone: Mobile Phone:	111-222-1111		Phone: Mobile Phone:	111-122-1111
Fax:	222-221-2212 charlieb1234@e	example.com	Fax: Email:	
Job Informatio	on:	Training Job-1 Training Job - Mario	copa County No. TM	M2924
Owner:		Example Owner		
lob Type:		Highway and Gener		
lob Location:		I-10 MP 100 to MP	120	
City: County:		Phoenix Maricopa		
State / Province:		Arizona		
Country:		United States		
Bid Location:		Engineer's Office		
Bid Date:		1/6/2020		
Bid Time:		5:00 AM		
equest for Qu	uote (RFQ) Ir	nformation:		
Publication Date:	8/21/2020 3:57 PI	м		
Response Deadlin	e Date: 7/29/20	09 11:00 AM		

# 8.3 QUOTES

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

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

## 8.3.1 SAMPLE RECEIVED QUOTE SCOPE SHEET

#### **Overview - Received Quote Scope Sheet**

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

	Red	ceived		
	Quote So	cope She	eet	
ROJECT: TRA	<b>19/2019</b> INING JOB TRAINING JOB - MARICOPA JENIX, AZ	COUNTY NO. TM2924		
GITE CONCRETE: FORM,	, SUPPLY AND INSTALL			
1. Ver 2. 4" ti 3. Flov 4. 8" ti	PROVEMENTS tical Curb; Curb and Gutter; Va hick broom finish walk with wirv w-Through planer slab and wal hick crosswalk paving with reb ored aggregate finish (1 locatio	e mesh; ramp w/dom lls ar 36" x 36" pattern b	room finish a	nd 18" x 36" pattern
			Price:	\$203,300
1. Cur 2. HC	MPROVEMENTS rb and Gutter Ramps w/ domes; planter w/ r x 36" patterned finish walk w/	ebar wire mesh		
<ol> <li>Sealants, ca</li> <li>Misc post fc</li> <li>Supply of er</li> <li>Demolition</li> <li>Traffic control</li> <li>Traffic control</li> <li>Traffic control</li> <li>Price valid f</li> <li>GC will provortion</li> <li>5% retention</li> <li>Alternate P</li> <li>by others.</li> </ol>	base and/or compaction; sand aulking and waterproofing; pre- potings and masonry wall footin mbedded iron or metal rol and pedestrian protection for 60 days vide a concrete pump washout n will be released 45 days afte Price to furnish and install 4" Price based on rock being p	area r completion of our w <b>aggregate base und</b> <b>laced prior to piles</b> ,	der parking s pilecaps an Summit Consti	d grade beams. \$24,100 ruction reserves the
	posal for any changes in price. Pl			

# 8.3.2 QUOTE REGISTER OVERVIEW

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

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

# 8.3.3 QUOTE RECORD OVERVIEW

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

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

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

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

#### **Overview - Quote Record**

leader				1								Total	2	
Description	Pipe Materia	s							<ul> <li>Optional Code:</li> </ul>			Extended Price:	-	\$0.
									v Date:	7/20/2023	-	Item Taxes: Quote Tax:		\$0.
Vendor	1128354 Alb	erta Ltd 0010 🔳	Vendor Name:	1128354 Alberta Ltd	Vendor	Phone:	780-920-3163		Source:		•	Bond:		
Contact	Ad-Hoc Co	ntact> 🔳	First Name:		Contact	Office:			Currency:	U.S. Dollar	•	Item Conditions:		\$0
Primary Email	:		Last Name:		Contact N	1obile:			Status:	Incomplete		Special Conditions:		
External Ref.	:								Ignore:	Reason:		Total:		\$0.
lesources (	Cost Items	3							Special Terms & Co		I			>
rag columns her	e to group	3			Saved views:	Stand	dard View	م .	Buyer's Special Term	s & Conditions				
Code 🚊	RFQ ID	Quote Group 🖮	Optional Code	Description	No Split	Free	Awarded	Duration						< >
1	1		1	pay item 1	✓				Vendor's Special	Terms & Conditions				
2	2		2	pay item 2	$\checkmark$									$\hat{}$
•	A								Special Conditions A	divetmente: ¢0	0.00			v
										inditions: O Evenly (a) Using				
										anditions costs for unawarded que				
												Saved views: St	andard View	- ,O
												Included Amount	% of Total	
								+	Special Terms & Condit	ions Qualifications Packages	Taxes Vendor'	s Profile Setup Minority		

## 8.3.4 HEADER BLOCK

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

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

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

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

#### 8.3.4.1 QUOTE RECORDS

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

Header	cord										
Descrip	ption:	Asphalt Mate	rial	S							
Ve	ndor:	1128354 Albe	erta	Lt 🔳 V	endor Name:	1128354 Alberta Ltd	Vendor P	hone: 780-92	20-3163	*	
Co	ntact:	Alberta Fra	ank	Ma 💷	First Name:	Frank	Contact C	ffice:			
Primary	Email:	Frankmatty@	gr	ail.com	Last Name:	Matty	Contact M	obile:			
External	Ref.:		6	÷		Address	: Book Register - Li	brary			0
				ctions columns here to g	roup Vendor Nam	e <u>ii</u>	Vendor Type	Tax ID	× Enter text	to search	-
			÷	+ 0010087554	1 Alliance Ge	eomatics LLC	Z001	461564451	4803300400	1261A 120th Ave NE	
			÷	+ 0010087554 + 1 NP - Vendor			Z001 1_NP Vendor	461564451 12345	4803300400 abc		
			÷		1_NP - Vend					1261A 120th Ave NE	
			÷	+ <u>1 NP - Vendor</u>	1_NP - Vend 1_Vendor1		1_NP Vendor			1261A 120th Ave NE 90th Street	
			÷	+ <u>1 NP - Vendor</u> + <u>1 NP - Vendor</u>	1_NP - Vend           1_NP - Vend           1_Vendor 1           1_Vendor 1           10X Enginee	or2 red Materials LLC	1_NP Vendor 1_NP Vendor			1261A 120th Ave NE 90th Street 1162 Mancheser Ave	
			÷	+ <u>1 NP - Vendor</u> + <u>1 NP - Vendor</u> + <u>1 NP - Vendor</u>	1_NP - Vend           1_NP - Vend           1_Vendor 1           1_Vendor 1           10X Enginee	or2	1_NP Vendor 1_NP Vendor 1_NP Vendor	824568213	abc	1261A 120th Ave NE 90th Street	

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

## 8.3.5 PRICE BLOCK

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

# 8.3.6 QUOTE RECORD TABS

#### 8.3.6.2 RESOURCES & COST ITEMS

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

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

g columns here	to group							Find:	[Search For	···] ···	Saved views: Pre	vious View	-
Package	Code 🛓	RFQ ID	Quote Group	Optional Code	Description	No Split	Free	Awarded	Du	Quantity	Unit of Measure	Unit Price	Extended Price
	3.1	3.1		3.1	Excavation, scrapers	~			1	50,000.00	Cubic Yard	\$0.00	\$0.0
P1	3.2	3.2		3.1	Excavation, trucks	~			1	50,000.00	Cubic Yard	P1	P1 \$200,000.0
P1	3.3	3.3		3.2	Embankment	✓			1	50,000.00	Cubic Yard	P1	P1
P1	3.4	3.4			Rock Excavation	✓			1	3,000.00	Cubic Yard	P1	P1

## COST ITEM TAGS AND USER DEFINED FIELDS

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

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

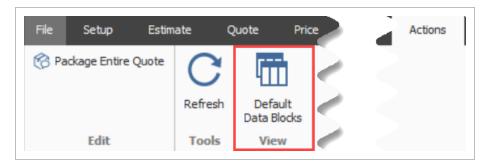
uote Record (	2																				
ieader																		Total			
Descriptio	Guard R	il Items									0	ptional Code						Extended Pri	ice:		\$30,200.
Conta	ct: Example	Sub #2 N	fel Blank	0	1 Pho	one: 11	11-222-3232	2				Date	:				*	Item Taxes:			\$0.
Company Nan	e: Example	Sub #2			Mot	bile						Source					•	Quote Tax: Bond:			
First Nan	ie: Mel					Fax: 22	22-222-111	1				Currency	: U.S. C	Dollar			•	Item Conditi	ions:		\$0.
Last Nan	e: Blank				Em	nail:						Status	Receiv	ved				Special Cond	litions:		
External Re	f.:											Ignore	s: 🗌 Re	eason:				Total:			\$30,200.
ag columns here t	o group																	Sav	red views: Sta	ndard View	-
Code 🚋	RFQ ID	Tag 11	Tag 12	Tag 13	Tag Ta 14 15	1g 5	Tag 16	Tag 17	Tag 18	Tag 19	Tag 20	Tag 21	Tag 22	Tag 23	Tag 24	Tag 25	User Defined 1	User Defined 2	User Defined 3	User Defined 4	User Defined 5
6.1					Pipe Co	oncre											11 inch copp	plastic casing			
6.2		_					_							-		-					-

# 8.3.7 DATA BLOCKS

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

Data Block tabs include:

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



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

Buyer's Special Terr	ns & Condition	s					
Vendor's Special	Terms & Condi	itions					
							1
			10.00				
Special Conditions A	Adjustments:		\$0.00				
Special Conditions A Distribute Special C	-	Evenly ()	\$0.00 Using Weighted Ave	age			
Distribute Special C	onditions: (			-			
Distribute Special C	onditions: (		Using Weighted Ave	ble Totals	aved views:	tandard View	- ,
Distribute Special C ☑ Include Special C	onditions: (	sforunaward	Using Weighted Ave	ble Totals	aved views:	itandard View % of Total	Notes
Distribute Special C Include Special C Drag columns here t Row	onditions: (	sforunaward	Using Weighted Ave	ble Totals S			Notes
Distribute Special C Include Special C Drag columns here t Row	onditions: (	sforunaward	Using Weighted Ave	ble Totals S	Amount		Notes

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

Sp	ecial Terms & Conditions drag and move
В	uyer's Special norms & Conditions
	Seller's Special Terms & Conditions

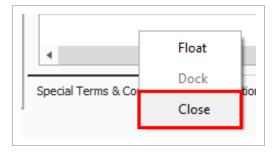
Drop the data block on top of an arrow where you wish to land the data block.

Qualifications		×
Bond		
Vendor can provide a BOND for all work quoted		
Bonding Company:		
Bonding Agent:		
Bonding Phone:	_	
Add Bond Cost to the Quote	Ť	
Cost of BOND to be added to quoted price :	₩Special Terms & Conditi ×	
Rate/\$1,000: 🕨 \$0.00	Buyer's Special Terms & Conditions ^	
Bond Cost: \$0.00	+	
Insurance	Vendor's Special Terms & Condi	
Vendor is INSURED as required by applicable law		
Insurance Company:	· · · · · · · · · · · · · · · · · · ·	
Insurance Agent:	Special Conditions Adjustments: 🔽 🗸	
	< >>	
Qualifications Packages Taxes Vendor's Profile	Setup Minority	

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

Quote Record	0									
Header										
Description:	Pipe Materials								<ul> <li>Optional Code:</li> </ul>	
									V Date:	7/20/2023
Vendor:	1128354 Alberta Ltd 0010	Vendor Name:	1128354 Alberta	a Ltd	Vendor Phone:	780-92	0-3163		Source:	
Contact:	<ad-hoc contact=""></ad-hoc>	First Name:			Contact Office:				Currency:	U.S. Dollar
Primary Email:		Last Name:			Contact Mobile:				Status:	Incomplete
External Ref.:									Ignore:	Reason:
Special Terms 8	Conditions					×	Re	source 4	Qualifications	
							-		•	
Buyer's Special Ter	ms & Conditions					^		ד פ to ⊆	Bond	de a BOND for all work quoted
								Code 🚊 🛛 RF		de a BOND for all work quoted
Vendor's Specia	l Terms & Conditions								Bonding Company:	
						-		1 1	Bonding Agent:	
1								2 2	Bonding Phone:	
Special Conditions	Adjustments:	\$0.00					<b>→</b>	A	Add Bond Cost to	the Quote
Distribute Special (	Conditions: O Evenly O Usi	ng Weighted Average							Cost of BOND to be	added to quoted price :
✓ Include Special	Conditions costs for unawarded q	uotes in Comparable	Totals						Rate/\$1,000:	\$0.00
Drag columns here	to group		Saved v	views: Standard	View	•			Bond Cost:	\$0.00
Row -	Scope Item 0	Number Communication	Included	Amount	% of Total	Nc			Insurance	
Number =	Scope Item (	Quote Group 🚊	Included	Amount	% or rotal	INC			Vendoris INSURE	D as required by applicable lav
									Insurance Co	mpany:
									Insurance	Agent:
<					_	~			Qualifications Packa	ages Taxes Vendor's Profile
						-	<u> </u>	ŗ		

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



# 8.3.8 DATA BLOCK TABS

## 8.3.8.3 SPECIAL TERMS & CONDITIONS

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

Buyer's Special Terr	ms & Conditions					
						$\sim$
✓ Vendor's Special	l Terms & Conditions					
						$\sim$
Special Conditions A	Adjustments:	\$0.00				
Distribute Special C	Conditions: O Evenly	Using Weighted Avera	ge			
Z Include Special C	Conditions conta forward	varded quotes in Comparab	1. T. t. l.			
V Include Special C	conditions costs for unav	varueu quotes în comparab	le lotais			
Drag columns here t		varueu quotes in comparat		aved views:	Standard View	2 - ا
		Quote Group 🚊		aved views:	Standard View % of Total	Notes
Drag columns here t	io group		Si			
Drag columns here t	io group		Si	Amount		

### 8.3.8.4 QUALIFICATIONS

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

	Qualifications	×
Bonding Company: Bonding Agent: American Bonding Phone: ✓ Add Bond Cost to the Quote Cost of BOND to be added to quoted price : Rate/\$1,000: \$0.00 Bond Cost: \$\$330.00 Insurance Vendor is INSURED as required by applicable law Insurance Company: Insurance Agent: American Insurance Phone: License Vendor is LICENSED to perform all work quoted Licensor: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class: Class:	Bond	
Bonding Agent: American Bonding Phone: Add Bond Costto the Quote Cost of BOND to be added to quoted price : Rate/\$1,000: \$0.00 Bond Cost: \$330.00 Insurance Vendor is INSURED as required by applicable law Insurance Company: Insurance Agent: American Insurance Phone: Ucense Class: Cl	Vendor can provide a BOND for all work quoted	
Bonding Phone: Add Bond Cost to the Quote Cost of BOND to be added to quoted price : Rate/\$1,000:\$0.00 Bond Cost: ▶ \$330.00 Insurance Vendor is INSURED as required by applicable law Insurance Company: Insurance Agent: American Insurance Phone: License Vendor is LICENSED to perform all work quoted Licensor: Class:	Bonding Company:	
Add Bond Cost to the Quote   Cost of BOND to be added to quoted price :   Rate/\$1,000:   \$0.00   Bond Cost:   \$330.00   Insurance   Vendor is INSURED as required by applicable law   Insurance Company:   Insurance Agent:   American   Insurance Phone:   License   Vendor is LICENSED to perform all work quoted   Licensor:   Class:	Bonding Agent: American	
Cost of BOND to be added to quoted price : Rate/\$1,000: \$0.00 Bond Cost: \$330.00 Insurance Vendor is INSURED as required by applicable law Insurance Company: Insurance Agent: American Insurance Phone: Insurance Phone: Insurance Phone: Insurance Phone: Insurance Companies Insurance Insu	Bonding Phone:	
Rate/\$1,000: \$0.00   Bond Cost: \$330.00   Insurance   Vendor is INSURED as required by applicable law   Insurance Company:   Insurance Agent:   American   Insurance Phone:   License   Vendor is LICENSED to perform all work quoted   Licensor:   Class:	Add Bond Cost to the Quote	
Bond Cost:   State Bond Cost: State State Bond Cost: State State State Bond Cost: State State State Bond Cost: State State State State State Bond Cost: State Stat	Cost of BOND to be added to quoted price :	
Insurance Vendor is INSURED as required by applicable law Insurance Company: Insurance Agent: American Insurance Phone: License Class: Class: Class:	Rate/\$1,000: \$0.00	
Vendor is INSURED as required by applicable law         Insurance Company:         Insurance Agent:         American         Insurance Phone:         License         Vendor is LICENSED to perform all work quoted         Licensor:         Class:	Bond Cost: \$330.00	
Vendor is INSURED as required by applicable law         Insurance Company:         Insurance Agent:         American         Insurance Phone:         License         Vendor is LICENSED to perform all work quoted         Licensor:         Class:		
Insurance Agent: American Insurance Phone: License Vendor is LICENSED to perform all work quoted Licensor: Class:		
Insurance Phone:	Insurance Company:	
License Vendor is LICENSED to perform all work quoted Licensor: Class:	Insurance Agent: American	
Vendor is LICENSED to perform all work quoted Licensor: Class:	Insurance Phone:	
Vendor is LICENSED to perform all work quoted Licensor: Class:	license	
Class:		
	Licensor:	
	Class:	
ID: EZ-LICINSE-AI		

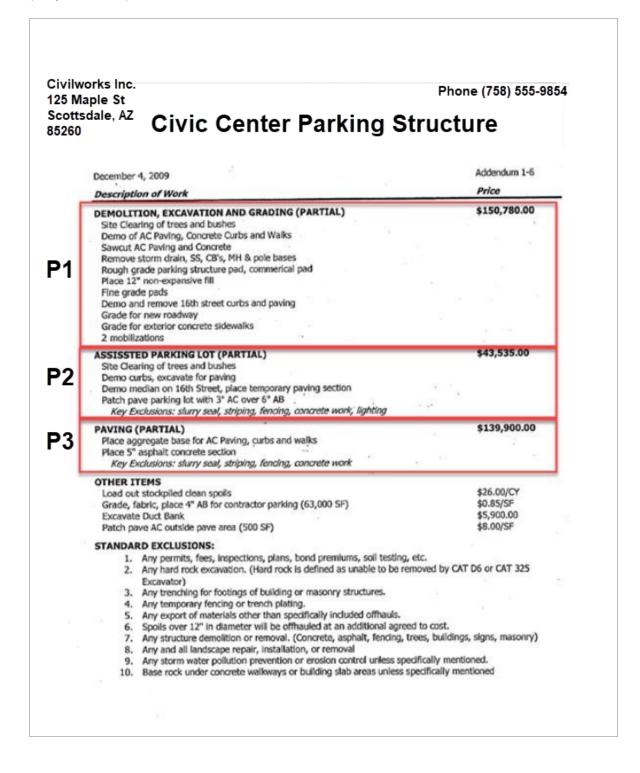
#### 8.3.8.5 PACKAGES

Using the Packages feature lets you logically organize quotes into an arranged collection of like grouped packaged quotes. You can determine how to enter quotes from subcontractors and classify them into a package grouping. When you create a package within the Packages block, and give it a monetary value, you can then assign that package code to one or more quote records. The package code is limited to three characters.

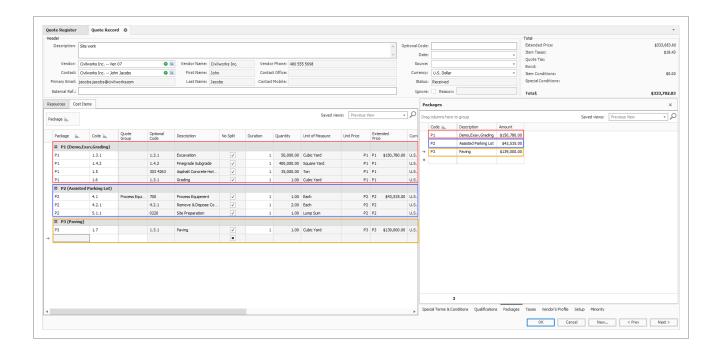
When comparing various vendor quotes in the Quote Comparison and Award form, with each quote containing its own scope of work, you can easily distinguish which items belong to each package. This helps to identify which quotes to award in your decision-making process.

As an example, the following Civic Center Parking Structure quote has three packages defined in it. The P1, P2, and P3 on the left represent the grouped package numbers that will be used to determine the package structure in the quote record. The vendor that submitted this quote shows detailed estimates defined for each of the three packaged items, but there is no breakdown provided in the quote of how

much each line item is worth. Rather, this quote is showing a package price for each collection of items (scope of work).



Estimate's Package feature lets you pick all the cost items that belong to a particular package, then assign the price to that collection of packages. It then proportionally distributes the total package price across all of the corresponding cost items when comparing and awarding.



## 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**).

Dra	g columns here to g	group			
	Description	≞.▼	RFQ Description	Quote Status	Seller
÷	Pipe Materials			Received	Example Vendo
4	Pipe Materials			Received	Example Vendo
	Pipe Materials			Received	Example Vendor
<u>k</u>	Pipe Materials			Received	Example Vendor
*					

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

ost breakdown Str	ucture (CBS) Register 🛛 🔘	Quote Register	Quote Record O			
Header						
Description:	Pipe Materials for site improve	ements.				
Contact:	Example Vendor 1 Pat Rober	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.

Resources Cost Items			Items					
Dra	g columns	here to	o group					
Code 🖮			Quote Gr	oup 🛓	Description			
<u>/4</u>	MPP10 MPP24		Pipe Materials Pipe Materials		Pipe 10" PVC SDR21			
					Pipe 24" PVC SDR35			
	MPR36		Pipe Materials		Pipe RCP 3	36 In		
*								

- 8. Add a **cost item** under Cost Items.
- 9. Then, add another **cost item** under Cost Items.
- 10. On the Packages tab, enter the following 2 new records:
  - Code: **P1**
  - Description: On Site
  - Amount: **\$200,000**
  - Code: **P2**
  - Description: Off Site
  - Amount: \$300,000

Pa	Packages										
Draj	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.

es	ources	Cost	Items						Pa	ckages		
ag	columns h	ere to	gro <b>Eind:</b> [Se	earch For]	··· Saved vie	ws: Previous	View -		Dra	g columns here	e to group	
	Package		Code	RFQ ID	Quote F	Optional Code	Description	No		Code 🛓	Description	Amount
T	P1		7		Pipe Materials	800 0220	10 Inch PVC Force Main			P1	OnSite	\$200,000.0
ł	P2		8		Pipe Materials	800 0330	24 Inch PVC Gravity Se			P2	Off Site	\$300,000.0
ł									$\rightarrow$			

- 13. Select **ОК**.
- 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		Exampl WBE Pipe Ma	le Vendor 6 aterials	Example Vendor 1 Pipe Materials for site improvments		
1	\$22.51	Ø P1	\$290,000.00	<i>∂</i> P1	\$300,000.00	@ P1	\$200,000.00	
t	\$52.84	@ P2	\$126,000.00	<i>∂</i> P2	\$125,000.00	@ P2	\$300,000.00	
<b>\$4</b>	28,694		\$416,000.00		\$425,000.00		\$500,000.00	
<b>54</b>	28,694		\$416,000.00		\$425,000.00		\$500,000.00	
<del>54</del>	28,694		\$0.00		\$0.00		\$0.00	
<b>54</b>	28,694		\$416,000.00		\$425,000.00		\$500,000.00	
	\$0.00		\$0.00		\$0.00		\$0.00	
		11/1	3/2019 4:1	11/1	3/2019 4:4	11/1	3/2019 4:3	

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

menu.

P1       \$200,000       Award         P2       \$300,000       Award And Lock         Lock       Lock         Lock       Lock         Edit Quote       Edit Quote         \$500,000       Edit Cost Item         \$0.00       \$0.00         \$500,000.00       \$0.00	Example Vendor 1 Pipe Materials for site improvements.	
□       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □       □		_
\$500,000.         Edit Cost Item           \$500,000.         Edit Package           \$0.00         \$0.00		-
\$0.00 \$0.00	\$500,000.	_
\$500,000.00		
	\$500,000.00	\$500,000.00

#### 8.3.8.6 TAXES

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

Taxes	
Item Tax Add Item Taxes to each Item's Price	
Quote Tax Add Taxes to the Quote	
Taxes to be added to Awarded Total as a Percentage of Total: Tax Rate: 0.00	
Total Tax: <b>\$450.00</b>	
Special Terms & Conditions Qualifications Packages Taxes Vendor's Profile Setup Minorit	y

## 8.3.8.7 SELLER'S PROFILE

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

1001000000	k Notes				
Example	save for trainin	g as needed.			
Alternate Co	ontact Informa	tion			
Email:					
Fax:					

#### 8.3.8.8 SETUP

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

Setup							×
Current Status							
RFQ Status:							
Last Update: 5/5/2020 7:	:05:03 PM						
Quote Origin: WMFarr							
Tags							
Tag 1: Pipe	Ŧ						
Tag 2:	Ŧ						
Tag 3:	-						
Notes							
notes							~
							~
Special Terms & Conditions	Qualifications	Packages	Tayes	Vendor's Profile	Setup	Minority	

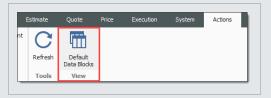
## 8.3.8.9 MINORITY

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

	usiness Enterprise	
Vendo	r qualifies as the following type of MINORITY BUSINESSENTERPRISE on this job;	
DBE	DBE Certification:	
MBE	MBE Certification:	
WBE	WBE Certification:	
OBE1	OBE1 Certification:	
OBE2	OBE2 Certification:	
OBE3	OBE3 Certification:	
OBE4	OBE4 Certification:	
OBE5	OBE5 Certification:	
OBE6	OBE6 Certification:	
OBE7	OBE7 Certification:	

TIP

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



## 8.3.9 CREATE A QUOTE FROM RFQ

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

TIP

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

## STEP BY STEP – CREATE A QUOTE FROM RFQ

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.

# 8.3.10 ENTER QUOTE DETAILS

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

#### 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**).

ra	g columns here to	group			
	Description	≞ ▼	RFQ Description	Quote Status	Seller
÷	Pipe Materials	_		Received	Example Vendo
Ł	Pipe Materials			Received	Example Vendo
	Pipe Materials			Received	Example Vendo
Ł	Pipe Materials			Received	Example Vendo
*					

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

Cost Breakdown Str	ucture (CB5) Register O Quote Re	egister	Quote Record O	·
Header				
Description:	Pipe Materials for site improvements.			
Contact:	Example Vendor 1 Pat Roberts			01
Company Name:	Example Vendor 1			

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

Re	sources	Cost I	Items	
Dra	g columns	here to	group	
	Code 🛓		Quote Group 🖮	Description
4	MPP 10		Pipe Materials	Pipe 10" PVC SDR21
	MPP24		Pipe Materials	Pipe 24" PVC SDR35
	MPR36		Pipe Materials	Pipe RCP 36 In
*				

- 8. Add a cost item under Cost Items.
- 9. Then, add another **cost item** under Cost Items.
- 10. On the Packages tab, enter the following 2 new records:
  - Code: **P1**
  - Description: On Site
  - Amount: \$200,000
  - Code: **P2**
  - Description: Off Site
  - Amount: \$300,000

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

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

_							_	Packages					
aç	columns here	to gro <b>Eind:</b>	[Search For]	··· Saved vi	ews: Previous	s View 👻		Dra	g columns here	e to group			
Package		Code	RFQ ID	Quote	Optional Code	Description	No		Code 🛓	Description	Amount		
1	P1	7		Pipe Materials	800 0220	10 Inch PVC Force Main			P1	OnSite	\$200,000.0		
,	P2	8		Pipe Materials	800 0330	24 Inch PVC Gravity Se			P2	Off Site	\$300,000.0		

- 13. Select **ОК**.
- 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		Exampl Pipe Ma	e Vendor 1 aterials	Exampl WBE Pipe M	e Vendor 6 Iterials	Example Vendor 1 Pipe Materials for site improvments		
I	\$22.51	<i>∂</i> P1	\$290,000.00	<i>∂</i> P1	\$300,000.00	Ø ₽1	\$200,000.00	
1	\$52.84	Ø P2	\$126,000.00	Ø P2	\$125,000.00	Ø 92	\$300,000.00	
<b>54</b>	28,694		\$416,000.00		\$425,000.00		\$500,000.00	
<u>54</u>	28,694		\$416,000.00		\$425,000.00		\$500,000.00	
<u>54</u>	28,694		\$0.00		\$0.00		\$0.00	
\$4	28,694		\$416,000.00		\$425,000.00		\$500,000.00	
	\$0.00		\$0.00		\$0.00		\$0.00	
		11/1	3/2019 4:1	11/1	3/2019 4-4	11/1	3/2019 4:3	

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

menu.

Example Vendor 1 Pipe Materials for site improvements.	
⊘ P1 \$200,000.	Award
	Award And Lock
	Lock
6	<u>U</u> nlock
Ø	Edit <u>Q</u> uote
\$500,000.	Edit <u>C</u> ost Item
\$500,000.	Edit <u>P</u> ackage
\$0.00	\$0.00
\$500,000.00	\$500,000.00

# 8.3.11 USE UNIT PRICE OR EXTENDED PRICE ON QUOTE RECORD ITEM

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

	ecord O													
Header														
C	Description:	AsphaltMaterials	phaltMaterials							Optiona	al Code:			
	Contact:	Example Vendor :	2 Stan Mark			• =	Phone:	111-133-2123				Date:		
Com	ipany Name:	ne: Example Vendor 2 Mobile:								Source:				
	First Name:	Stan					Fax	222-123-2134				Ci	urrency:	U.S. Dollar
	Last Name:	Mark					Email:						Status:	Received
F	xternal Ref.:											_	Tanore: [	Reason:
Resource	es Cost It	ems												Special Terms & Conditions
rag colun	nns here to g	roup								Saver	d views: Previous V	ew	- P	Buyer's Special Terms & Conditions
Code	e 🚊 🛛 🤉	Quote Group 🖮	Description	No Split	Free	Awarded	Duration	n Quantity	Unit of Measure	Unit Price	Extended Price	Currency	Default Tax Rate	
K MAAI	M A	sphalt Materials	Asphalt Mix (Finish)	V				1 35,000.0	Ton	\$34.00	\$1,190,000.00	U.S. Dollar		Seller's Special Terms & Conditions
MAFA	A A	sphalt Materials	Fine Aggregate	✓				1 1,860.0	) Ton	\$7.00	\$13,020.00	U.S. Dollar		
														Special Conditions Adjustments:
÷														special conditions Adjustitients:

# 8.3.12 DUPLICATING AN EXISTING QUOTE

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

### STEP BY STEP – DUPLICATE AN EXISTING QUOTE

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

Cos	st Breakdown Struct	ure (CBS) Register	Quote Register	Quote Com	parison & Award - I	Resources ©								
Drag	g columns here to group								F	nd: [Search For]		Saved views	: Stand	lard View
	Resource 📃	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Vendor Asphalt Material		Example Vendor 2 Asphalt Materials	Example Pipe Ma	e Vendor 3 aterials	Example DBE Pipe Ma	e Vendor 4 terials
	MAAM	Asphalt Mix (Finish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	🕻 🖉 🔺 \$3	81.50	835.70		\$34.13		\$34.13
	MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	18 5	7.25	87.35		\$8.19		\$8.19
→	MPP 10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28		\$3.28	\$3.28	ð	\$12.60	10	\$13.65
	MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$.	20.48	\$20.48	e	\$25.20	10	\$22.05
	MPR36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$.	34.13	\$34.13	e	\$31.50	10	\$32.55
		Scope Items												
		Summary												
		Minority Type											0	DBE
		Quoted Total				\$1,406,973.75	\$0.00	\$1,171,10	00.70	\$1,325,646.00		\$266,616.00		\$271,471.20
		Comparable Total	<			\$1,406,973.75	\$1,406,973.75	\$1,308,74	7.30	\$1,463,292.60	\$1	1,535,943.15	\$1	,540,798.35

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

8	Print	斗 By Quote Group	😪 Set All to F	teviewed	2		PD Dup	olicate Quote	🛞 Pad	kage Entire Quote	📍 Award	1	Lock		Quoted	Items	jazi Ze	ro Items
ð,	Preview	👒 All Quote Groups	🙊 Set All to N			2	Ø Ign	ore Quote	🕜 Edit	Package	haward And Lo	k 6	Unlock	<b>(6)</b>	🔐 Unit Pric	e	😥 So	ope Items
3	Export to Excel	Al Quote Items			Edit Resource	Edit Quote			$\sim$					Edit Prices	Substitu	te Values	💬 Ig	nored Quot
	Print	Layout	Quote Gro	ip Status	Resources					Quites							Vie	w
Cos	t Breakdown S	tructure (CBS) Regist	er Quot	e Register	Quote Con	nparison & A	Award - F	Resources (	3									
Jrag	columns here to	group																
	Resource E Code	Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)		Plug		Detail	Example Voids Asphalt Materi		Example Ve Asphalt Ma		Example Vend Pipe Materials improvements		Example DBE Pipe Mat	
>	маам	Asphalt Mix (Fin	ish)	36,750.00	Ton		\$31.50		\$34.13	\$34.1.	1 🕴 🖉 🔹 💲	31.50	P	\$35.70		\$34.13		\$34.
	MAFA	Fine Aggregate		1,860.00	Ton		\$7.25		\$8.19	\$8.1	10	\$7.25	P	\$7.35		\$8.19		\$8.
	MPP 10	Pipe 10" PVC SD	R21	12,600.00	Linear Feet		\$13.65		\$3.28	\$3.20	1	\$3.28		\$3.28	Ø	\$12.60	:0	\$13.
	MPP24	Pipe 24" PVC SD	R35	3,000.00	Linear Feet		\$22.05		\$20.48	\$20.4	1 4	\$20.48		\$20.48	Ø	\$25.20	:0	\$22.
	MPR36	Pipe RCP 36 In		1,024.00	Linear Feet		\$32.55		\$34.13	\$34.1.	1 4	\$34, 13		\$34,13	Ø	\$31.50	:0	\$32.
		Scope Items																
		Summary																
		Minority Type															0	D
		Quoted Total						\$1,406	973.75	\$0.0	\$1,171,1	00.70	\$1,32	5,646.00	\$266,	516.00	\$	271,471.3
		Comparable T	iotal <					\$1,406	973.75	\$1,406,973.7	\$1,308,7	47.30	\$1,46	3,292.60	\$1,535,5	943.15	\$1.	540,798.

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

	te (RFQ) Register	Quote Register	Quote Record	0																
Header																Total				
Description:	Asphalt Materials										-	Optional	lode:			Extended Price:				\$1,062,83
											v		Date:			Item Taxes: Quote Tax:				\$53,14
Vendor:	<adhoc vendor=""></adhoc>	0 8	Vendor Name					Vendor Phone:				So	urce:			Bond:				
Contact:	<ad-hoc contact=""></ad-hoc>	0 1	E First Name					Contact Office:				Curr	ency: U.S. Dollar		*	Item Conditions				
Primary Email:			Last Name				0	Contact Mobile:				9	atus: Received			Special Conditio	ns:			
External Ref.:												Ig	nore: 🗌 Reason:			Total:				\$1,115,97
lesources Co	st Items												Special Terms & C	onditions						
rag columns here	to group								Saved	views: Standard	View	· 2	Buyer's Special Ten	ns & Conditions						
Code 🛓	Quote Group 🔟	Description	No Solit	Free	Awarded	Duration	Quantity	Unit of Measure		Extended	Currency	Default Tax Rate								
MAAM	Asphalt Materials	Asphalt Mix (Finish)			V	1	35,000.00	Ton	\$30.00	\$1,050,000.00	U.S. Dollar		Vendor's Specia	Terms & Condition	15					
MAFA	Asphalt Materials	Fine Aggregate	✓		<ul> <li>Image: Control of the second se</li></ul>	1	1,860.00	Ton	\$6.90	\$12,834.00	U.S. Dollar									
													Special Conditions		\$0,0					
													Distribute Special C							
													Include Special C							
													Drag columns here t					aved views:		*
																				Notes
																				Notes
																				Notes
																			% of Total	
														Scope Item			Included	Amount	% of Total \$0.00 \$0.00	Notes

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

#### EXERCISE 8.1 – QUOTE MANAGEMENT

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

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

#### You should end up with similar results like below:

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

## Congratulations, you have completed this exercise!

# 8.4 QUOTE COMPARISON & AWARD

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

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

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

## 8.4.1 QUOTE COMPARISON & AWARD OVERVIEW

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

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

#### Overview - Quote Comparison and Award Form

2	Quote Group Tags Minority Setup	$\bowtie$		*		0										
ddress Book	Attachments	Request For Quote (RFQ)	Quotes	Resources	Cost Items	Reports										
	Setup	Quote Manag	ement	Quote Compa	arison & Award	Reports										
)uote C	omparison & Award - C	ost items 🛛 🕲	Quote	e Register												
Quote (	Group(s) 2	×	Dra	ag columns here to gr	oup							4				3 Find:
	Description 🛓	Reviewed		CBS Position Code	Description		Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Example S Guard Rail		Example Sub #1 Guard Rail Items	HD Engineering Group
	Electrical Work			Posicion Code			(1)0) Quanacy	Medadre		(i dicease)				il Itellio	Gool o Roll Techis	Concrete, Sitework
$\checkmark$	Guardrail Work			18	Guardrail Type 2		1,000.00	Linear Feet	\$24.00		\$25,000.00		ी 🖉 💲	24,000.00	\$25,000.00	\$50,000.0
	Sign Work			19	Guardrail Type 3	A	200.00	Linear Feet	\$31.00	<b>\$6,200.00</b>	\$7,000.00	\$7,000.00	10	\$6,200.00	\$6,000.00	\$7,000.0
					Scope Items											
			→		Summary											
					Minority Type											
												\$0.00		30,200.00	\$31,000.00	
					Quoted Total						\$32,000.00	\$0.00	>	50,200.00	\$31,000.00	\$50,000.0

# 8.4.2 EDIT MODE

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

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

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

uote Gro	up(s)	× D	rag columns here to grou	p					-		Find:	Search For] …	Saved views: Star	ndard View
	Description 🛓	Re	CBS Position Code	Description	Forecast (T/O)	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detai	C&H Concrete Construction, Inc.	Knopp Construction Concrete Formwork	Morin Contrete Contractors	Case Construction Concrete Formwork
	Concrete, Precast	<b>^</b>			Quantity						Concide Placement		Concrete Placement	
	Concrete, Sitework	1	3.4.1	formwork	1.00	Lump Sum	\$2,317,240.00		\$3,281,200.00	\$2,525,200.00	\$7,525,200.00		\$2, 525, 200.00	🕴 🔗 🛛 <b>\$2,317,240.0</b>
~	Concrete, Structural		3.4.2	place and finish	1.00	Lump Sum	\$285,000.00	\$285,000.00	\$375,500.00	\$295,000.00	🚦 🔗 \$285,000.00	\$295,000.00	\$294,000.00	\$548,567.0
	Doors & Windows			Scope Items										
	Electrical			Summary										
	Finishes (Div 9)			Minority Type										
	Fire Protection			Quoted Total					\$3,656,700.00	\$0.00	\$285,000.00	\$2,525,200.00	\$294,000.00	\$2,865,807.0
	Foundations			Comparable Total	<				\$3,656,700.00	\$2,810,200.00	\$2,810,200.00	\$2,810,200.00	\$2,819,200.00	\$2,865,807.0
	HVAC													
	Landscaping Work													
	Masonry													
	Plumbing													
	Rebar Install													
	Scaffolding													
	Sheet Metal													
H														

# 8.4.3 SUBSTITUTE VALUES

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

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

									Group	gineering ete, Sitework
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	2	\$24,000.00		\$25,000.00	0	\$50,000.00
19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	2	\$6,200.00		\$7,000.00		
20	Type 4 Signs	1,000.00	Square F	\$15.00	<b>ÿ</b>	\$15,000.00	1	\$15,000.00		
27.1	Electrical Work	1.00	Each	\$5,000.00	Ψ.	\$5,000.00	1	\$5,000.00		

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

I	ntegrations	Actions							
	(,100)	🖗 Duplicate Quote	🔗 Package Entire Quote	🚆 Award	Lock		👰 Quoted Items	💯 Zero Items	🖍 Configure Totals
	2	🖉 Ignore Quote	💮 Edit Package	🖺 Award And Lock	🔒 Unlock	<b>C</b>	Unit Price	Scope Items	🚹 Set Substitute Ranking
	Edit Quote					Edit Prices	Substitute Values	💬 Ignored Quotes	Default Data Blocks
			Quotes					View	

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

									Group	gineering ete, Sitework
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	2	\$24,000.00		\$25,000.00	P	\$50,000.00
19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	2	\$6,200.00		\$7,000.00		\$7,000.00
20	Type 4 Signs	1,000.00	Square F	\$15.00	<b></b>	\$15,000.00	1	\$15,000.00		\$13,000.00
27.1	Electrical Work	1.00	Each	\$5,000.00	<b></b>	\$5,000.00	1	\$5,000.00		\$3,500.00

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

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

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

_	Quoted Items	📨 Zero Items	Configure Totals
<b>C</b>	Unit Price	Scope Items	🚹 Set Substitute Ranking
Edit Prices	Substitute Values	🗭 Ignored Quotes	iii Default Data Blocks
		View	

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

9	Substitute Ranking	ı ×
	arded Splittable Quote vest Splittable Quote til	
Plu		
	ОК	Cancel

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

Example Vendor 1 Pipe Materials for site improvement 2	Architectural Designs, Inc. Electrical Work							
♂ P1 \$300,000.00								
♂ P2 \$125,000.00								
\$4,200.00								
HD Engineering Group Lowest Splittable Quote								

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

Print	😡 Quote Groups	🖗 Set Al	l to Re			🖉 Edit Quote		Lock	🔊 Quo	ed Items 🛛 📝 Scr		e Items 🔒 Set Subs		titute Ranking		Session F	Recap				
neview	All Items	🔍 Set Al	ᅅ Set All to Not Reviewed			🚆 Awa	rd	🔒 Unlock	C2 Unit	Price	💬 Ignor	red Quotes			i	Auto Aw	Auto Award +				
Export to Exc	cel				Edit	n Awa	rd And Lock	💮 Edit Pac	kage 👫 Subs	titute Values	s 🗗 Confi	igure Total:	s		efault a Blocks						
Print	Print Layout Quote Group Status			ip Status Co	st Items Quotes						-	Vie	ew			Tools					
Cost Breakdow	vn Structure (CBS) Reg	RFQ) Regis	egister Request for Quote (RFQ) Record Quote Register Quote Comparison & Award - Cost items O																		
Quote Group(	s)	×	Dr	rag columns here to	group															Find	#: [
	Description 🖮 Revi	iewed		CBS Position Code	e Description			⊨. (T/ Qui		Unit of Me	Unit Cost	Total Co: (Forecas		Plug	Detail	Example Sub #2 Guard Rail Items		Example Sub #1 Guard Rail Items		HD Engineering Group Concrete, Sitework	
E	Electrical work 2			18	Guard	rail Type	2		1,000.00	Linear	\$24.00	P	\$24,000.00	\$25.00	\$25.00	10	\$24.00	Ø	\$25.00	⊘ \$50	.00
E E	ectrical work 3	work 3 19		19 Guard		ail Type 3A		200.00	Linear	\$31.00	8	\$6,200.00	\$35.00	\$35.00	0 🚦 🔗 🛛 \$31.0		<b>10</b> 🔗 \$30.00		\$35.4		
	Suardrail Work			17	Toll Bo	oth			1.00	Each	\$40,00	P	\$40,000.00	\$25,000.00	\$25,264.55		\$25,264.55	10	\$40,000.00		
P	Pipe Materials				Scope	Items															
<u> </u>	lign Work				Summ	ary															
					Minor	ity Type															
					Quot	ed Total								\$57,000.00	\$25,264.55		\$30,200.00		\$71,000.00	\$50,000	00
					Comp	oarable Tot	al	<	(					\$57,000.00	\$57,264.55		\$55,464.55		\$71,000.00	\$82,264	55
					Awar	ded Total								\$0.00	\$0.00		\$30,200.00		\$40,000.00	\$0.	00
					Quot	ed Items To	otal							\$57,000.00	\$25,264.55		\$30,200.00		\$71,000.00	\$50,000	00
					Speci	al Condition	ns							\$0.00	\$0.00		\$0.00		<b>\$0.00</b>	<b>\$</b> 0.	00
			→	>	Last	Update										7/29/3	2009 2:21:	11/1	3/2019 9:0	11/13/2019 1:	þ

# 8.4.4 DISPLAY IGNORED QUOTES

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

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

Example Vendor 2 Asphalt Materials	Example Vendor 1 Pipe Materials for site improvements	Example Vendor 4 DBE Pipe Materials
Image: symbol with symbol	Award	
	Lock <u>U</u> nlock	1,990.00 6,150.00
	Edit Quote           Duplicate Quote	3,331.20
9	<ul> <li><u>Ignore Quote</u></li> <li><u>Package Entire Q</u></li> </ul>	uote
\$1,325,646.0 \$1,463,292.6	Edit Package Edit <u>Resource</u>	1,471.20 0,798.35

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

(	Curre	ncy: U	.S. Dolla	r	•	
	Sta	tus: Ig	nored			
	Ign	ore: 🗸	Reaso	n:	*	
	Day	ckages			A Description	Н
	Fa	ckayes			Do Not Use	н
	Drag	g column	s here to	o gro	Non Compliant	d:
tend ce		Code	<u> </u>	De		
	$\rightarrow$					Ш
						н
					×	1
				_		

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

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

Award		1761	Quoted I		2 3		Session R		
칱 Award And I	.ock 🔓 Unlo	ck Edit Prices	200 Unit Price	📝 Scope Ite	ems 🔐 Set Substi	tute Ranking	📍 Auto Awa	rd +	
		Eult Prices	Substitute	e Values  🗭 Ignored (	Quotes 🛗 Default Da	ata Blocks			
				View			Tools		
te Compariso	on & Award - Co	ost items 🛛							•
					Find: [Search For]		ved views: F	Previous View	•
Unit of Measure	Unit Cost	Total Cost (Forecast)		Detail	Example Sub #3 Sign Items	Example Sub # Guard Rail Item		le Sub #4 DBE tems	Example Sub #1 Guard Rail Items
Linear Feet	\$24.00	<b>\$24,000</b>	\$25,000.00	\$25,000.00	\$25,000.00	🊦 🔗 🛭 \$24,0	00.00	\$25,000.00	\$25,000.0
Linear Feet	\$31.00	<b>\$6,200.00</b>	\$7,000.00	\$7,000.00	\$7,000.00	🊦 🔗 🛛 \$6,2	00.00	\$7,000.00	\$6,000.00
Square F	\$13.00	₽ \$13,000	\$15,000.00	\$13,000.00	\$11,000.00	\$13,0	000.00 🕇 🔗	\$13,000.00	\$13,000.0
					Ø			Ø	
					\$500.00			Ø	
					Ø			Ø	
								DBE	
					D	D		D	B
			\$47,000.00	\$0.00	\$11,000.00	\$30,2	00.00	\$13,000.00	\$31,000.0
			\$47,000.00	\$45,000.00	\$43,000.00	\$43,2	00.00	\$45,000.00	\$44,000.00

# 8.4.5 EXPORT QUOTE COMPARISON AND AWARD TO MICROSOFT EXCEL

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

aste	Home Insert	Calibri ~	Formulas Da	= = =	View Autom	ext	Developer           General           \$ ~ % \$ \$ \$\$\$\$ \$\$\$\$	Conditional Format as Ce Formatting ~ Table ~ Style	II Insert Delete Format	∑ AutoSum ↓ Fill ~ ♦ Clear ~		ments Sensitivity	
	lipboard 15	Font	15		Alignment	15	Number 5		Cells			Sensitivity	
1	• I X	√ fr CBS											
	r		G					1	к			м	N
-	E Total C	ost	G		1 Vendor1		Cooper Outdoor Advertis	ing Inc		w	anderBoyB	M	IN
Uni	t Cost 💌 (Forec		Plug 🔽 🗖		Guard Rail Items		Guard Rail Items	ing inc	<ul> <li>Guard Rail Items</li> </ul>	T Gu	ard Rail Items		
-	\$24.00			\$25,000.00	10	\$24,000.00	🔗 P1		75 8 \$562.3	44.000.00	\$562,344,000.00		
	\$31.00 2	\$6,200.00		\$7.000.00	8	\$6,200.00	🔗 P1	\$6.781	.25 8 \$145.2	72.200.00	\$562,344,000.00 \$145,272,200.00		
			\$0.00	\$0.00		\$30,200.00		\$31,000	.00 \$707,6	16,200.00	\$707,616,200.00		
			\$0.00	\$0.00		\$0.00		\$0	.00	\$0.00	\$0.00		
			\$0.00	\$0.00		\$0.00		\$0	.00	\$0.00	\$0.00		
			\$0.00	\$0.00		\$0.00		\$0	.00	\$0.00	\$0.00		
			\$0.00	\$0.00		\$0.00		\$0	.00	\$0.00	\$0.00		
			\$32,000.00	\$0.00		\$30,200.00		\$31,000	.00 \$707,6	16,200.00	\$707,616,200.00		
			\$0.00	\$0.00		\$0.00		\$0	.00	\$0.00	\$0.00		
			\$32,000.00	\$0.00	0	\$30,200.00		\$31,000	.00 \$707,6	16,200.00	\$707,616,200.00		
			\$0.00	\$32,000.00	~	\$0.00		\$0	.00	\$0.00	\$0.00		
			\$32,000.00	\$32,000.00		\$30,200.00		\$31,000	.00 \$707,6	16,200.00	\$707,616,200.00		
			\$0.00	\$0.00		\$30,200.00		\$0	.00	\$0.00	\$0.00		
					5/11/2023 2:38:01 AM	4	7/24/2023 11:24:01 PM		6/2/2023 12:29:38 AM	6/3	2/2023 12:37:37 AM		
	Formatte	d Data Raw Data	(+)					1					

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

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

File Setup	Estimate Quote	Pri	ice System	Integra	ations Actions					
🖶 Print	风 By Quote Group		۵.		💫 Duplicate Quote		All Items	Unit Price		Scope Iter
neview	🕸 All Quote Groups	9		2	💋 Ignore Quote	<b>C</b> SI	💬 Quoted Items		e Values	💬 Ignored Q
Export to Excel	👰 All Quote Items		Edit Resource	Edit Quote		Edit Prices	🗩 Unquoted Items	💯 Zero Item	IS	Configure
Print	Layout		Resources					View		
Quote Companion	a & Award - Resource	s ©								
Quote Group(s)	Export spr	eadshe	et to					×	Saved vie	ws: Standar
Descr Test	ription $\leftarrow$ $\rightarrow$ $\vee$	↑ 【	> This PC >	Downloads		Ū,	Search Download	s		
	alt Mate Organize 🔻	N	ew folder					• 🕜		
Pipe 1	Material	sk (C:)	* ^ Nam	e		Тур	e	Size ^		
	Git Pr	ojects	* Ves	terday (2)					-	
	📙 Com	pliance	1 _		rol Columns List.xlsx	Mi	crosoft Excel Work	47		
	Cont	rol		mproved.xls		Mi	crosoft Excel Work	16		
	Estim		∼ Las	t week (1)	· · · · · · · · ·					
	Schee	dule	<b>B</b> (	Contacts_091	142023051609.xlsx	Mi	crosoft Excel Work	10		
	🕹 Dowr	nloads	v	cancilla in n	· · · ]	<b>F</b> 31.		~		
			× _	vices and A	ward 09212023.xlsx			_		
		e name:			ward 09212025.x15x			~		
	Save	as type:	Excel files (*.x	isx)				~		
	∧ Hide Fold	ers			(	Г	Save	Cancel		

# 8.4.6 ADDITIONAL QUOTE COMPARISON AND AWARD FUNCTIONS

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

#### Overview - Additional Quote Comparison and Award Functions

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

Image: Converte Faciment         Converte Faciment <th>i.</th> <th>Description</th> <th>Forecast</th> <th>Unit of</th> <th>Unit Cost</th> <th>Total Cost</th> <th>Plug</th> <th>Detail</th> <th>C&amp;H Concrete Construction, Inc.</th> <th>Knopp Construction</th> <th>Morin Concrete Contractors</th> <th>* Case Construction</th> <th>1</th>	i.	Description	Forecast	Unit of	Unit Cost	Total Cost	Plug	Detail	C&H Concrete Construction, Inc.	Knopp Construction	Morin Concrete Contractors	* Case Construction	1
place and finish         1.00         Lump Sum         \$0.00         \$ 90.00         \$ 535,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 538,500.00         \$ 5		a cara quart	(T/O) Quantity	Measure	CHIN CONT	(Forecast)				Concrete Formwork		Concrete Formwork	
Scope Items         Unit Hone Xer/24:000           Summary         Summary           Minority Type         Cubic Total           Quoted Total         \$3,856,700.00           \$2,855,000.00         \$2,855,000.00           \$2,855,000.00         \$2,855,000.00		formwork.	1.00	Lump Sum	\$2,339,113	\$2,339,113.70	\$3,281,200.00	\$2,525,200.00	\$2,525,200.00	\$2,525,200.00	\$2,525,200.00		
Summary         Control from t2,317,72           Minority Type         0           Notes         0           Quote to 150         0           Quote to 150         50.00           State         52,852,520.00           State         52,852,520.00		place and finish	1.00	Lump Sum	\$0.00	\$0.00	\$375,500.00	\$0.00	\$285,000.00	\$385,000.00	\$\$294,000.00	\$553,508.49	s
Minority Type         Image: Constraint of the state of the stat		Scope Items										Unit Price: S.	517,240.00
Minority Type         Encode Condition:: \$1,000           Notes		Summary						4				Quote Tax: 1	18,537.92
Quoted Total         \$3,656,700.00         \$0.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00         \$2,850,000.00 <td></td> <td>Minority Type</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>•</td> <td></td> <td></td> <td></td> <td>Special Cond</td> <td>tions: \$1,000.00</td>		Minority Type						•				Special Cond	tions: \$1,000.00
		Notes								D	D	0	
							\$3,656,700.00	\$0.00	\$285,000.00	\$2,525,200.00	\$294,000.00	\$2,892,622.19	
Comparable Total <		Comparable Total	<				\$3,656,700.00	\$2,525,200.00	\$2,810,200.00	\$2,810,200.00	\$2,819,200.00	\$2,892,622.19	

# 8.4.7 CONFIGURE TOTALS

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

aption eller uote Description inority Type	Visible  Visible  V	Sort None None
uote Description nority Type		
nority Type		None
	×	None
otes	✓	None
ctended Price		None
em Taxes		None
uote Tax		None
ond		None
em Conditions		None
uoted Items Total		None
pecial Conditions		None
uoted Total	$\checkmark$	None
ubstitute Values		None
omparable Total	$\checkmark$	Ascending
warded Total		None
ast Update		None
	em Taxes iote Tax nd em Conditions ioted Items Total ecial Conditions ioted Total bstitute Values imparable Total warded Total	am Taxes   note Tax   note Tax   nd   am Conditions   noted Items Total   noted Total   warded Total   warded Total

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

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

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

# 8.4.8 ADDING NOTES TO QUOTE COMPARISON & AWARD

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

# STEP BY STEP – ADD THE NOTES SECTION TO QUOTE COMPARISON & AWARD FORM

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

à	Preview	🧐 A	y Quote Group Quote Groups	😪 Set All to R	lot Reviewed	alt Resource					rage Entire Quote Package	¶ Award fii Award		🔒 Lock 🔒 Unlock	Edit Prices	Quoted Iter           Unit Price	з	Zero Items		stitute Ranking	<ul> <li>Session Recap</li> <li>Auto Award +</li> </ul>	
2	Export to Excel		Quote Items	Ouote Grou		Resources	ant from				Quotes					Substitute 1	alues 🧐	Ignored Quotes	The Default	Data Blocks	Tools	
Cos	st Breakdown St				e Register		parison & Awa	ard - Re	esources @		4											
Drag	columns here to g	group																Find: [Search Fi	r] …	Saved views	: Previous View	-
	Resource E		Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)		Plug		Detail	Example Asphalt		Example W Asphalt Ma	andor 2	Example Vendor Pipe Materials for improvements	site DBE	nple Vendor 4 Materials				
	маам		Asphalt Mix (Finis	h)	36,750.00	Ton	\$	31.50	\$34	.13	\$34.1	10	\$31.50	0	\$35.70	\$3	1.13	\$34.13				
→	MAFA		Fine Aggregate		1,860.00	Ton		\$7.25	\$8	. 19	\$8.1	10	\$7.25	ð	\$7.35	\$	R. 19	\$8.19				
	MPP 10		Pipe 10" PVC SDR	121	12,600.00	Linear Feet	\$	13.65	\$3	.28	\$3.20		\$3.28		\$3.28	8 \$1	2.60 📍 👌	\$13.65				
	MPP24		Pipe 24" PVC SDR	.35	3,000.00	Linear Feet	\$	22.05	\$20	.48	\$20.40		\$20.48		\$20.48	<i>∂</i> \$2	5.20 📍 👌	\$22.05				
	MPR36		Pipe RCP 36 In		1,024.00	Linear Feet	\$	32.55	\$34	. 13	\$34.1		\$34.13		\$34.13	8 \$3	1.50 🔋 👌	\$32.55				
			Scope Items																			
			Summary																			
			Minority Type														•	DBE				
			Quoted Total						\$1,406,973	.75	\$0.00	\$1,	171,100.70	\$1,3	25,646.00	\$266,61	i.00	\$271,471.20				
			Comparable To	tal <					\$1,406,973	.75	\$1,406,973.7	S \$1,	308,747.30	\$1,4	53,292.60	\$1,535,943	.15	\$1,540,798.35				

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

	Caption	Visible	Sort	
	Seller	✓	None	
	Quote Description	$\checkmark$	None	
	Minority Type	$\checkmark$	None	
ø	Notes	✓	None	
	Extended Price		None	
	Item Taxes		None	
	Quote Tax		None	
	Bond		None	
	Item Conditions		None	
	Quoted Items Total		None	
	Special Conditions		None	
	Quoted Total	$\checkmark$	None	
	Substitute Values		None	
	Comparable Total	$\checkmark$	Ascending	
	Awarded Total		None	
	▼ ▼			
ι	ocation: O Top	Bottom		

#### 6. Select OK.

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

Construit         Description         Count // Mean         Mean         Count // Mean         Mean         Count // Mean         Mean	Schlam         Decorption         Count         Mail         Original         Page         Detail         August Having         Page         Detail         August Having         Page         Page <th>columns here to group</th> <th></th> <th>Example Vendor 1</th> <th></th> <th>: [Search Fo</th> <th>c]</th> <th>Saved view</th> <th>rs: Previous Vie</th> <th>ew</th> <th></th>	columns here to group											Example Vendor 1		: [Search Fo	c]	Saved view	rs: Previous Vie	ew	
A         Fire Aggraphic         1,660,00         Tm         172.5         98.19         66.10         ©         97.35         66.10         173.5         66.10         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         66.10         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35         67.35 <t< th=""><th>M4A Pro Agergade 1,060.01 Tm P 273 88,19 87.97 10 12.22 0 81.31 87.97 10 12.22 0 81.31 10.01 10 10 10 11.200.001 (source Preci 10.200.001 (source</th><th>Resource ⊨ Code</th><th>Description</th><th>Utilization Count</th><th>Unit of Measure</th><th>Unit Cost (Scale 1)</th><th>Plug</th><th>Detail</th><th>Example N Asphalt M</th><th>endor 1 aterials</th><th>Example Vendor Asphalt Material</th><th>ć  </th><th>Pipe Materials for site</th><th>DBE</th><th></th><th></th><th></th><th></th><th></th><th></th></t<>	M4A Pro Agergade 1,060.01 Tm P 273 88,19 87.97 10 12.22 0 81.31 87.97 10 12.22 0 81.31 10.01 10 10 10 11.200.001 (source Preci 10.200.001 (source	Resource ⊨ Code	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example N Asphalt M	endor 1 aterials	Example Vendor Asphalt Material	ć	Pipe Materials for site	DBE						
a Pre 21 Pr C 55211 12,000 00 Unear Feet 113.65 13.28 13.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27 15.27	PPU0         Ppu 01/Pr0/C00211         12,2000         Linex Freet         \$13.05         \$1.27         \$2.27         \$2.27         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2.28         \$2	MAAM	Asphalt Mix (Finish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	10	\$31.50	e s:	35.70	\$34.13		\$34.13					
4     Pipe 24* Pirc SXR35     3,000.00     Linear Freet     \$22.55     \$23.40     \$23.47     \$23.47     \$23.47     \$23.47     \$23.47     \$22.55     \$22.55       6     Pipe 8CP 36 in     1,024:00     Linear Freet     \$32.55     \$34.13     \$54.13     \$54.13     \$54.13     \$54.13     \$55.25       South mary       Monity Type     One	Specific Processing         3,0000         Linear Freet         \$23.00         \$23.40         \$23.40         \$20.41         \$23.40         \$23.40         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20         \$23.20	MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	10	\$7.25	0	\$7.35			\$8.19					
Source Terms         Source Terms<	PPR-80P         Ppre-80P         Solution	MPP 10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28		\$3.28					\$13.65					
Scope Rems     Scope Rems       Summary     Scope Rems       Mronity Type     Scope Rems       Work     Scope Rems	Scope Trans         Scope Trans         Common y	MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05		\$20.48		\$20.48										
Summary Ministry Type Otto Dec	Summary         Monty Type         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O         O	MPR36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13		\$34.13	\$	94, 13	831.50	10	\$32.55					
Monty Type C D D D D D D D D D D D D D D D D D D	Monity Type:         October		Scope Items																	
	Notes         D         D         D           Quarted Total         \$1,406,972.75         \$0.00         \$266,616.00         \$271,471.20																			
	Quoted Total         \$1,406,573.75         \$0.00         Example Hotel         5.00         \$266,616.00         \$271,471.20											_		<u></u>						
									Discussion 14	2					_					
	Compande Total < \$1,466,973.75 \$1,466,973.75 24:0 \$1,535,943.15 \$1,540,798.35									otel										
Comparable Total < \$1,406,973.75 \$1,406,973.75 2.60 \$1,535,943.15 \$1,540,798.35			Comparable Total	<			\$1,406,973.75	\$1,406,973.75				2.60	\$1,535,943.15	\$1	,540,798.35					

# 8.4.9 ALL QUOTE GROUPS LAYOUT

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

File	Setup	Estimate	Quote	Price	Execution	System	Integrations	Actions	
📇 Prir	nt	🔉 By Quo	te Group	🖗 Set All	to Reviewed		<i>(*</i> )	🖗 Duplicate Quote	🛞 Package Entire Quote
📆 Pre	view	🛸 All Quo	te Groups	强 Set All	to Not Reviewed		2	💋 Ignore Quote	🅎 Edit Package
🛃 Exp	port to Excel	R All Quo	te Items			Edit Cost Item	Edit Quote		
1	Print	Layo	ut	Quote G	roup Status	Cost Items			Quotes

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

Features of this layout include:

#### **Overview - Quote Groups Layout**

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

	Print	💫 By Quote Group		€.,	( <b>*</b> )	💫 Dupli	cate Quote	😚 Pac	kage Enti	re Quote  🃍 Awar	d 🔒	rei	Quoted I	tems	💯 Zero Items				
q	Preview	🛸 All Quote Group	s 🙊			🕖 Ignor	e Quote	🕎 Edit	Package	🎓 Awan	d And Lock 🔒		🔝 Unit Price		Scope Items				
X	Export to Excel	All Quote Items		Edit Resourc	e Edit Quote						E	Edit Pri	ces	e Values	💬 Ignored Que				
	Print	Layout		Resource	s			Q	uotes						View				
os	st Breakdown Sti	ructure (CBS) Regi	ster	Quote Co	mparison & Awa	rd - Res	ources (	3											
rag	g columns here to g	roup										Fin	id: [Search For]		Saved views				
	Quote Group	<u>-</u>	Plug		Detail		Quote		Quote (	Group Total									
•	<ul> <li>Asphalt Materi</li> </ul>	ials	]	\$0.0	0	\$0.00	\$1,1	71,100.70		\$1,171,100.70		1							
	Resource Code	E Description			Utilization Count	Unit of Measure	2	Unit Cost (Scale 1)		Plug	Detail		xample Vendor 1 sphalt Materials		le Vendor 2 It Materials				
	MAAM	Asphalt Mix (Fir	iish)		36,750.00	Ton			\$31.50	\$34.13	\$ \$34.	13	831.50	Ø	\$35.70				
	MAFA	Fine Aggregate			1,860.00	Ton			\$7.25	\$8.19	\$8.	19 🏌	87.25	0	\$7.35				
		Scope Items																	
		Summary																	
		Minority Type																	
		Quoted Tota	Quoted Total										\$1,269,327.15	5 <b>\$0.</b> 0	00	\$1,171,100.70	\$1,325,646.00		
1	1	Comparable <sup>-</sup>	Comparable Total							\$1,269,327.15	5 <b>\$1,269,327.</b> 1	15	\$1,171,100.70	\$	1,325,646.00				
-		Awarded Tot	al: \$1,17	1,100.70						\$0.00	) <b>\$0.</b> (	00	\$1,171,100.70		\$0.00				
ļ	<ul> <li>Pipe Materials</li> </ul>			\$0.0	.00 \$0.00			271,471.20		\$271,471.20									
	Resource Code	E Description			Utilization Count	Unit of Measure	2	Unit Cost (Scale 1)		Plug	Detail		xample Vendor 3 pe Materials	DBE	le Vendor 4 aterials				
	MPP 10	Pipe 10" PVC SE	R21		12,600.00	Linear F	eet		\$13.65	\$3.28	\$3.2	28 6	\$12.60	10	\$13.65				
	MPP24	Pipe 24" PVC SE	0R35		3,000.00	Linear F	eet		\$22.05	\$20.48	\$ \$20.4	<del>1</del> 8 É	\$25.20	10	\$22.05				
	MPR36	Pipe RCP 36 In			1,024.00	Linear F	eet		\$32.55	\$34.13	\$ \$34.	13 6	\$31.50	10	\$32.55				
		Scope Items																	
		Summary					_												
		Minority Type	•				3							0	DBE				
		Quoted Tota				6				\$137,646.60	\$0.0	00	\$266,616.00		\$271,471.20				
		Comparable	Total	<						\$137,646.60	\$137,646.0	50	\$266,616.00		\$271,471.20				
		Awarded Tot	al: \$271,	471.20						\$0.00	) \$0.0	00	\$0.00		\$271,471.20				

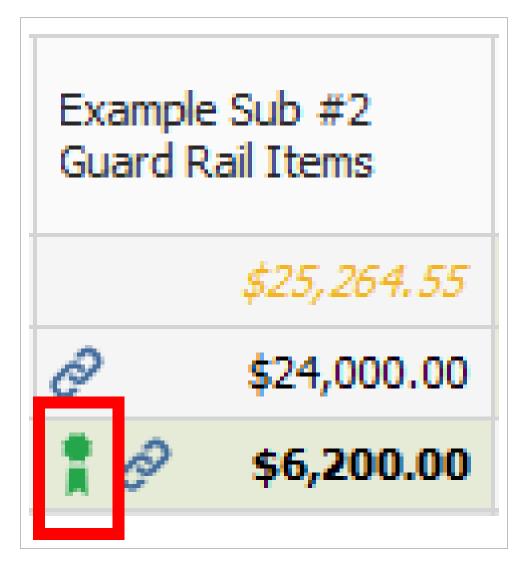
You can scan through all the quote groups in the estimate and see if you are carrying the most appropriate quote. You can also review the Totals per Quote Group and better analyze the risks in the estimate based on whether the cost is a plug number, detailed estimate or a quoted value.

# 8.4.10 COMPARE AND AWARD QUOTES

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

Example Sub #3 Sign Items		nple Sub #2 d Rail Items	Example Sub #4 DBE Sign Items
\$25,000.00	16	\$24,000.00	\$25,000.00
\$7,000.00	16	\$6,200.00	\$7,000.00
	<b>†</b>	<u>¢13 000 00.</u> Award	■
ମ୍ଭ \$500.00		A <u>w</u> ard And Loc Lock <u>U</u> nlock	k
- D	ø	Edit <u>Q</u> uote <u>D</u> uplicate Quote <u>Ig</u> nore Quote	DBE
\$11,000.00 \$0.00 \$0.00	G.	<u>P</u> ackage Entire ( Edit Package Edit Cost Item	Quote ,000.00 \$0.00 \$0.00

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



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

CBS Position Code	Description	Forec (T/O) Quan	Unit of Me	Unit Cost	Total Cost (Fore	Plug	Detail	Example Sub #2 Guard Rail Items	Example Guard Ra	
17	Toll Booth	1.00	Each	\$40,000	₽ \$40,0	\$25,000.00	\$25,264.55	\$25,264.55	10	\$40,000.00
18	Guardrail Type 2	1,000.00	Linear	\$25.00	₽ \$25,0	\$25,000.00		\$24,000.00	10	\$25,000.00
19	Guardrail Type 3A	200.00	Linear	\$30.00	₽ \$6,00	\$7,000.00	\$7,000.00	\$6,200.00	10	\$6,000.00
20	Type 4 Signs	1,000.00	Square	\$15.00	<b>\$15,0</b>	\$15,000.00				
27.1	Electrical Work	1.00	Each	\$5,000.00	<b>\$5,000</b>	\$5,000.00				
	Summary									
	Minority Type									
	Quoted Total					\$77,000.00	\$25,264.55	\$30,200.00		\$71,000.00
	Comparable Total	<				\$77,000.00	\$99,764.55	\$72,964.55	<b>1</b>	\$88,500.00
	Awarded Total					\$20,000.00	\$0.00	\$0.00		\$71,000.00
	Quoted Items Total					\$77,000.00	\$25,264.55	\$30,200.00	5	\$71,000.00
	Special Conditions					\$0.00	\$0.00	\$0.00		\$0.00
	Last Update							7/29/2009 2:21:	11/13/	2019 9:0

NOTE

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

#### 8.4.10.1 OPEN STATUS

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

Drag	columns here to gro	oup									Find: [Se
	CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items	HD Engineering Group Concrete, Sitework
	18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	<b>\$24,000</b>	\$25,000.00		🚦 🔗 🛛 \$24,000.00	\$25,000.00	\$50,000.00
	19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	\$6,200.00	\$7,000.00	\$7,000.00	\$6,200.00	\$6,000.00	\$7,000.00
1		Scope Items									
		Summary									
		Minority Type									
		Quoted Total					\$32,000.00	\$0.00	\$30,200.00	\$31,000.00	\$50,000.00
÷		Comparable Total	<				\$32,000.00	\$57,000.00	\$30,200.00	\$31,000.00	\$57,000.00

# 8.4.10.2 AWARD STATUS

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

uote Re	pister Q	uote Comp	arison	& Award - Cost ite	ems O													-
uote Gr	oup(s)	×	Dra	ag columns here to gr	roup										Find: [Search For]	Saved vie	ws: Previous View	-
< <	Descri h			CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	-9	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items	Example Sub #4 DBE Sign Items	HD Engineering Group Electrical Work	HD Engineering Group Concrete, Sitework	Architectural Designs, Inc. Electrical Work	Example Sub #3 Sign Items
1	Guardrail We	ork	~	17	Toll Booth	1.00	Each	\$40,000.00	\$40,000.00	\$25,000.00	\$25,264.55	\$25,264.55	🚦 🔗 🛛 \$40,000.00	\$25,264.55	\$25,264.55	\$25,264.55	\$25,264.55	\$25,264.
<	Sign Work			18	Guardrail Type 2	1,000.00	Linear Feet	\$25.00	\$25,000.00	\$25,000.00		\$24,000.00	🚦 🔗 🛛 \$25,000.00	\$50,000.00		\$\$0,000.00		
				19	Guardrail Type 3A	200.00	Linear Feet	\$30.00	\$6,000.00	\$7,000.00	\$7,000.00	86,200.00	📍 🔗 🛛 \$6,000.00	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.
				20	Type 4 Signs	1,000.00	Square F	\$15.00	\$15,000.00	\$15,000.00				813,000.00				🔗 Off \$300,000.
				27.1	Electrical Work	1.00	Each	\$5,000.00	\$5,000.00	\$5,000.00					\$3,500.00		\$3,700.00	
			→		Summary													
					Minority Type									DBE				
					Quoted Total					\$77,000.00	\$25,264.55	\$30,200.00	\$71,000.00	\$13,000.00	\$4,450.00	\$50,000.00	\$4,200.00	\$300,000.
					Comparable Total	<				\$77,000.00	\$98,764.55	\$71,964.55	\$87,500.00	\$98,764.55	\$98,764,55	\$98,764.55	\$98,964.55	\$385,764.

#### 8.4.10.3 REVIEW

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

Quote Gro	oup(s)	×
$\checkmark$	Description 📃	Reviewed
$\checkmark$	Electrical Work	
$\checkmark$	Guardrail Work	$\checkmark$
$\checkmark$	Sign Work	

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

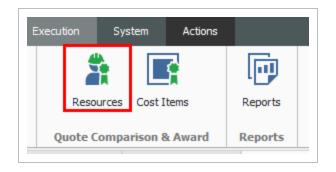
Quote Gro	oup(s)	×
$\checkmark$	Description 📃	Reviewed
$\checkmark$	Electrical Work	
$\checkmark$	Guardrail Work	$\checkmark$
<	Sign Work	✓

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

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

#### **STEP BY STEP – COMPARE AND AWARD QUOTES**

- 1. From the main Estimate landing page select **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 splitable.
  - 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**.

# 8.4.11 PACKAGE ENTIRE QUOTE

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

A Set All to Review Set All to Not Re	eviewed Edit Cost Item	()	licate Quote ore Quote	Package Entire Package Entire Package	-		Lock Unlock Edit Prices	Quoted Items		Configure Totals	2	
Quote Group St	atus Cost Items	tems Ø		Quotes					View		Tools	
columns here to grou	p								Find: [Search For	] Saved vie	ws: Previous View	•
CBS Position Code 🗎	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Harmon Construction Concrete, Sitework	Eagle Concrete Corp. Concrete, Sitework	Services, Inc.	C&H Concrete Construction, Inc. Construction, Etimotek	_
3. 1. 1	Sidewalks	4,544.00	SQFT	\$9.89	\$44,939.07	\$44,939.07	\$44,939.07	♂ P1 \$206,000.00	₽1 \$242,500.00	@ P1 \$217,213.00	Award All	
3. 1. 2	V curb	50.00	LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	@ P1	@ P1	@ P1	Award And Lock All	
3.1.3	Curb and Gutter	1,250.00	LF	\$34.51	\$43,133.12	\$43, 133. 12	\$43,133.12	@ P1	@ P1	@ P1	Lock All     Unlock All	11
.1.4	Valley gutter	50.00	LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	@ P1	@ P1	@ P1	Ø	-11
3.1.5	Handicap ramps	159.00	SQFT	\$9.89	\$1,572.47	\$1,572.47	\$1,572.47	@ P1	@ P1	@ P1	Belit Quote	11
3. 1.6	Truncated domes	1.00	Lump Sum	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	@ P1	@ P1	@ P1	Duplicate Quote	11
. 1.7	Flow thru planter slab	125.00	LF	\$95.04	\$12,005.46	\$12,005.46	\$ \$12,005.46	@ P1	@ P1	@ P1	Ignore Quote	<b>1</b> 1
3. 1.8	Flow thru planter walls	125.00	LF	\$95.04	\$12,005.46	\$12,005.46	\$12,005.46	@ P1	@ P1	@ P1	Package Entire Quote	
1.1.9	Median Infil	225.00	CY	\$41.02	\$9,230.60	\$9,230.60	\$9,230.60	@ P1	@ P1	\$9,230.60	\$9,230.60	- 1
3. 1. 10	Rolled curb adjacent to	. 50.00	LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	@ P1	@ P1	\$1,725.32	\$1,725.32	
3.1.11	Reinforcing	2,612,40	b	\$4,59	\$12,000.00	\$ \$12,000.00	\$1,306.20	A D1	@ P1	\$1,306.20	\$1.306.20	

# 8.4.12 INCOMPLETE QUOTES

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

Edit Cost Item	Duplicate ( Dignore Qu Edit Quote	ote 🌍 Edit Pa		🚆 Award	ock	Edit Prices	Unit Price	Scope Items     Image: Scope Items       Ignored Quotes     Image: Scope Items	ionfigure Totals et Substitute Ranking refault Data Blocks	Session Recap     Auto Award -
Cost Items			uotes					View		Tools
Quote Compa	rison & Award - Cost item	s 0								
columns here to grou	IP						Find	d: [Search For] ···	Saved views: Pre	vious View
CBS Position Code 😑	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Natomas Masonry, Inc. Masonry	Marquis Masonry Masonry	*H.P. Construction Inc. Masonry
4.1.1	CMU Walls	1.00	Lump Sum	\$485,922.27	\$485,922.2	7 \$400,000	\$400,000.00	1 P1 \$512,648.00	\$526,724.53	♂ P1 \$766,352.0
4.1.2	Precast Concrete Caps	1.00	1.00 Lump Sum \$14		\$14,577.6	7 \$12,000	0.00 <i>\$12,000.00</i>	1 🔗 P1	\$12,375.47	& P1
4.1.3	Steel Embeds	1.00 Lump Sum		\$12,148.06	\$12,148.0	\$10,000	0.00 <i>\$10,000.00</i>	🛊 🔗 P1	A \$0.00	@ P1
	Scope Items									
	Demolition								0	
	Caulking, Sealants &									
	Scafolding									Ø
	Shoring/Bracing							\$15,000.00	\$12,000.00	
	Testing/Inspection									
	Summary									
	Minority Type								🖸 мве	
	Notes							D	D	D

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

By Quote All Quote		Set All to R		LAY I	Duplicate Quote     Duplicate Quote	: 🛞 Package	: Entire Quote kage	🕴 Award	k 🛆 Unicck	17.5			Configure Totals Set Substitute Ranking	-	sion Recep
All Quote	Items			Edit Cost Item	Edit Quote					Edit Prices 🔡 S	ubstitute Values	🗩 Ignared Quotes 🛛 🖷	Cefault Data Blocks		
Layout	E (	Quote Grou	p Stat	tus Cost Items		Qu	otes					View		Т	ools
ost Breakd	lown Structu	ire (CBS) R	egiste	r © Quote Com	parison & Award - Cost items (	3									
Quote Grou	ip(s)	×	Drag	columns here to group								Find: [Search F	'or] ave	d views:	Previous Vie
	Description Concrete, P			CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Natomas Masonry, Inc. Masonry	* H.P. Construction Inc. Masonry	Marquis Masonry	lasonry
	Concrete, S	itework		4.1.1	CMU Walls	1.00	Lump Sum	\$1,879,709.33	\$1,879,709.33	\$4,400,000.00	\$1,708,825.67	🕴 🔗 P1 \$512,648.00		ð	\$0.0
	Concrete, S	tructural		4.1.2	Precast Concrete Caps	1.00	Lump Sum	\$170,882.67	\$170,882.67	\$12,000.00	\$12,000.00	🖁 🔗 P1	₽1	2	\$0.0
	Doors & Win	dows		4.1.3	Steel Embeds	1.00	Lump Sum	\$170,882.67	\$170,882.67	\$10,000.00	\$10,000.00	🖁 🔗 P1	& P1	ð	\$0.0
	Electrical				Scope Items										
	Finishes (Div	(9)			Demolition										
	Fire Protecti	on			Caulking, Sealants & Backer Rod								0		
	Foundations				Scafolding								8		
	HVAC				Shoring/Bracing							\$15,000.00			
	Landscaping	Work			Testing/Inspection										
~	Masonry				Summary										
	Plumbing				Minority Type									0	MB
	Rebar Insta	1			Notes							D	D		D.
	Scaffolding				Quoted Total					\$4,422,000	\$1,708,826.67	\$512,648.00	\$574,764.00		\$0.0
	Sheet Metal		→		Comparable Total <					\$4,422,000	\$1,730,826.67	\$512,648.00	\$574,764.00	¢1.	730.826.6

# 8.5 SCOPE ITEMS

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

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

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

#### Overview - Quote Record - Scope Items

pec	ial Terms & Cond	itions					>
Que	te Tax		- Item 1	lax -			
Add	Taxes to the Quot	e: 🔿 Yes 💿 No	Ad	d Item Taxes to ea	ach item's price		
ТАХ	ES to be added to a	awarded TOTAL as a % of total :					
		Tax Rate: 🕨 0.00					
		Total Tax: \$0.00					
Buy	er's Special Terms &	Conditions					
✓ s	eller's Special Term	is & Conditions					
Dist	ribute Special Cond	d to Seller's awarded total (any con ition :      Evenly O Using weight itions costs forunawarded quotes i	ed average		\$0.00		
Drag	g columns here to gro	oup		Find: [	earch For] ···	Saved views:	Previous View 🔹
	Row Number =	Scope Item	Quote Group	Included	Amount	% of Total	Notes
$\rightarrow$	1	Permits	Electrical Work	$\checkmark$			
	2	Surveying and Layout	Electrical Work		\$500.00	14.29	
	3	Temporary Traffic Control Devices	Electrical Work	$\checkmark$			
	4	Trench and Backfill for Electrical W	Electrical Work	$\checkmark$			
					\$950.00		

#### Overview - Quote Comparison and Award - Scope Items

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

#### Overview - Quote Comparison and Award - Scope Items (continued)

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

ost Break	down Structure (CB	S) Register	Quo	te Register	Quote Comparison & Award - C	ost items	0								
Quote Gro	up(s)	×	Dra	ag columns here to	group										
	Description 🖮	Reviewed		CBS Position Code	Description	<u>=</u>	Forecast (T/O) Quantity	Unit of Me	Unit Cost	Total Cost (Forecast)		Plug	Detail	Architectural Designs, Inc. Electrical Work	HD Engineering Group Electrical Work
	Electrical work 2			27.1	Electrical Work		1.00	Each	\$4,200	P	\$4,200.00	\$5,000.00	\$4,200.00	🚦 🔗 🛛 \$4,200.00	84,450.0
	Electrical work 3			6	Scope Items										
	Guardrail Work				Permits										<b>2</b> <sup>2</sup>
	Pipe Materials				Surveying and Layout									\$500.00	\$500.0
	Sign Work				Temporary Traffic Control Devi	ces									Ø
					Trench and Backfill for Electrical	l Work								<b>3</b> •	
					Painting Electrical Equipment									♥ □	\$150.0
					Temporary Power and Lighting										\$300.0
					Summary										
					Minority Type										
					Quoted Total							\$5,000.00	\$0.00	\$4,200.00	\$4,450.0
					Comparable Total	•	:					\$5,000.00	\$4,200.00	\$4,200.00	\$4,450.0
					Awarded Total							\$0.00	<b>\$0.00</b>	\$4,200.00	\$0.0
					Quoted Items Total							\$5,000.00	\$0.00	\$3,700.00	\$3,500.0
			→	- 5	Special Conditions							\$0.00	\$0.00	\$500.00	\$950.0
					Last Update									11/13/2019 1:0	11/13/2019 3:5

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

Qu	ote Register 🛛										
Dra	Drag columns here to group										
	Description	1	RFQ Description	Quote Status	Seller	Company		Awarded Total	Currency	Awarded	Awarded Status
	Electrical Work		Electrical Work	Accepted	Example Sub #5 MBE Chr	Example Sub #5 MBE	\$4,450.00	\$0.00	U.S. Dollar		None
	Electrical Work		Electrical Work	Accepted	Example Sub #3 Frank M	Example Sub #3	\$4,200.00	\$0.00	U.S. Dollar		None

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

e Register	Quote Comparison & Award - Cost item	5 Ø											
g columns here to	) group												
CBS Position Code	Description 🚊	Fored (T/O) Quan	)	Unit of Me	Unit Cost	Total Cost (Forecast)		Plug	Detail	Architect Designs, Electrical	Inc.	HD Engineering Group Electrical Work	
27.1	Electrical Work		1.00	Each	\$4,200	Q \$4	,200.00	\$5,000.00	\$4,200.00	10	\$4,200.00	84,4	150.00
	Scope Items												
	Permits											Ø	
	Surveying and Layout										\$500.00	\$5	500.00
	Temporary Traffic Control Devices											Ø	
	Trench and Backfill for Electrical Work											Ø	
	Painting Electrical Equipment											\$1	150.00
	Temporary Power and Lighting											\$3	300.00
	Summary												
	Minority Type												
	Quoted Total							\$5,000.00	\$0.00		\$4,200.00	\$4,4	50.00
	Comparable Total	<						\$5,000.00	\$4,200.00		\$4,200.00	\$4,4	50.00
	Awarded Total							\$0.00	\$0.00		\$4,200.00		\$0.00
	Quoted Items Total							\$5,000.00	\$0.00		\$3,700.00	\$3,50	00.00
	Special Conditions							\$0.00	\$0.00		\$500.00	\$9	50.00
	Last Update									11/13/	2019 1:0	11/13/2019	3:5

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

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

# 8.5.1 SCOPE ITEM SETUP

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

	dation Setup D	)ata Register	Quote Group Tag Rec	ord 🛛		
	Descripti	on: * Electrical W	ork			
	Award Stat	us: Complete				
	Review	ed:				
	Last Review	ed:				
Qu	iote Last Chang	ed:				
rag	g columns here to	o group				
rag	g columns here to Row Nu	o group Scope Item		Amount	:	% of Total
rag	Row _	Scope Item		Amount	: \$0.00	% of Total
rag	Row =	Scope Item Permits	ıt			% of Total
)rag	Row =1	Scope Item Permits		•	\$0.00	% of Total
)rag	Row =1 2	Scope Item Permits Surveying and Layou Temporary Traffic Co	ontrol Devices	•	\$0.00 \$500.00	% of Total
)rag	Row 1 Nu 1 2 3	Scope Item Permits Surveying and Layou Temporary Traffic Co	ontrol Devices or Electrical Work		\$0.00 \$500.00 \$0.00	% of Total
)rag	Row ⊨ 1 1 2 3 4	Scope Item Permits Surveying and Layou Temporary Traffic Co Trench and Backfill for	ontrol Devices or Electrical Work uipment		\$0.00 \$500.00 \$0.00 \$0.00	% of Total

#### STEP BY STEP - SET UP SCOPE ITEMS

- 1. Open your job.
- 2. Select the **Setup** tab.
- 3. Click on Foundation Data Setup in the Initialize section.
- 4. Select the **Quote group tags** tab to set up scope items within a quote group.
- 5. Create a new Quote Group Tag called Electrical Work and click Ok.
- 6. Open Electrical Work and add the following scope items:
- Permits
- Surveying and Layout
- Temporary Traffic Control Devices
- Trench and Backfill for Electrical Work

- Painting Electrical Equipment
- Temporary Power and Lighting
- 7. Enter **500** in the Amount field for Survey and Layout, and a **300** for Temporary Power and Lighting.
- 8. Click **Ok**.

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

#### STEP BY STEP – SET UP QUOTES FOR SCOPE ITEMS

- 1. From the Estimate tab, click on Cost Breakdown Structure (CBS).
- 2. Change your saved views to Quote Group Setup view.
- 3. Create a cost item **Entry Gate** with a subordinate **Electrical Work**.
- 4. Assign the **Electrical Work** quote group to the Electrical work cost item.
- 5. From the Quote tab, click **Request for Quote** (RFQ) to open the RFQ register.
- 6. Create an RFQ by selecting the **New** icon on the Actions tab.
- 7. Select Create RFQ from Quote Group Tag(s) and select Electrical Work.
- 8. Click **Ok**.
- 9. Click on the Seller Companies tab and select the following company names:
- Architectural Designs
- HD Engineering Group

- 10. Highlight both companies and select **Publish**.
- 11. Assuming you've already received quotes back from both companies, create a quote from this RFQ for both companies by selecting the companies and selecting **Create Quote**.
- 12. Click **Ok** to close the RFQ record.

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

### 8.5.2 SCOPE ITEM CREATION AND AWARD

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

#### STEP BY STEP – MANAGE AND AWARD SCOPE ITEMS

- 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.

# 8.6 QUOTE ITEM ADJUSTMENT

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

#### STEP BY STEP - QUOTE ITEM ADJUSTMENT

From the Ribbon, select the **Quote** tab.

- 1. Under the Quote Comparison and Award section, select **Resources**.
- 2. Locate a Vendor column.
- 3. Select the quote you want to edit under the vendor column. In the Ribbon, select the **Actions** tab.
- 4. Under the Quotes section, select **Edit Quote**. You can also right-click and select **Edit Quote**. This launches the Quote Record.
- 5. You can make Condition Adjustments by a percentage or an amount. Select the field to adjust the percentage or amount of the **Condition Adjustments**.
- 6. Items adjustments can be applied individually or by using the multi-edit function. Select multiple resources in the Quote Record, then right-click and select **Open**. This opens the Quote Resource Item Record.
- 7. If you populate a 10% discount adjustment to all of the items selected using the multi-edit tool, the amount value changes to "Varies". This is because of the variance in the unit rates for each selected item.
- 8. Click **Ok** to save the changes to the line items in the Quote record and to save the Quote.

#### **LESSON 8 REVIEW**

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

#### **LESSON 8 SUMMARY**

As a result of this lesson, you can:

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

This page intentionally left blank.



# LESSON 9 – FINALIZE THE ESTIMATE

This lesson is primarily suited towards contractors who must add profit or markup to their total estimated cost, which will be submitted in the form of a bid or proposal. Most owners can divert from this lesson as it's more geared towards adding profit and markup. There are a few use cases in which an owner may wish to use the price breakdown structure. For example: to add risk, contingency, or reserves if it is preferred, these are not shown directly in the budget line items. The price breakdown structure also provides a summary level review of the total estimate and is a great reference during estimate reviews.

# **LESSON DURATION: 45 MINUTES**

# LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Add job markup (profit)
- Use tools on the PBS form to review your estimate
- Spread Target Price over pay items
- Make bid adjustments

#### **LESSON TOPICS**

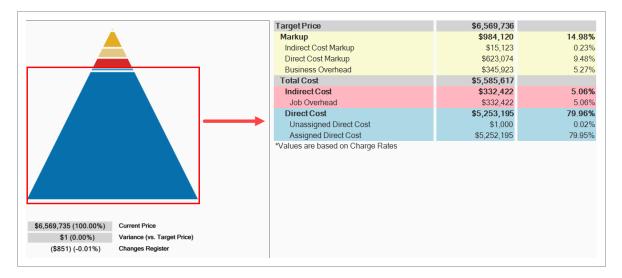
# 9.1 JOB MARKUP (PROFIT)

On the Data Map <sup>A Data Map</sup> notice how the different segments within the pyramid coincide with the percentage amounts that make up Direct Costs, Indirect Costs and Target Profit. Illustrations below show how the Data Map values correspond to the values that make up the cost and profit.

To open the Data Map, select the Price tab, then Data Map from the Overhead and Profit section.

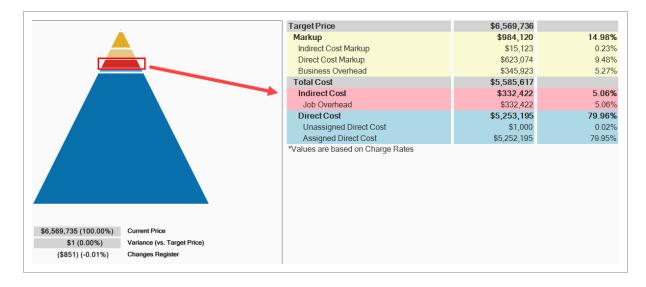
# 9.1.1 TARGET PRICE

For contractors building the price of your project is like building a pyramid. The foundation of your price consists of the direct costs of the job.



The images below represent a default examples.

On top of your direct costs, you can decide if costs with a cost segment of business overhead should be indirect costs or markup. You estimate your direct and indirect costs in the CBS Register.



At the top of the pyramid you add an amount for profit. You add profit in the Price Breakdown Structure (PBS) form. There is a very small block at the top of the Data Map, which comprises 0.22% of Indirect Cost Markup.

	Target Price	\$6,569,736	
	Markup	\$984,120	14.98%
	Indirect Cost Markup	\$15,123	0.23%
	Direct Cost Markup	\$623,074	9.48%
	Business Overhead	\$345,923	5.27%
	Total Cost	\$5,585,617	
	Indirect Cost	\$332,422	5.06%
	Job Overhead	\$332,422	5.06%
	Direct Cost	\$5,253,195	79.96%
	Unassigned Direct Cost	\$1,000	0.02%
	Assigned Direct Cost	\$5,252,195	79.95%
	*Values are based on Charge Rates		
Current Price			
ent Price ance (vs. Target Price)			

The total of the direct cost, indirect cost, and profit in the project is referred to in InEight Estimate as the Target Price. This is the final price that you want to submit as your proposal.

<u> </u>		Target Price	\$6,569,736	
		Markup	\$984,120	14.989
		Indirect Cost Markup	\$15,123	0.239
		Direct Cost Markup	\$623,074	9.489
		Business Overhead	\$345,923	5.279
		Total Cost	\$5,585,617	
		Indirect Cost	\$332,422	5.069
		Job Overhead	\$332,422	5.069
		Direct Cost	\$5,253,195	79.969
		Unassigned Direct Cost	\$1,000	0.029
		Assigned Direct Cost	\$5,252,195	79.959
		*Values are based on Charge Rates		
\$6,569,735 (100.00%)	Current Price			
\$1 (0.00%)	Variance (vs. Target Price)			
(\$851) (-0.01%)	Changes Register			
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,				

# 9.1.2 PRICE BREAKDOWN STRUCTURE

As you already practiced, your direct and indirect costs are estimated in the CBS. Your project's profit needs to be defined in the Price Breakdown Structure (PBS) form.

The main purpose of the Price Breakdown Structure (PBS) is to add markup (profit) to the estimate. The Price Breakdown Structure is a visual run-down of the costs and profit that make up your Target Price. It helps you analyze how your costs contribute to the price you are targeting, including the amount of profit you would like to include.

You can open the PBS from the InEight Estimate landing page by selecting the **Price** tab, then **Price Breakdown Structure (PBS)** from the Overhead and Profit section.

	Name	Definition
1	PBS Description	<ul> <li>The left side of the screen displays several cost classifications:</li> <li>Target Profit</li> <li>Business Overhead</li> <li>Job Overhead</li> <li>Direct Cost</li> </ul>
2	Various Columns	The Assigned and Unassigned columns show which costs are either assigned or not assigned to pay items. Unassigned costs are spread back to pay items based on the distribution logic set in Job Properties > Pricing. The Total columns represents a summation of both columns. Each layer displays with an amount, and the percentage of the Target

#### **Overview - Price Breakdown Structure**

#### Overview - Price Breakdown Structure (continued)

	Name	Definition
		Price that this amount represents.
3	PBS Menu	The right side of the screen holds several tabbed pages of information. This information is useful in analyzing the job at a summary level.
4	Refresh Data	To ensure that you are always reviewing the most up-to-date factors and ratios, click the Refresh Summary Data button whenever you are reviewing the data.

escription	Assigned	Unassigned	Total	% of Target	Markup Analysis	Price Status	Cost Source	Resource Utilization	Minority Goals	Subcontract Status	Vendor Status	0	
Price Breakdown Structure													
🗸 🔺 Target Price	\$5,252,19	\$1,317,54	\$6,569,73	100.00	Markup Analysi	s (based on B	id Quantities a	nd Charge Rate Mar	kup)				
🗸 🛕 Markup	\$0.00	\$984,119.62	\$984,119.62	14.98									
🗸 🛕 Target Profit		\$638,196.32	\$638,196.32	9.71	Markup as % of	All Costs (Ta	rget Price - Mari	(aut		17.62			
🛕 Indirect Cost Markup		\$15,122.66	\$15,122.66	0.23			-						
🛕 Direct Cost Markup		\$623,073.66	\$623,073.66	9.48	Markup as % of	All LaborCos	ts			122.70			
🗸 📥 Business Overhead	\$0.00	\$345,923.30	\$345,923.30	5.27	Markup as % of	All Direct Lab	or Costs			142.11			
Price % Add-On	\$0.00	\$295,638.13	\$295,638.13	4.50									
Job Financing	\$0.00	\$33,105.26	\$33,105.26	0.50	Markup as % of	All Indirect La	ibor Costs			898.32			
Indirect Cost Escala	\$0.00	\$2,131.11	\$2,131.11	0.03	Markup as % of	All Owned Eq	uipment and Re	nted Equipment Costs		101.26			
Direct Cost Escalation	\$0.00	\$15,048.80	\$15,048.80	0.23	Markup as % of	All OF Owner	chip and PE Per	tal Costa		239.23			
Business Overhead	\$0.00	\$0.00	\$0.00	0.00	Markup as % or	All OE Owner	snip and KE Ker	Lai Costs		239.23			
🗸 🛕 Total Cost	\$5,252,19	\$333,421.97	\$5,585,61	85.02	Markup as % of	All OE Operat	ion and REOpe	ration Costs		177.02			
🗸 📥 Indirect Cost	\$0.00	\$332,421.97	\$332,421.97	5.06	Markup as % of	All Materials (	Costs			28.61			
🗸 📥 Job Overhead	\$0.00	\$332,421.97	\$332,421.97	5.06									
Prime Bond	\$0.00	\$47,148.68	\$47,148.68	0.72	Markup as % of	All Supplies C	Costs			3571.02			
Indirect Cost A	\$0.00	\$5,888.67	\$5,888.67	0.09	Markup as % of	All Subcontra	ct Costs			900.51			
Direct Cost Add	\$0.00	\$104,088.34	\$104,088.34	1.58									
Job Overhead I	\$0.00	\$175,296.28	\$175,296.28	2.67	Markup per Manh	our				\$36.80			
V 🔺 Direct Cost	\$5,252,19	\$1,000.00	\$5,253,19	79.96	Markup per Equip	ment hour				\$61.84			
Direct Cost Items	\$5,252,19	\$1,000.00	\$5,253,19	79.96									
													Ø

All costs in the Price Breakdown Structure are based on pay quantities (not forecast takeoff quantities).

# 9.1.3 MARKUP VS. MARGIN

Let's look at the difference between Markup and Margin.

- Markup is a function of cost, while margin is a function of price
- Markup indicates how much you are marking up the cost
- Margin indicates what percentage of your price the markup represents

The percentages on the main PBS screen are margin, so you can see what percentage each category in the PBS represents compared to the total price. If you enter 10% in the Target Profit field, your profit will be 10% margin of your total price.

TIP

Description	Assigned	Unassigned	Total	% of Target
✓ ▲ Price Breakdown Structure				
✓ 🔺 Target Price	\$5,252,19	\$1,317,54	\$6,569,73	100.00
🗸 🔺 Markup	\$0.00	\$984,119.62	\$984,119.62	14.98
> 🛕 Target Profit		\$638,196.32	\$638,196.32	9.71
> 📥 Business Overhead	\$0.00	\$345,923.30	\$345,923.30	5.27
V 🛕 Total Cost	\$5,252,19	\$333,421.97	\$5,585,61	85.02

When you open the Direct or Indirect Markup Records, the Rate percentage there indicates markup of the cost. If you enter 10% markup on \$100, the markup will be \$10.

Within Job Properties, you can choose if costs with a cost segment of business overhead should be indirect costs or markup. If selecting markup, then Business Overhead will be spread within the Markup category of the Price Breakdown Structure. The Total Markup will be the sum of Target Profit and all Items categorized as Business Overhead.

Data Map	Job	Properties O						
Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Pricing
Calculate		a Pay Item Prices u	;ing:					
Indiv	te Unassign Idual Catego evel Catego		mount by:					
() Total	Cost/Billing	amount						
Using	Pay Item by Weighted I		its					
Categor O Indire Marke	ect Cost	: Overhead as:						

This lets you see the true total cost of the job, including the total markup inclusive of the business overhead. You can also create cost items and categorize them as business overhead, then possibly include overhead costs such as estimating or home office expenses. This provides you with added flexibility in marking up your job.

# 9.1.4 DEFINE PROFIT

Before you define profit, review the PBS. You estimated your direct cost items, and you also estimated some indirect cost items in the CBS. You can view your direct and indirect cost totals on the Price Breakdown Structure. Notice you have not defined profit yet.

Description		Assigned	Unassigned	Total	% of Target
🖌 🔺 Price Br	eakdown Structure				
🗸 🔺 Targ	get Price	\$5,252,19	\$645,755.99	\$5,897,950.68	100.00
✓ ▲	Markup	\$0.00	\$315,692.95	\$315,692.95	5.35
× ]	Target Profit		\$0.00	\$0.00	0.00
	💧 Indirect Cost Markup		\$0.00	\$0.00	0.00
	🛕 Direct Cost Markup		\$0.00	\$0.00	0.00
¥ ]	Business Overhead	\$0.00	\$315,692.95	\$315,692.95	5.3
	Price % Add-On	\$0.00	\$265,407.78	\$265,407.78	4.5
	Job Financing	\$0.00	\$33,105.26	\$33,105.26	0.5
	Indirect Cost Escala	\$0.00	\$2,131.11	\$2,131.11	0.0
	Direct Cost Escalation	\$0.00	\$15,048.80	\$15,048.80	0.2
	Business Overhead	\$0.00	\$0.00	\$0.00	0.0
✓ ▲	Total Cost	\$5,252,19	\$330,063.05	\$5,582,257.73	94.6
× .	Indirect Cost	\$0.00	\$329,063.05	\$329,063.05	5.5
,	🖌 📥 Job Overhead	\$0.00	\$329,063.05	\$329,063.05	5.5
	Prime Bond	\$0.00	\$43,789.75	\$43,789.75	0.7
	Indirect Cost A	\$0.00	\$5,888.67	\$5,888.67	0.1
	Direct Cost Add	\$0.00	\$104,088.34	\$104,088.34	1.7
	Job Overhead I	\$0.00	\$175,296.28	\$175,296.28	2.9
× 4	Direct Cost	\$5,252,19	\$1,000.00	\$5,253,194.68	89.0
	Direct Cost Items	\$5,252,19	\$1,000.00	\$5,253,194.68	89.0

You can define profit by entering a profit percentage directly on the PBS, or by modifying the Direct or Indirect Cost Markup Records.

The following steps walk you through plugging a Target Profit percentage directly on the PBS form.

#### 9.1.4.1 PROFIT AS A PERCENTAGE OF TARGET PRICE

#### 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.

#### 9.1.4.2 PROFIT THROUGH DIRECT COST MARKUP RECORD

The following steps walk you through how to add profit as markup on the Direct Cost Markup record.

#### 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.

escription	Dependency	Allocation			_ (	Cost	Breakdown				×
rag columns h	ere to group	Saved	views: Previo	us View 🔹	0	lost (	Category	Subject Cost	Rate		Cost
Descriptio	n		Currency	Total Cost (Forecast)	â.	T	otal	\$102,786	12.73		\$13,081.82
Direct Cos	at Markup		U.S. Dollar	\$13,081.82		>	Labor	\$57,792.70	15.00		\$8,668.91
					Π.	->	Owned Equipment	\$41,455.92	10.00		\$4,145.59
·					4	>	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 Category1	\$0.00	0.00	-	\$0.00
							Undefined	\$0.00	0.00	-4	\$0.00

# 9.2 COST ESTIMATE AUDIT/REVIEW

InEight Estimate offers built-in reports to double check your estimate and review different aspects of your project, including material costs, quotes, man-hours and production.

# 9.2.1 PRICE BREAKDOWN STRUCTURE TABS

The purpose of the tabs on the Price Breakdown Structure is to assist with estimate reviews.

		Markup Analysis	Price Status	Cost Source	Resource Utilization	Minority Goals	Subcontract Status	Vendor Status
--	--	-----------------	--------------	-------------	----------------------	----------------	--------------------	---------------

#### 9.2.1.1 MARKUP ANALYSIS

On this tab, you can compare your profit to your costs for labor, subcontract and other cost groupings. By seeing the ratios of your markup compared to your different cost categories, you can gauge if you have the right balance of costs in your estimate.

Markup Analysis	s (based on Bid quantities)	
Markup as % of	All Costs (Target Price - Target Profit)	11.11
Markup as % of	All LaborCosts	79.42
Markup as % of	All Direct Labor Costs	94.07
Markup as % of	All Indirect Labor Costs	510.05

For example, if your markup is more than 100% of your Labor cost, it may indicate that you don't have enough labor cost in your estimate to cover the work, which could indicate labor cost overruns during execution that would eat into your profit margin.

#### 9.2.1.2 COST SOURCE

The Cost Source tab shows the breakdown of Detail, Plug and Quote cost sources, as well as the amounts and percentages of each that are attributable to Direct and Indirect cost. Your Plug cost source should be the lowest percentage.

Markup Analysis	Price Sta	atus Cost Source	Resou	rce Utilization	Minority G	Goals	Subcontract Stat	us	Vendor Status	
Cost Source	Analysis (	based on Bid quant	ities)							
	[	Detail		Plug	*		Quote		Total	
		Amount	%	Amo	ount %	5	Amount	%	Amount	%
D	irect Cost	\$5,156,491.67	97.95	\$64,60	0.00 1.	.23	\$43,200.00	0.82	\$5,264,291.67	100.00
Ind	irect Cost	\$638,694.52	98.62	\$5,33	8.76 0.	.82	\$3,570.19	0.55	\$647,603.4	5 100.00
	Total	\$5,795,186.19	98.03	\$69,93	8.76 1	.18	\$46,770.19	0.79	\$5,911,895.14	100.0

\* Includes values entered as flat amounts (not percentages) on dependent cost items.

#### 9.2.1.3 RESOURCE UTILIZATION

The Resource Utilization tab shows a breakdown of the man-hours and equipment hours utilized on the job, based on take-off quantities.

Markup Analysis	Price Status	Cost Source	Resource Utilization					
Resource Uti quantities)	lization Analys	is (based on T	/0					
Total Manhours 26,838.86								
Total Equipmen	it Hours	15,961.51						
Total Shift Hou	rs	5,508.23						
Total Days *		682.70						
Total Schedule	Days	1	68.00					
* shift hours (	divided by (hou	rs per shift times	s shift per day)					

#### 9.2.1.4 SUBCONTRACT STATUS

The Subcontract Status tab displays a breakdown of subcontractor amounts, costs, and percentages for quoted cost items. This is a good place to review how much of your estimate is subcontracted.

#### 9.2.1.5 VENDOR STATUS

The Vendor Status tab displays a breakdown of vendor information, including amounts and percentages of the Target Price represented by vendors. This is a good place to review how much of

your estimate costs come from vendor quotes.

1arkup Analysis	Price Status	Cost Source	Resource Utilization	Minority Goals	Subcontract Sta	atus Vendor Status		
Vendor Anal	ysis (based on	Bid quantities	)					
Number of Ven	dors	2						
Total Vendor A	mount	\$1,442,571.90						
% of Target Pri	ice	21.96						
Company Name		Contact	Phone	2	Amount	Currency	Percent	Street Address
Example Vendor	4 DBE	Slim, Leste	r 111-1	22-1321	\$271,471.20	U.S. Dollar	4.13	400 Fourth Street
Example Vendor	•	Roberts, P	st 111-1	23-2134	\$1,171,100.70	U.S. Dollar	17.93	100 Tenth Street

# 9.3 SPREAD TARGET PRICE OVER PAY ITEMS

In the Cost Breakdown Structure you generated your direct and indirect costs, and in the Price Breakdown Structure you added profit to come up with a Target Price for the bid, but you still haven't decided how to spread the Target Price over your pay items.

In Lesson 4 you created pay items for the project in the Pay Item & Proposal Register. You can now go back to the Pay Item & Proposal Register to distribute your Target Price over those pay items.

### 9.3.1 CURRENT PRICE VS. TARGET PRICE

In InEight Estimate, Current Price means the total price that is currently assigned on your pay items. Open the Pay Item & Proposal Register to see what the Current Price is for your pay items (Price > Pay Item & Proposal).

At this point there is no pricing on your pay items, so your Current Price is \$0.00. This is because you have not yet spread your Target Price (the total of your cost and profit) over your pay items.

Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Meas	Unit Price 📻 (cu	Total Price (current)
+ Mobiliation	1.00	1.00	Each	\$0.00	\$0.00
+ Clearing and Grubbing	10.00	15.00	Acre	\$0.00	\$0.00
+ Excavation	50,000.00	40,000.00	CY	\$0.00	\$0.00
+ 10 " PVC Pipe	1,000.00	1,000.00	LF	\$0.00	\$0.00

## 9.3.2 PROPOSAL RECAP

On the Pay Item & Proposal Register, there is a Proposal Recap table where you can compare your Current Price to your Target Price to see if there is any variance.

					-
	Current	Target	Forecast	Variance	
Price:	\$6,455,450.00	\$6,506,904.35	\$6,462,850.00	\$51,454.35	AD
Profit:	\$599,221.88	\$650,676.22	\$655,858.61	\$5,182.39	ເຫ
Margin%:	9.28	10.00	10.15	\$10,653.01	ໄດບາ

Ideally, you want to add pricing to your pay items until your Current Price equals your Target Price, so that your Variance equals zero. That way you know you are covering all your costs and getting the profit you want.

Notice the Variance column will indicate if you need to ADD or CUT pricing on your pay items to hit your Target Price.

# 9.3.3 SPREAD THE TARGET PRICE

For lump sum contracts, spreading the Target Price may be as simple as spreading it to a single pay item that represents the entire project. However, most jobs will have at least a few pay items defined by the owner, and Unit Price contracts will have many pay items.

There are two main ways to distribute pricing onto your pay items:

- 1. Define pay item prices manually, by entering a unit or total price, or a margin percentage.
- 2. Use InEight Estimate's AutoPrice feature to distribute pricing automatically.

## 9.3.4 DEFINE PRICING FOR PAY ITEMS MANUALLY

First, you will walk through the process of defining pricing manually. This method requires filling in each item's price based solely on your own judgment.

#### 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
<b>1</b>	200	SITEWORK & ROADWAY					\$51,369.60	
+ 1.1	641 0 100	Mobilization	1.00	1.00	LS	\$20,000.00	\$20,000.00	-34.67
+ 1.2	201 0 102	Clearing & Grubbing	10.00	15.00	Acre	\$3,136.96	\$31,369.60	5.00

# 9.3.5 USE AUTOPRICE TO BALANCE AND HIT THE TARGET TOTAL

Perhaps you want to get a head start and have InEight Estimate spread your Target Price proportionately over your pay items for you. This can be done using the InEight Estimate AutoPrice feature.

TIP Once distributed, you will still have the ability to adjust your pricing on pay items manually as needed.

Look at how you can use the AutoPrice feature.

# 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.

# 9.3.6 USE AUTOPRICE TO UNBALANCE AND HIT THE TARGET TOTAL

The Autoprice to Unbalance feature in InEight Estimate can automatically distribute profit to account for your over- and underrun items.

InEight Estimate will take profit from your underrun and put it on your overrun by using the Actions > Unbalanced > Hit Target Total feature. The purpose is to maximize your profit by spreading it strategically between these items.

#### STEP BY STEP – UNBALANCE HIT TARGET TOTAL

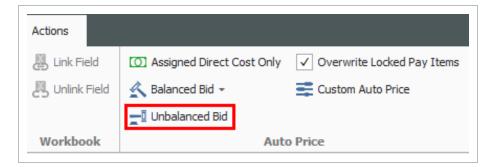
1. You may encounter overrun and/or underrun items in the Pay Item & Proposal Register of your job.

Description 📻 <b>Y</b>	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.

	em Recap - 2000 Clearin	ig aa arubbilig			em Recap - 3000 Excava	uon	
		Balanced Unit	Current Unit			Balanced Unit	Current Unit
Δ	Price:	\$4,985.70	\$4,994.91		Price:	\$2.86	\$2.86
١	Profit:	\$515.91	\$525.12		Profit:	\$0.29	\$0.29
	Total Cost:	\$4,469.79	\$4,469.79		Total Cost:	\$2.57	\$2.57
	Business Overhead:	\$245.35		<b></b>	Business Overhead:	\$0.15	
1	Job Overhead:	\$1,681.60		1	Job Overhead:	\$0.91	
A.	Unassigned Direct Cost:	\$0.00		-	Unassigned Direct Cost:	\$0.00	
A,	Assigned Direct Cost:	\$2,542.84			Assigned Direct Cost:	\$1.52	]

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



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

Unit I (curr		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

It	em Recap - 2000 Clearin	ig && Grubbing			em Recap - 3000 Excava		
		Balanced Unit	Current Unit			Balanced Unit	Current Unit
	Price:	\$4,985.70	\$11,706.11		Price:	\$2.86	\$1.52
	Profit:	\$515.91	\$7,236.32		Profit:	\$0.29	(\$1.05)
	Total Cost:	\$4,469.79	\$4,469.79		Total Cost:	\$2.57	\$2.57
۸	Business Overhead:	\$245.35		<b></b>	Business Overhead:	\$0.15	
۸	Job Overhead:	\$1,681.60		<b></b>	Job Overhead:	\$0.91	
A	Unassigned Direct Cost:	\$0.00		-	Unassigned Direct Cost:	\$0.00	
A	Assigned Direct Cost:	\$2,542.84	1		Assigned Direct Cost:	\$1.52	

profit from Excavation was put onto Clearing & Grubbing.

# 9.4 SELECTIVE PAY ITEM MARKUP

Estimate has a streamlined process to estimate the cost of a project and price the work to ensure all unassigned costs and markup are included in the final price of the project. For markup to be spread to pay items, a weighted distribution method is used as determined in the Job Properties, Pricing tab. It might be desirable for markup percentages to not be distributed, but rather directly applied to the costs assigned to any particular pay item.

This option can be set to keep markup with assigned costs for establishing a pay item price.

Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Pricing
Balanced	Price Options	;				_
Calculat	e Balanced F	Pay Item Prices u	sing:			
Cost	Amount					
⊖ Billin	g Amount					
Distribu	te Unassign	ed Cost/Billing A	mount by:			
Indiv	idual Catego	ories				
	evel Categor	ies				
O Total	Cost/Billing	amount				
-Markup O	ptions					
Markup	Pay Item by	:				
O Using	g Weighted [	Distribution				
🔿 Кеер	ing Markup v	vith Assigned Co	sts			
Categor	ize Business	Overhead as:	_			
	ect Cost					
Mark	up					
Calculat	e Proposal R	ecap Forecast M	arkup using:			
Unit I	Markup (curr	ent) x Forecast (	T/O) Quantity			
0.5	ant Drive T	otal Cost/Billing				

Additionally, this option can be used to isolate the markup and apply it only to specific pay items. The following is an example of a dependent cost item being used to mark up the labor of select site work pay items by 25%.

8	Print	🕀 New	Сору	🎨 Toggle Suspended	- Link Field	- 🗐 In	isert	O Assigned C	ost Only 📃 C	Verwrite Locked	Pay Items	🏒 🛛 📅 Def	ault Data Blocks		🛗 Bid Wizard		
÷,	Preview	🛞 Delete	Paste	Lock Quantities	週 Unlink Field	1 in	sert Subordinate	🔨 Balanced Bi	d - 🚍 C	Custom Auto Price		🔨 🔩 Con	pare Alternate Scenario		🌙 Reset Round	ing Precision	
e	Export to Excel	}< Out	+ Fill Down	✓ Lock Prices				- Unbalanced	Bid			pand / lapse =		Configure Pric Categories	te Import DOT P	Pay Item File	
	Print		Edi	t	Workbook		Insert		Auto Pr	ice		· · · · · · · · · · · · · · · · · · ·	liew		Tools		
Pa	y Item & Propo	osal Register	0														
Dep	a columns here to																
Dra	g columns here to	o group															
	Pay Item Number	Lock Quantity	Lock Price	Description	Pay Quant	tity	Forecast (T/O) Quantity	Unit of Measure	Currency	LABOR Cost	LABOR Cost Distribution	LABOR Markup	LABOR Marleup 9/	LABOR Price (balanced)	LABOR Price (current)	Unit Price (current)	Total Price (current)
$\rightarrow$	+ 1			EARTHWORK AND UTIL	LITIES	1.00	1.00	Lump Sum	U.S. Dollar	\$62,401.68	\$0.0	\$15,600.42	25.00	\$78,002.09	\$72,664.97	\$170,700.00	\$170,700.00
	+ 2			AC PAVING		1.00	1.00	Lump Sum	U.S. Dollar	\$29,711.17	\$0.0	0 \$7,427.79	25.00	\$37,138.96	\$34,430.26	\$97,253.00	\$97,253.00
	+ 3			PAVMENT MARKINGS		1.00	1.00	Lump Sum	U.S. Dollar	\$14,545.57	\$0.0	\$3,636.39	25.00	\$18,181.96	\$16,940.94	\$44,200.00	\$44,200.00
	+ 4			SITE CONCRETE		1.00	1.00	Lump Sum	U.S. Dollar	\$0.00	\$0.0	00 \$0.00	0.00	\$0.00	\$0.00	\$216,300.00	\$216,300.00
	+ 5			FENCING		1.00	1.00	Lump Sum	U.S. Dollar	\$7,163.88	\$0.0	\$1,790.97	25.00	\$8,954.84	\$8,099.23	\$42,300.00	\$42,300.00
	+ 6			LANDSCAPING		1.00	1.00	Lump Sum	U.S. Dollar	\$0.00	\$0.0	00 \$0.00	0.00	\$0.00	\$0.00	\$39,900.00	\$39,900.00
	+ 7			PILES AND PIERS		1.00	1.00	Lump Sum	U.S. Dollar	\$0.00	\$0.0	00 \$0.00	0.00	\$0.00	\$0.00	\$1,625,000.00	\$1,625,000.00

#### EXERCISE 9.1 – MANUALLY PRICE PAY ITEMS

To finalize your bid proposal, you will apply final pricing (costs and profit) to your pay items either manually or using the AutoPrice tool. In this exercise, you will practice entering prices manually for your pay items. Complete the following steps, using your job.

- 1. Continue manually pricing items in the Pay Item & Proposal Register.
- 2. Type **2.75** in the Unit Price (current) column for pay item Excavation.
- 3. Type **2** in the % Margin field for pay item 4000 10" PVC Pipe.
- 4. Check your variance to see if you need to add or cut your current pricing to hit your Target Price.

#### You should end up with similar results

Pay Item Number	Row Nu ≞	Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Meas	Unit Price (current)	Total Price (current)	% Margin
+ 1000	1	Mobilization	1.00	1.00	Lump Sum	\$20,000.00	\$20,000.00	-40.04
+ 2000	2	Clearing & Grubbing	10.00	15.00	Acre	\$4,705.04	\$47,050.40	5.00
+ 3000	3	Excavation	50,000.00	40,000.00	CY	\$2.75	\$137,500.00	6.44
+ 4000	4	10" PVC Pipe	1,000.00	1,000.00	LF	\$22.00	\$22,000.00	1.99

#### Congratulations, you have completed this exercise!

# 9.5 BID ADJUSTMENTS

Often you will want to continue adjusting certain pay items and then rebalance to hit the target total.

## 9.5.1 LOCK PRICE

You can lock down a pay item price and it will not factor in future rebalancing.

#### STEP BY STEP – LOCK PRICE

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

Pay Item Number	Description 📻 <b>T</b>	Lock Price	Pay Quantity	Forecast (T/O) Quantity
+ 202 0183	Unclassified Excavation		50,000.00	50,000.00
+ 641 0 100	Mobilization	$\checkmark$	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.

Co	st	Breakdown				
Cos	st C	ategory	Subject Cost	Rate		Cost
-	То	tal	\$130,759.83	-0.76		(\$1,000.00)
	>	Labor	\$58,969.83	0.00		\$0.00
	>	Owned Equipment	\$68,251.92	0.00		\$0.0
	>	Rented Equipment	\$0.00	0.00		\$0.0
	>	Supplies	\$0.00	0.00		\$0.0
	>	Materials	\$3,276.00	-30		(\$1,000.00
	>	Subcontract	\$0.00	0.00		\$0.0
	>	Fees	\$262.08	0.00		\$0.0
	>	Allowance	\$0.00	0.00		\$0.00
		Custom Category 1	\$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.

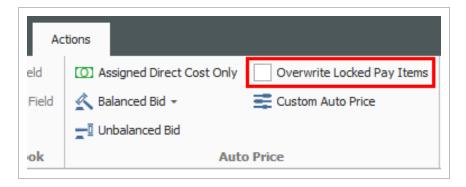
<u>D</u> es	scription	Dependenc <u>v</u>	Cost Categorization	Allocation		
Drag	g columns ł	nere to group				
	Descripti	on	1	Curre	Total Cost (Forecast)	Ac Co
	Small Too	ols		U.S. Dollar	\$5,896.98	
	Safety &	Training		U.S. Dollar	\$2,948.49	
÷	Cut			U.S. Dollar	(\$1,000.00)	
*						

- 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.

B	Au	ito Price Warnin	g	-	×
Variance due to	o rounding precision -				
across the unl	npted to hit your Tar ocked pay items in a to the items' roundir	ccordance with y	our selected p	oricing meth	
	Ini	tial rounding vari	iance:	(	\$84.43)
	l amount still remain ting to spread the in proportionately in	iitial rounding var	riance		(\$0.03)
Turn off th	is warning about rou	unding variances	for ALL JOBS		
	ninimize variances d the unlocked items,				
		Undo Aut	oPricing	Close	e

- Note on the proposal recap that a variance may still exists 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



## 9.5.2 SUSPEND PAY ITEMS

Like suspending cost items in the CBS Register, you can suspend pay items in the Pay Item & Proposal Register. Suspending a pay item causes it to no longer contribute quantities and pricing to the estimate.

This can be helpful when considering alternate items on a bid submission. Should the client decide to not require a pay item, you can suspend it, causing the pay item and any of its assigned cost items to no longer contribute any cost or price. It will no longer show up on your bid and no longer contribute to the overall total price.

You can suspend/unsuspend pay items in one of three ways:

	000 0000		U	00	בדנוטוריים טומיונץ פרויפו (פטתס	<i>.</i> ,	3,000.00	3,000.00	
•	+ 800 0400		9	90	4 Foot Diameter Manhole	51	Open	16.00	Eac
-	+ 501(A) 1306		10	100	Structural Excavation & Backfill		New	:00.00	Cubi
-	+ 506(A) 1322		11	110	Steel Reinforcement		Delete	00.00	Pour
-	+ 503(A) 1313		12	120	Retaining Wall			:50.00	Cubi
•	+ 600 0300		13	130	Paint Existing Steel Bridge St		Cut	1.00	Lun
-	+ 700		14	140	Process Equipment	5	Cop <u>v</u>	1.00	Each
-	+ 1000		15	150	Removal of Underground Storage	т	Paste	2.0	Each
-	+ 1010		16	160	Disposal of Contaminated So	il +	<u>Fill Down</u>	00.00	Cub
-	+ 1200 0100		17	170	Toll Booth	8	Link this field to Excel	1.00	Eac
-	+ 1500 0100		18	180	Guardrail Type 2	×.	UnLink from Excel	00.00	Line
-	+ 1500 0200		19	190	Guardrail Type 3A	2	Toggle Suspended	:00.00	Line
-	+ 1600 0230		20	200	Type 4 Signs		1,000.00	1,000.00	Squ
-	+ CO 1		21	21	Realignment of Water Line		1.00	1.00	Fad

• Right click on the pay item and select Toggle Suspended

• Select the pay item and click Toggle Suspended under the Edit section of the Actions Tab

File Setu	up Es	timate	Q					n					
Print		Open	*	Cut	+ Fill Down		Lock Pi	rices	🛃 Link Field	O Assign	ed Direct Cost (	Only Overwrite	e Locked
o Preview		New	e	Сору	Toggle Suspe	ended			A Unlink Field	\land Balanc	ed Bid 👻	Custom A	uto Price
Export to	Excel	Delete	_	Paste	Lock Quantiti	ies			00	- Unbala	inced Bid		
Print		June		, aste	Edit				Workbook			Auto Price	
Pay Item &	Proposal	Register	0										
Proposal R	ecap - Tra	aining Job	)										
		Current		Target	Foreca	ast	Variance	1					
Price:	\$6,455,	450.00	\$6,	514,915.53	\$6,462,850	.00	\$59,465.53	ADD					
Profit:	\$592	2,026.02	\$	651,491.55	\$658,609	.04	\$7,117.49	сит					
Margin%:		9.17		10.00	10	.19	\$13,693.38	СUТ					
Pay Item	-	up Lock		L	Row _	Line	Des	CUT			Pay	Forecast (T/O)	
rag columns	-	up			2		Des	]			Pay Qua		
rag columns Pay Iten Number + 641 (	n 0100	up Lock		L	Row =1	Line Nu 10	Des	cription	1		Qua 1.00	(T/O) Quantity 1.00	Meas.
Pay Item Number + 6410 + 2010	n 0100 0102	up Lock		L	Row = 1 Nu = 1 2	Line Nu 10 20	Des Mob	cription ilization aring &	n Grubbing		Qua 1.00 10.00	(T/O) Quantity 1.00 10.00	Meas. Lump Acre
rag columns Pay Iten Number + 641 ( + 201 ( + 202 (	n 0100 0102 0183	up Lock		L	Row = 1 Nu = 1 2 3	Line Nu 10 20 30	. Des Mob Clea	cription ilization aring & lassified	n Grubbing d Excavation		Qua 1.00 10.00 50,000.00	(T/O) Quantity 1.00 10.00 50,000.00	Meas. Lump Acre Ton
Pay Iten Number + 641 ( + 201 ( + 303 )	n 0100 0102 0183 5912	up Lock		L	Row = 1 Nu = 1 2 3 4	Line Nu 10 20 30 40	. Des Mob Clez Und Agg	cription ilization aring & lassified regate	n Grubbing d Excavation Base		Qua 1.00 10.00 50,000.00 40,000.00	(T/O) Quantity 1.00 10.00 50,000.00 45,000.00	Meas. Lump Acre Ton Ton
Pay Iten Number + 641 ( + 201 ( + 202 ( + 303 3 + 303 -	n 0100 0102 0183 5912 4263	up Lock		L	Row 1 Nu 1 2 3 4 5	Line Nu 10 20 30 40 50	. Des Mob Clez Unc Agg	cription ilization aring & lassified regate halt Co	n Grubbing d Excavation Base Increte Hot Mix Typ		Qua 1.00 10.00 50,000.00 40,000.00 38,000.00	(T/O) Quantity 1.00 10.00 50,000.00 45,000.00 35,000.00	Meas. Lump Acre Ton Ton Ton
Pay Iten Number + 641 ( + 201 ( + 202 ( + 303 ) + 303 · + 413 (	0 100 0 102 0 183 5912 4263 (B) 0464	up Lock		L	Row 1 Nu 1 2 3 4 5 6	Line Nu 10 20 30 40 50 60	. Des Mob Clea Und Agg Asp 36	cription ilization aring & lassified regate halt Co Inch R	n Grubbing d Excavation Base Increte Hot Mix Typ CP Culvert Class	ш	Qua 1.00 10.00 50,000.00 40,000.00 38,000.00 <b>1,000.00</b>	(T/O) Quantity 1.000 10.000 50,000.000 45,000.000 35,000.000 1,024.000	Meas. Lump: Acre Ton Ton Ton Linea
Pay Iten Number + 641 ( + 201 ( + 202 ( + 303 3 + 303 -	0100 0102 0183 5912 4263 (B) 0464 0220	up Lock		L	Row 1 Nu 1 2 3 4 5	Line Nu 10 20 30 40 50	. Des Mob Clea Und Agg 36 36	cription ilization aring & lassified regate halt Co Inch R inch PV	n Grubbing d Excavation Base Increte Hot Mix Typ	21)	Qua 1.00 10.00 50,000.00 40,000.00 38,000.00	(T/O) Quantity 1.00 10.00 50,000.00 45,000.00 35,000.00	Ton Ton Ton Linear

• Open the pay item record and checking/unchecking the Suspend box

Pay Item Number:	* 800 0400						Line Number: 90
Description:	4 Foot Diameter	Manhole					Alternate: BASE
							Suspend:
Quantity							
Lock Quantity:	Pay Quantity:	Forecast (T/O) Qty:	Unit of Measure:	Qty Variance:	Qty Variance %:	Qty Variance Group:	
_	16.	16.00	Each -	0.00	0.00	Even Run	

#### **LESSON 9 REVIEW**

- 1. Markup is a function of cost, while margin is a function of \_\_\_\_\_\_.
  - a. billing
  - b. price
  - C. job overhead
  - d. indirect costs
- 2. When adding profit, it must be the same amount for direct and indirect costs.
  - a. True
  - b. False
- 3. What options do you have to enter profit on the PBS?
  - a. % Mark-Up, % Margin, and Fixed Dollar Amount
  - b. % Mark-Up or % Margin
  - C. Fixed Dollar Amount Only
- 4. Once distributed, you still can adjust your pricing on pay items manually as needed.
  - a. True
  - b. False

## LESSON 9 SUMMARY

As a result of this lesson, you can:

- Add job markup (profit)
- Use tools on the PBS form to review your estimate
- Spread Target Price over pay items
- Make bid adjustments