

PROJECT COST MANAGEMENT



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CONTENTS

INTRODUCTION	19
Course Description	19
Course Objectives	19
How to Use this Manual	19
Lessons	19
Lesson Format	20
Call-Outs	20
Ongoing Use	21
1.1 Featured Content	21
1.2 Popular Topics	21
1.3 Quick Links	22
1.4 Frequently asked questions	23
LESSON 1 – ESTIMATING CORE CONCEPTS	27
1.1 Overview of the Estimating Process	28
Step 1 - Enter Project Details	29
Step 2 - Enter Proposal Deliverables	29
Step 3 - Calculate Direct & Indirect Project Cost	30
Step 4 - Add Markup, Contingency, & Fees	31
Step 5 - Distribute Cost + Markup to required Structure	32
1.2 Key Concepts and Terms	33
1.2.1 Job Folder	33
1.2.2 Library	34
1.2.3 Form	34
1.2.4 Cost Item	36
1.2.5 Pay Item	36
1.2.6 Resource	37
1.2.7 Resource Assembly	37

1.2.8 Cost Item Assembly	38
Lesson 1 Review	39
Lesson 1 Summary	39
LESSON 2 – GENERAL NAVIGATION	41
2.1 General Navigation	42
Step by Step – Estimate preferences setup	42
2.1.1 Estimate first time access	
Step by Step – Launch Estimate	
Step by Step – Estimate subsequent use	
2.1.2 Backstage View	
2.1.3 Overview - Backstage View	49
2.1.3.1 Archive / Restore	49
Step by Step – Archive and Restore a Job	49
2.1.3.2 Settings	50
2.1.3.3 Prompt to Save	51
2.1.3.4 Decimal Precision	51
2.1.4 Open a Job Folder	52
Step by Step – Open a Job Folder	52
2.1.5 Common Navigation	53
2.1.6 Help Bubbles	
2.1.7 Data Map	
2.1.8 InEight Estimate Layout	
2.1.9 Overview - Setup Tab	
2.1.10 Overview - Estimate Tab	
2.1.11 Overview - Quote Tab	
2.1.12 Overview - Price Tab	
2.1.13 Overview - System Tab	
2.1.14 Overview - Integrations Tab	
2.1.15 Library	61
2.1.16 Open Forms	61
Step by Step – Open Forms	62
2.2 System Settings Options	64
Step by Step – Decimal Precision	64 67
2.3 Columns	65
2.3.1 Move Columns	66
Step by Step – Move Columns	66
2.3.2 Sort and Filter Columns	68
Step by Step – Sort Columns	68

Step by Step – Filter Columns	68
2.3.2.1 Filter Editor Overview	70
Creating complex filters using the Filter Editor	71
Step by Step – Filter Editor	73
2.3.3 Group Columns	74
Step by Step – Group Columns	74
2.3.4 Saved Views	75
Step by Step – Create a Saved View	76
2.3.5 Subtotal Calculator	77
2.3.6 Register Running Totals	77
2.4 Find Feature	78
Step by Step – Find Feature	79
2.5 Keyboard Shortcuts	80
2.5.1 Navigating in a register	80
2.5.2 Navigating in a record	81
2.5.3 Menu and keystroke commands	82
2.5.4 Function keys in Estimate	82
Lesson 2 Review	83
Lesson 2 Summary	83
LESSON 3 – LIBRARY SETUP	85
3.1 Library Overview	86
3.1.1 Library Tabs	
3.1.1.1 Setup Tab	87
3.1.1.2 Estimate Tab	89
3.1.1.3 System Tab	
External Reports	91
3.1.1.4 Integrations	94
App Logs	94
3.2 Library Job Properties	95
3.3 Library Address Book	96
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	100
3.3.3 Contacts	101
3.3.4 View Vendors and Contacts in InEight Platform	102
3.3.5 Vendor and contact creation	
3.3.6 Merge and Upload Contacts and Vendors into Platform	108

3.3.6.4 Disconnected Contacts and Vendors	. 108
Inactive Contacts and Vendors	109
Step by Step – Merge Estimate Vendors to Platform	111
Step by Step – Upload Estimate Vendors to Platform	112
Step by Step – Merge Contacts to Platform	113
Step by Step – Upload Contacts to Platform	115
Step by Step – Create Vendors and Contacts via Quote Record	117
3.4 Library Job Properties Pricing	125
3.4.1 Job Properties Overview	125
3.4.2 Balanced Price Options	. 125
3.4.2.1 Calculate Balanced Pay Item Prices using Cost Amount:	126
3.4.2.2 Calculate Balanced Pay Item Prices using Billing Amount:	126
3.4.2.3 Distribution of Unassigned Costs/Billing Amount by Individual	
Categories	127
3.4.2.4 Markup Options	129
3.4.2.5 Categorize Business Overhead as Indirect Cost	130
3.4.2.6 Calculate Proposal Recap Forecast Markup	131
3.5 Library Foundation Setup Data	134
3.6 Resources	135
3.6.1 Library Resources Register	136
Overview - Library Resource Rate Register	137
3.6.2 Labor Resources	138
3.6.3 Resource Rate Record	138
Overview - Resource Rate Record	139
Step by Step – Create a Labor Resource	141
3.6.4 Construction Equipment Resources	143
3.6.5 Rented Equipment Resources	143
Step by Step – Create a Rental Equipment Resource	144
3.6.6 Equipment Consumption Rates	144
3.6.7 Non-Hourly Rate Calculator	145
Step by Step – Non-Hourly Rate Calculator	145
3.6.8 Installed Materials, Installed Equipment & Supplies Resources	146
Step by Step – Create an Installed Material Resource	147
3.6.9 Unique Resources	148
3.7 Resource Assemblies	149
3.7.1 Library Resource Assembly Register	149
Overview - Library Resource Assembly Register	149
3.7.2 Resource Assembly Record	
Overview - Resource Assembly Record	150

3.7.2.1 Productivity Rate Indicator in the CBS Register	151
Step by Step – Create a Resource Assembly	151
Exercise 3.1 – Create Resources & Resource Assemblies	153
3.8 Importing Resources	156
3.8.1 Open Resource Rate Register	156
Step by Step – Opening the Labor tab	156
3.8.1.1 Creating A Labor Saved View - Resource Rate Register	
3.8.2 Setting up the excel file	
3.8.2.2 Creating the resource	158
Step by Step – Creating the Resource	158
3.8.2.3 Resource Cost Details	
Step by Step – Resource Cost Detail	161
3.8.3 Filter/Sort/Paste - Resource Cost Details Register	163
Step by Step – Filter Resource Cost Detail Register	163
3.8.4 Manual Set-Up of Scales 2 & 3 - Optional	164
3.8.4.4 Resource Rate Register	165
3.8.4.5 Resource Cost Details Register	165
Step by Step – Manual Setup of Scales	165
3.8.4.6 Non Labor Resource Setup	167
3.8.5 Creating A Materials Saved View - Resource Rate Register	167
3.8.6 Creating A Material Resource	167
Step by Step – Creating the Resource	168
3.8.7 Create A Material Saved View - Resource Cost Details Register	169
Step by Step – Material Saved View	169
3.9 Quantity Checking	171
Step by Step – Quantity Checking	171
3.10 Security in Estimate	173
3.10.1 Role based permissions	173
3.10.2 Security in Estimate	175
3.10.3 Granting permissions to access Jobs and Snapshots	176
3.10.3.1 Organizational Breakdown Structure	179
3.10.4 Granting permissions to destinations and commands	179
3.10.4.2 Access Control Report	185
Step by Step – Access Control Report	186
3.10.5 Granting permissions to the Estimate Library	189
3.10.6 Common roles used when securing an Estimate	191
Lesson 3 Review	193
Lesson 3 Summary	193

LESSON 4 – PROJECT SETUP	
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	
Step by Step – Create a New Job	
4.2 Job Properties	
4.2.1 Overview Tab	
4.2.2 Cover Sheet Tab	
4.2.3 Cost Basis Tab	
4.2.4 Shift Rate Calculator	
Step by Step – Shift Rate Calculator	
4.2.5 Import Filtered Resources	
Step by Step – Import Filtered Resources	
4.2.6 Fuel Cost Tab	
Step by Step – Enter Fuel Costs	
4.2.7 Job Folder Tags Tab	
4.2.8 Schedule Tab	
4.2.9 Other Job Properties Tabs	
Exercise 4.1 – Define Job Properties	
4.3 Pay Item Creation	
4.3.1 Overview - Pay Item & Proposal Register	
Step by Step – Create a Pay Item	
4.3.2 Pay Item Prices by Category	
4.3.3 Standard Proposal report	
Exercise 4.2 – Create Pay Items	
Lesson 4 Review	
Lesson 4 Summary	
LESSON 5 – DIRECT COSTS	
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	232
Option 2	233
5.2.2 Insert Cost Item	233
Option 1	233
Option 2	
Step by Step – Create a subordinate cost item	235
5.2.3 Move Cost Items	
Exercise 5.1 – Create cost items	237
5.3 Costs and Production	238
5.3.1 Cost Item Record	238
5.3.2 Cost Segments	239
5.3.3 Cost Sources	240
5.3.3.1 Plug Tab	241
5.3.3.2 Detail Tab	241
5.3.4 Plug Costs	242
Step by Step – Define a plugged cost	242
5.3.5 Detail Costs	243
Step by Step – Detail costs	244
5.3.5.3 Add Cost Detail	245
Step by Step – Add cost detail	245
5.3.5.4 Add Assembly	246
Step by Step – Define cost detail by adding an assembly	246
Exercise 5.2 – Define cost detail	248
5.4 Cost Item Details	250
5.4.1 Cost Item Setup	250
5.4.1.1 Cost Curves	251
Cash Flow	255
Cash Flow example	258
Period Quantities	
Step by Step – Adjust shift arrangements	263
5.4.2 Notes	264
5.4.3 Man-Hour Factors	265
5.4.4 Unique Identifier	266
5.4.4.2 Highlight Unique (Delta) Toggle	268
5.4.5 Cost Drivers	269
5.4.6 Suspend Cost Items	271
Step by Step – Suspend a Cost Item	271
5.4.6.3 Editable Man-Hour Factors in Suspended Cost Items	272
5.4.6.4 Unsuspend a Cost Item	273

Step by Step – Unsuspend a Cost Item	273
5.4.6.5 Suspend Column	
5.4.7 Adding Cost Adjustments	
Exercise 5.3 – Manage cost item details	
Lesson 5 Review	
Lesson 5 Summary	
LESSON 6 – INDIRECT COSTS	
6.1 Indirect Costs Overview	
6.1.1 Navigation to Indirect Costs	279
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 general expense 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	
6.2.2.5 Direct Cost Add-On	
Step by Step – Define a direct cost add-on	
6.2.2.6 Repositioning Dependent Cost Items	
6.3 User-Defined Indirect Cost Items	
Step by Step – Add user-defined indirect cost items	
6.4 Cost Allocation	
6.4.1 Cost Allocation	
6.4.2 View Filter Excludes Cost Item Allocation Details	
Step by Step – Cost Allocation	
6.4.3 Cost Allocation to By Unit Cost	
Step by Step – Cost Allocation by Unit Cost	
6.5 Dependent Cost Item Allocation	
Step by Step – Dependent Cost Item Allocation	
6.5.1 Turning Off Cost Allocation	
Step by Step – Turning Off Cost Allocation	

6.5.2 Breaking a Cost Allocation Link	312
Step by Step – Breaking a Cost Allocation Link	
6.5.3 Pay Item Assignment for Allocation Distribution in an Unlocked Job	
Exercise 6.1 – Define Indirect Costs	316
Lesson 6 Review	318
Lesson 6 Summary	318
LESSON 8 – QUOTE MANAGEMENT	319
8.1 Quote Management Overview	. 320
8.1.1 Quote Management Workflow	320
8.1.2 Quotes and Quote Groups	320
8.1.2.1 Resource Level Quote Groups	. 321
8.1.2.2 CBS Level Quote Groups	321
8.2 Requests for Quote	. 322
8.2.1 Request for Quote (RFQ) Register Overview	322
8.2.2 Request for Quote (RFQ) Record	
8.2.3 Create an RFQ	324
8.2.3.1 Line Items	. 325
8.2.3.2 Terms & Conditions	. 326
8.2.3.3 Vendor Companies	326
8.2.4 Attachments	. 327
8.2.5 Setup	328
8.2.6 Publish an RFQ	329
Step by Step – Create and publish an RFQ	. 329
8.2.7 RFQ Email Draft	
8.3 Quotes	. 332
8.3.1 Sample Received Quote Scope Sheet	333
8.3.2 Quote Register Overview	334
8.3.3 Quote Record Overview	335
8.3.4 Header Block	336
8.3.4.1 Quote records	
8.3.5 Price Block	
8.3.6 Quote Record Tabs	
8.3.6.2 Resources & Cost Items	337
Cost item tags and user defined fields	
8.3.7 Data Blocks	. 339
8.3.8 Data Block Tabs	
8.3.8.3 Special Terms & Conditions	
8.3.8.4 Qualifications	
8.3.8.5 Packages	. 343

Step by Step – Create a multi-packaged quote	. 345
8.3.8.6 Taxes	350
8.3.8.7 Seller's Profile	351
8.3.8.8 Setup	351
8.3.8.9 Minority	352
8.3.9 Create a Quote from RFQ	353
Step by Step – Create a quote from RFQ	353
8.3.10 Enter Quote Details	354
Step by Step – Enter quote details	354
Step by Step – Create a multi-packaged quote	355
8.3.11 Use Unit Price or Extended Price on Quote Record Item	359
8.3.12 Duplicating an Existing Quote	360
Step by Step – Duplicate an existing quote	360
Exercise 8.1 – Quote Management	. 363
8.4 Quote Comparison & Award	364
8.4.1 Quote Comparison & Award Overview	364
8.4.2 Edit Mode	. 365
8.4.3 Substitute Values	365
8.4.4 Display Ignored Quotes	. 368
8.4.5 Export Quote Comparison and Award to Microsoft Excel	. 370
8.4.6 Additional Quote Comparison and Award functions	. 371
8.4.7 Configure Totals	372
8.4.8 Adding Notes to Quote Comparison & Award	373
Step by Step – Add the Notes section to Quote Comparison & Award	
form	374
8.4.9 All Quote Groups Layout	376
8.4.10 Compare and Award Quotes	377
8.4.10.1 Open Status	379
8.4.10.2 Award Status	379
8.4.10.3 Review	. 380
Step by Step – Compare and award quotes	380
8.4.11 Package Entire Quote	381
8.4.12 Incomplete Quotes	382
8.5 Scope Items	383
8.5.1 Scope Item Setup	386
Step by Step – Set up scope items	387
Step by Step – Set up quotes for scope items	388
8.5.2 Scope Item Creation and Award	389
Step by Step – Manage and award scope items	389

8.6 Quote Item Adjustment	
Step by Step – Quote item adjustment	
Lesson 8 Review	
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	
Step by Step – Modify the direct cost markup record	
9.2 Cost Estimate Audit/Review	
9.2.1 Price Breakdown Structure Tabs	
9.2.1.1 Markup Analysis	
9.2.1.2 Cost Source	
9.2.1.3 Resource Utilization	
9.2.1.4 Subcontract Status	
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	
9.5.1 Lock Price	
Step by Step – Lock Price	
9.5.2 Suspend Pay Items	
Lesson 9 Review	
	······································

Lesson 9 Summary	/	17
------------------	---	----

STEP-BY-STEP PROCEDURES

Step by Step – Estimate preferences setup	42
Step by Step – Launch Estimate	43
Step by Step – Estimate subsequent use	47
Step by Step – Archive and Restore a Job	49
Step by Step – Open a Job Folder	52
Step by Step – Open Forms	62
Step by Step – Decimal Precision	64
Step by Step – Move Columns	66
Step by Step – Sort Columns	68
Step by Step – Filter Columns	68
Step by Step – Filter Editor	73
Step by Step – Group Columns	74
Step by Step – Create a Saved View	76
Step by Step – Find Feature	79
Step by Step – Merge Estimate Vendors to Platform	111
Step by Step – Upload Estimate Vendors to Platform	112
Step by Step – Merge Contacts to Platform	113
Step by Step – Upload Contacts to Platform	115
Step by Step – Create Vendors and Contacts via Quote Record	117
Step by Step – Create a Labor Resource	141
Step by Step – Create a Rental Equipment Resource	144
Step by Step – Non-Hourly Rate Calculator	145
Step by Step – Create an Installed Material Resource	147
Step by Step – Create a Resource Assembly	151
Step by Step – Opening the Labor tab	156
Step by Step – Creating the Resource	158
Step by Step – Resource Cost Detail	161
Step by Step – Filter Resource Cost Detail Register	163

Step by Step – Manual Setup of Scales	
Step by Step – Creating the Resource	
Step by Step – Material Saved View	
Step by Step – Quantity Checking	171
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	313
Step by Step – Create and publish an RFQ	329
Step by Step – Create a multi-packaged quote	345
Step by Step – Create a quote from RFQ	353
Step by Step – Enter quote details	354
Step by Step – Create a multi-packaged quote	355
Step by Step – Duplicate an existing quote	360
Step by Step – Add the Notes section to Quote Comparison & Award form \ldots	374
Step by Step – Compare and award quotes	380
Step by Step – Set up scope items	387
Step by Step – Set up quotes for scope items	388
Step by Step – Manage and award scope items	389
Step by Step – Quote item adjustment	391
Step by Step – Add profit as a percentage of target price	400
Step by Step – Modify the direct cost markup record	400
Step by Step – Define pricing manually	405
Step by Step – Use AutoPrice to balance and hit the target total	406
Step by Step – Unbalance hit target total	407
Step by Step – Lock Price	412
Step by Step – Make Last Minute Bid Adjustments	412

EXERCISES

Exercise 3.1 – Create Resources & Resource Assemblies	
Exercise 4.1 – Define Job Properties	214
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	411



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
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.



Spend Target Price Over Pay Items Library Address Book



Overview of the Estimating Process

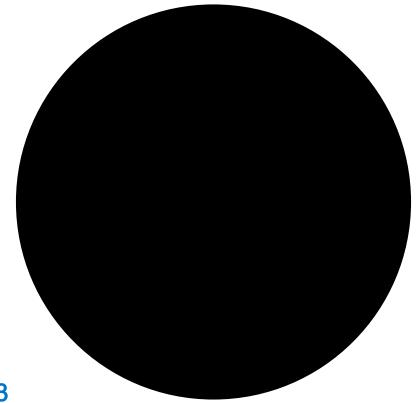
Cost Escalation Overview

Trench Calculator

Job Creation

Cost Breakdown Structure

View All Topics



QUICK LINKS

Quick Guides

Supplemental Documents

Integrated Solutions

1.4 FREQUENTLY ASKED QUESTIONS

How do I know what version of Estimate I have?

The product version displays on the information bar at the bottom of the Estimate screen. You can find more detailed version information by selecting **System** > **About Estimate**, then clicking on the **Version** tab.

Why does my CBS look different than my coworker's?

Often your **CBS register** looks different due to the **CBS Tree** being open on your instance when it is closed on someone else's or visa versa. If you prefer not to use the CBS Tree, you can close it by selecting the X on the CBS Tree title bar. To open the CBS Tree, select **Actions > CBS Tree Filter**. Your CBS may also look different due to using a different Saved View.

See Also:

Cost Breakdown Structures

Columns

How do I get the help bubbles to show back up?

To restore the system Help Bubbles, select **File > Settings**, then click on the **Restore Defaults** button. Check the **Never ask/show me again dialogs**, then click **OK**.

See Also:

General Navigation

Where is the UNDO button?

We don't have one, because in a multi-user environment, users may see unexpected behavior. User A changes a quantity on a resource from 15 to 20. User B replaces the resource with another resource on the cost item, and changes the quantity to 10. What is the expectation of User A when performing an UNDO operation at this time? We can't limit it to "just the changes User A recently made" since that data may not even be in the estimate anymore. Instead, we encourage users to become familiar with the PBS Changes Log, where any changes that affect the Target Price will be captured.

What does the Haul Calculator do?

In the CBS, Estimate's Haul Calculator lets you enter the specifics, such as distance and speed of up to three haul routes. Once entered, you can either:

- Calculate the number of trucks required to complete the haul in a set amount of time, or
- Calculate how long it will take to complete the haul with a set number of trucks.

Access the Haul Calculator from and employed equipment resource on a cost item record.

See Also:

Haul Calculator

What does the Trench Calculator do?

The Trench Calculator lets you quickly calculate trench, pipe, and bedding values. You can perform pipe-related take-off by defining the details of the trench (e.g., length, depth, width, hinge elevation, backslope, and swell factor), the pipe (diameter, elevation, and waste factor), and up to four beddings.

See Also:

Trench Calculator

In the CBS, what's the difference between a locked and 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.

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.

See Also:

Cost Breakdown Structure

I cannot see any of the data blocks in a cost item record. How can I see them again?

In the cost item record, select Actions > Default Data Blocks.

See Also:

Costs and Production

How can I sync my existing library address book entries with Platform's vendors and contacts?

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.

See Also:

Library Address Book

In Quote Management, what are scope items and how can I set this up?

Subcontractors and suppliers can sometimes 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.

See Also:

Scope Items

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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

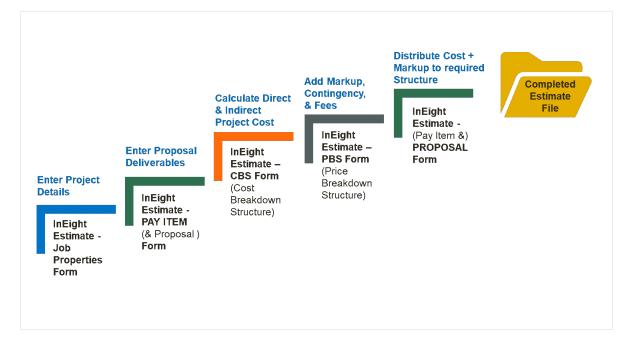
Lesson Topics

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.

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File Setup	Estimate Quot	te Price	Execution	System	Integrat	ions					童	
	Indation Pay Item p Data * Proposal		d Resource	Labor Equipment Materials	Resource Assemblies	Cost Item Assemblies Standa	ard Reports					
	Initialize			Resources		Assemblies	Reports					,
ost Breakdown S	tructure (CBS) Reg	jister	Job Properties	0								-
Overview Securit	ty Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Trackir	ng Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment	- •
Identification												
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County: 1	Maricopa		Owner: Exa	ample Owner J	lerry Slate		[E For	ecast Start:	6/11/2019	*	
Country:	United States 🔹	-	Architect: Exa	mple Architect -	- Robert Fro	ost	[Fore	cast Finish:	11/20/2019	•	
State:	Arizona -	7							Duration:			162
Latitude:		0.00000										
Longitude:		0.00000										
Proposal												
Bid Date:	12/23/2013 -	1				Opening Type:	Dublic					
biu bate.	12/25/2015					opening type.	Fublic					
Bid Time:	10:00:00 PM					Proposal Type:	Unit Price					
			n Oronn		1	Plan Holders:						5
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Bid Location:		tractor 1 Tor			00,000.00	Liquidated Damages: Liq. Damages Per:					_	
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Bid Location:		ractor 1 Tor			00,000.00	Liquidated Damages: Liq. Damages Per:		55		ОК	•	

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.

	y Item &	Proposal Register	0															
Pr	oposal Re	ecap - Training Jo	\$						× 1	Item Recap - 200	SITEWORK & ROA	DWAY						×
		Current	Target	Forecast	Variance					escription		Unit Price (balanced)	Total Price (balanced)		otal Price current)			
	Price:	\$6,569,735.00	\$6,569,736.28	\$6,577,223.80	\$1.28	DD				A Price		(balanced)	(balanced) \$3,164,056		53.402.700.			
	Markup:	\$984,118.34	\$984,119.62	\$1,041,388.54	\$57,268.92	TUT				 Distribution 			\$549,496.57		\$888,140.0	7		
Ma	argin%:	14.98	14.98	15.83	\$66,039.81	TUT				 Markus 			\$478,396.13		\$717,152.3			
											fit (Markup records)		\$313,781.00		\$552,537.2			
							P	ricina is	now sp	read to								
Drag	g columns h	here to group							ay items						Saved vi	tws: Standard	/ien	- >
	Position Code	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 f (curre
÷	= 1	200	SITEWO	RK & ROADWAY					U.S. Dollar		\$3,402,700.00			\$478,396.13			\$649,383.87	
	+ 1.1	641 0 100	Mobili	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
		201 0 102	Clear	ng & Grubbing		10.00	10.00	Acre	U.S. Dollar	\$5,900.00	\$59,000.00	\$976.24		\$9,762.36		\$1,973.16	\$19,731.56	
	+ 1.2					50.000.00	50,000.00	Cubic Yard	U.S. Dollar	\$5.50	\$275,000.00	\$1.11		\$55,694.42		\$1.65	\$82,417.49	
	+ 1.2 + 1.3	202 0 183	Unda	sified Excavation		50,000.00												
		202 0 183 303 5912		sified Excavation gate Base		40,000.00	45,000.00	Ton	U.S. Dollar	\$26.50	\$1,060,000.00	\$3.02		\$120,771.08		\$4,14	\$165,733.22	
	+ 1.3		Aggre		x Type A		45,000.00		U.S. Dollar U.S. Dollar	\$26.50 \$42.45	\$1,060,000.00 \$1,613,100.00	\$3.02 \$7.61		\$120,771.08 \$289,320.12		\$4.14	\$165,733.22 \$374,948.12	
	+ 1.3 + 1.4	303 5912	Aggre	gate Base	x Type A	40,000.00												
	+ 1.3 + 1.4 + 1.5	303 5912 303 4263	Aggre Asphi WATER	gate Base It Concrete Hot Mi		40,000.00	35,000.00		U.S. Dollar		\$1,613,100.00	\$7.61		\$289,320.12			\$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

	- •							Training Job -								ۍ	_
File	Setup	Estimate	Quote	Price	Execution	Sys	tem	Integrations	Actions	More Act	ions					童≣	
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Job	Properties	Cost	Breakdown Str	ucture (CB	5) Register	8											
_											1			reviou	- 1/		7
rag	columns here to g	roup							Find:	[Search For]		Saved	lews:	reviou	sview		1
	CBS Position Code	<u> </u>	Description			Op Cod	ional le		Forecast (T/O) Quant	ty	Unit of Measure		Unit Cost		Total Cost (Forecast)	Allocate	:d
÷			JOB							20.00	Mile		\$293,09	95.93	\$5,861,918.63		i]
	+		Prime Bond			PRI	ME BON	ND .		1.00	Lump Sum		\$47,06	9.88	\$47,069.88]
	+		Price % Add-Or	n		PRI	CE % A	DD-ON		1.00	Lump Sum		\$294,92	8.95	\$294,928.95]
	+		Job Financing			FIN	ANCE E	XPENSE		1.00	Lump Sum		\$	0.00	\$0.00		
	+		Indirect Cost Es	scalation		INC	IRECT	COST ESCAL		1.00	Lump Sum		\$	0.00	\$0.00		
	+		Direct Cost Esca	alation		DIR	ECT CO	OST ESCALAT		1.00	Lump Sum		\$18,83	37.35	\$18,837.35		
	+		Indirect Cost A	dd-On		INC	IRECT	COST ADD-ON		1.00	Lump Sum		\$	0.00	\$0.00		
	+		Job Manageme	nt & Equip	ment	JOE	MANA	GEMENT & E		1.00	Lump Sum		\$157,09	6.28	\$157,096.28		
	+		General Expens	se .		GEI	IERAL E	EXPENSE		1.00	Lump Sum		\$4,20	00.00	\$4,200.00		
	+	1	Direct Cost Add	l-On		DIR	ECT CO	OST ADD-ON		1.00	Lump Sum		\$104,30	1.10	\$104,301.10		
	+ 1		Mobilization			641	0100			1.00	Lump Sum		\$11,90	9.51	\$11,909.51		
	+ 2		Clearing & Grut	obing		201	0102			10.00	Acre		\$3,91	18.50	\$39,184.97		
	□ 3		Unclassified Exe	cavation		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		
	+ 3.2		Embankment			3.2				50,000.00	Cubic Yard		ş	1.68	\$83,992.94		
	□ 4		Aggregate Base	e		303	5912			45,000.00	Ton		\$1	15.40	\$692,928.99]
	+ 4.1		Furnish & Haul B	Base Materia	l i	4.1				45,000.00	Ton		\$1	1.54	\$519,513.30]
	+ 4.2		Finegrade Subg	rade		4.2				400,000.00	Square Yard		ş	0.19	\$75,848.36]
	E 42		Testall Assesses	to Passa		10				45 000 00	Top			1 17	ANT 567 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 Breakdown Structure				
✓ 🔺 Target 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 Marku	p	\$0.00	\$0.00	0.00
🛕 Direct Cost Markup		\$0.00	\$0.00	0.00
V 📥 Business Overhead	\$0.00	\$315,692.95	\$315,692.95	5.35
Price % Add-On	\$0.00	\$265,407.78	\$265,407.78	4.50
B Job Financing	\$0.00	\$33,105.26	\$33,105.26	0.56
Indirect Cost Escala	\$0.00	\$2,131.11	\$2,131.11	0.04
Direct Cost Escalatio	on \$0.00	\$15,048.80	\$15,048.80	0.26
Business Overhead	\$0.00	\$0.00	\$0.00	0.00
🗸 🛕 Total Cost	\$5,252,19	\$330,063.05	\$5,582,257.73	94.65
🗸 📥 Indirect Cost	\$0.00	\$329,063.05	\$329,063.05	5.58
🗸 📥 Job Overhead	\$0.00	\$329,063.05	\$329,063.05	5.58
Prime Bond	\$0.00	\$43,789.75	\$43,789.75	0.74
Indirect Cost A	. \$0.00	\$5,888.67	\$5,888.67	0.10
Direct Cost Add.	\$0.00	\$104,088.34	\$104,088.34	1.76
Job Overhead I.	\$0.00	\$175,296.28	\$175,296.28	2.97
🗸 📥 Direct Cost	\$5,252,19	\$1,000.00	\$5,253,194.68	89.07
Direct Cost Items	\$5,252,19	\$1,000.00	\$5,253,194.68	89.07

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.

Propo	osal Recap - Ti	aining Jo	Ь			×	1	tem Recap -	641 0100 Mo	bilization			×
		Current	Target	Forecas	t Variance					Balanced Unit	Current Unit		
P	Price: \$6,455	,450.00	\$6,553,976.75	\$6,462,850.0	\$98,526.75	ADD			Price:	\$18,300.00	\$386,800.00		
Pr	rofit: \$54	4,294.64	\$642,821.40	\$604,568.9	7 \$38,252.43	ADD			Profit:	\$2,049.63	\$370,501.39		
Margi	in%:	8.43	9.81	9.3	5 \$32,502.50	ADD			Total Cost:	\$16,298.61	\$16,298.61		
								Busines	s Overhead:	\$840.31			
								Jol	b Overhead:	\$3,546.52			
								Unassigned	Direct Cost:	\$2.26			
ag col	olumns here to gr	oup						-	Direct Cost:	\$11,909.51 Sav	ed views: Standa	ard View	•
-					Pav	Eorecast (T/O)		Find:	[Search For]	Sav			
Pa	olumns here to gr ay Item umber	oup Descrip	ion		Pay Quantity	Forecast (T/O) Quantity		-			ed views: Standa Total Price (current)	ard View Unit Price (balanced)	▼ Total Price (balanced)
Pa	ay Item							Find:	[Search For]	Sav	Total Price (current)	Unit Price	Total Price (balanced)
Pa Nu +	ay Item umber	Descript Mobiliza			Quantity	Quantity))	Find:	[Search For] Currency	Unit Price (current)	Total Price (current) \$386,800.00	Unit Price (balanced)	Total Price (balanced) \$18,30
Pa Nu + +	ay Item umber 641 0100	Descript Mobilizat	tion		Quantity 1.00	Quantity)) 1.00 10.00	Find: Unit of Measure Lump Sum	[Search For] Currency U.S. Dollar	Sav Unit Price (current) \$386,800.00	Total Price (current) \$386,800.00 \$61,200.00	Unit Price (balanced) \$18,300.00	Total Price (balanced) \$18,30 \$58,67
Pa Nu + +	ay Item umber 641 0100 201 0102	Descript Mobiliza Clearing Unclass	tion & Grubbing		Quantity 1.00 10.00 50,000.00 40,00	Quantity 50,00) 1.00 10.00 000.00	Find: Unit of Measure Lump Sum Acre Cubic Yard	Search For) Currency U.S. Dollar U.S. Dollar U.S. Dollar		Total Price (current) \$386,800.00 \$61,200.00 \$425,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31	Total Price (balanced) \$18,30 \$58,67 \$315,50
Pa Nu + + +	ay Item umber 641 0100 201 0102 202 0183	Descript Mobiliza Clearing Unclass Aggrega	tion & Grubbing fied Excavation	Type A	Quantity 1.00 10.00 50,000.00 40,00	Quantity 50,00 Pricing is) 1.00 10.00 000.00 S NO	Find: Unit of Measure Lump Sum Acre Cubic Yard	Search For) Currency U.S. Dollar U.S. Dollar U.S. Dollar	Unit Price (current) \$386,800.00 \$6,120.00 \$8.50	Total Price (current) \$386,800.00 \$61,200.00 \$425,000.00 \$880,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31	Total Price
Pa Nu + + +	ay Item umber 641 0100 201 0102 202 0183 303 5912	Descript Mobiliza Clearing Unclass Aggrega Asphalt	tion & Grubbing fied Excavation ate Base		Quantity 1.00 10.00 50,000.00 40,00	Quantity 50,00 Pricing is) 1.00 10.00 000.00 S NO	Find: Unit of Measure Lump Sum Acre Cubic Yard	Search For) Currency U.S. Dollar U.S. Dollar U.S. Dollar	Unit Price (current) \$386,800.00 \$6,120.00 \$8.50 \$22.00	Total Price (current) \$386,800.00 \$61,200.00 \$425,000.00 \$880,000.00 \$1,330,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31 \$19.47 \$52.28	Total Price (balanced) \$18,30 \$58,67 \$315,50 \$778,80 \$1,986,64
Pa Nu + + + +	ay Item umber 641 0100 201 0102 202 0183 303 5912 303 4263	Descript Mobiliza Clearing Unclass Aggrega Asphalt 36 Inc	tion & Grubbing fied Excavation ate Base Concrete Hot Mix	ass III	Quantity 1.00 10.00 50,000.00 40,00 38,000	Quantity 50,00 Pricing is)) 10.00 000.00 s no bid it	Find: Unit of Measure Lump Sum Acre Cubic Yard	Search For) Currency U.S. Dollar U.S. Dollar U.S. Dollar		Total Price (current) \$386,800.00 \$61,200.00 \$425,000.00 \$1,330,000.00 \$1,330,000.00 \$100,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31 \$19.47 \$52.28 \$87.19	Total Price (balanced) \$18,30 \$58,67 \$315,50 \$778,80
Pa Nu + + + + + + +	ay Item umber 641 0100 201 0102 202 0183 303 5912 303 4263 413(B) 0464	Descript Mobiliza Clearing Unclass Aggrega Asphalt 36 Inc 10 Inch	tion & Grubbing fied Excavation ate Base Concrete Hot Mix h RCP Culvert Cla	ass III DR21)	Quantity 1.00 10.00 50,000.00 40,00 38,00 1,000	Quantity 50,00 Pricing is b 12,00)) 10.00)00.00 s no bid it	Find: Unit of Measure Lump Sum Acre Cubic Yard W Spreatems	[Search For] Currency U.S. Dollar U.S. Dollar U.S. Dollar	Sav. Unit Price (current) \$386,800.00 \$6,120.00 \$8.50 \$22.00 \$35.00 \$35.00 \$100.00	Total Price (current) \$386,800.00 \$61,200.00 \$425,000.00 \$1,330,000.00 \$1,330,000.00 \$336,000.00	Unit Price (balanced) \$18,300.00 \$5,867.33 \$6.31 \$19.47 \$52.28 \$87.19	Total Price (balanced) \$18,30 \$58,67 \$315,50 \$778,80 \$1,986,64 \$87,19

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.

Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment
Work Hou Pay Hou Shit	shift Ari sge urs per Shift ırs per Shift: fts per Day:	8.00 8.00 1.00	Standard Wa Scale 1: Scale 2: Scale 3:	0.00 %		es Lock Cost Items Pay Item Unit Pr Activate PBS Cha Activate Quantit Maintain CBS Str	ice Precision: anges Log y Checking	2		Preserv Data So	Tabs e Original Cos ource	t Item
Currency	s per Week: Entry Currency:	5.00 Fields	Shift	Checkbox		When man-coun ndard Rates Sales Tax Rate:	t changes: 🔘	Change UM / M Change Days	an-Hour	R	adio butto	ons

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.

rag	columns here to group			Find: [Search F	or]	··· Save	d views: Standa	ard View	•	
	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	1	0.00	Acre	\$3,918.50	\$39,184.97		
	□ 3	Unclassified Excavation	202 0183	50,00	0.00	Cubic Yard	\$4.54	\$226,856.16		
	+ 3.1	Excavation	3.1	50,00	0.00	Cubic Yard	\$2.86	\$142,863.22		
8	+ 3.2	Embankment	3.2	nultiple		Cubic Yard	\$1.68	\$83,992.94		
	□ 4	Aggregate Base	303 View /			Ton	\$15.40	\$692,928.99		
	+ 4.1	Furnish & Haul Base Material	7.1		.00	Ton	\$11.54	\$519,513.30		
	+ 4.2	Finegrade Subgrade	4.2 Items	at once	.00	Square Yard	\$0.19	\$75,848.36		
	■ 4.3	Install Aggregate Base	4.3		0.00	Ton	\$2.17	\$97,567.33		
	+ 4.3.1	Place Aggregate Base	4.3.1	45,00	0.00	Ton	\$1.63	\$73,460.92		
	+ 4.3.2	Blue Top Aggregate Base	4.3.2	400,00	0.00	Square Yard	\$0.06	\$24,106.42		
	□ 5	Asphalt Concrete Hot Mix Type A	303 4263	35,00	0.00	Ton	\$42.62	\$1,491,580.59		
	+ 5.1	Furnish & Haul Hot Mix	5.1	35,00	0.00	Ton	\$39.27	\$1,374,562.54		
	+ 5.2	Install Hot Mix Type A	5.2	35,00	0.00	Ton	\$3.34	\$117,018.05		
	6	36 Inch RCP Culvert Class III	413(B) 0464	1,02	<u>4.00</u>	Linear Feet	\$67.54	\$69,159.49		
	+ 6.1	Furnish RCP Materials	6.1	1,02	4.00	Linear Feet	\$33.48	\$34,286.70		
	+ 6.2	Excavate RCP Trench	6.2	1,85	3.56	Cubic Yard	\$4.51	\$8,379.59		
	+ 6.3	Install RCP Pipe	6.3	1,02	1.00	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.

TIP

CBS	Code:	Op	tional Code:	Desc	ription:					Forecast (T/O) Qty:	Unit of Me	asure
÷	4	30	3 5912	Aggi	regateBa	se				45	,000.00	Ton	
	4.1	4.1		Furn	ish & Ha	ul Base Ma	terial			45	,000.00	Ton	
PI A	ssignment:	PII	ine Number:	PI De	escriptio	n:						Cost Segn	nent:
303 5912 - 40		40	40		AggregateBase		Record foc		C	uses		Direct Cost	
Cos	st Item Summar	у	<mark>⊉</mark> <u>D</u> etail :	\$11.54	₽ PI	u <u>q</u> : \$0.00		on 1 i	ter	n			
Drag	g columns here	to gr	oup	Find:	[Search	For]		Saved views	: 1	Previous View		-	
	Row Number 🗎		Code	Resource Assemb		Descriptio	n			uantity ess Waste)		ste % 1-on	Qua
	+	1	LT1			Teamster							
÷	+	2	ETDT			Dump Tru	ck						
	+	3	MBR			Aggregat	e Base F	tock		45,500.0	00	5.00	•
*													

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	0 Lump Sum	\$11,909.51
+ 2	Clearing & Grubbing	201 0 102	10.0	0 Acre	\$3,918.50
□ 3	Unclassified Excavation	202 0 183	50,000.0	0 Cubic Yard	\$4.68
+ 3.1	Excavation	3.1	50,000.0	0 Cubic Yard	\$3.00
+ 3.2	Embankment	3.2	50,000.0	0 Cubic Yard	\$1.68
□ 4	Aggregate Base	303 5912	45,000.0	0 Ton	\$15.40
+ 4.1	Furnish & Haul Base Material	4.1	45,000.0	0 Ton	\$11.54
+ 4.2	Finegrade Subgrade	4.2	400,000.0	0 Square Yard	\$0.1
■ 4.3	Install Aggregate Base	4.3	45,000.0	0 Ton	\$2.1
+ 4.3.1	Place Aggregate Base	4.3.1	45,000.0	0 Ton	\$1.6
+ 4.3.2	Blue Top Aggregate Base	4.3.2	400,000.0	0 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 Code	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		\$3,402,700.00
	+ 1.1	641 0 100	Mobilization	1.00	1.00	Lump Sum	U.S. Dollar	\$395,600.00	\$395,600.00
	+ 1.2	201 0 102	Clearing & Grubbing	10.00	10.00	Acre	U.S. Dollar	\$5,900.00	\$59,000.00
	+ 1.3	202 0 183	Unclassified Excavation	50,000.00	50,000.00	Cubic Yard	U.S. Dollar	\$5.50	\$275,000.00
	+ 1.4	303 5912	Aggregate Base	40,000.00	45,000.00	Ton	U.S. Dollar	\$26.50	\$1,060,000.00
	+ 1.5	303 4263	Asphalt Concrete Hot Mix Type A	38,000.00	35,000.00	Ton	U.S. Dollar	\$42.45	\$1,613,100.0
	2	400	WATER & SEWER				U.S. Dollar		\$718,550.00
	+ 2.1	413(B) 0464	36 Inch RCP Culvert Class III	1,000.00	1,024.00	Linear Feet	U.S. Dollar	\$97.45	\$97,450.00
	+ 2.2	800 0220	10 Inch PVC Force Main (SDR21)	12,000.00	12,000.00	Linear Feet	U.S. Dollar	\$29.50	\$354,000.0

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	ssembl	y Regis	ter Ø															
g col	lumns	here to g	group																
Co	ode	<u> </u>	Descrip	otion			Resource File Description		Quantity		Unit of Measur	e	Unit C	Cost	Total Cost	Currency		anizational gory	Geograph Area
-	cco	NC	Concre	ete Crew		Standard Assembly File			1.00	Hour	Hour		\$375.03	\$375.03	U.S. Dollar	Cond	crete		
		Row Numbe	r ≞	Resource Code	Description		Quantity Unit of Measure L		Unit Cost	Unit Cost Currency Cost Driver			Resource File Descr		Organizatio Category	Organizational Category		Wage Zone	
	\rightarrow		1	LC2	Carpenter Journe	eyman	2.00	Each	\$28.92	U.S.	Dollar	CI Du	ra	a Standard Labor Rate F		Carpenter		Southwest	Wage Zon
			2	LF2	Finisher		1.00	Each	\$28.07	U.S.	J.S. Dollar CI Du		ra	Standard	Labor Rate File	Finisher - C	onc	Southwest	Wage Zon.
			3	LIW1	Iron Worker		1.00	Each	\$35.55	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Iron Worke	r	Southwest	Wage Zon.
					Laborer		1.00 Each	\$26.37 U \$117.60 U	/ U.S. D	Dollar	CI Du	ura Standar	Standard	rd Labor Rate File	Laborer		Southwest	Wage Zon.	
					Hydraulic Crane :		Each		U.S.	Dollar CI Dur		ura Standard		ndard Equipment Rate.	Crane				
					Carpenter Appre		1.00	Each	\$27.48 U	U.S.	J.S. Dollar CI Du		ura Standard		Labor Rate File	Carpenter		Southwest	Wage Zon.
			7	LO2	Operator Class 2		1.00	Each	\$28.07	U.S.	Dollar	CI Du	ra	Standard	d Labor Rate File			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	an	1.00	Each	\$31.47	U.S.	Dollar	CI Du	ra	Standard	Labor Rate File	Carpenter		Southwest	Wage Zon.
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+	CMA	INT	Equipm	ent Mainten	ance	Stand	ard Assemb	ly File		1.00	Each			\$73.60	\$73.60	U.S. Dollar	Mech	hanic	
+	CPA	/E	Paving	Crew		Stand	ard 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.

ost Item Assembl	y Register 🛛								
ag 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

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

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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.

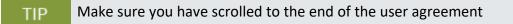
As a new user to the InEight, the First-time sign in dialog box opens when you first sign in, and presents questions about your working environment in the Project Suite environment. Preferences are set for language, date, and number formats and the User Agreement, which you must accept before you begin.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

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

First	time sign in 1 2 Language User agreement Preferences
	Please choose your preferred language
	O Dutch (Nederlands)
	English
	🔿 Español (América Latina)
	🔿 Français (Canada)
	🔿 Norsk (Bokmål)
	O Português (Brasil)
	Cancel

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**.



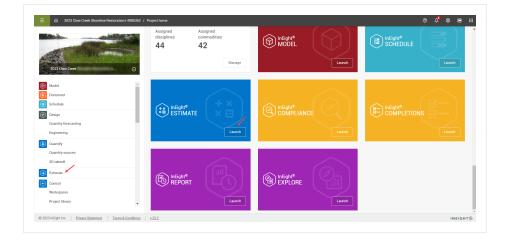
3. Select a **date format** and **number format**, and then click **Next**.

2.1.1 Estimate first time access

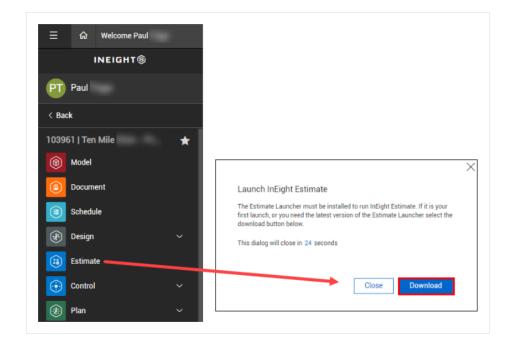
Platform's primary function lets you connect and share data between all Eight applications involved in managing a project. This allows project management workflows to pass between jobsite, field office, and front office seamlessly in a consistent and standardized user interface.

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.



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	- 1
Project home	
Project details	
Settings	_
Workflows	
© 2022 InEight Inc. Privacy Sta	atement
🚏 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.



🕼 InEight Estimate Launcher S	etup — 🗆 🗙
8	Completed the InEight Estimate Launcher Setup Wizard
	Click the Finish button to exit the Setup Wizard.
	Back Finish Cancel

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

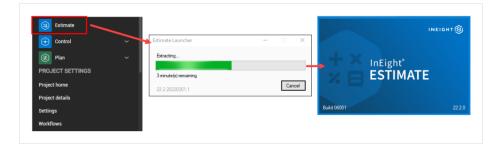
5. Select **Estimate** again to start the Estimate Launcher, which extracts the required files to launch the Estimate application.

🔅 Estimate					IN	еі G н т 🛞
Control	~	Estimate Launcher	– – ×			
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PROJECT SETTINGS		3 minute(s) remaining			ESTIMATE	
Project home		22.2.20220301.1	Cancel			
Project details						
Settings				Build 06001		22.2.0
Workflows						

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.

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2.1.2 Backstage View

InEight Estimate opens to the Backstage view. You can also get to the Backstage view from other tabs, by selecting the File tab.

Section	Description
1	From the Start page you have the option to create, open or save a project, or close all jobs that are open.
2	You access the Library or open the Jobs page to go to the Job Register, Compare Jobs, delete a job, or do a Primavera Batch Sync.
3	 Templates allows you to create Job templates. You can create job snapshots or access previously created snapshots in the Snapshot Register. You can also archive or back up and restore job folders.
4	Settings allows you to customize options such as General settings, Account Code settings, Timesheet Warehouse settings, Licenses and Currency settings.
5	From the Open a recent Job section of the Start page, you can open the Training job or click More to open your list of jobs.
6	You have the option of creating a new job from scratch, a template, from an existing job, or using the Bid Wizard.

2.1.3 Overview – Backstage View

\bigotimes	InEight Estimate	-	×
Start	ESTIMATE		
New 1 Open	ESTIMATE		
Save Close Job	Open a recent Job		
Close All Jobs			
Jobs 2	Training Job - Training Job - Maricopa County		
Templates Snapshots 3	Create a new Job from		
Archive / Restore Settings Exit	Sratch Template Existing Job Bid Wizard		

2.1.3.1 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.

- <page-header>
- Several options appear for archiving and restoring your jobs and library

- 3. Select Archive Job.
 - The Job Register appears
- 4. Select the **Training Job**, then click **OK**.
- 5. When prompted to include attachments, click **Yes**.
 - The Save As window appears
- 6. Browse to where you want to save the job, then click **Save**.
- 7. To restore the job, select **Restore Job Archive** from the Archive / Restore page of the Backstage View.
- 8. Browse to the archived job and select it.
- 9. Click **Open**.
 - If the job already exists, a prompt will appear asking if you want to overwrite it
 - To overwrite it, select Yes
 - If you select No, you will be prompted to save it under a new Job Code

2.1.3.2 Settings

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

- General Settings
- Default Job Start page
- Decimal Precision

• Language

	Settings	
Options General Decimal Precision	General ☐ Prompt to Save Every 5	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 •
	Title Bars Show Job Code Show Job Description Show Job Code and Description 	Language Select a Language: English (United States)

2.1.3.3 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.

2.1.3.4 Decimal Precision

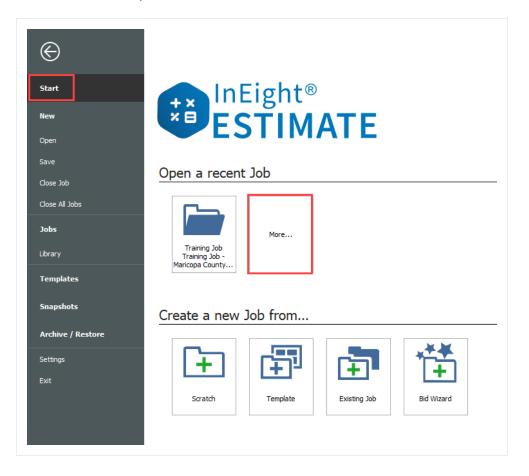
The **Decimal Precision** setting is also helpful. This is where you can specify the way your numbers display in the system. For example, you may want your costs to display to the hundredth decimal place (2), and your quantities to display as whole numbers with nothing to the right of the decimal (0).

TIP

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

2.1.4 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, simply click on it to open it. If it's not showing, click on **More**... and select the job from the Job Register. The Job Register is the form that lists all of your existing job folders so you can select the one you need.



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.

3	<u> </u>							Training Job -	Esti	imate								2
File	Setup	Estimate	Quote	Price	Execution		System	Actions	Mo	ore Actions							盫	
B P	rint	C Ope	n 욹 Cut	+ Fi	l Down	+	8	• Cost Item			🛨 Asser	mbly	2.	1			Е	
Q P	review	🕂 New	唱 Copy	🔀 Sp	olit	-	A	🔚 Subordinate	Cost	t Item	🜁 Subor	rdinate Assembly	100	×.			2	
e e	xport to Excel	😣 Dele	te 📄 Paste	🔁 To	oggle Suspended			Dependent (Cost	Item				Expand Collapse		Clear Filter		
	Print			Edit						Ins	sert				View			
Cost	Breakdown S	tructure	(CBS) Registe	er O														
Drag	columns here to	group								Find:	[Search	For] …	Save	d views:	Previous Vie	ew		•
	CBS Position Code	1	Description				Foreca (T/O) (st Quantity		Unit of Measure		Unit Cost	Total Co (Foreca		Currency	Optio Code		
	-		ЮВ					1.0	00 L	Lump Sum		\$5,861,800	\$5,861	,800.79	U.S. Dollar			
	+		Prime Bond					1.0	00 L	Lump Sum		\$47,069.28	\$47	,069.28	U.S. Dollar	PRIM	E BOND	
	+		Price % Add-	On				1.0	00 L	Lump Sum		\$294,923.52	\$294	,923.52	U.S. Dollar	PRICE	e % add	-ON
	+		lob Financing					1.0	00 L	Lump Sum		\$0.00		\$0.00	U.S. Dollar	FINA	NCE EXP	ENSE
												±0.00		40.00				

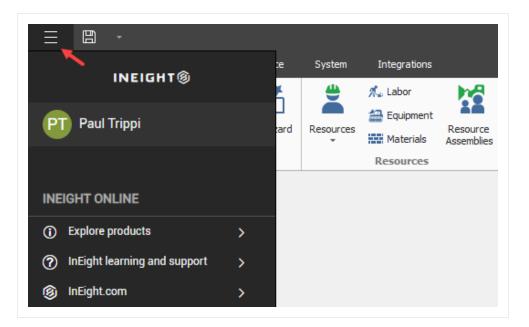
You can change the default form that opens when you start up a job. From the Backstage view, click on **Settings** to change the Job Startup > Start Page settings.

ì	Settings	- 0
Options Options Options Options Decimal Precision Fax Mail Account Code Settings Network Options Option Option	General Image: Complexity of the second se	Navigation Ribbon Classic Navigation Bar When a record form is closed, return focus to: The last form accessed The form that opened it
	Title Bars Show Job Code Show Job Description Show Job Code and Description Language Select a Language: English (United States)	Job Startup Start Page: Cost Breakdown Stru Cost Breakdown Structure (CBS) Register Pay Item & Proposal Register Quote Register Quote Comparison & Award Price Breakdown Structure None
Restore Defaults		OK Cance

2.1.5 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.

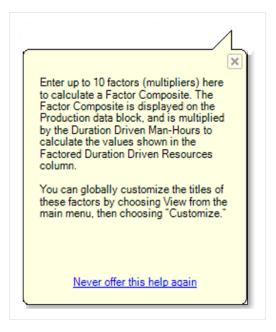
Estimate's on-premise software is authenticated by your Windows login credentials, which is shown below the main menu.



2.1.6 Help Bubbles

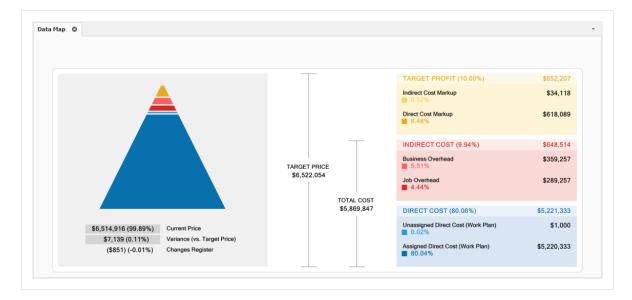
Help bubbles appear at various times in InEight Estimate, including the first time you open InEight Estimate. These messages contain important information to clarify key functions in the system.

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.



2.1.7 Data Map

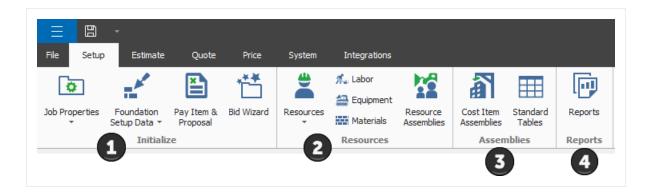
Found in the Price tab, the Data Map is a great way to view a high level summary of your estimate and can be accessed at any time during the estimating process. You can see totals of direct costs, indirect costs, profit, and overall bid price.



2.1.8 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.

2.1.9 Overview - Setup Tab



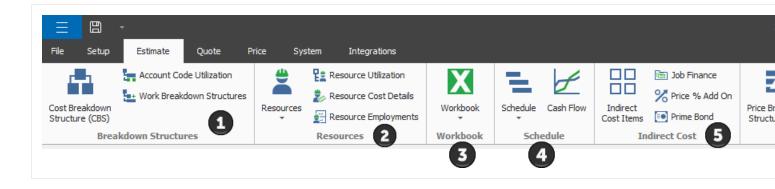
	Section	Description
1	Initialize	From the initialize section, you can access the following registers. Job Properties is where you enter the basic project details. Foundation Setup Data is where you populate all account codes and validated fields. The Pay item & Proposal Register provides an alternate 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

Section

Description

will find reports on resources such as Resources Changes, Resource Utilization, and Resource Cost Details.

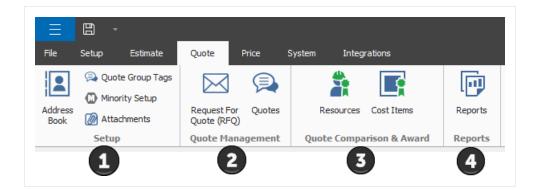
2.1.10 Overview – Estimate Tab



	Section	Description
1	Breakdown Structures	From the Breakdown Structures section in the Estimate tab you can access the Cost Breakdown Structure (CBS) Register, Account Code Utilization Register, and Work Breakdown Structures (WBS) Register.
2	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.
3	Excel 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.
4	Schedule	From the Schedule icon, you can 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.

	Section	Description
5	Indirect Cost Items	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.
6	Overhead and Profit	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.
7	Alternates	Alternates are used to define alternate scenarios in order to assess the impact of those scenarios.
8	Reports	From the Reports section, you can run reports on CBS Summary, CBS Details, CBS Outline, CBS Estimate Summary, CBS Currency Comparison.

2.1.11 Overview – Quote Tab



	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

	Section	Description
		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 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.

2.1.12 Overview – Price Tab

File Setup Estimate Quote	Price System Integrations			
Lock Cost Items to Pay Items CO Pricing Pay Item & Proposal Competitors	Price Breakdown Structure (PBS)	▶ PBS Changes Log PBS Changes	BASE -	Reports
Pay Items	Overhead and Profit	Audit Log	Alternates	Reports

	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	The Price Breakdown Structure (PBS) Register is a visual run-down of

	Section	Description
	and Profit	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
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.

2.1.13 Overview - System Tab

Ξ									
File	Setup	Estimate	Quote	Price	System	Integrations			
=	⊙ Sa	aved Views 👻	💮 Colors +		- External R	leports +	0	🔋 About Estimate	0
-	Ti	tles +	🔅 Output Se	ettings 👻	🚺 External R	eferences +	\odot	🍪 Release Notes	
Customize	2	9			_		Estimate Help	InEight.com	InEight University
		Ŀ	Customiz	e			(9 Help	

S	Section 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.

2.1.14 Overview - Integrations Tab

Ξ	Đ	-						
File	Setup	Estimate	Quote	Price	System	Integrations	Actions	More Actions
Publish	Estimate w Project	Publish Cost Items to Active Project InEight Platform	· ·	p Logs				
		2						

	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	App Logs	Shows a list of InEight Project Suite application logs that you can export to Excel.

2.1.15 Library

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



TIP

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 86

2.1.16 Open Forms

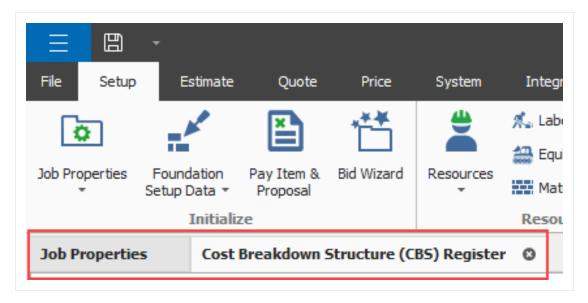
The following steps assume you already opened the Training Job.

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.

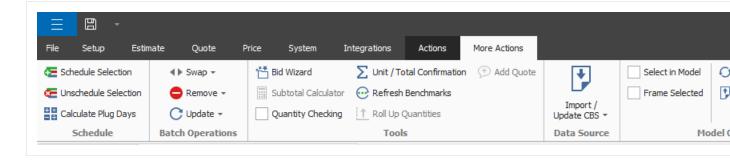
6	-		
File	Setup	Estimate	
B	•	-	
Job Pro	operties *	Foundation Setup Data 👻	Pay I Pro
00 (Overview	' D=	
0.	Security	~	
	Cover Sh	eet	

• 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

\equiv	ē -										
File	Setup	Estimate	Quote	Price	System	Integrations	Actions	More Acti	ons		
📑 Prir	nt	🕂 New	🖥 Сору	🔁 To	oggle Suspended	indent 🖚	🛒 Split		📕 Link Field	E Cost Item	Þ
🗟 Pre	eview	🛞 Delete	Paste			de Outdent	🚉 Split by	Cost Type	📇 Unlink Field	🔚 Subordinate Cost Item	뮫
🛃 Exp	port to Excel	}< Cut	+ Fill Down					Cost Items		📑 Dependent Cost Item	
	Print				Edit				Workbook		



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.

	System Integrations		
Sa ⊘ Tit	<u>6</u>	Settings	- • ×
Customize	⊡-Options -General -Decimal Precision	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	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 •
		Title Bars Show Job Code Show Job Description Show Job Code and Description	Language Select a Language: English (United States) -
	Restore Defaults		OK Cancel

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.

TIP Units of Measure will default to English, and Currency will default to U.S. Dollar.

)		Settings	- 🗆 X
General	Decimal Precision		
- Decimal Precision	Cost Summary Precision	2	
Fax Mail Account Code Settings	Unit Cost Precision	2	
- Network			
Deployment Mode	Quantity Precision	2	
SQL Security	Short Percent Precision	2	
Security Roles Attachment Settings	Shore receiler recision	2	
Timesheet Warehouse Settings	Long Percent Precision	2	
···· Licenses	Company Data Develoine		
Currency	Currency Rate Precision		

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.

Jnit Cost	Total Cost (Forecast)	Currency	Option 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			×
Drag a column Custom Captio	from by low to p r gister.	place it into t	the
Optional Code	Optional Code		*
Owned Equipme Silling	nt Owned E Billing	quipment	
Owned Equipme Total	nt Owned E Total	quipment	
owned Equipme otal Cost	nt Owned E Total Cos	quipment st	
Owned Equipme Jnit Cost	nt Owned E Unit Cost	quipment t	
ay Hours tules	Pay Hour Rules	s	
Pay Item Assignment	Pay Item Assignme		
ay Item escription	Pay Item Description		
ay Item ine Number	Pay Item		

- 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.

③ Go To Co	lumn –		×
Column:	that are not curren	tly in the vi	•
M Include columns		Can	

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 Y Unit	t Cost	Total Cost (Forecast)
Values Text F	ilters	
Enter text to sea	rch	Q
(All)	Month	
Acre	Pound	
Cubic Yard	✓ Square	Feet
✓ Each	Square	Yard
Linear Feet	Ton	
✓ Lump Sum		
Mile		
-		
Clear Filter	Filter Edito	or 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 **(All)**, 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)] Beg	ins with <enter a="" value=""> 😣</enter>
IOr 💿		
[WBS: CEAS (Civil Engineering /	Account Code System)]	🛯 💷 Begins w 👻 <enter a="" th="" valu<=""></enter>
		\geqslant Is greater than or equal to \clubsuit
		< Is less than
		$\leqslant~$ Is less than or equal to
		👄 Is between
		🕰 Is not between
		R Contains
		RCB Does not contain
		Begins with
4		Rec Ends with
		a%c Is like
Load Save	OK	n%c Is not like
45,000.00	Ton	Is any of
400,000.00	Square Yard	 Is none of
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 Г/О) Quantity	, 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
Filte	er Edito	or				×			U.S. Dollar
And	^								U.S. Dollar
Ĩ	UM/Da	v -	Begins with <enter a<="" td=""><td>a value> 🕲</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/ Equip-Hour								U.S. Dollar
	UM/Ho	ur							U.S. Dollar
	UM/ Ma	an-Hour							U.S. Dollar
	UM/Sh	ift							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	2						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).

os	t Breakdown Struct	ure (CBS) Register O							
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 Y
» [+	Price % Add-On	PRICE % ADD	1.00	Lump Sum	\$312,935.61	\$312,935.61	v	
Î	+	Direct Cost Add-On	DIRECT COST	1.00	Lump Sum	\$110,803.57	\$110,803.57	v	
	+	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	✓	Detail
	+ 4.1	Furnish & Haul Base Material	4.1	45,000.00	Ton	\$13.67	\$615,142.90	v	Detail
	+ 5.1	Furnish & Haul Hot Mix Filter	Editor	•			× 374,562.54	~	Detail
4	+ 5.2	Install Hot Mix Type A And)				117,018.05	~	Detail
	+ 7.1	Furnish 10 Inch PVC Materials	10 Inch PVC Materials						Detail
	+ 7.2	Excevere another packing to those	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	- [rotal cost (rorecast	\$42,000.00	v	Plug			
	+ 12.1.1	Furnish Retaining Wall Mater		125,719.65	✓	Detail			
	+ 14.1.2	Raw Materials Tanks		244,383.14	✓	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	✓	Detail
	+ 17.2	Concrete Reinforcement					\$1,500.00	v	Plug
1	+ 17.3	Cast in Place Concrete					\$3,500.00	✓	Plug
	+ 17.4	Concrete Masonry Unis					\$2,900.00	✓	Plug
	+ 17.5	Paneing	and		~ ~	and Total	\$2,100.00	✓	Plug
	+ 17.6	Wood Doors	.oad Save		OK Ca	ncel Apply	\$1,000.00	~	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	~	Plug
	+ 17.9	Fire Protection Aping	15300	1.00	Lump Sum	\$3,300.00	\$3,300.00	✓	Plug
1	+ 17.10	Interior Luminaires	16510	1.00	Lump Sum	\$3,400.00	\$3,400.00	~	Plug
	+ 11	Constint Dick Howanes	LINIA COLONICA IO D		Ends	ét 000.00	£1 000 00		Oh an
	Σ	•		Σ 0.00			∑ \$0.00		
	2	26 🦻					\$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 gro	NIP					- ,
	CBS Position Code 🖮	Description	Account T	Unit of Measure	Total Cost (Forecast)	Un	ing Account Code ription
÷	•	JOB		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	ş	Æ
	+	Direct Cost Add-On	7000	Lump Sum	\$99,962.10		OVERHEAD
	□ 1	SITEWORK & ROADWAY		Each	\$2,387,025.45	\$	ORK
	+ 1.2	Clearing & Grubbing	1110	Acre	\$39,184.97		
	■ 1.3	Undassified 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
	□ 2	WATER & SEWER		Each	\$519,502.60	\$5	
	Σ	0			∑ \$0.00		
		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.

nd: 🖸	
00 And	ith <enter a="" value=""> 🕲</enter>
• Or	ith <enter a="" value=""> 🕲</enter>
	-
≒ Add Condition	
🚽 Add Group	
🗲 Clear All	

- 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").

Cost Breakdown Structure (CBS) Register 🔹						
rag	▼ g columns here to group	Init of				
	CBS Position Code	leasure 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.

ost Breakdown Stru	tt Breakdown Structure (CBS) Register 🔹							
Jnit of ∕leasure ≞								
Unit of Measure	CBS Position Code	Description	Optional Code	Forecast (T/O) Quantity	Unit Cost	Total Cost (Forecast)		
🛙 Acre	1			10.00		\$39,184.92		
Cubic Yard	19			117,865.76		\$498,571.30		
🖾 Each	29			59.00		\$1,684,854.23		
E LF	1			2,083.95		\$0.0		
🛛 Linear Feet	11			30,248.00		\$459,303.93		
Lump Sum	23			22.00		\$667,772.98		
🛛 Mile	1			0.00		\$0.0		
Month	2			2.00		\$10,000.0		
Pound	3			60,000.00		\$44,408.30		
Square Feet	9			136,300.00		\$276,594.9		
Square Yard	2			800,000.00		\$99,954.7		
Ton	8			160,000.00		\$2,034,391.0		

- 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

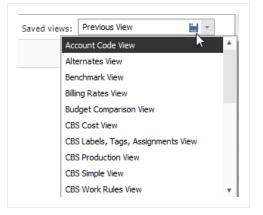
Once you have set up a view the way you like it, you can save the view so you won't have to configure it again later. InEight Estimate also comes with some pre-built views to help you organize the screen the way you want to see it.

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
groups,	ame for the current view. All filters, sorts, and column settings will be saved under this that you can recall them later while in this
View nar	me:
Save	as Locked Corporate View
of	clude this view in the Saved Views section the 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.

IOD F	roperties Foundation Setup Data *	Pay Item & Bid Wizard Proposal	Resources *	Materials	Ľ	<u>O</u> pen
	Initiali	ze		Resources	Ð	New
Cos	t Breakdown Structure	(CBS) Register 🛛	8	<u>D</u> elete		
1000	columns here to group				*	Cu <u>t</u>
Jrag	columns here to group				립	Сору
1					and the second second	Paste
	+ 1.1	ation		\$11,909	=	Insen cost Item Assembly
	+ 1.2	Clearing & Grubbing		\$19,592	Ę.	Insert Cost Item Assembly as Subordinate
	■ 1.3	Unclassified Excavation		\$85,360		
	+ 1.3.1	Excavation		\$1,36		Split
÷	+ 1.3.2	Embankment		\$83,99	*	Split by Cost Typ <u>e</u>
	□ 1.4	Aggregate Base		\$617,083		Merge Cost Items
				519,513	2-	Insert <u>R</u> esource
	8	Subtotal Calculator		× \$3	12	Insert Resource Assembly
	Total Cost (Forecast)	\$85,360.07		\$97,567	0	Toggle Suspended
	Units:	1.00		\$73,460		Go To Cost Allocation Item
	_ Unit Cost:	\$85,360.07		\$24,106	æ	Schedule Selection
	Man-Hours (Total)	1000.54		,550,528	œ=	Unschedule Selection
	Man-Hours / Unit:	1000.54		\$64,306		Calculate Plug Days
	Units / Man-Hour:	0.00		605,796	_	Subtotal Calculator
	onits / Man-Hour:	0.00		005,790	1	Roll Up Quantities
			du en e	-1-1 1 -1-	\odot	Add Quote
	As-En	tered Currency As-Entere	ed Units Tr	aining Job	V	Hud Quotein

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.

join join </th <th></th> <th>Drag co</th> <th>lumns here to group</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>Save</th> <th>d views: RockStart</th> <th>Major Cost Cate •</th>		Drag co	lumns here to group									Save	d views: RockStart	Major Cost Cate •
Pice Martine Network Pice Marking Network Pice Marking Network Pice Marking Network Pice Mark		CE Po	ts isition Code	Description			Unit Cost			Equipment Total	Equipment			Subcontract Total Cost
No. 6 Aud Office B 3.000 B 3.000 (B 20.000 (D 20.0000 (D 20.000 (D 20			2	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	
Johnsong P J.11 Preshow South State														
International Internatinterenation International International International	Job Financing		2.1.1	Furnish BCP Materials			\$33.48	\$34,286,70		\$0.00	\$0.00	\$0.00		
Deck CloreMather Deck: Cl	Indirect Cost Escalation													
Index Clark Ald Clark # 2.1.4 Boolf RC Pres Mon OSC 1000 Clark Yead 54.00 55.00 55.00 55.00 55.00 5	Direct Cost Escalation													
Date Control B 2 Discher/Free Verw Discont Discont <thdiscont< th=""> Discont <thdiscont< th=""></thdiscont<></thdiscont<>	Indirect Cost Add-On													
Strepson P 2.5.1 Annoh 25 bahar Leasons Jamma Data Jamma Data <thjamadat< th=""></thjamadat<>	Direct Cost Add-On													
Maile Addition Locate Instandand Baland Locate Instandand Locate Instandand <thlocate instandand<="" th=""></thlocate>	SITEWORK & ROADWAY													
PALIFICAL ADDRECTION TO ADDRECTION	WATER & SEWER				12,000.00	Linear Feet								
Consense B 3.1.1 December 3/endember 4 0.0000 lower 4 0.0000	STRUCTURAL CONCRETE &			Excavate-Instal-Backfil 10 Inch	12,000.00	Linear Feet	\$9.28	\$111,403.37	\$54,705.77	\$56,697.60	\$0.00	\$0.00	\$0.00	
Constraints, sectory * 2.3.1.1 Excense to them PPC of PD_ Log Mode 4.1.0 Case Yead 51.0 Excense to them PPC of PD_ Log Mode 51.0 Excense to them PPC of PD_ Excense	INDUSTRIAL & REMEDIATION		2.3	24 Inch PVC Gravity Sewer (SDR35)	3,000.00	Linear Feet	\$49.67	\$149,011.37	\$40,869.88	\$34,371.68	\$2,702.96	\$0.00	\$67,554.00	
Dates: Control € 2.5.1.2 December 2.5.1.2 <thdecember 2.5.1.2="" <="" th=""></thdecember>	COMMERCIAL		2.3.1	Excavate 24 Inch PVC	3,000.00	Linear Feet	\$3.00	\$9,005.49	\$2,973.89	\$6,031.60	\$0.00	\$0.00	\$0.00	
Special Risk Monaries # 2.3.3 Armital Standard Statishing/C Social Distance Statistical Statisticond Statis Statistical Statisticae Statisticae Statistatisticae S	GUARDRAIL & SEGNING		2.3.1.1	Excavate 24 Inch PVC 0-6 ft D	1,390.00	Cubic Yard	\$1.95	\$2,712.05	\$1,008.84	\$1,703.21	\$0.00	\$0.00	\$0.00	
E Book 10 2 4 bits March Class Freed 64 J2 64 J2 3 4 J2 3 25 J 24 J2 3 25 J 24 J4 3 5 4 J 25 J2 3 J 65 J 65 J 10 2 4 4For Classers Frank How 16 door 16 J 50 J 51 J2 4 J 52 J2 J 51 J2 J <	Indirect Costs	+	2.3.1.2	Excavate 24 Inch PVC 6-10 ft	3,610.00	Cubic Yard	\$1.74	\$6,293.44	\$1,965.05	\$4,328.39	\$0.00	\$0.00	\$0.00	
B 2.4 4Fort Dameter Marchine 16.0 Each 457,9447 417,77.27 611,753.20 690.0 690.00	Special Risk Allowance	→ 1+	2.3.2	Furnish & Install 24 Inch PVC	3.000.00	Linear Feet	\$32.93	\$98,782,54	\$13,676,44	\$14,174,40	\$0.00	\$0.00	\$67,554.00	
B 2.4 4Fort Dameter Marche 15.0 6x7 45.93.03 957.95.47 151.77.27 611.753.20 650.00		+	2.3.3	Backfil 24 Inch PVC	4,520.00	Cubic Yard	\$9,12	\$41,223,34	\$24,219,55	\$14,165,68	\$2,702.96	\$0.00	\$0.00	
• 2.4.1 Promote PM Revealse Nationals files files 52.0.2 files			2.4	4 Foot Diameter Machole	16.00	Each	\$3,594.03	\$57,504,47	\$13,717,27	\$11,763,20		\$0.00	\$30,880.00	
+ 2.4.2 Excavate_instal=8ed/fill Marrhole 16:00 Each \$\$1,592.53 \$\$25,480.47 \$\$13,717.27 \$\$11,763.20 \$\$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 \$\$\$\$0.00 \$\$\$\$0.00 \$\$\$\$0.00 \$\$\$\$\$0.00 \$\$\$\$\$\$0.00 \$\$\$\$\$\$0.00 \$\$\$\$\$\$\$\$														
			21712	Excavate tristal backfill Pariticle	16.00	Cach	\$1,392.33	\$25,900.97	\$13,717.27	\$11,763.20	50.00	\$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 total cost , type + before the second word. For example: total +cost .
-	Type - to exclude records that contain a

Search Syntax	Example
	specific word, for example: total-cost. You can combine different operators. Use + and - to select records that contain both pay and item, excluding records that contain assignment. For example: pay +item - assignment.
"quotes"	To search for a string that contains a space character, you need to enclose this string in quotation marks. For example: "total cost" .
:	To search against a specific column, type the first letters of the column's display name plus a colon character. For example: optional: unassigned . Now the grid displays records containing unassigned in the optional code 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 c	olumns here to grou	p			× mat	erial	1/13 🛛 \land 🗸	Ö
	CBS Position Code 🗎	Description	Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Subj
+		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 0 100	1.00	Lump Sum	\$11,909.51	\$11,909.51	
+	- 2	Clearing & Grubbing	201 0 102	10.00	Acre	\$3,918.50	\$39,184.97	
	3	Unclassified Excavation	202 0 183	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	
+	- 3.2	Embankment	3.2	50,000.00	Cubic Yard	\$1.68	\$83,992.94	
=	4	Aggregate Base	303 5912	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	
E	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	
	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

Press	То
Home	Move to the beginning of the cell
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				

Press	То
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

2.5.3 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

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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:

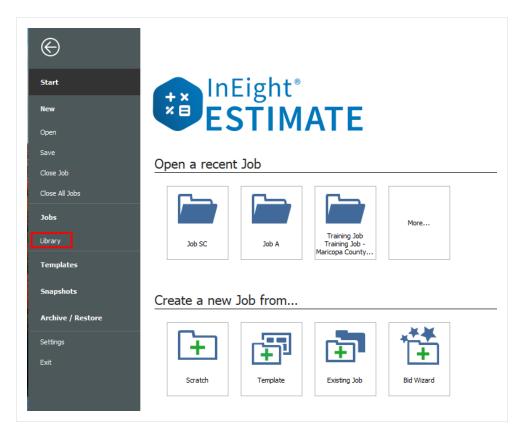
- Library Job Properties
- Library Foundation Setup Data Register
- Library Resource Rate Register
- Library Assembly Register

Lesson Topics

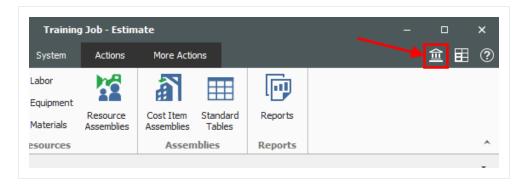
3.1 LIBRARY OVERVIEW

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. .

\equiv	8 -					
File	Setup	Estimate	System	Integrations	Actions	More Actions

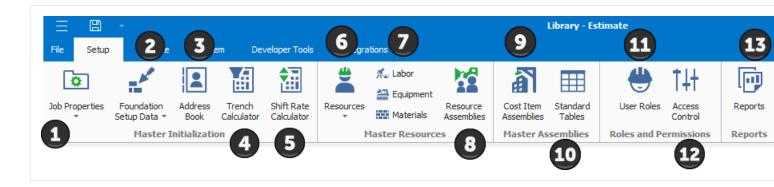
3.1.1.1 Setup Tab

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.				

Overview - Setup Tab (continued)

	Name	Description
5	Shift Rate Calculator	Allows you to set up shift rate configurations that you can access at the 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.

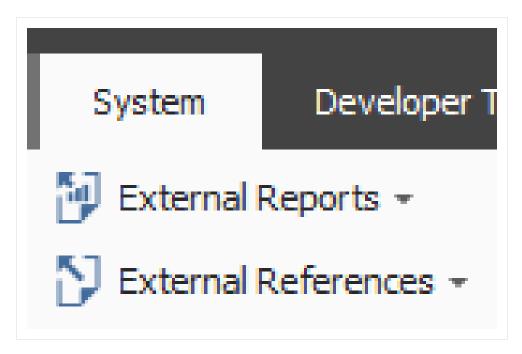
Overview - System Tab (continued)

	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 D	evelope rts +	er Tools Integ						
InEight Fold	der							
Estimate Op	Estimate Open Support Tickets							
Integration	s							
Customize								
	8			istomize Menu Items		- 0	×	
	allov			not only generate report cuments, reports, or Inte				
	when	n you select one o	f these menu items,	added to the External Re the associated Windows	s program wil	l open the desig		
	1 · ·			ernet resource defined b k on the Help button.	y the comma	na.	it) 4,5	
		Menu Order 🚊	Menu Text	Open			5,9	
	→	1	InEight Folder	www.ineight.com			3,9	
	-	2	Estimate Open S	https://ineight.com/help	-support/		,04	
	-	3	Integrations	https://ineight.com/inte	grations/		2,9	
	-						3,9 3,1	
	-						3,0	
							2,2	
							9,7	
		Add Edit	t Delete		ОК	Cancel	Help 9,1	
	_	202 0 103		30,000.00		90.00		

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.

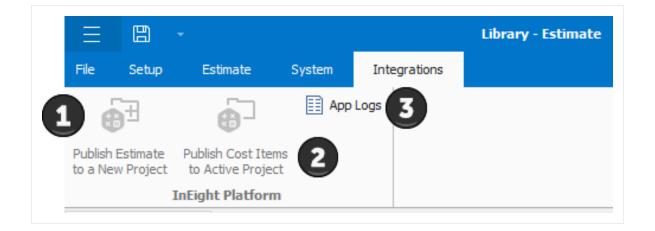
8	Customize Menu Items – 🗆 🗙
	ernal Reports menu allows you to not only generate reports created by Estimate, but it also you to open programs, folders, documents, reports, or Internet resources with the associated m.
	Menu Text:
For ad	Type the name of a program, folder, document, report, or Internet resource and Windows will open it for you. If you do not know the command, click the Browse button and select the file that you would like to open.
n	Browse OK Cancel
Ad	d Edit Delete OK Cancel Help

TIP	Customized Job Folder Tags match the view of the fields in the Job Properties form.
	Pic Source Outer Proc Standa Control Control Control Control Thes Output Settrops Control Control Control Control Control Control Control Control Control Control Thes Control Control Control Control Control Control Thes Control Control Thes User Tag 12 Tag 13
	Oct Classing Out in ju - Lin J Out in ju - Lin J Out in ju - Lin J Image: Second adjust User Top 3: Top 3 User Top 3: Top 3 Image: Second adjust User Top 3: Top 3 User Top 3: Top 3 Image: Second adjust User Top 3: Top 3 User Top 3: Top 3 Image: Second adjust User Top 3: Top 3 User Top 3: Top 3 Image: Second adjust User Top 3: Top 3 User Top 3: Top 3 Image: Second adjust User Top 3: Top 3 User Top 3: Top 3 Image: Second adjust User Top 3: Top 3 Top 3 Top 3 Image: Second adjust User Top 3: Top 3 Top 3 Top 3 Image: Second adjust User Top 3: Top 3 Top 3 Top 3 Image: Second adjust User Top 3: Top 3 Top 3 Top 3 Image: Second adjust User Top 3: Top 3 Top 3 Top 3 Top 3 Image: Second adjust User Top 3: Top 3 Top 3
	User Trag 10 User Trag 22: Trag 22 User Trag 10: User Trag 22: Trag 22 User Trag 10: User Trag 21: Trag 12 User Trag 10: User Trag 21: Trag 12 Restore All Customized Values OC Cancel Trag 4

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.

	Level	Time	Domain 📃	Area		Message		ExceptionMessage	ExceptionType	Route -	CorrelationId
<u>etails</u>	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
<u>tails</u>	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
tails	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
ails	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
ails	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
ails	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
tails	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
tails	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>tails</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-f6470a650ff
tails 🚬	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
	Area: Correlat	Design ionId: 0b1c7752-578f-4	4e12-b02b-ccc	l8fa4d148	Bro Bro	wse Chain)				
		ionId: 0b1c7752-578f-4 2023-12-13 11:2	1:18 -0700	l8fa4d148	3d Bro	wse Chain)				
	Correlat Expires: Machine	ionId: 0b1c7752-578f-4 2023-12-13 11:2	1:18 -0700	l8fa4d148	3d Bro	vise Chain)				
	Correlat Expires: Machine Mes	ionId: 0b1c7752-578f-4 2023-12-13 11:2 pd1sdwk000INM	1:18 -0700		3d Bro	wse Chain)				
	Correlat Expires: Machine Mes EntityCh	ionld: 0b1c7752-578f-4 2023-12-1311:2 pd1sdwk000INM SSAGE ange -> Publish NoMess	1:18 -0700 ageTargetsExc	eption:		***Chain)				
	Correlat Expires: Machine Mes EntityCh InEig	ionid: 0b1c7752-578f-4 2023-12-13 11:2 pd1sdwk000INM ssage ange -> Publish NoMess pht.Platform.M	1:18 -0700 ageTargetsExc lessagin	eption:	Mes)				

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	-							Library - E	stimate								Ŧ	-		×
File Setu	p Estima	ite Syste	m Integrati	ons														1	1	?
Job Properties	Foundation		Trench Shif	t Rate Reso	Labor	Resource	Cost Item	Standard	User Roles		Report									
÷	Setup Data Maste	 Book Initialization 		ulator	 Materials Master Resou 		Assemblies Master As	Tables ssemblies	Roles and Pe	Control ermissions	Repor	ts								^
Job Properti	ies O																			-
Overview	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Folder Tags	Pricing Sch	hedule Cash	Flow E	quipment Maintena	nce Benchr	marking	Alternates								
Cod	le: Library									Status:	Bidding] •	Organizati	on:					
Descriptio	on:																			
Note	25:																			< >
Last Save	d: 11/28/202	3 9:32:00 AM																		
Job created b Source Jo																				
																(DК		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.

=	☆ Master data libraries / Ver	ndors					VENDORS	VENDO	R TYPES	0	4 ⁰ ®			
÷	r 🛛						VENDONS	YENDO	RITES	C7		Q		
	ID	Name 1		Alternate name			Туре			Y				
	T		Ţ			T						T		
	0010118762	1123910 B.C. Ltd		Sun Star Shuttle			Z001			mloops		-		
	0010105600	1127571 B.C. Ltd		Sparrow Excavat	ion and Fe	encing	Z001		- (.illooet				
	0010069102	112792 Canada Inc		DBA AMJ Campb	ell Van Li	nes	Z001			elta				
	0010106779	1128354 Alberta Ltd		Yvolution Metal V	Norks		Z001)	У				
	0010097951	1135391 Ontario Ltd		DBA Orleans Auto	opro		Z001		5	ans				
	0010114422	1138357 Alberta Ltd.		Young Contractin	ng		Z001			Jnoka				
	0010111084	1142023 B.C LTD		Barcelo Flame Gr	rilled Chic	ken	Z001		(Burnaby				
	0010092209	1165292 BC Ltd		DBA Hydro Tech			Z001			rnaby				
	0010006725	1169572 Alberta Ltd.		DBA A-1 Portable	es		Z001		5	rose				
	0010119746	11754491 Canada Ltd		Synstone			Z001		atford					
	0010102352	1189589 AB Ltd		Fire-Alert SE Edm	nonton		Z001			dmonton				
	0010118867	1190475 BC LTD		Vancouver Island	f Forest &	Marine	Z001		(Juncan				
_									1			*		
		Ele Setup Est									Library -	Estimate		
			imate Sy	ystem Integrations	Actions	: W ^L Merge	e Vendors 🛛 🗏 Link	Field			2			
		Review		Vendors and Contacts	🖷 Сору		遇 und		-	ear View Vendors				
			Contacts De	efault Quotes Layouts	+ Fill Dov	wn Edit	Work	Collaps		iter InEight Pl				
		Address Book Register												
		Drag columns here to grou	ρ											
		Vendor ID	Vendor Nam	ne	<u>i</u>	Vendor Type	Tax ID	Tax Jurisdiction	Address 1		Address 2	Country / Region	City	Sta
		+ 0010087554		Seomatics LLC		2001	461564451		1261A 120			United States Of America	Bellevue	Wa
		+ <u>1 NP - Vendor2</u> + <u>1 NP - Vendor1</u>	1_NP - Venx			1_NP Vendor 1_NP Vendor		abc	90th Stree			United States Of America	Scottsdale	Ari
		+ 1 NP - Vendor 1	1_Vendor1			1_NP Vendor								
		+ 0010099994		ered Materials LLC		Z001		1516913100	1162 Mand	teser Ave		United States Of America	Wabash	Ind
		+ 0010099994	10X Engine	ered Materials LLC		Z001	824568213	1516913100	1162 Mand	heser Ave		United States Of America	Wabash	Indi
		+ 0010119449	11032119 0	Canada Inc		Z001	731900882	7001509700	300 Greent	ank Road Suite 12		Canada	Ottawa	Ont
		+ <u>0010098991</u>		Intario Ltd oa Fire Alert		Z001	898821194	7001520100	1-890 Tayl			Canada	Orleans	Ont
		+ 0010106673	1107075 B.			Z001	728732926			Richter Pass Road		Canada	Osoyoos	Brite
		+ 0010097822	11088009 0			2003		7001906500	PRIMARYA		PRIMARYAd.		PRIMARYAddress1	Tarr
		+ 0010033404 + 0010102467	111008 Car 1112004 Or			Z002 Z001		7001565130 7001568530	6866 McKe	t Hogan Lane		Canada	Greely Seeley's Bay	Ont
		90.00.002907	1112004 Or 1123910 B			2001		7001568530	1016 Qual			Ua 1808	Kamloops	Onta Britis

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

Ad	dre	ss Bo	ok Register	0												
ra	g col	lumns	here to group													
	Ve	ndor I	D	Vendor Name	<u>i</u>	Vendor Type	Tax	ID	Tax Jur	isdiction	Address	1		Country / Region		City
÷	-	0010	106779	1128354 Alberta Ltd		Z001	863	377379	700014	7200	Box 516		-	Sanada		Vimy
			Vendor ID	First Name	Last Name	Company	<u>in.</u>	Addres	is 1	Address 2	City	<i></i>		Country / Region	Primary Email	
	↦	\rightarrow	0010106779	Frank	Matty	Alberta									Frankmatty@gmail	.com
	4		0010106779	Tom	Cross	Alberta Ltd						1			Tomcross@gmail.o	om

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 Registe	er 🛛
Drag columns here to grou	q
Vendor ID 🚊	Vendor Name
8 +	Alpha
8 +	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	r	Vendor Record O											
Vendor Details			Contacts	Notes	License / Bond / Insurance	Minority Certifications	Default Quotes						
Vendor ID:	1_NP	Vendor2											
Vendor Name: 🔺	1_NP	Vendor2	License	✓ Licensed									
Vendor Type:	1_NP	Vendor		Licensor: Jeff Lewis									
Tax ID:	12345			Class:	A								
Tax Jurisdiction:	abc		Iden	tification:	GDIMNDG83								
Address 1: Address 2:	90th S	treet	Bonded	☑ Bonded									
Country / Region:	United	States Of America	j (Company:	Owens Inc								
City:	Scotts	dale	1	Agent:	Phil Jones								
State:	Arizon	ia ~	il l	Phone:									
Postal / Zip Code:	85258		Cost p	per 1,000:	0.00								
Phone Number:	99999	999	Insured										
Fax Number:	96325	8741	e marco										
Web Site URL:			j (Company:	Evergreen Insurance								
Peference Number:	-		ill	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	Integra	tions Ac	tions						
📑 Print	V.	U.		C Open	+ Fill Down	恩 Link Field	14	7	7	U.S.		
Export to Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts	📲 Сору			Expand / Collapse *	Filter	Clear Filter	View Vendors	View Contacts	
Print		Layouts		Ec	lit	Workbook		View		InEight	Platform	
Address Book Reg	ister Ø											

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	ф	Estima	ate	System	Integrations	Actions
٩	Print Prev Expo	iew	Excel		ors and tacts	Vendors ar Default Quo		Copy
	P	rint				Layouts		
Ad	dres	s Bo	ok Reg	ister	0			
Drag	g colu	umns	here to	group				
	Ven	dor I	D		Vendor	Name		<u>i</u>
÷	-	0010	106779		112835	i4 Alberta Ltd		
			Vendo	r ID	First	t Name	Last N	ame
		\rightarrow	00101	06779	Fran	nk	Matty	
			00101	06779	Tom	1	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		Set	φ.	Estim	ate	ŝ	System	Int	tegrations	Actions		
4	Print Prev Expo	view	Excel		lors and	-	Vendors an Default Quo		Contacts	Copy		
	P	rint					Layouts	L				
Ad	dres	s Bo	ok Reg	ister	0							
Drag	g coli	umns	here to	group								
	Ver	ndor I	D		Vendor Name							
	+	0010	087554		1 Allia	nce	Geomatics L	LC				
\rightarrow	-	1 NP	- Vend	or2	1_NP	- Ve	ndor2					
			Quote Group				esource ode		source			
		\rightarrow	Aspha	lt Mate	rials							

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	tegrations	Actions
름	Print	<u>ا</u>	-	I		🛞 Delete
à	Preview	10	2	* S	i	🖶 Сору
명	Export to Excel	Vendors Conta		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.

		An Press Reviews Depart to Daniel Contraction	star Conductive Adam Conductive Conduction Todatory of Conduction Todatory	A Line field B Line field B Line field Colore + Hor Class Colore + Hor Class The Field Colore + Hor Class Field Colore + Hor Class Field Colore + Hor Class Field Class Field Class Field	Kan Gar Hatform	Nacia						
=	A Master data libraries / W	endors		0 4 8 6 11	≡	🟠 Master data libraries / C	Contacts			a) 🖧	• •
			VENDORS VENDOR TYPES					CONTACTS	CONTACT TYPES			
۲			(D D D	(🖸 🖄 😋 Promote			(D2	D	(i) Q
	10	Name ↑	Туре			Full name	Primary email	Contact type	Office number		Is User	
	T	T	T)	Υ		Υ	Υ	T		- 7	All	1
	0010087554	1 Alliance Geomatics LLC	Z001	Sellevue ^		Tem Cross	Tomcross@gmail.com	Vendor	(false	
0	1_NP - Vendor2	1_NP - Vendor2	1_NP Vendor	rottsdale		Jim Softy	jim.softy@gmail.com	Vendor			false	
	1_NP - Vendor1	1_Vendor1	1_NP Vendor			Tom Cross	Tom.Cross@gmail.com	Vendor			false	
0	0010099994	10X Engineered Materials LLC	Z001	oash		Frank Matty	Frankmalty()gmail.com	Vendor			talse	
0	0010119449	11032119 Canada Inc	2001	Manua		nandytest123 gmail.com	nandytest123@gmail.com	Test contact type A	009099		false	
	0010098991	1105900 Ontario Ltd oa Fire Alert	Z001	iteans		TestUser100nandy@gmail.com	TestUser100nandy@gmail.com	Test contact type A	889		false	
	0010106673	1107075 B.C. LTD	Z001 0	1005		NP-Contact1 With Vendor	nikitaben pareich@ineight.com	Designer	123456789		false	
	0010097822	11068009 Canada Inc	2003	MARYAddress1		Paving Dude II	paying dudell@allstarpaving.com	Vendor			false	
	0010033404	111008 Canada inc.	2002	Josefy		Nadoosha Karunanayaka	abc@gmail.com	Owner	3145		talse	
	0010102467	1112004 Ontario Inc	2001	'celey's Bay		Bhatt Shreya	fitnessmylife2018(Jigmail.com	Owner			talse	

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

☆ Master data libraries / Ven	dors			QA-T01-23.6 🕐	4 ⁹	86	
/endor > Edit vendor	VENDOR DETAILS	USERS CONTACTS					
				Can	cel	Save	
	Vendor details						
	* ID	* Name					
	0010010622	Smith and Construction					
	Alternate name	Vendor type					
		Z001	*				
	Vendor tax ID	Vendor tax jurisdiction					
	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.

Qu	ote Register 🛛 🕲	Quote Record	b									
Dra	g columns here to gr	oup										
	Description 😐	Quote Status	Vendor			Vendor	Name	Contact			Quote Total	Awarde Total
15	Asphalt Materials	Received	Lewis Concrete AA1	L		Lewis (Concrete	<ad-hoc cor<="" td=""><td>itact></td><td></td><td>\$1,115,975</td><td></td></ad-hoc>	itact>		\$1,115,975	
A	Guard Rail Items	Invalid	_PC1PC1			_PC1		SUB 18 111	1 test		\$0.00	
1	Guard Rail Items	Invalid	SUB4		1	SUB4		SUB4 Harry	/ Belefony		\$0.00	
_	new J-11	Received	SJ-5 SJ-5	~								
14	Pipe Materials	Received	Ven10	® -						Address	Book Register	- Librar
X	Pipe Materials	Received	Example Vendor 4 DB	Actions								
1	sa	Received	Example Prime Contra		١Ē		H New	1.)B	1
1	Sign Items	Invalid	Example Sub #34 DBE	¥ 🚨	2	•	Copy	× 7*			50	<u> </u>
_	Sign Items	Incomplete	[Enter Vendor Name]	Vendors and	Vendors			Expand /	Filter	Clear	View Vendors	View Co
A	Site work	Received	Civilworks Inc Ven	Contacts	Default Qu youts	Jotes	Edit	Collapse *	View	Filter	InEight	Diatform
	test	Received	[Enter Vendor Name]			test			view		Incigite	Plation
*				+ 9999	99	Rob	ert Roberts				Z002	
				+ <u>aa</u>		cc						
				+ <u>AA1</u>		Lew	is Concrete					
Que	ote Register ader Description: Aspl	Quote Record	0									
	Vendor: <	-Hoc Vendor>		•								
	1	-Hoc Contact>		0 1								
	Contact: <ad< td=""><td>-Hoc Contact ></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></ad<>	-Hoc Contact >										
P	Contact: <ad< td=""><td>+Hoc Contact></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></ad<>	+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	D			E				Vendo	r Record	d - Library	p
Header				Vendor Details	2		Contacts	Notes	Licens	e / Bond / Insura	
Description:	Site work		1	Vendor ID: *	V187						
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	•				Last Walle	
Primary Email:				Tax ID:							
External Ref.:				Tax Jurisdiction:							
Resources Cos	t Items			Address 1:	125 Maple Ave						
Resources Cos	A Ivens			Address 2:							
Package 🖮				Country / Region:	United States Of America	•					
				City:	Phoenix						
Package 🚋	Code 🖮	RFQ ID	Quote Group	State:	Arizona	*					
D P1 (Dem	o,Exav,Grading)			Postal / Zip Code:	85256						
D P2 (Assis	ted Parking Lot)			Phone Number:	480 555 2656						
🛛 P3 (Pavir	ig)			Fax Number:							
*				Web Site URL:							
				Reference Number:							
				Quote							
				Currency:	U.S. Dollar	•					
				Do Not Use:							
							4				
										ок	Next >
										OK	Next >

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

8			Vendor	Record - Library			-	□ ×		
Vendor Details		Contacts	Notes	License / Bond / Insurance	Minority C	ertifications	Default Quotes			
Vendor ID:	V187	License	d							
Vendor Type:	Z004 *		Licensor:	John Lewis						
Tax ID:			Class:	General Engineering						
Tax Jurisdiction:		Iden	tification:	ROC 338065						
Address 1:	125 Maple Ave									
Address 2:		Bonded								
Country / Region:	United States Of America +		Company:	Hartley Bonding						
City:	Phoenix		Agent:	Jim Smith						
State:	Arizona 🔹		Phone:	480 555 6582						
Postal / Zip Code:	85256	Cost p	per 1,000:	53.00	Contacts	Notes	License / Bond / Insurance	Minority Ce	rtifications	Default Quotes
Phone Number:	480 555 2656	Insured			Name	Authorit	y and Certification Numbe	er .		-
Fax Number:		_			DBE	AW93746				
Web Site URL:		0	Company:	Bribrick	MBE					
teference Number:			Agent:	Tom Jones 480 568 6584	WBE					
Juote			Phone:	400 300 0304	Other Min	ority Certifi	ications:			
Currency:	U.S. Dollar 🔹				Ø OBE1	CL038746	i			
Do NotUse:					OBE2					
					OBE3					
					OBE4					
					OBE5					
				ок	OBE6					
					OBE7					
					Certificat	ion 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.

8			Address Bo	ok Register - Li	brary			
A	ctions							
Drag	g columns here to grou	q				× Enter text to search	^	\sim \$
	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				
(± 0	V		7000				•
						ОК	Canc	el
							-	

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

leader					2		
Description:	Site work			Contact Details		1	
				First Name: *	Robert	Address 1:	125 Maple Ave
Vendor:	Lewis Concrete VI	187	• 1	Last Name: *	Cantor	Address 2:	
Contact:	<ad-hoc contact=""></ad-hoc>			Company: *	Lewis Concrete	Country/Region:	United States Of America
Primary Email:	[-0	Primary Email: *	rcantor@lewisconcrete.com	State:	Arizona
External Ref.:				Contact Type:	Estimate Contact	City:	Phoenix
				Department:		Postal/Zip Code:	85256
lesources Co	st Items			- Position:	Contractor	Fax Number:	
Padkage 🖮				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	ul Trippi
D P2 (Assi	sted Parking Lot)			Vendor: Lewis	s Concrete V187	Last Changed On: 12	/29/2023 11:50:42 AM
D P3 (Pavi	ng)			Do Not Use:			
E P3 (Pavi							
E P3 (Pavi							

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

Solution	tion:				Address	Book Register - Li	ibrary						œ
Drag	colu	umns	here to group)					× Er	nter text to sear	rch	^	~ 🔅
	Ver	ndor I	D 🚊	Vendor Name		Vendor Type	Address	1	Count Regio			Tax ID	Tax Jurisd
→	-	<u>V187</u>		Lewis Concrete		Z004	125 Map	ole Ave	United	d States Of Ame	rica		
			Vendor ID	First Name	Last Name	Company	1	Address 1		Address 2	City		Sta
		÷	<u>V187</u>	Robert	Cantor	Lewis Concrete		125 Maple	Ave		Phoenix	c	Ari
4		•				-					ОК	Cance	> >

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.

-		A.44	Sook Register - L	ibran					=							
Actions		Address	sook kegister - L	uorary												
g columns here to gr	oup				×E	inter text to search.		~~	٥							
Vendor ID 📄	Vendor Name		Vendor Type	Address 1	Coun Regio	try / m	Та	x ID Ju	ix risd							
- <u>V187</u>	Lewis Concrete		2004	125 Maple Ave	Unite	d States Of America										
Vendor I		Last Name	Company	ii Addre		Address 2 O	lity	s								
→ <u>V187</u>	Robert	Cantor	Lewis Concrete	125 M	aple Ave	Pf	hoenix	A								
						OK	(Cancel								
Ξ ŵ Μa	ister data libraries / Ver	ndors									ineightsuit	ineightsuite-qa 23.12 🕐 🛱	ineightsuite-qa 23.12 🏼 🖓 🖓 🛞 🗄	ineightsuite-qa 23.12 🕐 🗘 🕲 🛞 🎫	ineightsuite-qa 23.12 🕐 🗘 🕲 🛞 🎫	ineightsuite-ga 23.12 🕐 🖧 🛞 😥 🎫
Vendor > E	dit vendor	VENDOR	DETAILS	USERS	CON	TACTS										
												Cancel	Cancel Save	Canael	Canad	Canad
												Cancel	Cancel Save	Cancel Save	Cancel Save	Cancel Save
														1	í.	í.
		Vendor	details													
										-	-	-	-			
		* ID				* Name										
		V187				Lewis Cond	crete									
		Alternate name				Vendor type										
		Alternate name				Z004										
						2004										
		Vendor tax ID				Vendor tax ju	urisdiction	1								
		Status				Default curre										
		Available			•	Select one										
		Default paymer				Default incot										
		Default paym	ent terms		*	Default inc	oterms		•							
		Default incoter	ns location													
		Address	200		Ve	ndor > Edit	vendor					VENDOR DETAILS	VENDOR DETAILS USERS	VENDOR DETAILS USERS CONTACTS	VENDOR DETAILS USERS CONTACTS	VENDOR DETAILS USERS CONTACTS
		Address	503		•											
		Country / Regio	n		_											
					-	Full name			Primary email			Contact type				
								T			Т	T	T 7	Т	T T	Y
					D	Robert Cantor			Name23@Example		e.com	e.com Estimate Contact	e.com Estimate Contact	e.com Estimate Contact 480 555 2658	e.com Estimate Contact 480 555 2658	e.com Estimate Contact 480 555 2658 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.

Ad	dress Book Reg	ister O		
Dra	g columns here to	group		
	Vendor ID	Company =	Vendor	Address 1
8		Phoenix Contractors	Example Vendor 1888	100 Tenth Street
X		Phoenix Contractors	Example Vendor 1666	100 Tenth Street
X		Phoenix Contractors	Example Vendor 5551	100 Tenth Street
X		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 gr	oup		
	Vendor ID	First Name	Last Name	Com
8	Values Text I	Filters		Phoe
8				Phoe
8	Enter text to se	arch	Q	Phoe
8	(All)		^	Phoe
8	✓ (Blanks)			PC5
8	Example Pri	me Contractor 13		PC3
~	Example Sul	b #14 DBE		new
	Example Sul			jose
	Example Sul			InEi
	Example Ver	ndor 123	•	InEI
				InEig
	Clear Filter	Filter Editor	Close	InEi

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.

٩,	Print Previ Expo	iew	Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts	Copy				ink Field InLink Field	Expand / Collapse •	Filter	Clear Filter	View Ver
	Pr	rint			Layouts			Edit		Wo	rkbook		View		
	lres	s Bo	ok Reg	ister ©											
Drag	colu	Imns	here to	group											
Drag			here to	group Vendor Name	. 1	Vendo	r Туре	Tax ID	Tax Jurisd	iction	Addres	s 1			Address
Drag						Vendo	r Type	Tax ID	Tax Jurisd	iction		s 1 st Street Suite	≥ 9000		Address
	Ven			Vendor Name Example Sub	#34 DBE	Vendor Last Name	r Type	Tax ID Company	Tax Jurisd					City	Address

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.

ddress Book Register	Contact Record	Vendor Reco	rd 🛛			
/endor Details	^	Contacts	Notes			
Vendor ID: 4909	173019474807	Drag columns	here to a			
Vendor Name: * 51st	State		-			
Vendor Type: Z002	2	First Nar	ne			
Tax ID: 13						
Tax Jurisdiction: 5th L	.evel					
Address	W, Addie					
eters						
uote		<u> </u>				
	Address Boo	ok Register	Contact Record O			
	Contact Det	tails				
Do Not Use: 🗹 🗸	F	First Name: Tor	ιγ		Address 1:	300 Third Street
		ast Name: LM			Address 2:	300 Third Street
		ast Name: LM	\sim		Address 2: /Region:	300 Third Street
			\sim			
		anv: *	\sim		/Region:	vica
			\sim			vica
	L	anv: *	\sim	-	/Region:	off-1
	L	Title: jr.tl	\sim	-	Region: Office Number:	off-1
	Language F Vendor	Title: jr.tl	gløh		Office Number: Mobile Number: Security	off-1
	Language F Vendor	Title: jr.tl	- Jish	10	Office Number: Mobile Number: Security Last Changed By:	off-1 mob-1

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.

三 命 Master data libraries / Venc	ors			
Vendor > Edit vendor	VENDOR DETAILS	USERS	CONTACTS	
	Status		Default currency	
	Available	٩	Select one	•
	Available Unavailable	▲ ▼	Default incoterms	•
	Default incoterms location			
	Addresses	P	RIMARY REMIT TO	ADDITIONAL

Step by Step — Merge Estimate Vendors to Platform

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

음 Print 袁 Preview 같 Export to Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts		+ Fill Down	Link Fields	Expand / Collapse +	Filter	Clear Filter	View Vendors	View Contact	v Upload	Vendors with Platfo	
Print		Layouts			Edit	Workbook		View			InEig	ht Platform		
Address Book Reg	ister u													
-														
Drag columns here to Vendor ID		e <u> </u>	Addr	ess 1	1	City	State	Posta Zip C		Phone Number	4	Address 2	Vendor Type	Таз
Drag columns here to	group	: 1		ess 1 Seventh Street		City Hometown	State		ode			Address 2 100 Seventh	Vendor Type	Ta

- Note that the connected Estimate vendor previously exists in Platform, prior to the merge of the two vendor records.
- 2. Select Merge.

The displayed ve	endors will be m	erge	d to the selected primary v	vendor.										
Drag columns her	e to group										Sav	ved views:	Standard View	-
Primary	Vendor ID	Ŧ	Vendor Name	1	Vendor Type	Address 1	Address 2	City	Postal / Zip Code	Phone Number	Fax Number	Web Site UR	L Currency	Do Not Use
+	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														
												Г	Merge	Cancel

- 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 Preview			L.		P.			1			וי£י ערַיו	Merge Vendors Upload Vendors		1			
đ	Export	to Exc	el	Vendors a Contact		Vendors ar Default Quo		Contacts	View	/ Vendors	View Cont	acts						
	Print	t				Layouts					In	Eight Platf	orm					
Add	lress B	ook I	۱eg	ister 🛛														•
Drag	column	s here	e to	group										S	aved views:	Previous View	•	\$
	Vendo ID	Ŧ	1	/endor Nam	e	<u> </u>	endor T	ype		Country / Region			City		State	Postal / Zip Code	Phone Number	
8	+		E	xample Sub	#98								Hometown		AZ	889050	111-123-	12:
8	+		E	xample Sub	77					United Sta	tes Of Amer	ica	Hometown		Arizona	889030	111-232-	-34:
8	-		E	xample Ver	ndor 12	23				United Sta	tes Of Amer	ica	Hometown		Arizona	889060	111-123-	21
		Ve	ndo	r ID	First N	ame		Last Nam		Stat		Postal / Zip Code	Country / Region	Primary	Email		Contact Type	
	8	1		1	Pat			Roberts		AZ		889060						

- 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 / O	ounu y /	
Attention				
		Platform and sy ill save the Libra		d back to
Are you sure	e you want to co	ontinue?		
		Ye	S	No

Step by Step — Merge Contacts to Platform

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

름 Print ፙ Preview 같 Export to Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts	Copen		J Link Fields	Expand / Collapse	Clear Filter	View Vendors	View Contact	j⊉ U	erge Contacts with F pload Contacts to Pl		
Print Address Book Reg	ister ©	Layouts			4	Workbook	View			InEi	ght Platfo	orm		
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 Ala	ska	Hometown	889009	pt@sub.com
	Larry	Jack E	xample Sub #	4 DBE		900 First Str	900 First Stre	-t Su	United States Of	America Aria	70na	Hometown	889009	tc@yahoo.c

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

≡		s / Contacts	2				QA-T01-23.8		<u>.</u> 4	3	
				CONTACTS	CONTACT TYPES						
ŧ) 🗹 🛞 🖨 Pr	omote user					C	J [3	()	Q
	Full name 1	Primary email		Mobile number	City	Created on	Address 1	1	ls User		A
	larry jack 🔻 🍸			T		month/day/		T	All	Ļ	
	Larry Jack	tc@yahoo.com		111-565-8958	Hometown	09/15/2023 01:07:50 PM	900 First Street Suite 9000		false		ç

2. Select Merge.

rag columns	s here to group										Saved	views: Prev	ious View	-
rimary	First Name	Last Name	Company	<u>i</u> _	Primary Email	Contact Type	Address 1	Address 2	Country / Region	State	City	Postal / Zip Code	Mobile Number	Office Number
\checkmark	Larry	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.
	Larry	Jack	Example Sub #44 DBE		pt@sub.com		900 First Stree	343 Plum st	United State	Alaska	Hometown	889009		111-332-4.

- 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.

Attention		×							
Successfully mer	rged contacts with primary conta	ict.							
	ОК	-						•	
	☆ Master data libra	ries / Contacts			/	QA-T01-23.	8 @ 4	<u>۶</u> 8	© #
				CONTAC	TS CONTACT TYPE.				
(€ ⊗ ⊴			CONTAC	CONTACT TYPE.		C7 (] ()	Q
(€ 🗹 🛞 🖨	Promote user Company	Primary email	CONTAC	Address 2		Created on	〕 ()	٩
(Primary email			Ţ			

Step by Step — Upload Contacts to Platform

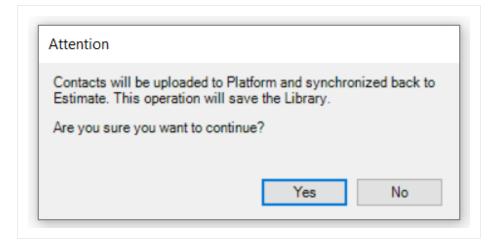
1. Choose a disconnected contact, and then select **Upload Contacts to Platform**.

Print Preview Export to Excel	Vendors and Contacts	Vendors and Default Quotes	Contacts		View Vendors		😰 Merge Conta					
Print		Layouts			1	InEight	Platform					
Address Book Reg	ister ©											
Drag columns here to	group			/				Т		Saved views:	Previous View	•
Vendor ID 🔻	First Name	Last	t Name 😐			Address 1	Address 2		Country / Region	State	City	Postal Zip Co
8	Keesha	Blan	ł.			700 First S	tr		United Arab Emirates	Abu Dhabi	Hometown	88900

- 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.

Orag columns l	here to group				- <u>`</u>		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.

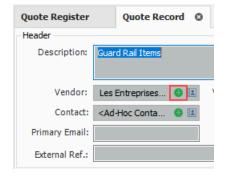
Attention	×					
Successfully upl	oaded contacts to Platform.					
	ОК					
		/ Contacts			QA-T01-23.8	0 4 <mark>4</mark> 8 🕞
			CONTACTS	CONTACT TYPES		
	🕀 🗹 🛞 😋 Pro	note user		Image: A start of the start		[] [] (i) Q
	Full name 1	Primary email	Office number	Mobile number	C	reated on
	T	_	T		Ĩ Ţ Ţ	month/day/year 📋 🝸

Step by Step — Create Vendors and Contacts via Quote Record

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

Drag	g columns here to group							
	Description	<u>=</u>	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 Canbeo	00		Les Entrenrises	<ad-hoc contact=""></ad-hoc>
ß	Guard Rail Items		Invalid	SUB4	Ľ	<u>O</u> pen		SUB4 Harry Belefony
	new J-11		Received	vendor-Nada V206	Ð	<u>N</u> ew	[<ad-hoc contact=""></ad-hoc>
ß	Pipe Materials		Received	Adams Concrete Ven	\otimes	<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		<u>P</u> aste	- 1	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	₿	Link this field	to Excel	Lewis Concrete Robert Canto
	test		Received	[Enter Vendor Name]	N.	UnLink from	Excel	<ad-hoc contact=""></ad-hoc>

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



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	r Record - Library		- • •
endor Details		Contacts	Notes	License / Bond / Insurance	Minority Certifications	Default Quotes
Vendor ID: \star	Ven7869]	Tag 1:		 Last Changed By 	r Paul
Vendor Name: 🔺	Adams Concrete]	Tag 2:			1/24/2024 2:11:49 PM
Vendor Type:	Z002 -]				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:						

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	Minority Certifications	Default Quotes
	Tag 1:	Concrete	 Last Changed I 	By: Paul
	Tag 2:		🕹 👻 Last Changed (0n: 1/24/2024 2:17:05 PM
	Tag 3:		•	
Notes:	endor for	project work in the Phoenix me	tro area.	A
		must be included on the work in		tion.
		ОК	Cancel New	< Prev Next >

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

	æ			- Library	Book Register	Addres	^				ctions
					VE.		Ŧ	1	🕒 New	V.	un I
				View Contacts	View Vendors	Clear Filter	Filter	Expand / Collapse ~		Vendors and Default Quotes	ndors and ontacts
	^			Platform	InEight		View		Edit	youts	Lay
		text to search	× Enter							here to group	g columns h
	State	City		Country / Region	dress 1	A	dor Type	Ver	ndor Name	D = Ve	Vendor II
	Arizona 🔺	Scottsdale	Of America	United States C	29 King St	10	2	zoo	lams Concrete	869 Ad	+ <u>Ven78</u>
	Sage	city-SAGA		12020					n 202	02 Ve	+ VEN20
	Saga					ord €	uote Reco		n 202	02 Ve	+ VEN20
	Arizon						eader	-	vilworks Inc.	2Z CI	+ <u>Ven 0</u>
\$246,720.0	Adrz				pe Materials	tion: (Descript		ndor 300	Ve	+ <u>v300</u>
\$12,336.0									2 V 3	Q	+ <u>v</u> 3
\$259,056.0 ×					Items		External I	F			
کر -	Previous View	ved views:	Sa		group	s here to	ag columns	D			
1.5		No Split	•	Description	Quote Group 🚞		Code 🖮				
			/C SDR21	Pipe 10" PV	Pipe Materials		MPP 10	1			
			/C SDR35	Pipe 24" PV	Pipe Materials		MPP24				
			6 In	Pipe RCP 3	Pipe Materials		MPR36	1			
		-									
		- 5									

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				
Vendors and Contacts	Vendors an Default Quo		🖶 New 🔁 Copy	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**.

三 命 Master data libraries / Vendo	arc		0 4 ²² 8 🖲
Vendor > Edit vendor	VENDOR DETAILS USERS	CONTACTS	
			Cancel Save
	Vendor details		_
	* ID	* Name	
	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	PRIMARY 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**.

First Name: *	Tom	Address 1:	123 Maple Dr
First Name: *	Iom	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	ul Trippi
Vendor: Vend	or 1 Vend 1	Last Changed On: 1/2	25/2024 9:11:43 AM
Do Not Use:			

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

ſ	2	U,	🕂 New	1.1	<u>}</u>			₩ •										
	ors and tacts	Vendors and Default Quotes			pand / F lapse *	ilter *	Clear Filter	View Vendors	View Contacts									
	La	iyouts	Edit		Vie	w		InEight	Platform						^			
ag c	olumns	here to group				Sav	ed views:	Previous View	•		Enter text to s	arch		^	× ₫			
v	/endor I	ID 🚊 Ve	endor Name		Vendor [•]	Гуре	Add	ress 1	Country / Region			City		State				
-	Ven7	7 <u>869</u> A	dams Concrete	÷	Z002		102	9 King St	United States C)f Americ	a	Scottsdale		Arizon	a			
		Vendor ID	First Name	00	ote Record			Company	⊒_ Ad	dress 1	Address	2 0	itv		Sta			
	÷	<u>Ven7869</u>	Tom	· ·	ader													
	4				Description	n: F	ipe Materia	ls										46,720.
										•					{		Ŷ	12,000.
					Vendo Contac	H		rete Ven7869 rete Tom Hen		61	First Na		ms Concrete	e	4			\$0.0
					Primary Emai	Ľ	danis conc	rete Tom Her	rys		Last Na				\rightarrow			\$0.U
					External Ref	. [625	9,056.0
				Pe	sources	Cost	Items								7	_	<i>4</i> 25	×
															-)-			
				Dra	g columns he	re to	group									-	^	\sim
					Code 🖮		Quote Gro	up 🛓 De	escription		No Split	Free	Awar	ded	Du			
				4	MPP 10	2	Pipe Mater		pe 10" PVC SDR21		~							
				A.	MPP24 MPR36		Pipe Mater Pipe Mater		pe 24" PVC SDR35 pe RCP 36 In		 ✓ ✓ 				(
				*	MERCOO		ripe mater	idis Fij	DE KOP 30 III		•		1					
																-		
				4														

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

A	tions	S							
١				E	Сору	14			
	dors ontac		Contacts			Expand / Collapse *	F	ilter *	Clei Filti
	L	ayo	uts		Edit		Vie	w	
Drag) colu	imns	here to group)					Save
	Ven	dor I	D 🚞	Ve	ndor Nan	ne	Ve	endor	Туре
\rightarrow	-	Ven7	<u>869</u>	Ac	lams Con	crete	Z002		
			Vendor ID		First Na	me		Last	Name
	→ <u>Ven7869</u>			Tom				Henr	ys
		4							

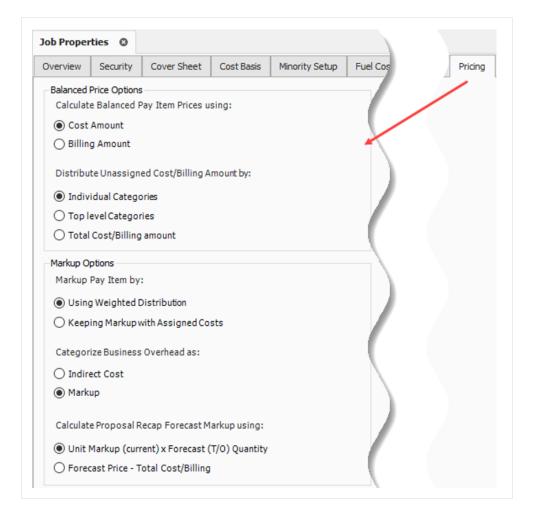
The vendor opens in Project Suite > Master data libraries > **Vendors**, and includes the new contact.

						⌀ 4 <mark>°</mark> ⊗ ⊛ Ⅲ			
Vendor > Edit vendor	VENDOR DETAILS	USERS	CONTACTS						
						Cancel Save			
	Vendor details					<u>~</u>			
	D		* Name						
	Ven7869		Adams Concrete						
	Addresses		PRIMARY REMIT TO	ADDITIONAL					
	Country / Region		Vendor > Edit vendor		VE	NDOR DETAILS USERS CO	INTACTS		
			⊕ ⊠ ⊗						
			Full name	Primary email		Contact type	Office number	Mobile number	City
			T		T		T	T	T
			Tom Henrys	Tomhenry@adamsconcre	te.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.



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.

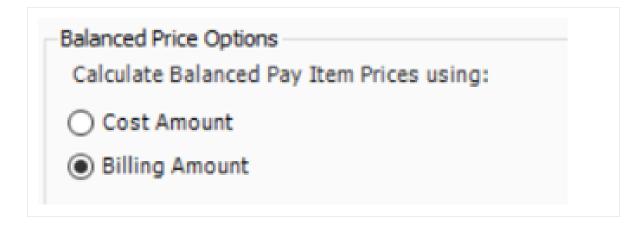
3.4.2.1 Calculate Balanced Pay Item Prices using Cost Amount:

Balanced Price Options
 Calculate Balanced Pay Item Prices using:
 Ocst Amount

O Billing Amount

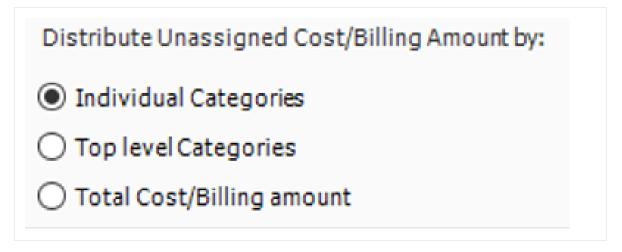
Description	n		Assigned	Unassigned	Total	% of Target	% of Subject	Assigned Billing	Unassigned Billing	Total Billing	% of Target	% of Subject
Pri 🔺	ice Brea	kdown Structure										
~ 🔺	Targe	t Price	\$5,040,796.20	\$1,222,999.47	\$6,263,795.67	100.00		\$5,164,80	\$1,123,41	\$6,288,21	100.00	
~	🛕 Ma	arkup	\$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	
		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	
~	📥 То	otal 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:



Descri	ption		Assigned	Unassigned	Total	% of Target	% of Subject	Assigned Billing	Unassigned Billing	Total Billing	% of Target	% of Subject
- 🔺	Price Bre	eakdown Structure										
¥	🔺 Targ	get 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
	- v 1	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	
		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	
	- 🔺 T	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	
	~ <i>/</i>	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	
	- v 🎽	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	

3.4.2.3 Distribution of Unassigned Costs/Billing Amount by Individual Categories



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.

						L	abor					
			G	iross Wages			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										

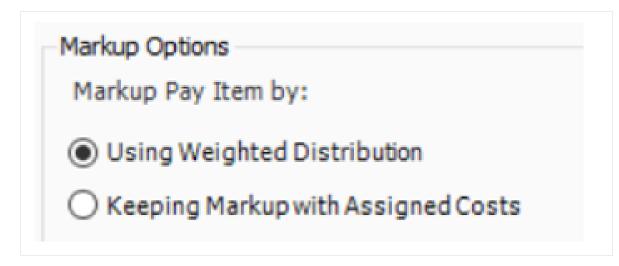
• Top Level Cost Categories - This option uses the ten top level cost categories (labor, owned equipment, rented equipment, supplies, materials, etc.) as the basis for establishing the weighted distribution amounts.

				Labor		Ownee	d Equipme	ent	N	laterials		Balanced
Pay Item	Description	Total Cost	Cost	Weight	Distribution	Cost	Weight	Distribution	Cost	Weight	Distribution	
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			\$100,000			\$50,000			
	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.

					Balanced
Pay Item	Description	Total Cost	Weight	Distribution	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			
	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						Ī	
	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			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 Proj	pert	ies		Pay Item & Prop	oosal Register		Price Brea	kdown Structu	re O	Cos	t Breakdown S	structure (
Descriptio	n				Assigned	Una	assigned	Total	% of Target		% of Subject	
~ 🔺 Pr	Price Breakdown Structure Target Price		Structure									
- v 👗	Ta	rget F	rice		\$5,263,291.67	\$1,	259,783.56	\$6,523,075.24	1	00.00		
*	۸	Mark	up		\$0.00	\$	638,732.42	\$638,732.42		9.79		
	>	A 1	Targe	t Profit		\$	638,732.42	\$638,732.42		9.79	11.52	
~	۸	Total C	l Cos	t	\$5,263,291.67	\$	621,051.14	\$5,884,342.81		90.21		
	*			Indirect	ect Cost	\$0.00	\$	620,051.14	\$620,051.14		9.51	
		> 1	B	usiness Overhead	\$0.00	\$	340,453.76	\$340,453.76		5.22		
		> :	Jo	b Overhead	\$0.00	\$	279,597.38	\$279,597.38		4.29		
	\checkmark	4	Direct	Cost	\$5,263,291.67		\$1,000.00	\$5,264,291.67	4	80.70		
		- 1	b Di	rect Cost Items	\$5,263,291.67		\$1,000.00	\$5,264,291.67		80.70		

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

Job Prop	erti	es	Pay Item & Pro	posal Register		Price Brea	kdown Structu	re O	Cos	t Breakdown S	structure (
Descriptio	Description		Assigned Una		assigned	Total	% of Target		% of Subject		
🗸 🔺 Pri	ce B	real	kdown Structure								
- v 👗	Tar	get	Price	\$5,263,291.67	\$1,	259,783.56	\$6,523,075.24	10	0.00		
~		Ma	rkup	\$0.00	\$	979, 186. 18	\$979,186.18	1	5.01		
	>	\land	Target Profit		\$	638,732.42	\$638,732.42		9.79	11.52	
	>	٨	Business Overhead	\$0.00	\$	340,453.76	\$340,453.76		5.22		
~		То	tal Cost	\$5,263,291.67	\$	280,597.38	\$5,543,889.05	8	4.99		
	¥]		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	8	0.70		
			Direct Cost Items	\$5,263,291.67		\$1,000.00	\$5,264,291.67	8	0.70		

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.

	Curre	at Ta		Ea	recast	Mari	Variance						
	Curre		get	FO	recast	vari	ance						
Price:	\$6,455,450.	\$6,523,075	5.24	\$6,462,8	,850.00 \$67,625 ,560.32 \$7,172		25.24 A	DD					
Markup:	\$571,107.	.19 \$638,732	2.42	\$631,5			72.10 A	DD					
Margin%:	8.	.85 9	.79		9.77	\$1,41	13.30 A	D ADD					
ob Properties	Pay Item & Pr	roposal Register 🛛 🔘	Price	Breakdown	Structure	Cos	t Breakdow	n Struc	ture (CB5) I	Register			
ag columns here t	to group									Saved view	s: Previous View	•	5
Position :	Pay Item Number	Description			Forecast (Quantity	T/O)	Unit of Measure	Unit (curr	Price rent)	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	
+ 3	202 0183	Unclassified Excavatio	n		5	50,000.00	Cubic Yard		\$8.50	\$425,000.00	\$3.04	\$151,909.18	
+ 4	303 5912	Aggregate Base			4	45,000.00	Ton		\$22.00	\$880,000.00	\$4.64	\$185,711.50	
+ 5	303 4263	Asphalt Concrete Hot	Чіх Туре	A A	3	35,000.00	Ton		\$35.00	\$1,330,000.00	(\$12.23)	(\$464,653.94)	
+ 6	413(B) 0464	36 Inch RCP Culvert C	ass III			1,024.00	Linear Feet		\$100.00	\$100,000.00	\$23.17	\$23,166.27	
+ 7	800 0220	10 Inch PVC Force Mai	n (SDR2	1)	1	12,000.00	Linear Feet		\$28.00	\$336,000.00	\$1.46	\$17,550.62	
+ 8	800 0330	24 Inch PVC Gravity Se	ewer (SD	R.35)		3,000.00	Linear Feet		\$64.00	\$192,000.00	\$7.46	\$22,394.31	
+ 9	800 0400	4 Foot Diameter Manh	ke			16.00	Each		\$4,500.00	\$72,000.00	\$448.18	\$7,170.88	
+ 10	501(A) 1306	Structural Excavation	& Backfi			800.00	Cubic Yard		\$30.00	\$24,000.00	\$5.25	\$4,201.04	
+ 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	
+ 13	600 0300	Paint Existing Steel Bri	ige Stru	cture			Lump Sum		\$100,000.00	\$100,000.00	\$10,918.94	\$10,918.94	
+ 14	700	Process Equipment					Each	\$1	,920,500.00	\$1,920,500.00	\$170,356.68	\$170,356.68	
+ 15	1000	Removal of Undergrou		ige Tanks			Each		\$12,500.00	\$25,000.00	\$1,571.46	\$3,142.91	
+ 16	1010	Disposal of Contamina	ted Soil				Cubic Yard		\$25.00	\$20,000.00	\$2.25	\$1,802.45	
+ 17	1200 0100	Toll Booth			_		Each		\$30,000.00	\$30,000.00	\$2,169.15	\$2,169.15	
+ 18	1500 0100	Guardrail Type 2					Linear Feet		\$24.00	\$24,000.00	(\$2.06)	(\$2,059.88)	
+ 19	1500 0200	Guardrail Type 3A					Linear Feet		\$31.00	\$6,200.00	(\$2.66)	(\$532.14)	
+ 20	1600 0230	Type 4 Signs					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	

 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 Recap - Training Job									
	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	-	5
Position	Pay Item Number	Description	Forecast (T/O) Quantity	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	ï
+ 2	201 0102	Clearing & Grubbing	10.00	Acre	\$6,120.00	\$61,200.00	\$1,007.30	\$10,072.97	i
+ 3	202 0183	Unclassified Excavation	50,000.00	Cubic Yard	\$8.50	\$425,000.00	\$3.04	\$151,909.18	j
+ 4	303 5912	Aggregate Base	45,000.00	Ton	\$22.00	\$880,000.00	\$4.64	\$185,711.50	l
+ 5	303 4263	Asphalt Concrete Hot Mix Type A	35,000.00	Ton	\$35.00	\$1,330,000.00	(\$12.23)	(\$464,653.94)	J
+ 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	1
+ 8	800 0330	24 Inch PVC Gravity Sewer (SDR35)	3,000.00	Linear Feet	\$64.00	\$192,000.00	\$7.46	\$22,394.31	l
+ 9	800 0400	4 Foot Diameter Manhole	16.00	Each	\$4,500.00	\$72,000.00	\$448.18	\$7,170.88	ĺ
+ 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	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	1
+ 13	600 0300	Paint Existing Steel Bridge Structure	1.00	Lump Sum	\$100,000.00	\$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 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	i
+ 17	1200 0100	Toll Booth	1.00	Each	\$30,000.00	\$30,000.00	\$2,169.15	\$2,169.15	1
+ 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)	ĺ
+ 20	1600 0230	Type 4 Signs	1,000.00	Square Feet	\$13.00	\$13,000.00	(\$1.12)	(\$1,115.77)	1
+ 21	C01	Realignment of Water Line	1.00	Each	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00	1
21			*•	62,85	0.00	\$6,455,450.00		\$571,107.19	

	b Properties	Pay Item & Proposal Register	Price Breakdown Strue	cture	Cost Breakdown	Structure (CBS)) Register 🛛	
ra	g columns here to	group						
	CBS Position Code	E Description	Optional Code	Foreca (T/O)	ist Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
÷		ЈОВ			20.00	Mile	\$291,755.30	\$5,835,106.0
	+	Prime Bond	PRIME BOND		1.00	Lump Sum	\$46,915.38	\$46,915.3
	+	Price % Add-On	PRICE % ADD		1.00	Lump Sum	\$293,538.39	\$293,538.3
	+	Job Financing	FINANCE EXPE	E	1.00	Lump Sum	\$0.00	\$0.0
	+	Indirect Cost Escalation	INDIRECT COS	S	1.00	Lump Sum	\$0.00	\$0.0
	+	Direct Cost Escalation	DIRECT COST		1.00	Lump Sum	\$0.00	\$0.0
	+	Indirect Cost Add-On	INDIRECT COS	S	1.00	Lump Sum	\$0.00	\$0.0
	+	Job Management & Equipme	nt JOB MANAGEN	ч	1.00	Lump Sum	\$157,096.28	\$157,096.2
	+	General Expense	GENERAL EXPE	E	1.00	Lump Sum	\$4,200.00	\$4,200.0
	+	Direct Cost Add-On	DIRECT COST	·	1.00	Lump Sum	\$104,301.10	\$104,301.1
	+ 1	Mobilization	641 0 100		1.00	Lump Sum	\$11,909.51	\$11,909.5
	+ 2	Clearing & Grubbing	201 0102		10.00	Acre	\$3,918.50	\$39,184.9
	□ 3	Unclassified Excavation	202 0183		50,000.00	Cubic Yard	\$4.68	\$233,915.8
	+ 3.1	Excavation	3.1		50,000.00	Cubic Yard	\$3.00	\$149,922.8
	+ 3.2	Embankment	3.2		50,000.00	Cubic Yard	\$1.68	\$83,992.9
	□ 4	Aggregate Base	303 5912		45,000.00	Ton	\$15.40	\$692,928.9
	+ 4.1	Furnish & Haul Base Material	4.1		45,000.00	Ton	\$11.54	\$519,513.3
	+ 4.2	Finegrade Subgrade	4.2		400,000.00	Square Yard	\$0.19	\$75,848.3
	■ 4.3	Install Aggregate Base	4.3		45,000.00	Ton	\$2.17	\$97,567.3
	+ 4.3.1	Place Aggregate Base	4.3.1		45,000.00	Ton	\$1.63	\$73,460.9
	+ 4.3.2	Blue Top Aggregate Base	4.3.2		400,000.00	Square Yard	\$0.06	\$24,106.4
	□ 5	Asphalt Concrete Hot Mix Ty	Pe A 303 4263		35,000.00	Ton	\$42.62	\$1,491,580.5
	+ 5.1	Furnish & Haul Hot Mix	5.1		35,000.00	Ton	\$39.27	\$1,374,562,5
		102						\$5,835,106.0

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	💾 🔹 👘							ibrary - Estimate							
File	Setup	Estima	te Exec	ution S	System	Integrations	Action	s						童 📰	?
	•	-*		La		-	🕵 Labor		a l			†4†			
Job	Properties	Foundation Setup Data		Trench Calculator	Shift Rate Calculator	Resource Rates *	Hateria	ent Resource	Cost Item S	tandard Tables	User Role		Reports		
		Maste	r Initializati	on		P	laster Res	ources	Master Asse	mblies	Roles and	Permissions	Reports		^
Jot	Propertie	s Fo	undation Se	tun Data Pe	nictor O										
	rioperae		unuation Se		cyister @										
	count Codes	_	Work Breakd		-	Group Tags	Units of M	easure Curren	ies Resource	/ Assembly	Files Geo	graphic Areas	Wage Zones	Orga 🔄	•
Ac	count Codes	_			-	Group Tags	Units of M	easure Curren	ies Resource		_		Wage Zones		•
Ac	count Codes	Tags	Work Breakd		-	Group Tags Unit of Measure		easure Curren Secondary Unit Of Measure		For]	Save Quantity		-	Orga	• У
Ac	count Codes g columns he	Tags ere to group Account	Work Breakd	own Structure	es Quote	Unit of		Secondary	Find: Search F	For]	Save Quantity	d views: Star	ndard View Auto-Quantity	Orga <	► v
Ac	count Codes g columns he	Tags ere to group Account Code	Work Breakd	own Structure	es Quote	Unit of Measure		Secondary	Find: Search F	For]	Save Quantity	d views: Star Quantity	ndard View Auto-Quantity	Orga <	• У
Ac	count Codes g columns he	Tags re to group Account Code 1001.34	Work Breakd	own Structure scription move insulatio	es Quote	Unit of Measure Each		Secondary	Find: Search F	For]	Save Quantity	d views: Star Quantity 0.00	ndard View Auto-Quantity	Orga <	• У

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.

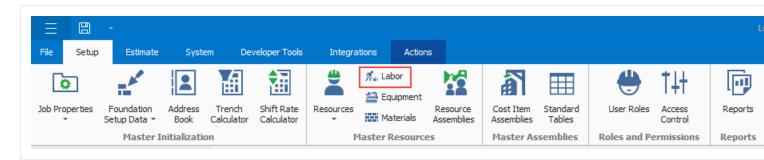
	Resources
Equipment	
Rented Construction Equipment	Construction equipment rented from a third party.
Installed Materials	Materials that will remain installed on site after the project is completed, (e.g., concrete, piping, aggregate).
Installed Equipment	Equipment that will remain installed on site after 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.



Overview – Library Resource Rate Register

	Name	Description
1	Tabs	 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. Notice that you are on the Labor Tab
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 Rate per Unit	This is the resource cost 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.

All	Labor Co	onstruction Equipment R	ented Construction	n Equipment	Installed Material	Installed Equ	uipment Su	pplies Unique		
rag	column 2: t	o group 3		4		5 Find	± [6 ₽	r] … Saved vi	ews: 7 jous Viev	v -
	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	\$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 = 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				
resource rate record			Resource File Description	Unit of Measure	Productivity Factor
+ LC1	Carpenter App	rentice	Standard Labor Rate	Hour	1.0
+ LC1	Carpenter App	rentice	Standard Labor Rate	Hour	1.0
+ LC2	Carpenter Jou	rney	Standard Labor Rate	Hour	1.0
+ LC2	Carpenter Jou	rney	Standard Labor Rate	Hour	1.0
+ LC3	Carpenter For	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.

Setup	1	Charge Rate 2 ng	Rate					6
Scale	1	Scale 2 Scale 3 A	Il Scales					Special Instructions
Cost C	ateo	ory Breakdown	Amount	()	Percent	Is Taxed	Is Insured	Use the Materials cost category to add additional labor cos formaterials and supplies.
То			Varies					Worker's Comp values for this resource can be adjusted
~	Lab	or	Varies					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 which
	•	Labor Burden	Varies					the resource is employed.
		 Labor Fringes 	Varies					Standard Worker's Comp Overrides can be defined in the
		> 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
		Undefined Labor	\$0.00	÷	0.00			
>		erials	\$0.00					Scale 2 Factor: 1.50 x Base Wage
	Und	lefined	\$0.00					Scale 3 Factor: 2.00 x Base Wage
								This option multiplies the Scale 1 base wage by the facto entered here to automatically calculate the base wage fo 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 Charge	e Rate	Billing Rate			
Resource File:	Standard	Labor Rate File	*		
Geographic Area:	Southwes	t	•		
Wage Zone:	Wage Zor	Wage Zone A			
Org. Category:	Carpente	r	•		
Account Code:			đ		
Cost Driver:	CI Duratio	n	•		
Cost Curve:	Employed	Cost Item	•		
Tag 1:	Non Unior	ı	•		
Tag 2:	Hourly		•		
Tag 3:			*		
		1.00			
roductivity Factor:					
roductivity Factor: Default Quantity:		1.00			

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.

o 💾 🕞													ibrary - Estimate
File Setup	Estimate	Exec	ution	System									
٥	-	2	围			🐔 Labor 🔐 Equipment		a		٢	†4†	D	
Job Properties	Foundation Setup Data 🔻	Address Book	Trench Calculator	Shift Rate Calculator	Resource Rates *	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	User Roles	Access Control	Reports	
	Master I	nitializati	on		1	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.

lesoui	rce	Rat	e Register	Labor Rate Rec	ord ©		
ode: *	•	.ME	CHINEIGHT Descr	iption: Mechanic	- Heavy Duty		
Setup		4 ,	Charge Rate Billir	ng Rate			
Scale	1	S	cale 2 Scale 3	All Scales			
Cost C	ateg	gory	Breakdown	Amount	€→	Percent	
✓ To	tal			\$57.00			
~	Lat	oor		\$57.00			
		Lab	oor Base	\$52.00			
	~	~	Lab	oor Burden	\$5.00		
			¥	Labor Fringes	\$5.00		
			Travel	\$0.00	÷	0.00	
			Premium	\$0.00	€	0.00	
			Holiday	\$0.00	÷	0.0	
			Savings	\$0.00	÷	0.0	
			Pension	\$3.00	÷	5.7	
			Vacation	\$0.00	÷	0.00	
			Subsistence	\$2.00	÷	3.85	
			Health & Welfare	\$0.00	<	0.00	

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

Base Wage Fac	tors for O	vertime									
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									
	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 Cor	struction Equipment Rent	ted Construction Equipment	Installed Materia	al Installed Equi	ipment Supp	lies Unique					
rag	columns here to	group					Find:	earch 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
<i>→</i>	+ 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

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	phic 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	CLDura	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.

Job P	rope	erties	Constructi	on Equipment Ra	tate Record 🛛
Code:	*	EAPAV	Descrip	otion: Asphalt Pa	aver
Setu	p	🖶 Charge I	Rate Billing	Rate	
Cost	Cate	gory Breakdo	own	Amount	Fuel
v T	otal			\$199.00	Fuel Type Consumption Rate
	0	vned Equipm	ent	\$199.00	Gasoline - 12.00 Gallon/Hour
	>	OE Owners	hip	\$0.00	
	*	OE Operati	on	\$199.00	Consumption Rate factored
		OE Rep	air Parts	\$0.00	with cost per liter gives you a
		OE Rep	air Labor	\$0.00	fuel cost.
		OE Fue		\$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 Charge F Calculate Non-Hourly Period RE Rental	
Period: Week	dy 💌
Amount Per Period:	\$4,000.00
Hours Per Period:	20.00

Cod	e: '	RECR110	Descripti	ion: [Crane	110 Ton
Set	tup	🔱 Charge Rate	Qu	ote	Billin	g Rate
Cost Category Breakdown		ategory Breakdown		Amou	unt	
¥	То	tal		\$20	00.00	
	≻	Rented Equipment		\$20	00.00	
	>	Fees		\$	0.00	
		Undefined		5	50.00	

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

Job	Properties	5	Resource Rate	Register 🕻							
All	Labor	Const	ruction Equipment	Rented Con	struction Equipm	ent Insta	lled M	laterial	Installed Equipment	Supplie	
Drag	columns her	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	
	+ MAC		Asphalt Cement		\$195.00	0	0.00 Ton		Standard Material Rate.		
	+ MACA1	-1/2	Coarse Aggregate	e 1-1/2 In	\$9.10 0.00			Ton Standard Material Rat			
	+ MAFA		Fine Aggregate		\$7.80	0	.00	Ton	Standard Materia	al Rate	
	+ MAHAU	L	Aggregate Haul Q	uarry to P	\$2.60	0	0.00 Ton		Standard Material Rate.		
	+ MAIA3/	4	Intermediate Agg	regate 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	
	+ MC2000)	Concrete 4000 PS	I	\$110.50	0	.00	Cubic Yard	Standard Materia	al Rate	
	+ MC3500)	Concrete 3500 PS	I	\$104.00	0	.00	Cubic Yard	Standard Materia	al Rate	
	+ MDIRTA	1	Dirt Class A		\$1.30	0	.00	Cubic Yard	Standard Materia	al Rate	
	+ MDIRTE		Dirt Class B		\$6.50	0	.00	Ton	Standard Materia	al Rate	

• Cost categories will differ on each type of resource record

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	Descriptio	n: Brick F	avers
Setup	🔱 Charge Rate	🖵 Quot	e Billin	g Rate
Cost C	ategory Breakdown	A	mount	
✓ To	tal		\$5.00	
~	Materials		5	
	Installed Materials		\$5.00	
	Undefined Materia	ls	\$0.00	
>	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*

Res	ource Rate Regis	iter O									-
Al	Labor Constr	ruction Equipment Rented Co	onstruction Equipment Installe	d Material	Installed Equipment	Supplies U	Inique				
Drag	columns here to gro	oup				Find: Sea	ch For]	- Saved vie	ws: Previous	View	×
	Resource E.	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.



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	 Expanding an assembly reveals the list of resources that make up that assembly. 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

esou	rce A	ssembly	Regis	er o																		-
ag col	umns	here to gr	oup										Find	: [Sear	ch For]		··· Saved	views:	Stan	idard View		-
2	de	<u>-</u>	Descrip	otion		Resou File D	urce escription		Quan		Unit of Measure	Unit Cost	Total Cos	st	Currency		Organization Category		Geogr Area		Wage Zone	Man Cou
-	CCO	NC	Concre	te Crew		Stand	lard Assemb	ly		1.00	Hour	\$330.3	8 \$3	330.38	U.S. Dolla	r	Concrete					
		Row Number	-	Resource Code	Description		Quantity	Unit o Meas		Unit Cost	Currency		Resource File Descript	ion		Organi Catego	zational ory	Geogra Area		Wage Zone		
	\rightarrow		1	LC2	Carpenter Journe	eyman	2.00	Each		\$28.92	U.S. Dollar	CI Dura	Standard La	bor Rate	: File	Carper	nter	Southw	est	Wage Zon		
			2	LF2	Finisher		1.00	Each		\$28.07	U.S. Dollar	CI Dura	Standard La	bor Rate	e File	Finishe	r - Conc	Southw	est	Wage Zon		
-			3	LIW1	Iron Worker		1.00	Each		\$35.55	U.S. Dollar	CI Dura	Standard La	bor Rate	e File	Iron W	orker	Southw	est	Wage Zon		
3			4	LL2	Laborer		1.00	Each		\$26.37	U.S. Dollar	CI Dura	Standard La	bor Rate	e File	Labore	r	Southw	est	Wage Zon		
-			5	ECRHC	Hydraulic Crane	25 Ton	1.00	Each		\$84.00	U.S. Dollar	CI Dura	Standard Eq	uipment	Rate	Crane						
			6	LC1	Carpenter Appre	ntice	1.00	Each		\$27.48	U.S. Dollar	CI Dura	Standard La	bor Rate	: File	Carper	nter	Southw	est	Wage Zon		
			7	LO2	Operator Class 2		1.00	Each		\$30.21	U.S. Dollar	CI Dura	Standard La	bor Rate	: File	Opera	tor	Southw	est	Wage Zon		
			8	ETFT	Flatbed Truck		1.00	Each		\$7.00	U.S. Dollar	CI Dura	Standard Eq	luipment	Rate	Truck						
1			9	LC3	Carpenter Forem	ian	1.00	Each		\$33.87	U.S. Dollar	CI Dura	Standard La	bor Rate	e File	Carper	nter	Southw	est	Wage Zon		
4	CGR	ADE	Gradin	g Crew		Stand	lard Assemb	ly		1.00	Hour	\$175.0	6 \$1	175.06	U.S. Dolla	r	Earthwork					
+	CMA	INT	Equipm	ent Mainter	ance	Stand	lard Assemb	ly		1.00	Each	\$58.0	0 \$	\$58.00	U.S. Dolla	r	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.

	ource Assemb	bly Re	gister	Resource	e Assembly R	ecord 0								
Cod	e: * CCONC		Descripti	ion: Concr	ete Crew	1						2	Qty:	
R	Resource File:	Stand	dard Assembly	File 🔹	Tag 1:		•						UM: Hour	
Geo	graphic Area:			-	Tag 2:		•					Unit	Cost:	\$330.
	Wage Zone:			-	Tag 3:		-					Curr	ency: U.S. Do	llar
0	rg. Category:	Conc	rete	-	Man Count:	8.00					•	Last Change	ed By:	
					Equip Count:	2.00					4	Last Change	d On:	
	Notes:													
Cost		Assemi	bly Details											
			- 2)						Find:	Search For] ··· Sa	ved views: Previous V	/iew	•
Drag	t Summary	to grou	- 2	Descripti	ion	Quantity	Unit of Measure	Unit Cost	Currency	Find: E Cost Driver	Search For] ··· Sau Resource File Description	ved views: Previous V Organizational Category	^r iew Geographic Area	• Wage Zone
)rag	t Summary	to grou	IP 3		ion ter Journey	Quantity 2.00			Currency U.S. Dollar	Cost	Resource	Organizational	Geographic	Wage Zone
Drag	t Summary	to grou 1	up 3 Resource Code		ter Journey		Measure	\$28.92		Cost Driver	Resource File Description	Organizational Category	Geographic Area	Wage Zone Wage Z
Drag	t Summary	to grou 1 2	IP 3 Resource Code LC2	Carpente	ter 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	(T/O) Quantity	Unit of Measure	Unit 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 🛛				
Dra	g columns here to	group				
	Code 📃	Description	Resource File Description	Quantity	Unit of Measure	
	+ CCONC	Concrete Crew	Standard Assembly	1.00	Hour	
\rightarrow	+ 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	on Equipment Resource			
Resource Code	RPW3000	RE Rental Amount	\$3.40	
Resource Description	Pressure Washer 3000 PSI	Organizational Category	Clean & Insp	pect
Resource File		Standard Rental Rate	e File	
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	or Apply Standard Tax and	d enter a Unique Sales	Tax Rate: 69	%

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

Assembly #1

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	urces for this Assembly.	
Resources on Assembly	Resource Description	Resource Quantity
Resources on Assembly	Resource Description Teamster Foreman	Resource Quantity .5
-	•	-
LT2	Teamster Foreman	-

Assembly #2 (continued)

ETPU	Pickup	1
EL950	Loader 950	1

You should end up with similar results:

e	source de	= ▼	Resource File Description	e	Organizationa Category		Geographic V Area Z			Description	Unit of Measure
-	LSFA		Standard La	bor Rate File	Supervision	Sou	thwes	est		Field Administrator	Hour
	Scale		Total	Labor	Labor Base	Labor Burd	den Labor Fi		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		

	esou ode	rce / 👻	Descri	ption	_	Resource File	Unit of Measure	Unit Cost (Scale 1)	Curr	ency 👻		anizational [-
-	RP	W3000	Pressu	re Washer 3000 PSI	St	tandard Rental Rate Fi	le Hour	\$3.40	U.S.	Dollar	Clea	in & Inspect	
		Total		Rented Equipment	RE Rent	tal RE Rent Expense	RE Overhead	RE Finance Expe	ense	RE Insura	ance	RE License	
	•		\$3.40	\$3.40	\$3.	.40 \$0.00	\$0.00	\$	0.00	\$	0.00	\$0.00	j

Resource / 💌 Description 💌				n –	Resource File Description	-		Unit Cost (Scale 1)	Currency 👻	Organizationa Category	al 👻
	MC	СВ	Pre-Cast	Concrete Catch Basin	Standard Material R	ate File	Each	\$318.00	U.S. Dollar	Concrete	
		Total	Materials	Installed Materials	Undefined Materials	Fees	Sales Taxes	Undefined Fee	es Undefined	Billing Rate	Billing Markı
	۲	\$318.00	\$300.00	\$0.00	\$300.00	\$18.00	\$18.00	\$0	.00 \$0.0	\$318.00	

			_															
Ass Cod				mbly ription	Ŧ	Resource File Descript	ion 💌	Quantity -	Unit of Measure	- L	Unit Cost	Y	Total Cost 👻	Currenc		Organization Category		eographic rea
- 0	BF	IDGE	Bridg	e Crew		Standard As	sembly File	1.0	0 Hour		\$17	0.11	\$170.11	U.S. Dol	lar			
		Row Number	1	Resource Code	Description	Quantity	Unit of Measure	Unit Cost	Currency	Cost		Reso File D	urce lescription		Organiza Categor		Geograp Area	hic Wage Zone
	۲		1	LC2	Carpenter Journeyma	an 2.0	0 Each	\$28.92	U.S. Dollar	CID	Juration	Stand	lard Labor Rate I	File	Carpent	er	Southwe	st Wage Zo
			2	LC3	Carpenter Foreman	1.0	0 Each	\$31.47	U.S. Dollar	CID	Juration	Stand	lard Labor Rate	File	Carpent	er	Southwe	st Wage Zo
			3	LF2	Finisher	1.0	0 Each	\$28.07	U.S. Dollar	CID	Juration	Stand	lard Labor Rate	File	Finisher	- Concrete	Southwe	st Wage Zo
			4	LL2	Laborer	2.0	0 Each	\$26.37	U.S. Dollar	CID	Juration	Stand	lard Labor Rate	File	Laborer		Southwe	st Wage Zo

ode	1	- T	Descrip	otion		Resource File Description		Quantity		Unit of Measure	Unit Cost	Total Cost	Currency	Organizational Category	Geographic Area	Wage Zone	
CF	RIPF	RAP	Rip Ra	Rip Rap Replacement Crew		Standard Assembly		ly	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	n	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	n s	System	Actions				
8	Print	🕂 New	📮 Сору	恩 Lin	nk Field	~				ource Utiliza	ation	a
ą	Preview	🛞 Delete	🖹 Paste	- 思 u	nlink Field	4			Reso	ource Cost	Details	2
e	Export to Excel	}< Cut	+ Fill Do	wn		Expan Collaps		Clear Filter				Copy Job R to Libr
	Print		Edit	Wor	kbook			Vi	iew			
Job	Properties	Resource	ce Rate Re	gister 🛛								
All	Labor Co	nstruction Equ	ipment F	Rented Const	ruction Equ	pment	Installed Ma	terial	Installed Ed	quipment	Supplie	es Unique
Drag	columns here to	group										
	Resource			Unit of	Prod	uctivity	Default		Waste %	Unit Co	ost	Unit Cost
	Code	Description	on 🚊	Measure	Fact		Quantity		Add-on	(Scale		(Scale 2)

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.

9 🖬 🗟										Resource	- Import De	no - Estima	te					- 0
File Setup	Estimate	Quote	Price	Execution	System	Actions												盒 囲
0	-		***		🐔 Labor 🔛 Equipment	1 0	a	===	P									
	Foundation etup Data *	Pay Item & Proposal	Bid Wizard	Resource	Materials	Resource Assemblies	Cost Item Assembles	Standard Tables	Reports									
	Initializ	e			Resources		Assen	nblies	Reports									
Cost Breakdown	Structure (CBS) Regist	er Re	source Rat	e Register 🛛 🛛	Resource	Cost Detail	s Register	r									
Al Labor C	Construction E	aupment i	Rented Const	ruction Equipr	ment Installed	Material	Installed Equip	ment S	upplies Unic	ue								
rag columns here	to group														P.	ind: [Search	For]	Saved views: RB_Resource Labor Upload VI
User Defined 1 =	Resou Code	ce De	scription		ource File cription		Organizationa Category	4	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**.

88	* E	× ✓	f _x														
	A	В	c	D	E	F	G	н	1.1	1	ĸ	L .	M	N	0	P	
Require	d																
Validat	ed Field																
Not Reg	uired																
				Co	lumn Headers may differ b	ased on Design De	cision Item #67										
				Resource Ri	ite Register										Resource	e Cost Details	i R
UDF1	Resou	rce 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	1 2	22
	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	2 2	23.
	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	1 2	24
	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	2	25
	10004 LSUBN	4	Foreman Boilermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		TRUE	1.50	2.00	\$32.92	2	26
	10005 LPF1		Lead Pipe Fabricator	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar		L TRUE	1.50	2.00	\$33.92	1 7	27
	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	7	28
	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	2	29
	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	1 1	30
	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	1	31
	10010 LBM2		Journeymon Bollermoke	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Holon	Houstly	U.S. Dollar		TRUE	1.50	2.00			32

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		В	C	D	E	F	G	н	1	J	K	L	M	N	0	Р	
equired																	
alidated	Field																
lot Requi	red																
					umn Headers may differ b	ased on Design Dec	ision Item #67										
					ate Register											e Cost Details	Re
		Resource Code	Description -	Resource File Description	Organizational Category	Geographic Area	Ware Zone				Default Quantity -	Use Base Ware Factors	*Scale Factor 2 -			Labor Base	
	0000		Carpenter Journeyman		Carpenter	Southwest	Wage Zone A			U.S. Dollar	1	TRUE	1.50				22 1
	0001		Foreman Pipe		Carpenter	Southwest	Wage Zone A	Non Union			1	TRUE	1.50				23.1
		LSUIW	Foreman Iron		Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	TRUE	1.50				24.
	0003 1		Foreman Civil	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union			1	TRUE	1.50				25.1
1	0004 1	LSUBM	Foreman Boilermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	TRUE	1.50				26.
1	0005 1	LPF1	Lead Pipe Fabricator	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	TRUE	1.50				27.1
1	0005 1	LPF2	Journeyman Pipefitter	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	TRUE	1.50				28.
	0007				Carpenter	Southwest	Wage Zone A			U.S. Dollar	1	TRUE	1.50				29.1
	0008				Carpenter	Southwest	Wage Zone A			U.S. Dollar	1	TRUE	1.50				30.
1	0009	LBM1	Lead Boilermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	TRUE	1.50	2.00	\$37.92		31.1
11	0010	LBM2	Journeyman Boilermake	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A	Non Union	Hourly	U.S. Dollar	1	TRUE	1.50	2.00	\$38.92	1 2	32.1

- 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	발 습기 Setup	- Estimate	: Quot	le Price	E Exec	aution	System	Actions				
	Properties	Foundation Setup Data *			rd Resou	s * HE N	abor iquipment faterials sources	Resource Assemblies	Cost Item Assemblies	Standa Table	and R s	eports
Cos	t Breakdov	wn Structure	(CBS) Reg	ister	Resource	e Rate Reg		Resourc	e Cost Detaile	s Regis		
All	Labor	Construction	Equipment	Rented O	onstruction	Equipment	Installed	Material	Installed Equip	ment	Supplies	Uniqu
Drag	columns he	re to group										
	User Defined 1		e e	Description		Resource P Description			Organizationa Category	4	Geogr Area	a

- 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.

	-	án -						Resource - In	mport Dem	no - Estima	te					- 6
	Г	Setup E	stimate Quo		cution System Action											盦
٢	5		 E 	11	A Labor	a ≣	I 🕞									
			_		Equipment											
P	rop	erties Found Setup (urce Resource s • 📅 Materials Assemble											
			Initialize		Resources	Assemblies	Reports									
	Be	eakdown Stra	cture (CBS) Reg	ister Resource	e Rate Register O Resou	rce Cost Details Regis	ter									
	-	_				-										
1	Ľ	abor Const	uction Equipment	Rented Construction	Equipment Installed Material	Installed Equipment	Supplies Unit	ane								
g	colu	mns here to gr	sup											Find: Search F	for]	Saved views: R8_Resource Labor Upload Vi.
													Line Breez			
	Use		Resource		Resource File	Organizational	Geogra	Wape				Default	Use Base	Scale 2	Scale 3	
	Use Def	r hed 1	Resource Code	Description	Resource File Description	Organizational Category	Geogra Area	Wage Zone	Tag 1	Tag 2	Currency	Deraux	Wage Factors	Scale 2 Factor	Scale 3 Factor	
1	Def	r Ined 1		Description Carpenter Journey			Geogra Area Southwest	Zone	Tag 1 Non Union	-	Currency U.S. Dollar	Deraux	Wage		Factor	
ſ	t +	ined 1 🖳	Code		Description	Category	Area	Zone Wage Zone A		Hourly		Quan	Wage Factors	Factor	Factor 0.00	
1	+ +	ined 1	Code LC2	Carpenter Journey	Description Standard Labor Rate File	Category Carpenter	Area Southwest	Zone Wage Zone A Wage Zone A	Non Union	Hourly	U.S. Dollar	Quan	Wage Factors	Factor 0.00	Factor 0.00 0.00	
1	+ + +	ined 1 10000 10001	Code LC2 LSUPF	Carpenter Journey Foreman Pipe	Description Standard Labor Rate File Standard Labor Rate File	Category Carpenter Carpenter	Area Southwest Southwest	Zone Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union	Hourly Hourly Hourly	U.S. Dollar U.S. Dollar	Quan 1.00	Wage Factors	Factor 0.00 0.00	Factor 0.00 0.00 0.00	
	Def + + +	Ined 1	Code LC2 LSUPF LSUTW	Carpenter Journey Foreman Pipe Foreman Iron	Description Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File	Category Carpenter Carpenter Carpenter	Area Southwest Southwest Southwest	Zone Wage Zone A Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union Non Union	Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar	Quan 1.00 1.00 1.00	Wage Factors	Factor 0.00 0.00 0.00	Factor 0.00 0.00 0.00 0.00	
	Def + + + +	ined 1	Code LC2 LSUPF LSUTW LSUC	Carpenter Journey Foreman Pipe Foreman Iron Foreman Civil	Description Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File	Category Carpenter Carpenter Carpenter Carpenter	Area Southwest Southwest Southwest Southwest	Zone Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar	Quan 1.00 1.00 1.00 1.00	Wage Factors	Factor 0.00 0.00 0.00 0.00 0.00	Factor 0.00 0.00 0.00 0.00 0.00	
	Def + + + + +	Ined 1	Code LC2 LSUPF LSUTW LSUC LSUBM	Carpenter Journey Foreman Pipe Foreman Iron Foreman Civil Foreman Bolermaker	Description Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File Standard Labor Rate File	Category Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter	Area Southwest Southwest Southwest Southwest Southwest	Zone Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar	Quan 1.00 1.00 1.00 1.00 1.00	Wage Factors	Factor 0.00 0.00 0.00 0.00 0.00 0.00	Factor 0.00 0.00 0.00 0.00 0.00 0.00	
	Def + + + + + + +	ined 1 10000 10000 10002 10003 10004 10004 10005	Code LC2 LSUPF LSUTW LSUC LSUBM LSUBM LPF1	Carpenter Journey Foreman Pipe Foreman Iron Foreman Civil Foreman Bolermaker Lead Pipe Fabricator	Description Standard Labor Rate File Standard Labor Rate File	Category Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter	Area Southwest Southwest Southwest Southwest Southwest Southwest	Zone Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A	Nan Union Nan Union Nan Union Nan Union Nan Union Nan Union	Hourly Hourly Hourly Hourly Hourly	U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar	Quan 1.00 1.00 1.00 1.00 1.00 1.00 1.00	Wage Factors	Factor 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	Factor 0.00 0.00 0.00 0.00 0.00 0.00 0.00	
	Def + + + + + + + + + +	ined 1	Code LC2 LSUPF LSUTW LSUC LSUBM LPF1 LPF2	Carpenter Journey Foreman Pipe Foreman Iron Foreman Civil Foreman Bolermaker Lead Pipe Fabricator Journeyman Pipefiter	Description Standard Labor Rate File Standard Labor Rate File	Category Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter	Area Southwest Southwest Southwest Southwest Southwest Southwest Southwest	Zone Wage Zone A Wage Zone A	Non Union Non Union Non Union Non Union Non Union Non Union Non Union	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 1.00 1.00 1.00 1.00 1.00 1.00 1.00	Wage Factors	Factor 0.00 0.00 0.00 0.00 0.00 0.00 0.00	Factor 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	
	Def + + + + + + + + +	ined 1 10000 10001 10002 10003 10004 10005 10005 10006 10007	Code LC2 LSUPF LSUTW LSUC LSUBM LPF1 LPF2 LPF3	Carpenter Journey Foreman Pipe Foreman Iron Foreman Civil Foreman Bolermaker Lead Pipe Fabricator Journeyman Pipefitter Pipefitter A	Description Standard Labor Rate File Standard Labor Rate File	Category Carpenter Carpent	Area Southwest Southwest Southwest Southwest Southwest Southwest Southwest	Zone Wage Zone A Wage Zone A	Non Union Non Union Non Union Non Union Non Union Non Union Non Union	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	Quan 1.00 1.00 1.00 1.00 1.00 1.00 1.00	Wage Factors V V V V V V V V V V	Factor 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	Factor 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	

- 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 E				
						tors 🖃	Scale Factor 2	 *Scale F 	actor 3 -	Total 🖃 Labor				
							1.5			\$28.92				
							1.5		2.00					
							1.5		2.00					
							1.5			\$31.92				
						_	1.5		2.00					
							1.5		2.00					
							1.5		2.00					
							1.5		2.00					
							1.5		2.00					
							1.5	50	2.00	\$38.92				
										Æ				
AII.	Labor Con	structure (CBS) Re	-		rce Cost Details Regis		Inique						Find: [Search]	For1
AI	Labor Cons columns here to g	struction Equipment group Resource	-	Equipment Installed Material Resource File	Installed Equipment	Supplies U	Wage	Tag 1	Tag 2	Currency	Default	Use Base Wage	Find: (Search 1 Scale 2 Eartor	Scale 3
AI	Labor Constructions here to g	struction Equipment group Resource Code	Rented Construction	Equipment Installed Material Resource File Description	Installed Equipment Organizational Category	Supplies U Geogra Area	Wage Zone				Quan	Wage Factors	Scale 2 Factor	Scale 3 Factor
u 20	Labor Cons columns here to g	struction Equipment group Resource	Rented Construction	Equipment Installed Material Resource File	Installed Equipment	Supplies U	Wage	Tag 1 Non Union		Currency U.S. Dollar		Wage Factors	Scale 2	Scale 3 Factor
All rag	Labor Cons columns here to (User Defined 1 =	struction Equipment group Resource Code	Rented Construction	Equipment Installed Material Resource File Description	Installed Equipment Organizational Category	Supplies U Geogra Area	Wage Zone		Hourly		Quan	Wage Factors	Scale 2 Factor	Scale 3 Factor 2.00
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All rag	Labor Cons columns here to (User Defined 1 = + 10000 + 10001	struction Equipment group Resource Code LC2 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 C Geogra Area Southwest Southwest	Wage Zone Wage Zone A Wage Zone A	Non Union Non Union	Hourly Hourly Hourly	U.S. Dolar U.S. Dolar	Quan 1.00 1.00	Wage Factors	Scale 2 Factor 1.50 1.90	Scale 3 Factor 2.00 2.00 2.00
All rag	Labor Cons columns here to (User Defined 1 == + 10000 + 10001 + 10002	struction Equipment group Resource Code LC2 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	Supples I Geogra Area Southwest Southwest Southwest	Wage Zone Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union Non Union	Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar	Quan 1.00 1.00 1.00	Wage Factors	Scale 2 Factor 1.50 1.50 1.50	Scale 3 Factor 2.00 2.00 2.00 2.00
All rag	Labor Con columns here to (User Defined 1 + 10000 + 10001 + 10002 + 10003	roup Resource Code LC2 LSUPF LSUF 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	Installed Equipment Organizational Category Carpenter Carpenter Carpenter Carpenter Carpenter	Supples I Geogra Area Southwest Southwest Southwest	Wage Zone Wage Zone A Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar	Quan L.00 L.00 L.00 L.00 L.00 L.00 L.00	Wage Factors	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
All rag	Labor Con: columns here to (User Defined 1 = + 10000 + 10001 + 10002 + 10002 + 10003 + 10004	struction Equipment group Resource Code LC2 LSUP# LSUC LSUC LSUEM	Rented Construction Description Carpenter Journey Foreman Pipe Foreman Don Foreman Civil Foreman Bolemaker	Equipment Installed Material Resource File Description Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Ca	Supples L Geogra Area Southwest Southwest Southwest Southwest Southwest	Wage Zone Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union Non Union Non Union	Hourly Hourly Hourly Hourly Hourly Hourly	U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar U.S. Dollar	Quan L00 1.00 1.00 1.00 1.00 1.00 1.00	Wage Factors	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
All rag	Labor Con columns here to s Defined 1 = + 10000 + 10001 + 10002 + 10003 + 10004 + 10004	struction Equipment group Resource Code LSUPF LSUFF LSUTW LSUC LSUEM LSUEM LPF1	Rented Construction Description Carpenter Journey Foreman 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 Organizational Category Carpenter Ca	Supples L Geogra Area Southwest Southwest Southwest Southwest Southwest Southwest	Wage Zone Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union Non Union Non Union Non Union	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	Quan L.00 L.00 L.00 L.00 L.00 L.00 L.00	Wage Factors	Scale 2 Factor 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
All rag	Labor Con columns here to (User Defined 1 = + 10000 + 10001 + 10002 + 10002 + 10003 + 10004 + 10005 + 10005	struction Equipment group Resource Code LSUPF LSUFF LSUFW LSUFW LSUFW LSUFW LSUFW LSUFW LSUFW LSUFM LSUFM	Rented Construction Description Carpenter Journey. Foreman Dram Foreman Ovi Foreman Ovi Foreman Ovi Foreman Ovi Sourneyman Pipefiter Journeyman Pipefiter	Equipment Installed Material Resource File Description Standard Labor Rate File Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter Carpenter	Supples I Geogra Area Southwest Southwest Southwest Southwest Southwest Southwest	Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A	Non Union Non Union Non Union Non Union Non Union Non Union	Hourly 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 U.S. Dolar	Quan	Wage Factors	Scale 2 Factor 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
All rag	Labor Cons columns here to (User Defined 1 = + 10000 + 10001 + 10002 + 10003 + 10004 + 10005 + 10005 + 10005	struction Equipment group Resource Code LSUPF LSUFF LSUFW LSUC LSUC LSUC LSUC LSUC LSUC LSUC LSUC	Rented Construction Description Carporter Journey. Foreman Pipe Foreman Dole Foreman Bolemaker Lead Pipe Fabricator Journeyman Pipetter Pipefitter A	Equipment Installed Material Resource File Description Standard Labor Rate File Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Ca	Supples I Geogra Area Southwest Southwest Southwest Southwest Southwest Southwest Southwest	Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A Wage Zone A 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	U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar U.S. Dolar	Quan	Wage Factors	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
AI	Labor Con columns here to (User Defined 1 + 10001 + 10002 + 10004 + 10005 + 10005 + 10005 + 10005 + 10005 + 10007 + 10007	struction Equipment group Resource Code LSUPF LSUFW LSUC LSUBM LSUC LSUBM LPF1 LPF2 LPF3 LPF4	Rented Construction Description Carponer Journey Foreman Pipe Foreman Dvid Foreman Dvid Foreman Rolermaker Lead Pipe Fabricator Journeyman Pipefitter Pipefitter B	Equipment Installed Material Resource File Description Standard Labor Rate File	Installed Equipment Organizational Category Carpenter Ca	Supples I Geogra Area Southwest Southwest Southwest Southwest Southwest Southwest Southwest Southwest	Wage Zone A 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 U.S. Dollar U.S. Dollar	Quan	Wege Factors	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.

rag o	olumns here to gr	oup												Find: [S	earch For]	Saved view	s: Labor	hew	•
R	iesource 🛌	Scale 📐 🔻	Total	Labor	Labor Base	Labor Burden	Labor Fringes	Travel	Premium	Holiday	Savings	Pension	Vacation	Sort Ascending	Apprenticeship	Undefined Fring	pe1 U	Indefined Fringe2	Undefi
L	BM1	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	2 Sort Descending	\$0.00		\$0.00	\$0.00	
U	BM2	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	Custom		below to place it into	×
U	C2	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.~	\$0.00	\$0.00	\$0.00	(a) Course Bu This Column	\$0.00	Drag a c	olumn fron	egister.	
U	PF1	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00	Group By This Column	\$0.00	Custor	a Caption	Default Caption A	
L	PF2	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	Adjustne		Adjustment Allowance	-
U	PF3	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	34	\$0.00	Remove All Columns	\$0.00	Allowario		Anowarice	
U	PF4	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	e7.00	Go To Column (Ctrl+G)	\$0.00	Allowance	•	Allowance	
L	SUBM	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	30.00	Column Chooser	\$0.00	Apply		Apply	
L	SUC	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	Тах	Standard Tax	
	SUIW	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<="" td=""><td>\$0.00</td><td>Business</td><td>Tawar</td><td>Business Taxes</td><td></td></a+>	\$0.00	Business	Tawar	Business Taxes	
U	SUPF	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)	Sur	0000 1000	10.000	Contractor Texas	
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														Reset Caption				_	
														Reset All Captions		Fees		Fees	
															2	Fees Und	efined1	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 Str	ucture (CBS)	Register	Resour	ce Rate Register	r i	Resource	Cost Details Regis	ter 🕴
Dra	g columns here to gr	oup							
	Resource 😑	Scale 😐	Total	Labor	Labor Base	Labor B	urden	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**.

		Structure (CBS) Re		Resource Rate			ost Details Registe	r O	Labor Rate Record						
rag	g columns here to	5													
	User Defined 1	Resource 🛌	Descriptio	n	Resource Fi Description	le	Organizational Category		Geographic Area	Wage Zone	Scale 🛓 🍸	Total	Labor Base	Travel	P
•	10009	LBM1 Lead Boilermaker LBM2 Journeyman Boilermaker	ermaker	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A	Values 1	Numeric Filte	rs	\$0	.00	
	10010	LBM2		Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0	.00	
	10000	LC2 Carpenter Journeyman	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A	From 1		To 1	\$0	.00		
	10005	LPF1	Lead Pipe	Fabricator	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				 \$0	.00
	10006	LPF2	Journeym	an 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	LPF4	Pipefitter	в	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0	.00
	10004	LSUBM	Foreman 8	Boilermaker	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0	.00
	10003	LSUC	Foreman (Civil	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0	.00
	10002	LSUIW	Foreman 1	Iron	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A				\$0	.00
	10001	LSUPF	Foreman F	Pipe	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.

A		в	c	M	N	0	P	Q	R	s	т	U	V	w	х	Y	z
Required	1																
Validate		_															
Not Regi	lired	_				_											
		Resource Rate	Register			Resource	e Cost Details Regis	ter									
User Defi	ned 1	Resource Code	Description	* *Scale Factor 2	* *Scale Factor 3 *	Total 👻	Labor Base 👻	Travel 👻	Premium *	Holiday 👻	Savings 👻	Pension *	Vacation 👻	Subsistence 👻	Health & Welfare 👻	Apprenticeship 👻	Undefined Fringe 1 🔻
	10000 (LC2	Carpenter Journeym	an 15	0 2.00	\$28.92	22.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10001 1	LSUPF	Foreman Pipe	1.5	0 2.00	\$29.92	23.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10002 1	LSUIW	Foreman Iron	1.5	0 2.00	\$30.92	24.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.00
	10003 (LSUC	Foreman Civil	1.5	0 2.00	\$31.92	25.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10004 1	LSUBM	Foreman Boilermak	er 1.5	0 2.00	\$32.92	26.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.00
	10005 1	LPF1	Lead Pipe Fabricato	1.5	0 2.00	\$33.92	27.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.0
	10006 1	LPF2	Journeyman Pipefit	er 1.5	0 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 1	LPF3	Pipefitter A	1.5	0 2.00	\$35.92	29.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.00
	10008 1	LPF4	Pipefitter 8	1.5	0 2.00	\$36.92	30.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.00
	10009 1	LBM1	Lead Boilermaker	1.5	0 2.00	\$37.92	31.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.00
	10010 1	LBM2	Journeyman Boilern	aker 1.5	0 2.00	\$38.92	32.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.65	0.00	0.0

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

Breakdown Sl	tructure (CBS) Re	gister Resource Rate	Register Resource	Cost Details Register 0	Labor Rate Record											
columns here to	group									_	Find:	Search For]		Saved views:	Labor View	
User Defined 1 ៉	Resource Code	Description	Resource File Description	Organizational Category	Geographic Area	Wage Zone	Scale 🔻	Total	Labor Base	Travel	Premium	Holiday	Savings	Pension	Vacation	Subsistence
10000	LC2	Carpenter Journeyman	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00		10.00	P0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10001	LSUPF	Foreman Pipe	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00				\$0.00	\$0.00	\$0.00	\$0.00	\$0
10002	LSUTW	Foreman Iron	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00)			\$0.00	\$0.00	\$0.00	\$0.00	\$0
10003	LSUC	Foreman Civil	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00				\$0.00	\$0.00	\$0.00	\$0.00	\$0
10004	LSUBM	Foreman Bollermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00				\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10005	UP#1	Lead Pipe Fabricator	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00				\$0.00	\$0.00	\$0.00	\$0.00	\$0
10006	LPF2	Journeyman Pipefitter	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00		Down		\$0.00	\$0.00	\$0.00	\$0.00	\$0
10007	UPF3	Pipefitter A	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00	00 -	k this field to E		\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10008	LPF4	Pipefitter B	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00	B Uni	Link from Exce	el	\$0.00	\$0.00	\$0.00	\$0.00	\$0
10009	LBM1	Lead Bollermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.
10010	LBM2	Journeyman Bollermaker	Standard Labor Rate File	Carpenter	Southwest	Wage Zone A		\$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

it Br	eakdo	wn Stru	ucture (CBS) Regi	ster	Resource	Rate Regi	ster O Re	sour	ce Cost Details Regi	ster	Labor R	ate Record									
L	abor	Const	ruction Equipment	Rented Co	onstruction Ex	quipment	Installed Mater	rial	Installed Equipment	Supples	Unique										
g colu	umns he	ere to gr	oup															Find	1: [Search For]	Saved views:
Res Cod	source de	<u>h.</u>	Resource Type			Description			Resource File Description		Unit		Productivity Factor	Default Quantity	Wat Add	ite % Unit Cos on (Scale 1)		Unit Cost (Scale 2)	Unit Cost (Scale 3)	Currency	Use Base Wage Factors
+	LBM1		Labor Rate			Lead Boller	maker	1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	5	37.90	\$46.65	\$62.20	U.S. Dollar	
+	LBM2		Labor Rate			Journeyma	n Bollermaker	1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	s	38.90	\$48.15	\$64.20	U.S. Dollar	
+	LC2		Labor Rate			Carpenter	Journeyman	1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	\$	28.90	\$33.15	\$44.20	U.S. Dollar	
+	LPF1		Labor Rate			Lead Pipe F	abricator	1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	s	33.90	\$40.65	\$54.20	U.S. Dollar	
+	LPF2		Labor Rate			Journeyma	n Pipefitter	1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	5	34.90	\$42.15	\$56.20	U.S. Dollar	
+	LPF3		Labor Rate			Pipefitter A		1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	5	35.90	\$43.65	\$58.20	U.S. Dollar	
+	LPF4		Labor Rate			Pipefitter B		1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	5	36.90	\$45.15	\$60.20	U.S. Dollar	
+	LSUEM		Labor Rate			Foreman B	olermaker	1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	s	32.90	\$39.15	\$52.20	U.S. Dollar	
+	LSUC		Labor Rate			Foreman O	M	1	Standard Labor Rate Fi	le	Hour		1.00	1.0	00	5	31.90	\$37.65	\$50.20	U.S. Dollar	
+	LSUTW		Labor Rate			Foreman Ir	on	1	Standard Labor Rate Fi	le .	Hour		1.00	1.0	20	5	30.90	\$36.15	\$48.20	U.S. Dollar	
+	LSUPF		Labor Rate			Foreman Pl	De .		Standard Labor Rate Fi	le .	Hour		1.00	1.0	10		29.90	\$34.65	\$46.20	U.S. Dollar	Image: A start of the start

3.8.4.5 Resource Cost Details Register

Cos	st Breakdown Str	ructure (CBS) Reg	ister	Resource Rate R	egister	Resource Cost	t Details Register 🛛 🔘	ι	abor Rate Record				
Dra	g columns here to g	roup											
	User Defined 1	Resource Code	Descriptio	n	Resource Fil Description	e	Organizational Category		Geographic Area	Wage Zone	Scale	Ŧ	Total
\rightarrow	10000	LC2	Carpente	r Journeyman	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A		2	\$33.15
	10001	LSUPF	Foreman	Pipe	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A		2	\$34.65
	10002	LSUIW	Foreman	Iron	Standard La	bor Rate File	Carpenter		Southwest	Wage Zone A		2	\$36.15

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**.

	Dreakuowii S	tructure (CBS) R	egister	Resource Rate	Register	Resource co	ost Details Register 🛛 🔾	Labor Rate Record						_
rag	columns here to	group									_			
	User Defined 1 ៉	Resource Code	Descriptio	on	Resource Fil Description	e	Organizational Category	Geographic Area	Wage Zone	Scale	▼ Tota	Labor Base	Tra	vel
•	10000	LC2	Carpente	er Journeyman	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A	Values	Numeric	Filters		\$0
	10001 10002 10003 10004 10005 10006	LSUPF	Foreman	Pipe	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		-			\$0.
	10002 10003 10004 10005 10006	LSUIW	Foreman	Iron	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A	From	2	To 2		\$0
	10003 10004 10005	LSUC	Foreman	Civil	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A					\$0
10003 10004 10005	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	Journeyn	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
10007 10008	LPF-4	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.

							-				-						-
-	A	в	C	M	N	0	P	Q	R	2	1	U	V	W	X	Ŷ	Z
	quired																
	idated Field	_															
No	Required																
-		Resource Rate					Cost Details Regist										
11e	v Defined 1			*Scale Factor 2 ×	*Scale Easter 2 X				Bramium	Holiday Y	Cauloge X	Beerlee X	Vacation X	Subristance	Haalth & Walface Y	Approxicación	Undefined Fringe 1 *
Usi	10000		Carpenter Journeyman	1.50		\$28.92	22.10			0.22		0.66	0.44	0.00		0.00	
-			Foreman Pipe	1.50				0.00		0.22		0.66	0.44	0.00		0.00	
-		LSUIW	Foreman Iron	1.50						0.22		0.66	0.44	0.00		0.00	
	10003		Foreman Civil	1.50		\$31.92		0.00		0.22		0.66	0.44	0.00		0.00	
-		LSUBM	Foreman Boilermaker	1.50				0.00		0.22		0.66	0.44	0.00		0.00	
-	10005		Lead Pipe Fabricator	1.50				0.00		0.22		0.66	0.44	0.00		0.00	
	10006		Journeyman Pipefitter	1.50				0.00		0.22		0.66	0.44	0.00		0.00	
	10007		Pipefitter A	1.50				0.00		0.22		0.66	0.44	0.00		0.00	
-	10008	LPF4	Pipefitter B	1.50		\$36.92		0.00	0.00	0.22		0.66	0.44	0.00	0.66	0.00	
	10009	LBM1	Lead Boilermaker	1.50	2.00	\$37.92	31.10	0.00	0.00	0.22	0.00	0.66	0.44	0.00	0.66	0.00	0.00
	10010	LBM2	Journeyman Boilermake	r 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	0.00
								_									

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

st Breakdown St	tructure (CBS) R	egister	Resource Rate	Register	Resource Co	st Details Register 🛛 🔘	Labor Rate Record	1								
g columns here to (group						-			_					Find:	[Search Fo
User Defined 1	Resource Code	Descriptio	n	Resource Fi Description	le	Organizational Category	Geographic Area	Wage Zone	Scale	Ŧ	Total	Labor Base	٦	Travel	Premium	Holiday
10000	LC2	Carpenter	Journeyman	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$33.15		3.15	\$0.00	\$0.00	\$
10001	LSUPF	Foreman P	ipe	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$34.65		New			\$
10002	LSUTW	Foreman 1	iron	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$36.15	0	Dele	te		\$
10003	LSUC	Foreman (Ivc	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$37.65		Cut			\$
10004	LSUBM	Foreman 8	Sollermaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$39.15		Сор	<u> </u>		\$
10005	UPF1	Lead Pipe	Fabricator	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$40.65	B.	Paste			*
10006	LPF2	Journeym	an Pipefitter	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$42.15	1+	Eill D	lown		\$0
10007	LPF3	Pipefitter	A	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$43.65	묧	Link	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> nLi	nk from Exc	el	\$0
10009	LBM1	Lead Bole	rmaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$46.65	\$4	6.65	\$0.00	\$0.00	ş
10010	LBM2	Journeym	an Bollermaker	Standard La	bor Rate File	Carpenter	Southwest	Wage Zone A		2	\$48.15	\$4	8.15	\$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.

	lutoSave On C	្រៃ ស ់			intight	Resource Rate I	mport Worksheet.xlsx - Save	ed to OneDrive - li	ntight +		
	le Home	Insert Pag	e Layout Formulas Data	Review View Add-in	vs Help BLUE	BEAM VEO	≈ Power Pivot Team	n 🖓 Tell me	what you want to do		
Past T	te Clipboard	B 7	• 11 • A* A* = 및 • □ ⊕ • □ ☆ • ▲ • Font rs	=		vity \$ = %			I Insert Delete Fo	Fill * Clear * Edit	Z T Sort & Find & Filter * Select *
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4	А	B	с	D	E	F	G	н	I J	К	L M
		Required									
		Validated Field									
		Not Required									
Ļ							Column Headers may differ	based on Design	Decision Item #67		
ł	line Defende	Resource Code v	Decidation	Resource File Description	Conservable Arrow	Resource Rate		Trad	Tes 2	I as he first day of Tax	VINIQUE Sale VINIT Of Measur
	10000	MAAM	Asphalt Mix (Finish)	Standard Material Rate File	Geographic Area	wage zone *	Asphalt	Pave ·	U.S. Dollar		 Unique sale + Unit of Measur 5 Ton
-	10000	MAC	Asphalt Cement	Standard Material Rate File			Asphalt	Plant Asphalt	U.S. Dollar		5 Ton
	10002	MACA1-1/2	Coarse Aggregate 1-1/2 in	Standard Material Rate File			Asphalt	Plant Asphalt	U.S. Dollar		5 Ton
- 6	10003	MAFA	Fine Aggregate	Standard Material Rate File			Asphalt	Plant Asphalt	U.S. Dollar		5 Ton
-	10004	MAHAUL	Aggregate Haul Quarry to Plant				Asphalt	Plant Asphalt	U.S. Dollar		5 Ton
	10005	MAJA3/4	Intermediate Aggregate 3/4 In	Standard Material Rate File			Asphalt	Plant Asphalt	U.S. Dollar		5 Ton
	10006	MASAND	Sand	Standard Material Rate File			Asphalt	Plant Asphalt	U.S. Dollar		5 Ton
	10007	MATK	Tack	Standard Material Rate File			Asphalt	Pave	U.S. Dollar	TRUE	5 Gallon
	10008	MBR	Aggregate Base Rock	Standard Material Rate File			Base Stone	Aggregate Base	U.S. Dollar	TRUE	5 Ton
5	10009	MC2000	Concrete 4000 PSI	Standard Material Rate File			Concrete	Concrete	U.S. Dollar	TRUE	5 Cubic Yard
1	10010	MC3500	Concrete 3500 PSI	Standard Material Rate File			Concrete	Concrete	U.S. Dollar	TRUE	5 Cubic Yard
	10011	MDIRTA	Dirt Class A	Standard Material Rate File			Earthwork	Water/Sewer	U.S. Dollar	TRUE	5 Cubic Yard
	10012	MDIRTB	Dirt Class B	Standard Material Rate File			Earthwork	Water/Sewer	U.S. Dollar	TRUE	5 Ton
	10013	ММН	Manhole Precast 4 Ft	Standard Material Rate File			Manholes	Manhole	U.S. Dollar	TRUE	5 Each
		Labor Owned	Egp Rental Egp Perm	anent Equipment Materi	als Supplies	(+)			1 4		
			hoose Paste		and the second s	<u> </u>				Average: 5005.75 Cou	nt: 140 Sum: 140161 III

- 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.

Cost	Breakdow	vn Stri	ucture (CBS) Regi	ster	Resource	Rate Regi	ster O
AI	Labor	Const	ruction Equipment	Rented	Construction E	quipment	Installed Material
Drag	columns he	re to gr	oup	-			
	User Defined 1		Resource Code	De	scription		source File scription
÷ [6	New				
		ø	Delete				
		3<	Cut				
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		+	Eill Down				
		88	Link this field to I	Excel			
		콩	UnLink from Exce	el 👘			
		围	Copy to <u>Besourc</u>	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.

cos	t Breakdown Str	ucture (CBS) F	tegister	Resource	e Rate Register	Resource	Cost Details Regis	ter O										
rag	columns here to gr	oup						_						Find: [3	earch For] …	Saved views: La	bor View	•
	Resource 🛌	Scale 🖭 🕇	Total	Labor	Labor Base	Labor Burden	Labor Fringes	Travel	Premium	Holiday	Savings	Pension	Vacation	Sort Ascending	Apprenticeship	Undefined Fringe 1	Undefined Fringe2	Undef
- 1	LBM1	1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	Z1 Sort Descending	\$0.00	\$0.0	\$0.00	
1	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	\$0.00	\$0.00	\$0.00	1.3.4.4.4.4.4.4.4.4.4.4.4.4.4.4.4.4.4.4.	\$0.00	Drag a column	from 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	9.00	\$0.00	\$0.00	Group By This Column	\$0.00	Custom Capti	on 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	-
	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	97.00	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	30.00	E 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	
	LSUTW	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)	Su.	Business Taxes	business Taxes	
														✓ Fixed None		Consumption Rate	Consumption Rate	
														Fixed Left		Contingency	Contingency	
														Fixed Right		Allowance	Allowance	
														Change Caption		Custom Category	1 Custom Category1	
														Reset Caption				
														Reset All Captions		Fees	Fees	
																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.

ile Set	up Estima	ste Quote	e Price	Execution	s	ystem	Integration	15			
٥	1		***		📌 Lal	bor uipment		â		P	
ob Propertie	s Foundation Setup Data		Bid Wizard	Resource Rates *	Ma		Resource Assemblies	Cost Item Assemblies	Standard Tables	d Reports	
	Initi	ialize			Reso	ources		Assen	nblies	Reports	
Cost Break	down Structu	re (CBS) Regi	ster Jo	b Properties	5 0						
Overview	Security (Cover Sheet	Cost Basis	Minority Setup	Fue	el Cost	Job Tracking	Job Folde	er Tags	Competitors	Pricing
-Standard S	hift Arrangeme	nts	Standard Wag	e Rate Compos	site	Rule	s Lock Cost Iter	ns to Pay Iter	ns		
Work Hou	rs per Shift	8.00	Scale 1:	100.00 9	6		Pay Item Unit	Price Precisio	n:	2	
	rs per Shift:	8.00	Scale 2:	0.00 9	6		Activate PBS C Activate Quant				
Pay Hou				0.00 9	6		-	Structure at L		0	
	ts per Day:	1.00	Scale 3:				Maintain CBS :	scrutture at th	evel:	0	

- 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.

8	10 Inch PVC Force Main (SDR21)	Linear Feet	Pay Item	Detail	Direct Cost	Quote Group			Quote Grou	up	No	· · 5.
+ 7.4	Concrete Batch Four	Ton	Fixed	Detail	Pired Cust	Quantity War	ning		Quantity W	/arning	No	5
+ 7.3	Concrete Batch Three	Ton	Fixed	Detail	Direct Cost	Quantity Driv	-		Quantity D	river	Yes	
+ 7.2	Concrete Batch Two	Ton	Fixed	Detail		Quantity Che	dk		Quantity C	heck	No	
+ 7.1	Concrete Batch One	Ton	Fixed	Detail	Discussion	Plug Days			Plug Days		No	
7	Concrete Pour	Ton	Superior CI	Detail	Di	Phase Code			Phase Code	e	No	
+ 6.4	Backfill RCP Pipe	Cubic Yard	Superior CI	Detail	D Include o	Period Count				nt Mismatch	No	- 1
+ 6.3	Install RCP Pipe	Linear Feet	Superior CI	Detail	Di	A Custom C	aption		Default Ca	ption	Visi.	
+ 6.2	Excavate RCP Trench	Cubic Yard	Superior CI	Detail	Di Column:			×	37.17	4.65		\$4,963
+ 6.1	Furnish RCP Materials	Linear Feet	Superior CI	Detail	D 🛞 Go	To Column	- 0	× –	0.00	0.00		\$0
6	36 Inch RCP Culvert Class III	Linear Feet	Pay Item	Detail	Direct Cost	\$67.54	\$69,159.49		149.30	18.66	\$	\$20,073
+ 5.2	Install Hot Mix Type A	Ton	Superior CI	Detail	Direct Cost	\$3.34	\$117,018.05		233.33	23.33	\$	\$58,941
+ 5.1	Furnish & Haul Hot Mix	Ton	Superior CI	Detail	Direct Cost	\$39.27	\$1,374,562.54		233.33	29.17	Ś	\$50,010
5	Asphalt Concrete Hot Mix Type A	Ton	Pay Item	Detail	Direct Cost	\$42.62	\$1,491,580.59		466.67	52.50	\$1	108,952
+ 4.3.2	Blue Top Aggregate Base	Square Yard	Superior CI	Detail	Direct Cost	\$0.06	\$24,106.42		320.00	40.00	\$	\$16,874
+ 4.3.1	Place Aggregate Base	Ton	Superior CI	Detail	Direct Cost	\$1.63	\$73,460.92		240.00	30.00	Ś	\$33,884
4.3	Install Aggregate Base	Ton	Superior CI	Detail	Direct Cost	\$2.17	\$97,567.33		560.00	70.00	\$	\$50,759
+ 4.2	Finegrade Subgrade	Square Yard	Superior CI	Detail	Direct Cost	\$0.19	\$75,848.36		320.00	40.00	\$	\$39,464
CBS Position ៉ 🖳 Code	Description	Unit of Measure	Quantity Driver	Cost Source	Cost Segment	Unit Cost	Total Cost (Forecast)	Hours (Duration driv	en)	Days (Duration driven)	Labor Tota	l Cost

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
+ 1	7.1	Concrete Batch One	35,000.00	Ton 🔹		Fived
+ 1	7.2	Concrete Batch Two	35,000.00	Ton	Remaining Quan	tity: 16,875.00 Ton
+ '	7.3	Concrete Batch Three	35,000.00	Ton	\checkmark	Fixed
+ :	7.4	Concrete Batch Four	35,000.00	Ton	✓	Fixed

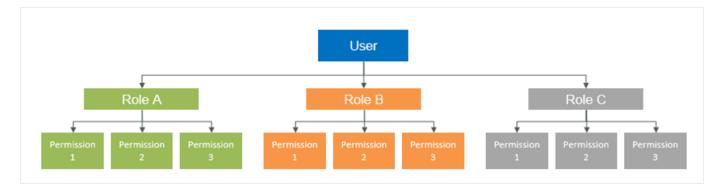
- 7. NOTE As you check Quantity Check for the four batches of Concrete, the superior cost item Quantity Warning turns yellow. This is indicating a quantity warning. Hover your mouse over the superior cost item Quantity Warning column. Then, an overlay message appears showing the quantity discrepancy. 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

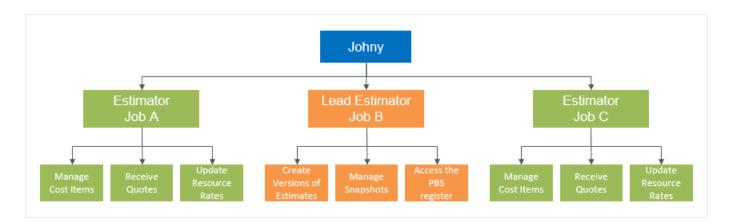
3.10.1 Role based permissions

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**).

Ŧ) 🖻 🛞 庙 🏌				C7	D	()	Q	2
	Name 🕇 📃	Description	Administ	trator 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.

					9 4 ⁹ 8
Roles and permissions > Edit role					Cancel
ole details					
lame	Description		* Administrator level		
Estimator	Estimator		Level 1 - Project Admin	· (i)	
ermissions					
Suite administration					
Organization and project					
Master data libraries					
Model					
Document					
Estimate					
□ Select all				Search	
Jobs	Select all	Snapshots	Select all		
Launch Estimate		🗹 🛞 View snapshots 📐			
🗹 🕀 Add jobs		Add snapshots			
🗹 💽 Edit jobs		🗌 🖻 Edit snapshots 🚺			
🗌 🛞 Delete jobs		Delete snapshots			
Cabadula					

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.

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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 Vie	Ö or	Nors - 🔁 External Reports - utput Settings - 🔀 External References - tomize	Estin		Notes InEight com University		
9		New Job			Platform	projec	ts
Corr	Project: *	Project A4998		A Project ID	Project Name	Status	Created Date
Core	e Project:	Project A1330	-	Project A4997	Project A4997	New	4/1/2020 3:56:1
	Code: *	A4998	-1	Project A4998	Project A4998	New	4/1/2020 3:56:1
			_ [Project A4999	Project A4999	New	4/1/2020 3:56:
Des	cription:	Clemson Creek Restoration project	^	Project A5	Project A5	New	4/1/2020 3:52:3
				Project A50	Project A50	New	4/1/2020 3:52:3
				Project A500	Project A500	New	4/1/2020 3:52:4
	1	Auto-Update Job in Connected Analytics	- 1	Project A5000	Project A5000	New	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.

(+) Add	users 🗹 🛇					1 DETAILS	ROLES	S
	First name 1	L	Status	Roles (10)			(+) A	\dd
	T			* Role		* Organization/Project		
	Partner i 9	1	Active	Estimator			• 0	(
	Partner2		Active					
	Partner20	۱.	Active			۹. ۹		
	Partner21	E.	Active	Dev/Ops Administrator			. Θ	(
	Partner22	Pá	Active			2023 Clow Creek Shoreline Restoratio		
	Partner23	Pē	Active			2020 Concrete Repairs Program 499		
	Partner24	F	Active	Superintendant	*	Bridge Deck Repairs and Shoulder Re-	Θ	(
	Partner25		Active			Springbrook Golf Course Dynamic Sig		
	Partner26	1	Active			Retaining and Noise Wall Rehabilitation		
	Partner27		Active	Superintendant	*	2020 Clow Creek Shoreline Restoratio	• 😑	(
	Partner28	L I	Active			•	-	
	Partner29	R	Active	Superintendant		Steel Structure Training Job 105091 X	• 0	(
	Partner3	Pa	Active					
	Partner30	Pé	Active					
	Partner4		Active	Superintendant		Steel Structure Partner Job 105094 $$ $$ $ imes$	• Θ	(
	Partner5		Active					
	Partner6	1	Active					
	Partner7		Active	Foreman	*	Steel Structure Training Job 3 105093 X	• Θ	(
	Partner8		Active					
	Partner9	P\	Active	Foreman	*	Steel Structure Training Job 2 105092 X		
	Patrick	Sa	Active					
	Paul	br	Active					
	Paul	7	Active					
	Pavan		Not req					
	Pavithra		Active					

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.

Roles (1)			↔ Add r
* Role		* Organization/Project	
Lead Estimator	•	Site Work	× • 🖯 🔿
			Q
			~
		▼ Site Work	-
		2023 Clow Creek Shore	ine Restoration 49
		2020 Concrete Repairs	Program 4992404
		Bridge Deck Repairs and	d Shoulder Reconst
		Springbrook Golf Cours	e Dynamic Sign Ins
		Retaining and Noise Wa	ll Rehabilitation and 🖕

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.

File Setup	Estimate	System	Tools Integra	rations	Actions										
Print Preview Export to Excel	Cut	Copy	Link Field	Expand / Collapse *		Classic Navigatio									
Print		Edit	Workbook		View		Tools								
ser Roles Registe					•	Access (Control Register								
ag columns here to	group	Saved views:	s: Standard View		•	Туре 🖮	Category is	<u>h.</u>					Saved views:	Standard View	
Role Name	<u>i.</u>	Description													
Estimator		Estimator				Type		Category	у <u>і</u> .	Subcategory	h.	Ribbon Name	2		
Foreman		Foreman					Command								
Integration Setti	tings	Integration Set	ettings		_		Destination								
IS Role IS Role			Access Control												
KN ROLE1			F	Account Code U	Utilization	i Register									
Lead Estimator		Lead Estimator	or division			F	Account Record	rd							
MLQ-0		test-level 0				F	Address Book Record								
MLQ-1		test-level 1			_	F	Address Book Register								
MLQ-2		test-level 2				F	Attachments R	Register							
MLQ-3		test-level 3				F	Bond Cost Item	m Record							
MLQ-3- Copy w/	Add Projects	test-level 3				/ F	Cash Flow								
NP 1		Estimate Full A	Access				Competitor Ree	ecord							
NP-2		NP-2					Competitors								
Role 01-Enginee	jer	Role 01-Engine	neer			/ I I V	Connected Ana	alytics							
Role 1 - Enginee	err	Role 1-Engine	æer						ure (CBS) Register						
Role 2 - Estimato	Jorr	Role 2- Estimat	ator						akdown Structure (CBS) Regist	ster Form		Cost Breakd	down Structure (CB	BS) Register	
Role 3 - Lead Est	stimator	Role 3-Lead Er	Estimator				Cost Curve Rec								
Role 4 - Regiona	al Admin	Role 4- Region	nal Admin				Cost Item Asse		outs						
Role 5 - Adminn		Role 5- Admin	A				Cost Item Asse								
Role 6 - Settings	s Admin	Role 6- Setting	igs Admin				Cost Item Asse								
Role 7 - Enginee	er @ Root	Role 7- Engine	eer @ Root				Cost Item Reco		inter-						
Role 8- Admin 2	1	Role 8- Admin	12				Custom Auto P								
SJ- Role3-Snaps	shots-Add,vi	SJ-Role3					Custom Auto P	nce need	70						
0.0147								Dennel							
	55	1				1	Default Quote I	Record	2						

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					*
Drag columns here to grou	qu	×	K [PBS	1/18 🔘 🔿 🗸	Ö
Туре	Category	Ribbon Name				
+ Destination	Fuel Cost Record	Fuel Cost Record				1
+ 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	Ouote Comparison & Award - Resources	Ouote 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.

9	- Use	r Roles Regi	ster - Library	æ	-		×	8	-			
A	ctions							A	ctions			
8	Print	C Open	📙 Link Field					2	Print	New	🖥 Сору	Link Field
ā	Preview	🖶 Сору	📇 UnLink Field					-	Preview	🛞 Delete	🖹 Paste	📇 UnLink Field
e	Export to Excel							đ	Export to Excel	° Cut	+ Fill Down	
	Print	Edit	Workbook				^		Print	Ec	lit	Workbook
Drag	columns here to	group	Saved views:	Standard Vi	ew		•	Dra	g columns here to	group		
	Role Name	<u>=</u>	Description						Subcategory	<u> </u>	Ribbon Name	
	1_MR		1_MR						+ Work Breakd	own Structur	Actions > Ed	it > Copy
\rightarrow	Account Administ	rator	Open						+ Work Breakd	own Structur	Actions > Ed	it > Cut
	Account Administ	rator-/	Copy						+ Work Breakd	own Structur	Actions > Ed	it > Delete
	Account Administ	rator- (5	_				+ Work Breakd	own Structur	Actions > Ed	it > Fill Down
	Account Administ		Link this field to						+ Work Breakd	own Structur	Actions > Ed	it > New
	Account Administ	rator-	UnLink from Exc	el					+ Work Breakd	own Structur	Actions > Ed	it > Open
	Account Administ	rator-Cop	Account Administ	rator					+ Work Breakd	own Structur	Actions > Ed	it > Paste
	Account Administ	rator-Cop	Account Administ	rator					+ Work Breakd	own Structures	Actions > Ed	it > Copy
	Account Administ	rator-Jay	Account Administ	rator					+ Work Breakd	own Structures	Actions > Ed	it > Delete
	Account Administ	rator-Josh	Account Administ	rator					+ Work Breakd	own Structures	Actions > Ed	it > Fill Down
	Account Administ	rator-KS	Account Administ	rator					+ Work Breakd	own Structures	Actions > Ed	it > New
	Account Administ	rator-Lav	Account Administ	rator-Lav					+ Work Breakd	own Structures	Actions > Ed	it > Open
	Account Administ	rator-Shu	Account Administ	rator				→	+ Work Breakd	own Structures	Actions > Ed	it > Paste
	Account Administ	rator-sree	Account Administ	rator					+ Work Breakd	own Structures	Actions > Vie	w > Clear Filter
	Account Administ	rator-Sri	Account Administ	rator					+ Work Breakd	own Structures	Actions > Vie	w > Default Data B
	ACS Admin		Kiewit ACS Admin	n					+ Work Breakd	own Structures	Actions > Vie	w > Filter > Filter
		222							+ Workers Con	p Overrides	Actions > Ed	it > Copy
4		~~~~~					Þ		+ Workers Com	p Overrides	Actions > Ed	it > Cut
		As-Ente	red Currency As	-Entered Lin	ite 23	10.04	Library					

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

ag	g columns here to group	Saved views: Standard View •		Тур	pe iii.		× Enter text to search
	Role Name 🚊	Description			Type is.	Category	Ribbon Name
	Estimator	Estimator		7	+ Destination	Job Status Register	Job Status Register
	Foreman	Foreman		1	+ Destination	Main Form	Main Form
	Integration Settings	Integration Settings			+ Destination	Microsoft Excel	Microsoft Excel
	IS Role	IS Role			+ Destination	Organizational Category Record	Organizational Category Record
	KN ROLE1	KN ROLE1			+ Destination	Pay Item & Proposal Register	Pay Item & Proposal Register
	Lead Estimator	Lead Estimator division			+ Destination	Pay Item & Proposal Register Pay Item Record	Pay Item & Proposal Register Pay Item Record
	MLQ-0	test-level 0					DDC Change Depart
	MLQ-1	test-level 1	7	Ì	Destination	PBS Change Record	PBS Change Record
	MLQ-2	test-level 2			+ Destination	PBS Changes Register	PBS Changes Register Delete
	MLQ-3	test-level 3			+ Destination	Period Resource Quantities	Period Resource Quantitie
	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
	NP-2	NP-2			+ Destination	Price Category Record	Price Category Record + Eill Down
	Role 01-Engineer	Role 01- Engineer		1	+ Destination	Quantity Roll-Up Record	Quantity Roll-Up Record
	-	Role 1- Engineer			+ Destination	Quote Comparison & Award - Cost items	Quote Comparison & Awa
	Role 2 - Estimatorr	Role 2- Estimator			+ Destination	Quote Comparison & Award - Resources	Quote Comparison & Awal
	Role 3 - Lead Estimator	Role 3- Lead Estimator		1	+ Destination	Quote Cost Item Record	Quote Cost Item Record
	Role 4 - Regional Admin	Role 4- Regional Admin		1	+ Destination	Quote Group Tag Record	Quote Group Tag Record
	Role 5 - Adminn	Role 5- Admin		1	+ Destination	Quote Group Tags Register	Quote Group Tags Register
	Role 6 - Settings Admin	Role 6- Settings Admin		1	+ Destination	Quote Record	Quote Record
	Role 7 - Engineer @ Root	Role 7- Engineer (© Root		1	+ Destination	Quote Register	Quote Register
	Role 8- Admin 2	Role 8- Admin 2		1	+ Destination	Quote Resource Item Record	Quote Resource Item Record
	SJ-Role3-Snapshots-Add,vi	SJ-Role3		1	+ Destination	Reports	Reports
	an all the literation		Ŧ	1	+ Destination	Request for Quote (RFQ) Record	Request for Quote (RFQ) Record
	55			1	+ Destination	Request for Quote (RFQ) Register	Request for Quote (RFQ) Register

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

50	er Roles Register 0		•	ACC	255 1	Contro	ol Register	0		
raţ	g columns here to group	Saved views: Standard View -		Тур	e ii.					× Enter text to search
	Role Name 😐	Description			Type		5.	Category	Ribbon Name	
	Estimator	Estimator				e Destina	-	Job Status Register	Job Status Register	
	Foreman	Foreman			_	Destina		Main Form	Main Form	
	Integration Settings	Integration Settings				Destina		Main Form Microsoft Excel	Microsoft Excel	
	IS Role	IS Role				Destina		Organizational Category Record	Organizational Category Record	
	KN ROLE1	KN ROLE1				Destina Destina		Pay Item & Proposal Register	Pay Item & Proposal Register	
•	Lead Estimator	Lead Estimator division				Destina Destina		Pay Item & Proposal Register Pay Item Record	Pay Item & Proposal Register Pay Item Record	
	MLQ-0	test-level 0						Pay Item Record PBS Change Record	Pay Item Record PBS Change Record	
	MLQ-1	test-level 1) → L		Destina		PBS Change Record	PBS Change Record	
	MLQ-2	test-level 2					tole			
	MLQ-3	test-level 3					ead Estimator			
	MLQ-3- Copy w/Add Projects	test-level 3		l k	_	_	stimator			
	NP 1	Estimate Full Access				Destina		PBS Changes Register	PBS Changes Register	
	NP-2	NP-2					tole			
	Role 01-Engineer	Role 01- Engineer					stimator			
	Role 1 - Engineerr	Role 1-Engineer				-	ead Estimator	1		
	Role 2 - Estimatorr	Role 2- Estimator			+ 0	Destina	tion	Period Resource Quantities	Period Resource Quantities	
	Role 3 - Lead Estimator	Role 3- Lead Estimator			+ C	Destina	tion	Price % Add-On Record	Price % Add-On Record	
	Role 4 - Regional Admin	Role 4- Regional Admin			+ 0	Destina	tion	Price Breakdown Structure	Price Breakdown Structure	
	Role 5 - Adminn	Role 5- Admin				Destina		Price Category Record	Price Category Record	
	Role 6 - Settings Admin	Role 6- Settings Admin				Destina		Quantity Roll-Up Record	Quantity Roll-Up Record	
	Role 7 - Engineer @ Root	Role 7- Engineer @ Root				Destina		Quote Comparison & Award - Cost items	Quote Comparison & Award - Cost items	
	Role 8- Admin 2	Role 8- Admin 2			_	Destina		Quote Comparison & Award - Resources	Quote Comparison & Award - Resources	
	SJ-Role3-Snapshots-Add,vi	SJ-Role3				Destina		Quote Cost Item Record	Quote Cost Item Record	
	01 0 L 4 7 L 1 1 1 L	and the the still been been be			+ 0	Destina	tion	Quote Group Tag Record	Quote Group Tag Record	
	55					Destina		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.

				Control Register	0			
columns here to group	Saved views: Standard View -	1	ſype ≣	-			× PBS	17/18 0
Role Name 🚊	Description		Тур	e 🚊	Category	Ribbon Name		
Estimator	Estimator		+	Register Command	PBS Changes Register	Actions > Edit > Copy		
Foreman			+	Register Command	PBS Changes Register	Actions > Edit > Cut		
Integration Settings	Integration Settings		+	Register Command	PBS Changes Register	Actions > Edit > Delete		
IS Role	IS Role		+	Register Command	PBS Changes Register	Actions > Edit > Fill Down		
KN ROLE1	KN ROLE1					Actions > Edit > New		
Lead Estimator	Lead Estimator division			-				
MLQ-0	test-level 0							
MLQ-1	test-level 1							
MLQ-2	test-level 2							
MLQ-3	test-level 3		-		PBS Changes Register	Actions > Edit > Open		
MLQ-3- Copy w/Add Projects	test-level 3							
NP 1	Estimate Full Access				r			
NP-2	NP-2			Estimator				
Role 01-Engineer	Role 01-Engineer		-	Register Command	PBS Changes Register	Actions > Edit > Paste		
Role 1 - Engineerr	Role 1-Engineer			Role				
Role 2 - Estimatorr	Role 2- Estimator			→ Lead Estimato	r			
Role 3 - Lead Estimator	Role 3- Lead Estimator			Estimator				
Role 4 - Regional Admin	Role 4- Regional Admin		-	Register Command	PBS Changes Register	Actions > Tools > Activate Changes Log		
Role 5 - Adminn	Role 5- Admin			Role				
Role 6 - Settings Admin	Role 6- Settings Admin			→ Lead Estimato	r -			
Role 7 - Engineer @ Root	Role 7- Engineer @ Root	→	+	Register Command	PBS Changes Register	Actions > Tools > Activate 'View Change R	lecord Prompt	
Role 8- Admin 2	Role 8- Admin 2		-	Register Command	PBS Changes Register	Actions > Tools > Deactivate Changes Log	3	
SJ-Role3-Snapshots-Add,vi	SJ-Role3			Role				
0.0147 1. HI	**************************************			→ Lead Estimato	e			
55			+	Denister Command	Drojacte	(Context Menu) > Conv		
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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 🔺										
ō	Job Properties	File	e name C:\Users\Paul	Downloads \AccessCo	ontrolExport.xisx						
200	Foundation Setup Data		AutoSave 💽 Off) 🗗	ଗା୨୍ଦ୍୍⇒	AccessContr	olExport.xlsx ⑦ No L	Label V D	Paul Trippi (🏟		_	0
> 🚊	Resources		alusare Con la		Accesscond	SIEXPOILXISX (J) NO I	Label V /	Paul Inppr	<u> </u>		
> 増	Resource Assemblies	F	File Home Ir	nsert Page Layout	Formulas Data	Review View	v Automate Help		🖓 Comm	nents	ය Share
> 中	Cost Breakdown Structure										
> 🔍	Quotes	C1	1 -	$\times \checkmark f_x$	Ribbon Name						
> 🖂	Price Breakdown Structure		A		в		С	D	E		F
>	Pay Item & Proposal		Туре	Category		Ribbon Name		1_MR		Account	t Adminis
_	Billing Rate Reports										
	Estimate Comparison Report	3	Command								
	Audit	4	Command								
	Job Register	5	Command	Bond Cost Item R	Record	Actions > Viev	w > Default Data Blocks				
	InEight Schedule Cost Risk (xlsx)	6	Command	Bond Cost Item R	Record	N/A					
	Library Module	7	Command	Cash Flow			nt > Page Setup				
	Master Job Properties		Command	Cash Flow		Actions > Print					
	Master Foundation Setup Data		Command	Cash Flow		Actions > Print					
			Command	Cash Flow			ols > Cash Flow Options	No	No	No	
>	Master Resources	A	Command	Cash Flow			ols > Display Settings	No	No	No	
	Master Resource Assembly Rec		Command	Cash Flow			ols > Worksheet	No	No	No	
	Access Control (Excel)		Command	Cash Flow		N/A					
>	Saved Views (Library)		Command	Cash Flow		N/A		No	No	No	
Cu	ustom Reports		Command	Column Captions			nu) > Change Caption				
Sa	aved Views		Command	Column Captions			nu) > Reset All Captions				
			Command	Column Captions			nu) > Reset Caption				
			Command	Connected Analyt			ols > Auto-Update				

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	В	С	D	E	F	G	
				Account	Account Administrator-			
1	Туре	Category	Ribbon Name	Administrator	All permission	Design - Eng - Admin	Design - Eng - Project Admin	Design
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.

TIP

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

File Setup	Estimate	Quote	Price	System	Integrations				
o	_k^		***		🕵 Labor			====	
-	1				🟭 Equipment	ĂĂ	::		· 🕞
Job Properties	Foundation Setup Data 👻	Pay Item & Proposal	Bid Wizard	Resources *	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	Reports
	Initiali	ze			Resources		Assem	ıblies 🦊	Reports

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

😛 Save As			
$\leftarrow \rightarrow \land \checkmark \checkmark \checkmark$	This PC > Downloads	ٽ ~	
Organize 🔻 New fo	older		
🖆 OSDisk (C:) 🖈	^ Name	Date modified	Ту
📙 Git Projects 🖈	∨ Last week (1)		
Compliance1	InEight Control Columns List (1).xlsx	11/7/2023 2:08 PM	м
Control		11/1/2023 2.00 PWI	IVI
EstimateCloud	✓ Last month (5)		
Schedule	AccessControlExport.xlsx	10/26/2023 8:57 AM	Μ
On a Drive Ja Fishe	Excel import.xlsx	10/23/2023 5:32 PM	M
OneDrive - InEigh [*]	Suite Administration PT.xlsx	10/11/2023 10:41 AM 10/9/2023 9:42 AM	M
💻 This PC	 Platform topics.xlsx Roles-and-Permissions-Workbook.xlsx 	10/9/2023 9:42 AM 10/6/2023 9:25 AM	M
🗊 3D Objects		10/0/2025 9:25 AIVI	IVI
E. Desktop	✓ Earlier this year (9)		
Documents	InEight Control Columns List.xlsx	9/20/2023 3:49 PM	Μ
Downloads	improved.xlsx	9/20/2023 12:10 PM	М
	V <		
File name:	\Users\Downloads\AccessControlExport.xlsx		
Save as type: xls	x files (*.xlsx)		
∧ Hide Folders			

5. Click Save, and then click Run.

Bave As			×
\leftarrow \rightarrow \checkmark \uparrow \clubsuit > This PC > Downloads	ٽ ×	> Search Downloads	
Organize 🔻 New folder		8==	- ?
SDisk (C:) 🖈 ^ Name	Date modified	Туре	Size ^
Git Projects * VLast week (1)			
Compliance1	11/7/2023 2:08 PM	Microsoft Excel Work	47
Control	11/1/2023 2:00 PW	WICIOSOTE EXCEL WORK	71
EstimateCloud			
Schedule	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 	10/11/2023 10:41 AM	Microsoft Excel Work	41
This PC	10/9/2023 9:42 AM	Microsoft Excel Work	38
SD Objects	10/6/2023 9:25 AM	Microsoft Excel Work	57
Desktop Sector (9)			
Documents	9/20/2023 3:49 PM	Microsoft Excel Work	47
Downloads A improved.xlsx	9/20/2023 12:10 PM	Microsoft Excel Work	16 🗸
V Cowinidaus V K			>
File name: C:\Users\Downloads\AccessControlExport.xlsx			~
Save as type: xlsx files (*.xlsx)			~
		- 1	
∧ Hide Folders		Save	Cancel
A Hide Polders			

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.

Master data libraries				
✓ Select all				
Account code structure	✓ Select all	Contacts	✓ Select all	Cos
🗹 🎯 View Account code	A	🗹 🞯 View contacts		~
✓		🗹 🕀 Add contacts		
🗹 🖻 Edit Account code		🗹 💽 Edit contacts		
🗹 🛞 Delete Account code		Promote contact to user A		
Approve/Reject Account code <u>^</u>		 Delete contacts 		
Approve all account codes	-			
Cost centers	✓ Select all	Currency	✓ Select all	Dis
✓		Wiew currency		~
✓		🗹 🕀 Add currency		
✓ I Edit cost centers		🗹 💽 Edit currency		
✓ Delete cost centers		 Delete custom currency 		
Estimate	✓ Select all	Field attributes	✓ Select all	Gen
🗹 💽 Edit estimate library 📐		🗹 🐵 View field attributes		~
✓ Use templates <u>A</u>		🗹 🕂 Add field attributes		
🗹 🕀 Add template		🗹 📝 Edit field attributes		
🗹 🖻 Edit template		🗹 🛞 Delete field attributes		
 Delete template 				

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	Description	* Administrator level	
Estimate Administrator		Level 3 - Account Admin	• ()
		Level 0 - Base	
Permissions		Level 1 - Project Admin Level 2 - Organization Admin	
		Level 3 - Account Admin	6
Suite administration			
Organization and project			

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

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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.

◆ Saved Views ▼ ∜ Titles ▼ stomize	0	iolors • 🚱 External Reports • Autput Settings • 🕥 External References • stomize	Esti	e About E About E Release Release () InEight. Help	Notes InEight com University		
9		New Job			Platform	projec	ts
Core Proje	. *	Project A4998		A Project ID	Project Name	Status	Created Date
Core Proje		Project A4550		Project A4997	Project A4997	New	4/1/2020 3:56:1
Cod	*	A4998	7	Project A4998	Project A4998	New	4/1/2020 3:56:1
				Project A4999	Project A4999	New	4/1/2020 3:56:1
Descriptio	n:	Clemson Creek Restoration project	۱.	Project A5	Project A5	New	4/1/2020 3:52:3
			,	Project A50	Project A50	New	4/1/2020 3:52:3
			- 1	Project A500	Project A500	New	4/1/2020 3:52:4
		Auto-Update Job in Connected Analytics		Project A5000	Project A5000	New	4/1/2020 3:56:

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.

Job Proper	ues	•								
Overview	Cov	ver Sheet	Cost Basis	Minority Setup	Fuel Cost					
Co	de:	4985362 \	version 1							
Project	ID: [4985362								
Descript	ion:	2020 Clov	v Creek Shorelin	e Restoration Project	t					
				Overview	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Folder Tags	Pric
				Identificat	tion					
No	tes:	Shoreline	Restoration pro		cation: Scotts	ale, AZ				
					City: Scotts	ale				
				с	ounty:					
				Co	ountry: United	States O 👻				
					State: Arizona	Ť]			
				La	titude:				41.	77287
				Lon	gitude:				-88	14793

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

Overview	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Folder Tags		
	ode: 4985362-v						
Project		-					
Descript	· · ·	Court Character	e Restoration Proj	at Original S			
			eline stabilization a	-			
	The project	≡ \	2020 Clow Cre	ek Shoreline	Restoration 853	62 / Project details	ଡ 4 ⁶ ® ଭ
		All project	s & organizations	Edit	project		Project settings Cancel Save
		Projec	t details:				
					1º	* Project ID	Notes
					19 A.	4985362	The project includes shoreline stabilization and revegetation of native turf grasses in designated areas to restore impaired ecological function to the impacted area
			-		and and the	* Name	
						2020 Clow Creek Shoreline F	
		CALL COM			Real State	* Phase 🕜	
		C. C.	7. 18 Sec. 1		1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1	Thuộc 😈	

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
and)	4985362
	* Name
	2023 Clow Creek Shoreline Restoration
SEC.	* Phase
CON NOT	Job Properties O Pre-E Overview Cover Sheet Cost Basis Minoph 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.

Jo	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, 14793
	4985362	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

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.

Pro	oject ID 🖮							
	Proj =	Description	-	Country	State	City	Latitude	Longitude
	Unassigne							
÷	4985362							
	4985362	2020 Clow Creek Shoreline Restoration - Per Addendum 1		United Stat	Illinois	Naperville	41.77287	-88.1479
	4985362	2020 Clow Creek Shoreline Restoration Project - Original Estir	mate	United Stat	Illinois	Naperville	41.77287	-88.1479
	4985362	2020 Clow Creek Shoreline Restoration Project - Per Addendu	um 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
	4985362	2023 Clow Creek Shoreline Restoration - Per Addendum 3		United Stat	Illinois	Naperville	41.77287	-88, 1479
	4985362	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
	4985922							
	4992404							
	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.

Ur	ganization 🚋			/			
	Organization 🚊	Source Job	Project Name	Description	de	Status	Schedule
÷	Unassigned						
	Estimate Infrastructure						
	Estimate Mining						
+	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_South Center	ral					
•	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	tions	Actions				
📑 Print		🕂 New	Сору	े;; Close		21-	E			
👌 Previe	w	🙁 Delete	📄 Paste	+ Fill Do	wn					
🛃 Expor	t to Excel	S< Cut	ें toad			Job Status	Organization Tree Filter			1
Pri	nt		Edit			Tools	View			
Job Regi	ster ©						/			
Organiz	ation			×	Dra	g columna nere	to group			
Name						Code		<u>=</u>	In Use	Descriptic
~ S1000	000 - PKS Ir	nc			÷	100657				Clark/K
						101515				India
						101898				WCAD
~ S/	A 1000 -	Corporation	n			101924				Waterloo
~	SB2000 -	Energy				101979				East Rail M
	> SC20	02 - Oil, Gas &	Chemical			102447				Border We
		03 - Power				190001				190001
		04 - Industrial				190002				190002
>		Infrastructure	2			190003				19000
>					190004					19000
>		Home Office			24-5 FullImport T01				24-5 Fuli	
	000000	thance office				24-5 Selectiv	eImport T01			NP1-245
						245-BC2				BC2
						Σ		0)	
								120)	
4				Þ	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.

<u></u>
È
<u>in</u> .
ised per Addendum #1
ised per Addendum #2
I

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.

\odot	Library - Estimate
Start	In Eight [®]
New	ESTIMATE
Open	LJIMAIL
Save	Open a recent Job
Close Job	
Close All Jobs	
Jobs	More
Library	Training Job Training Job - Maricopa County
Templates	
Snapshots	Create a new Job from
Archive / Restore	
Settings	
Exit	
	Scratch Template Existing Job Bid Wizard

- 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 JOB PROPERTIES

When you create a new project, the **Job Properties** form automatically displays. This is where you can enter basic information about the project. To open the Job Properties form at any other time, on the InEight Estimate landing page, select the **Setup** tab and click **Job Properties**.

4.2.1 Overview Tab

The Job Properties form opens to the Overview tab.

Overview – Overview Tab

	Name	Description
1	Code	This is the name of the Estimate job and can be change at the time of creation, but cannot be changed after.
2	Project ID	The Project ID originates from Core and cannot be changed. Click on the Project ID to navigate to the Project Suite Core project.
3	Description	The Description can be changed at any time.
4	Status	 Indicates where in the process this job is (e.g., Bidding, Awarded, etc.) When searching for jobs in the Job Folders list, you can filter and sort jobs by their status These job statuses can be adjusted to fit your company requirements in the Jobs Register, Tools Menu, Job Statuses.
5	Project Name	Information in this field derives from Core.
6	Organization	Information in this field derives from Core.
7	Notes	Notes can be added in the Core project at any time and is used to document project specifics.
8	Job created by	Indicates the user or entity that initially created the job.
9	Source Job	The name of the original job that the job was copied from.

	Job Properties O	•
	Overview Cover Sheet Cost Basis Minority Set	nce Benchmarking Alternates
	1 Code: Training Job West district	4 Status: Bidding • Organization: S100000 - PKS Inc •••
A	Project ID: Training Job 2	Project Name: Training Job 6
New Job	Description: West district freeway5 South project	5
Core Project: * Training Job 2	3	
Code: * Training Job West district		
	Notes:	^
Description: West district freeway 5 South project.		
3		
Auto-Update Job in Connected Analytics		
OK Cancel		
		×
	Last Saved: 4/4/2024 10:37:12 AM	
	Job created by: Paul	
	Source Job: 9	
	•	
		OK Cancel

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.

4.2.2 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)

Overview	Securit	ty Cover Sheet	Cost Basis	Minority Set	tup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment	4	
Identificati	ion														
Loc	ation: I	-10 MP 100 to MP	120	Type:	Highv	way and Ger	eral Engineering			Contra	ect Duration:				16
	City:	hoenix		Engineer:	Exam	ple Engineer	Fred Jones			E Tir	ne Measure:	Contract Day	s -		
Co	ounty: N	Maricopa		Owner:	Exam	ple Owner	Jerry Slate			E Fo	recast Start:	1/6/2014	-		
Co	untry:	United States	-	Architect:	Exam	ple Architect	Robert Frost			E For	ecast Finish:	6/5/2014	-		
	State:	Arizona	-								Duration:				1
Lat	itude:		0.00000												
Long	itude:		0.00000												
Proposal															
Bi	id Date:	12/23/2013	•					Opening Type:	Public						
Bi	d Time:	10:00:00 PM						Proposal Type:	Unit Price						
Est	timator:	Example Prime Co	ntractor 1 To	m Cross				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.

4.2.3 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.

	Name	Description
4	Default Currency:	The default will be set to U.S. Dollar, but this can be changed if needed.
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 Secur Cover Sheet	Cost Basis	Min 2 stup	Fuel Cost	Job Tracking	Job Folder Tag	3 Competitors	Pricing	Schedule	Cash Flow	Equipment	4	Þ
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	Scale 1 Scale 2 Scale 3	: 0.00 %		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: (0 O Change UM / M O Change Days	an-Hour	Preserv Data Sc	e Original Cos nurce	t Item		
Currency Default Currency: U.S. Dollar Resource / Assembly Filter			Sta	ndard Rates Sales Tax Rate:		5.00 %						
Labor Rate	esource / Asser] [All]] [None]] [None]		Geographic A [All] [None] (None]		Wage Zone	-17		nizational Cat II] Ione] Ione Plantal	egory	Import I Reso		d

4.2.4 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.

Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment	4	
Work Ho Pay Hou Shi	Shift Arrange urs per Shift Irs per Shift: fts per Day: s per Week:	8.00	Scale 1 Scale 2 Scale 3	: 0.00 %		es Lock Cost Items Pay Item Unit Pr Activate PBS Cha Activate Quantity Maintain CBS Str When man-count	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	t 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

گ Acti	ions		Shift / Rate	Calculator Re	cord - Training	j Job		E –	
<u>ب</u>	Copy Calculator from Library								
îг с	Copy Calculator to Library								
•	Clear All								
-	Tools								
	Shift Rate Calculator Name:	[Enter Name]							
		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
	Shift 1								101210
,	Shift 1 Work Hours	10.00	10.00	10.00	10.00	10.00	0	0.00	
,		10.00	10.00	10.00	10.00 0.00	10.00 0.00	0.00	0.00	50.00
,	Work Hours								50.00

- 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.

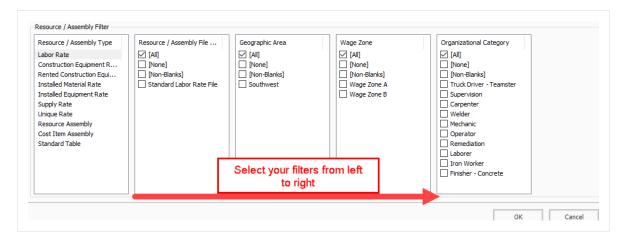
Shift 2								
Work Hours	12.00	12.00	12.00	12.00	12.00	0.00	0.00	60.00
Scale 1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scale 2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Scale 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

• 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	Fue
-Standard S	hift 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	

4.2.5 Import Filtered Resources

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



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]	🗹 [AI]
Construction Equipment R	[None]	[None]	[None]	[None]
ented Construction Equi	[Non-Blanks]	[Non-Blanks]	[Non-Blanks]	[Non-Blanks]
stalled Material Rate	Standard Labor Rate File	Southwest	Wage Zone A	Truck Driver - Teamste
istalled Equipment Rate			Wage Zone B	Supervision
Supply Rate				Carpenter
Inime Pate				Welder

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

4.2.6 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

Ov	erview	Security	Cover S	Sheet	Cos	st Basis	Mino	ority Setup	p Fuel Cos	t
Drag	g columns	s here to grou	up							
	Fuel Type			Cost Per UM		Curre			Account Code	
	Diesel			\$	4.20	U.S. Do	lar	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		

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

4.2.7 Job Folder Tags Tab

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

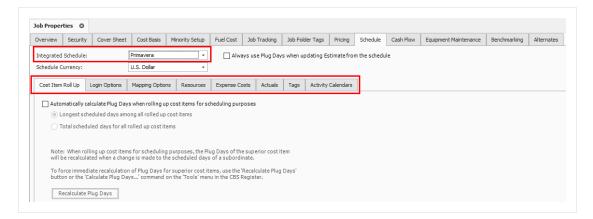
b Prope	rties 🕲												
verview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Pricing	Schedule	Cash Flow	Equipment Maintenance	Benchmarking	Alternates
Job Folder	Tag Assignm	ients											
	Tag	1:		•		Tag 13:							
	Tag	2:				Tag 14:							
	Tag	3:				Tag 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.

4.2.8 Schedule Tab

The Schedule tab is used to define the scheduling options for the integration between InEight Estimate Primavera or Microsoft Project. The settings you define here determine what information is sent to your scheduling tool, and how it will be structured.

- At the top of the Schedule tab, the Integrated Schedule can be set to Primavera or Microsoft Project or Manual
- You will need to confirm the proper settings are defined on each of the Schedule sub-tabs. These settings are defined in detail in *Lesson 12 Schedule Integration*



4.2.9 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

	Other Job Properties Tabs
	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 th 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	ity Cover Sheet	Cost Basis	Minority Setup	Fuel Cos	t Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment Mainte	enance	Benchmarking	Alternates	
Identification															
Location:	Scottsdale		1	Type: infra	structure						Contract Duration:				8
City:	Scottsdale		Engi	neer: Exa	mple Engineer Fro	ed Jones					Time Measure:	Calendar	Days -		
County:	Maricopa		0	vner: Exa	mple Owner Jerry	y Slate				1	Forecast Start:	10/15/20	19 -		
Country:	US .	•	Archi	itect: Exa	mple Architect Ro	obert Frost				1	Forecast Finish:	12/24/20	19 -		
State:	AZ	•									Duration:				
Latitude:			0.00000												
Longitude:			0.00000												
Desseal															
Proposal Bid Date:	10/1/2019 -	7					Opening Ty	ne: Dub	lic						
Bid Date:	10/1/2019 -]					Opening Ty								
		•]					Opening Ty Proposal Ty								
Bid Date: Bid Time:			timator Jim Sly			1		pe: Unit							
Bid Date: Bid Time: Estimator:			timator Jim Sly				Proposal Ty	pe: Unit						\$1,	1
Bid Date: Bid Time: Estimator:	Hard Dollar Corpora		timator Jim Siy				Proposal Ty Plan Holde	pe: Unit ers:	Price			•		\$1,	
Bid Date: Bid Time: Estimator: Bid Location:	Hard Dollar Corpora		imator Jim Sly			\$500,000.00	Proposal Ty Plan Hold Liquidated Damag	pe: Unit ers: ges: Per: Day	Price			•		\$1	

The following Cost Basis settings are defined:

verview Security Cover S	iheet Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipment Maintenance	Benchmarking	Alternates
Pay Hours per Shift: 8 Shifts per Day: 1	00 Scale 1 00 Scale 2 00 Scale 3	: 0.00 %		Lock Cost Items Pay Item Unit P Activate PBS Ch Activate Quantit	rice Precision: anges Log ay Checking ructure at Level: thanges: C	2 1 Change UM / N Change Days	fan-Hour	Preserv Data Sc	e Original Cos burce	t Item		
Urrency Default Currency: U.S. Do tesource / Assembly Filter Resource / Assembly Type Labor Rate		e / Assembly File	•	dard Rates Sales Tax Rate: Geographic			sge Zone [Al]			Organizational Category	^	Import F
Construction Equipment R Rented Construction Equi Installed Material Rate Installed Equipment Rate Supply Rate Unique Rate Resource Assembly Cost Item Assembly Standard Table	[Non		e	[None] [None] [Non-Bla ☑ Southwe			[None] [Non-Blank Wage Zone Wage Zone	A		Variante Service	ч ч	Kesou

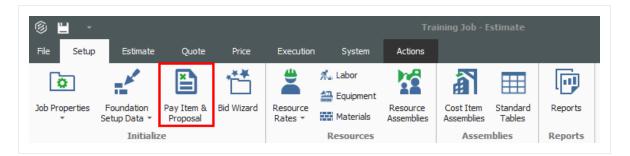
Congratulations, you have completed this exercise!

4.3 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**.



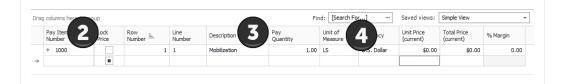
	Name	Description
1	Proposal and Item Recaps	Related to pricing during bid close-out. You can disregard them at this time.
2	Pay Item Number	Represents the bid item number from the client (if they give you one) or can be a number you specify. This field is alpha-numeric
3	Position Code	Controls the way 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.

4.3.1 Overview – Pay Item & Proposal Register

Proposal R	ecap - Training Jo	b					×	Item Reca	p - 200 SITEW	DRK & ROADW	AY						×
	Current	Target	Forecast	Variance				Description			Unit Price (balanced)	Total Pri (balance					
Price:	\$6,569,735.00	\$5,897,950.68	\$6,577,223.80	\$671,784.32	CUT			V A Price			(balanced)	\$2,834	-,	(current) \$3,402,700.			
Markup:	\$987,477.27	\$315,692.95	\$1,044,716.27	\$729,023.32	CUT			_	istribution			\$319.7		\$888,140.0			
Margin%:	15.03	5.35	15.88	\$731,836.84	сит				Markup			\$150.1		\$718,760.4			
										kup records)			\$0.00	\$568,618.5	1		
									📥 Business C	Iverhead		\$150,1	41.93	\$150,141.9			*
															_		
rag columns	2 9040	0			-0	. —)							Saved vie	ws: Standard	View	- 5
Pay Item Number		Lock Quantit	y Price	Description	•	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Currency	Unit Price (current)	Total Prio (current)		Unit Markup (balanced)		Unit Distribution	Total Distribution	Unit (curr
200	1			SITEWORK & P	ROADWAY				U.S. Dollar		\$3,402	,700.00		\$150,141.93		\$319,521.54	
+ 6410	0100 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	i 1
+ 2010	1.2			Clearing & G	irubbing	10.00	10.00	Acre	U.S. Dollar	\$5,900	.00 \$59	,000.000,	\$257.19	\$2,571.93	\$1,251.61	\$12,516.08	8
+ 202.0	1.3			Unclassified	Excavation	50,000.00	50,000.00	Cubic Yard	U.S. Dollar	\$5	.50 \$275	,000.000	\$0.30	\$14,840.72	\$0.83	\$41,414.20	
+ 303 5	5912 1.4			Aggregate B	Base	40,000.00	45,000.00	Ton	U.S. Dollar	\$26	.50 \$1,060	,000.00	\$0.94	\$37,486.40	\$2.05	\$82,054.63	3
+ 303 4	4263 1.5			Asphalt Con	crete Hot Mix Type A	38,000.00	35,000.00	Ton	U.S. Dollar	\$42	.45 \$1,613	,100.00	\$2.49	\$94,505.14	\$4.71	\$179,101.18	3
= 400	2			WATER & SEW	ER				U.S. Dollar		\$718	,550.00		\$34,584.99		\$76,228.25	5
+ 413(8	B) 0464 2.1			36 Inch RCP	Culvert Class III	1,000.00	1,024.00	Linear Feet	U.S. Dollar	\$97	.45 \$97	,450.00	\$4.33	\$4,325.59	\$9.94	\$9,944.34	•
+ 800 0	2.2			10 Inch PVC	Force Main (SDR 21)	12,000.00	12,000.00	Linear Feet	U.S. Dollar	\$29	.50 \$354	,000.000	\$1.43	\$17,165.84	\$3.04	\$36,531.54	•
+ 800 0	2.3			24 Inch PVC	Gravity Sewer (SDR35)	3,000.00	3,000.00	Linear Feet	U.S. Dollar	\$64	.50 \$193	,500.00	\$3.16	\$9,484.48	\$7.32	\$21,965.47	7
+ 800 0	2.4			4 Foot Diam	eter Manhole	16.00	16.00	Each	U.S. Dollar	\$4,600	.00 \$73	,600.00	\$225.57	\$3,609.08	\$486.68	\$7,786.90	0
500	3			STRUCTURAL	CONCRETE & BRIDGES				U.S. Dollar		\$631	,895.00		\$32,304.21		\$78,703.66	5
+ 501(4	A) 1306 3.1			Structural En	xcavation & Backfill	800.00	800.00	Cubic Yard	U.S. Dollar	\$28	.00 \$22	,400.00	\$1.39	\$1,111.52	\$3.16	\$2,525.23	8
	A) 1322 3.2			Steel Reinfo	rcement	30,000.00	30,000.00	Pound	U.S. Dollar	\$1	.70 \$51	,000.000	\$0.08	\$2,536.15	\$0.13	\$4,011.30	
+ 506(/				Retaining W		850.00		Cubic Yard	U.S. Dollar	\$545		250.00	\$27,45	\$23,336,43	\$67.68	\$57,526,49	

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



4.3.2 Pay Item Prices by Category

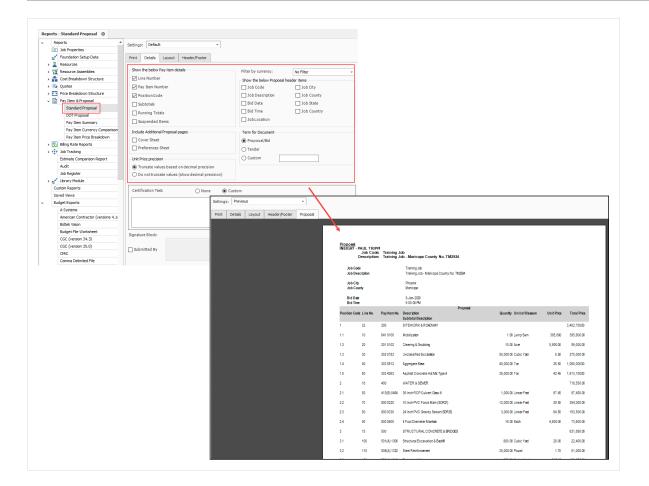
Owners are increasingly requiring more information from contractors as part of their bid submissions. Many times, this is a further breakdown of a bid price such as separating the price of an item based on its labor cost, material cost or man-hours. Select columns in the Pay Item & Proposal register 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)		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	\$5.50
+ 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	\$26.50
+ 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	\$42.45
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	\$97.45

4.3.3 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.



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 🛓 Code 🗎	Pay Item 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
2	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

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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

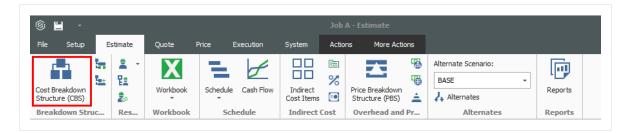
Lesson Topics

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	- Estimate						
File Setup	e Estimate	Q	uote	Price	Execution	System	Integrations	Actions	More Actions						1	ê 🖩
📇 Print	🕀 New	9	Сору	🛒 Spl	t	⇒ Indent	🐰 Link Field) 🗏 Cost	Item	Assembly	2. Resource			T F	CBS Tree Filter Mod	le:
Review	🛞 Delete	B	Paste	🚉 Spl	t by Cost Type	- Outdent	Junlink Field	🔚 Subo	rdinate Cost Item	🔁 Subordinate Assembly	Resource /				Filter	*
Export to E	xcel 3< Cut	+	Fill Down	Tog	gle Suspended			Depe	ndent Cost Item			Expa		Clear CBS Tree Filter Filter	Filter	
Print				Edit			Workbook			Insert		,		View	Navigation	
Cost Breakd	own Structure (Cl	85) R	enister	0			-						-0		<u> </u>	J @-
		1 in	-				-(3)				-(4)-				1.114	
B	lter Mode) ×	P	ag colum	ns here to	group		•							Saved views: Sta	andard View	-
Code	Description		CBS	on Code 🗎	Descrip	tion		Option	nal	Forecast	Unit of	Unit Cost	Total Cost	Subject Cost	Subject Cost	Allocated
× 📫	JOB	Ш		on Code -				Code		(T/O) Quantity	Measure		(Forecast)		Rate	
88	Prime Bond	÷	=		JOB					20.00	Mile	\$294, 138. 13	\$5,882,762.51			
88	Price % Add-On	ш	+		Prime	Bond		PRIME	BOND	1.00	Lump Sum	\$47,148.68	\$47,148.68			
	Job Financing	11	+		Price	% Add-On		PRICE	% ADD-ON	1.00	Lump Sum	\$295,638.13	\$295,638.13			
	Indirect Cost Esc		+		Job Fir	ancing		FINAM	ICE EXPENSE	1.00	Lump Sum	\$33,105.26	\$33,105.26			
88	Direct Cost Escal		+		Indire	ct Cost Escalat	tion	INDIR	ECT COST ESCALA	TION 1.00	Lump Sum	\$2,131.11	\$2,131.11			
	Indirect Cost Ad		+		Direct	Cost Escalatio	n	DIREC	T COST ESCALATI	ON 1.00	Lump Sum	\$15,048.80	\$15,048.80			
>	Direct Cost Add- SITEWORK & RC	11	+		Indire	ct Cost Add-Or	1			1.00	Lump Sum	\$5,888.67	\$5,888.67	\$294,433.42	2.00	
> = 1 > = 2	WATER & SEWER		+		Direct	Cost Add-On		DIREC	T COST ADD-ON	1.00	Lump Sum	\$104,088.34	\$104,088.34	\$5,204,417.24	2.00	
> 📩 3	STRUCTURAL CO		= 1		SITEW	ORK & ROADW	AY	200		1.00	Each	\$2,464,161.56	\$2,464,161.56			
→ == 4	INDUSTRIAL & R		+ 1.	1	Mobil	ization		6410	100	1.00	Lump Sum	\$11,909.51	\$11,909.51			
> 📥 5	COMMERCIAL	Ш	+ 1.	2	Clear	ing & Grubbing		2010	102	10.00	Acre	\$3,918.50	\$39,184.97			
> 📥 6	GUARDRAIL & SI		□ 1.	3	Unda	ssified Excavatio	on	202 0	183	50,000.00	Cubic Yard	\$4.68	\$233,915.81			
> 🚔 7	Indirect Costs	11	+ 1.	3.1	Ex	cavation		1.3.1		50,000.00	Cubic Yard	\$3.00	\$149,922.88			
8	Special Risk Allov	v	+ 1.	3.2	Em	bankment		1.3.2		50,000.00	Cubic Yard	\$1.68	\$83,992.94			
			■ 1.	4	Aggr	egate Base		303 5	912	45,000.00	Ton	\$15.40	\$692,928.99			
			+ 1.	4.1	Fu	rnish & Haul Base	e Material	1.4.1		45,000.00	Ton	\$11.54	\$519,513.30			
			+ 1.	4.2	Fir	egrade Subgrad	e	1.4.2		400,000.00	Square Yard	\$0.19	\$75,848.36			
			■ 1.	4.3	In	stall Aggregate B	ase	1.4.3		45,000.00	Ton	\$2.17	\$97,567.33			
			+ 1.	4.3.1		Place Addredate	Base	1.4.3	1	45.000.00	Ton	\$1.63	\$73.460.92			
		11			107								\$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.

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.

TIP 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**.

	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.

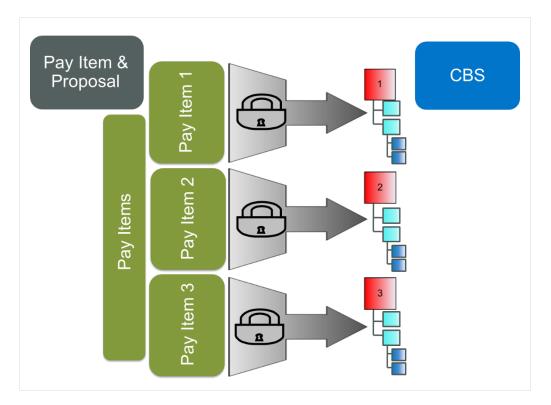
Overview – Work Breakdown Structure (WBS) View Register

WBS Tree	1	>	Dr	ag columns here to g	roup 2			F	ind: [Search	For]	Saved views:	Standard View	•
VBS: CEAS			•	Code 🛓	Description				Quantity	Unit of Measure	Currency	Unit Cost	Total Cost (Forecast)
Code	Description			CEAS	Civil Engineering Accourt	t Code System			1.00	Each	U.S. Dollar	r \$2,494,088	\$2,494,088.03
CEAS	Civil Engineering Account	Code System		□ 10	GENERAL PROVISIONS				1.00	Lump Sum	U.S. Dollar	r \$35,054.51	\$35,054.5
> 10	GENERAL PROVISIONS	code system		□ 10.10	PROJECT SETUP				1.00	Each	U.S. Dollar	r \$14,000.00	\$14,000.0
> 11	EARTH WORK		→	10.10.100	YARD				1.00	Each	U.S. Dollar	r \$4,000.00	\$4,000.0
> 12	PAVEMENT WORK			10.10.200	OFFICE FACILITIES				1.00	Each	U.S. Dollar	r \$2,000.00	\$2,000.0
> 13	BRIDGE WORK			10.10.500	UTILITIES				1.00	Each	U.S. Dollar	r \$8,000.00	\$8,000.0
> 14	CONCRETE STRUCTURES			■ 10.20	EQUIPMENT SETUP				1.00	Each	U.S. Dollar	r \$14,624.39	\$14,624.3
> 17	PIPE WORK			0 10.20.100	MOBILIZATION				1.00	Load	U.S. Dollar	r \$11.909.51	\$11,909.5
			4	:	37								\$2,494,088 .
Cost Items	2		4		37								
Cost Items	3		1		37			Fi	nd: [Search F	or]	Saved views:	Standard View	\$2,494,088. ;;
rag columns here to				ptional	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Fi Total Cost (Forecast)	nd: [Search F Allocated	for] ···· Allocation Source	Saved views: Currency	Cost R	;
rag columns here to			C	ptional	Forecast (T/O) Quantity		Unit Cost \$4,000.00	Total Cost	-	Allocation		Cost R	* tesource Assem

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."

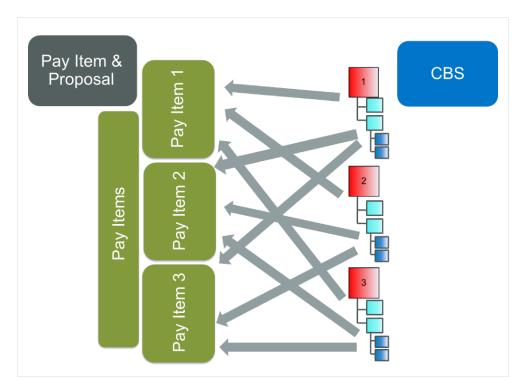
In a locked approach, level one cost items are automatically created and assigned to pay items. This locked approach works well when pay items adequately represent the work plan. Subordinate cost items inherit the pay item assignment of superior cost items.



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 Tags	Competitors	Pricing
Standard S	hift Arrange	ments	-Standard Wa	age Rate Composite	e Rule	s			
Pay Hou Shi	ırs per Shift rs per Shift: fts per Day: s per Week:	8.00	Scale 1 Scale 2 Scale 3 Shift	: 0.00 %		Lock Cost Items Pay Item Unit Pr Activate PBS Cha Activate Quantit Maintain CBS Str When man-count	ice Precision: inges Log / Checking ucture at Level:	2 0 O Change UM / M) Change Days	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.

CBS Position 🗎 Code	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
t	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

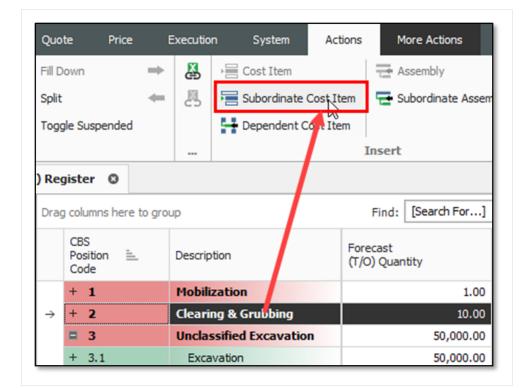
Right-click on the row header of the superior cost item and select Insert Subordinate.

CBS	Description		- Fill Down
Position Code		+	<u>F</u> III Down
	JOB	8	Link this field to Excel
+	Prime Bond	- 8	UnLink from Excel
+	Price % Add-On	(CD	
+	Job Financing	\rightarrow	Indent
+	Job Management & E	iqu 👝	Outdent
+	General Expense		
+ 1	Mobilization		Insert
+ 2	Clearing & Grubbing		Insert Su <u>b</u> ordinate
+ 3	Excavation		Insert Dependent <u>C</u> ost Item
÷ 4	10" PVC Pipe	_	

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	ß	Link this field to Excel
	□ 3	Unclassified Excavation	ß	UnLink from Excel
	+ 3.1	Excavation	-	Indent
	+ 3.2	Embankment	+	Outdent
	□ 4	Aggregate Base		
	+ 4.1	Furnish & Haul Base Material		Insert
-	i 4.2	Finegrade Subgrade		Insert Subordinate
	□ 4.3	Install Aggregate Base		Insert Dependent Cost Item
	+ 4.3.1	Place Aggregate Base	Ξ	Insert Cost Item Assembly
	+ 4.3.2	Blue Top Aggregate Base	1	Insert Cost Item Assembly as Subordinate
	□ 5	Asphalt Concrete Hot Mix Ty	ß	Split
	+ 5.1	Furnish & Haul Hot Mix	2.	Insert <u>R</u> esource
	+ 50	Install Hot Mix Type A	100	

Option 2

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

Quo	te Prie	ce E	Execution	ı Sys	stem A	tions	More Actions	
Fill D	own	\Rightarrow	8	• Cost	Item		- Assembly	2
Split		-	8	F Sibo	rdinate Cost I	Item	🔁 Subordinate Assem	bly 🎦
Togg	jle Suspende	ed		🕂 Depe	ndent Cost It	em		
:				- 1		In	isert	
) Reg	gister 🛛							
Drag	; columns he	re to grou	ıp			F	Find: [Search For]	
	CBS Position Code	<u>-</u>	Descript	ion		Fored (T/O)	cast) Quantity	Unit of Measure
	+ 1		Mobiliz	ation			1.00	Lump Su
	+ 2		Clearin	g & Grub	bi g		10.00	Acre
	■ 3		Unclass	sified Exc	avition		50,000.00	Cubic Ya
\rightarrow	+ 3.1		Excav	ation			50,000.00	Cubic Ya

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

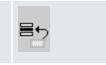
As you develop your estimate, you may need to move cost items around in the Cost Breakdown Structure. To move a cost item:

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.



Ę	=	4	-
			2
			3

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.

CBS Cod	e: Optional Cod	le: Description:					Fore	cast (T/O) Qty:	Unit of Measu	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	3.1	Excavation						50,000.00	Cubic Yard		↓ \$3.00	\$149,922.88	U.S. Dollar	
IAssig	nment: PI Line Numb	er: PI Description:							Cost Segment		Pay Quantity:	Cost Source:	Alternate:	
202 0 18		Unclassified Ex							Direct Cost		50,000.00	Detail -	BASE	
										-				_
C <u>o</u> st Ite	m Summary 🍃 Deta	il : \$3.00 🛱 Plug	: \$0.00 📮	Quote : \$0.00	Allocation					I	Employment Setup			>
Cost Cat	egory	Unit Cost	Total Cost	Unadjusted Total Cost	Cost Adjustment Percent	↔	Cost Adjustment Amount		Total . Billing Amount ,	r c il		Type: Construction Ec	uipment Rate	
 Total 		\$3.00	\$149,922.88	\$149,922.88	0.00		\$0.00	\$3.28	\$163,881.06		Description: Water Tr			
> L	abor	\$0.66	\$33,170.48	\$33,170.48	0.00		\$0.00	\$0.93	\$46,438.66	\$	Quantity (Less Waste):	Wast	e % d-on:	
> C	wned Equipment	\$2.34	\$116,752.40	\$116,752.40	0.00		\$0.00	\$2.35	\$117,442.40		waste).			
	ented Equipment	\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00		Quantity:	1.00 Producti Fa	ctor:	1
	upplies	\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00		Cost Driver: Sc	hadula –		
	laterials	\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00		cost briver: Sc	riedule +		
	ubcontract	\$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		Employment Cost			
	ees Ilowance	\$0.00	\$0.00	\$0.00	0.00		\$0.00	\$0.00	\$0.00 \$0.00		Unit Cost: \$29	.60 Total Cost:	\$1,302.40	
	ustom Category1	\$0.00	\$0.00	\$0.00	0.00	•	\$0.00	\$0.00	\$0.00	11				
-	Indefined	\$0.00	\$0.00	\$0.00	0.00	÷	\$0.00	\$0.00	\$0.00		Maintenance Labor Cost	1		
							40.00	40100			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.

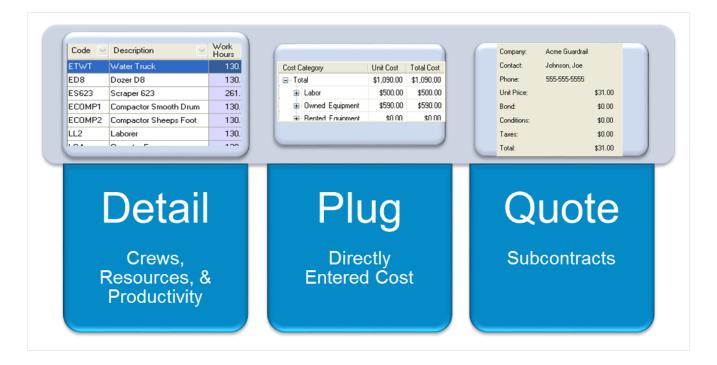
BS Code:	Ont	ional Code:	Descr	iption:			Forecast (T/O) Qty:	Unit of Measure		Unit Cost:	То
bs code:	Opt	ional code:	Descr	iption:			Forecast (1/O) Qty:	Unit of Measure	-	Unit COSE:	
									Ŧ		
2	400		WATE	R & SEWER			1.00	Each	Ŧ	\$496,284.83	
2.1	413	(B) 0464	36 Inc	h RCP Culvert Class	s III		1,024.00	Linear Feet	•	\$67.54	
I Assignment:	PIL	ine Number:	PI Des	cription:				Cost Segment:		Pay Quantity:	Co
413(B) 0464 🗎 60 36 Inch RCP Culvert Class III							Direct Cost	-	1,000.00	D	
		•					1	A Description			\vdash
C <u>o</u> st Item Summar	У	🤹 <u>D</u> etail : \$6	7.54	벅 Plug : \$0.00	Quote : \$0.00	Allocation		Business Overh	ead		
This cost item has								Direct Cost			
Click the Next but	tton t	to move to a s	ubordir	nate cost item and e	enter 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:
	 Place holder value until you get more information (from subcontractors or designers) For preliminary estimates when limited information is available
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.

ost Breakdow	n Structure (CBS)	Register	Cost Item R	ecord 🕲							
IS Code:	Optional Code:	Description	1:		Forecast (T/O) (Qty:	Unit of Measure:	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 Prepa	ation			1.00	Lump Sum	▼ \$3,664.55	\$3,664.55	U.S. Dollar	
Assignment:	PI Line Number:	PI Descript	ion:				Cost Segment:	Pay Quantity:	Cost Source:	Alternate:	
200 0 100	170	Toll Booth					Direct Cost	- 1.00	Detail -	BASE	_
ost Item Summa	ry 🕏 Detail : \$	3,664.55	🛱 Plug : \$2,500.0) 🖵 Quote : \$	0.00 <u>A</u> llocation			Cost Item Setup			:
ost Category		Unit Cost	Total Cost					Default 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 Eq 	uipment	\$0	.00 \$0.00					For every 8.00 ho	urs worked, pay 8.0	0 hours	
 Rented Ec 	uipment	\$0	.00 \$0.00								
 Supplies 		\$0	.00 \$0.00					-Default Shift Arrangeme			
 Materials 		\$0	.00 \$0.00					Work Hours per Shift:		ays per Week:	
 Subcontra 	ct	\$2,500						8.00	1.00	5.00	
> Fees		\$0	.00 \$0.00					Default Properties			
 Allowance 		\$0	.00 \$0.00					Account Co	de: 8000	1	
Custom Ca		\$0	.00 \$0.00						rve: Linear	•	
Undefined		\$0	.00 \$0.00					COSt Cu	Lincui	•	
Billing Rate		\$0	.00 \$0.00				-				
Billing Rate Ma	rkun	\$0	.00 \$0.00					💽 🔝 P 🕵	📚 📜 S		\approx

5.3.3.2 Detail Tab

	Code:	Optional C	ode: Description:		F	orecast (T/O) Qty:	Unit of Measure:	Unit Cost:	Total Cost:	Currency:
								~		
H	17	1200 0100	Toll Booth			1.00	Each	\$25,264.55	\$25,264.55	U.S. Dollar
	17.1	0220	Site Preparati	ion		1.00	Lump Sum	+ \$3,664.55	\$3,664.55	U.S. Dollar
PI A	signment:	PI Line Nur	mber: PI Description	n:			Cost Segment:	Pay Quantity:	Cost Source:	Alternate:
120	0 0 100 🚽	170	Toll Booth				Direct Cost	- 1.00	Detail 👻	BASE
_	t Item Summa columns here		tail : \$3,664.55		Quote : \$0.00 ed views: Pre	Allocation evious View	•	Cost Item Setup Default Pay Rules	Scale 1: Scale	2: Scale 3:
Drag	Row	c	Resource Assembly	Description	Quantity (Less	Waste	Qua	Composite Wage So		e 2: Scale 3: 00 0.00
			Assembly		Waste)	Add-on	"	For every 8.00 ho	urs worked, pay 8.0	0 hours
÷		1 LL2		Laborer			3.00 E	Default Shift Arrangeme	ents	
		2 LO1		Operator Class 1			1.00 E	Work Hours per Shift:	Shifts per Day: D	ays per Week:
		3 EG14G		Grader 14G			1.00 E	8.00	1.00	5.00
		4 ETWT		Water Truck			1.00 E	Default Properties		
	+	5 LT1		Teamster			1.00 E		de: 8000	2
								0		
*									rve: 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.

	Forecast (T/O) Qty:	Unit of Measure:	Unit Cost:	Total Cost:	Currency:
	1.00	Each	\$24,100.00	\$24,100.00	U.S. Dollar
	1.00	Lump Sum		\$2,500.00	U.S. Dollar
		Cost Segment:	Pay Quantity:	Cost Source:	Alternate:
		Direct Cost	~ 1.00	Plug	BASE
Quote : \$0	.00 Allocation]	- 171 I	M Description	
<u>Q</u> uote : șu			Cost Item Setup	Detail	
ed views:	Previous View	-	Default Pay Rules	Plug	
Quantity (Less Waste)	Waste % Add-on	Qua k	Composite Wage Sc For every 8.00 ho Default Shift Arrangeme Work Hours per Shift: 8.00 Default Properties Account Cc Cost Cu	er [:: ode: 8000	×

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.

h	1		200	SITE	WORK & R	OADWAY		
	1.	.1	641 0100	Mob	oilization			
PI	Ass	ignment:	PI Line Number:	PI D	escription:			
64	1 10	100 🗎	1.1	Mot	oilization			
Q	ost i	Item Summar	y 🚊 <u>D</u> etail : \$0	.00	👯 Plug	: \$20,000.00	<u> Q</u> uote : \$0.00	Allocation
Co	st C	Category		Unit 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		
		Donted Eq.			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

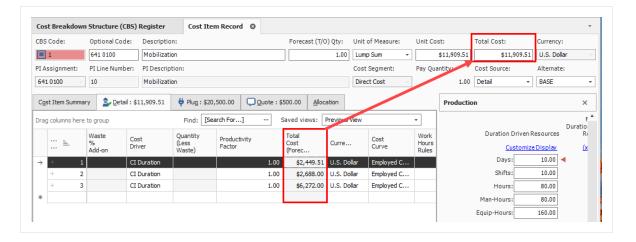
When you enter a production value, all the other production fields will auto-fill based on what you entered.

ost	t Item Summary	⊒ ∕⊈	etail : \$11,909.51	🛱 Plug : \$20	,500.00	Quote : \$500.00	<u>A</u> llocation							Production				×
ag	columns here t	group				Find: [Search For]	··· Sa	ved views:	Previo	ous View		•		Proc	luction	Qty Driven Hourly	
	Row 🛌	c	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Mea	Product Factor		W H	Pay H	Unit Cost			riven Resources tomize Display	Resources	
	+ 1	LT1		Teamster			1.00	Each		1.00	80.00	80.00	\$30		Days:	10.00 ৰ	0.00	
	+ 2	ETLT		Lowboy Trailer			1.00	Each		1.00	80.00	80.00	\$33		Shifts:	10.00	0.00	
	+ 3	ETTT		Tractor Truck			1.00	Each		1.00	80.00	80.00	\$78		Hours:	80.00	0.00	
															Man-Hours:	80.00	0.00	
						Resou	rces								Equip-Hours:	160.00	0.00	
														۰		,		Þ
														🔄 🔹	P 😫	😫 📃 S	🛓 🜫	: в

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.

ra	g columns here to	group			Saved views:	Previous View	-	2				PRODUC	TION	
	Row	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit Mea			Duration Driven Resources	Factored Duration Driven Resources		Cost It Summa
•	+ 1	LT1		Teamster			2.00	Each	\rightarrow	Days	45.00	45.00	0.00	45
	+ 2	ETDT		Dump Truck			2.00	Each		Shifts	45.00	45.00	0.00	45
	+ 3	MBR		Aggregate Base Rock	45,500.00	5.00	47,775.00	Ton		Hours	360.00	360.00	0.00	360
٠										Man-Hours	720.00	720.00	0.00	720
				RESO	URCES					Equip-Hours	720.00	720.00	0.00	720

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.

nt: PIL		Number: P					′		10.00	Acre			\$1,397.01		13,970.09 U	U.S. Dollar
1.1			PI Descrip	ption:						Cost Segm	ment:		Pay Quantity:	Cost Source	e: A	Alternate:
	÷	/	Clearing f	& Grubbing						Direct Cos	st	•	.6.67	Detail	- B	BASE
ummary	2	<u>D</u> etail : \$1,3	,397.01	₩ Plu <u>g</u> : \$0.00	Quote	e:\$0.00	Allor	cation				P	roduction			
here to g	roup					Saver	d views:	Previ	ous View	•	Q					
<u>.</u>		Resource Assembly		scription	Quantity (Less Wast		Waste % Add-on			Unit of Measure	r.					Factored D Driven Res
1		CGRADE	Gra	ading Crew					1.00	Hour			Days		10.00	j .
Row	-								6 Quantity	Unit of	Proc		Shifts		10.00	1
Number	-			iy .		(Less W/	aste) P	Add-on		Measure	Fac		Hours		80.00	1
											\square	1	Man-Hours		320.00	1
	2 1												Equip-Hours		200.00	j l
	3 L	LO3	CGRADE	Operator Class	3				2.00) Each		1				
	4 7	EG14G	CGRADE	E Grader 14G					1.00) Each		112	Acre/Day			(Internet
	5 7	ECOMP1	CGRADE	Compactor Smo	oth Drum				1.00	Each		11				
	6 /	LO4	CGRADE	Operator Forem	ian				1.00	Each		1				
											•					
		-							,,,,,,,,			1				
1	1	I I Row I I Number I I 2 I I 3 I I 4 I I 5 I I	Image: matrix with a straight of the straigh	Image: Second cond cond cond cond cond cond cond	Image: Second condition Resource Assembly Description 1 CGRADE Grading Crew 1 CGRADE Grading Crew Row Number → Code Resource Assembly Description 1 ETWT CGRADE Water Truck 2 LL2 CGRADE Laborer 3 L03 CGRADE Operator Class 4 EG14G CGRADE Grader 14G 5 ECOMP1 CGRADE Compactor Smoother										$ \begin{array}{ c c c c c c c c c c c c c c c c c c c$	Image: Second

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.

ost Item Setup			Period Quantities			
Composite Wage Scale: For every 8.00 hours w	100.00	Scale 2: Scale 3: 0.00 0.00 8.00 hours	Use Period Quantit	ies Edit		
Default Shift Arrangements -			Execution			
Work Hours per Shift: Shif 8.00	ts per Day: 1.00	Days per Week: 5.00	Allow As-Built:	None	•	
Default Properties						
Account Code:	1020	d.	Tag 1:	Estimator 1	-	
Cost Curve:	Linear	-	Tag 2:	Roadway	•	
Worker's Comp Override:		-	Tag 3:		•	
Quantity Driver:	Pay Item	Ŧ	Tag 4:		-	
Quantity Roll-Up:		L.	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.

efault Pay Rules	Scale 1: Scale 2: Scale 3:	Period Quantities		
Composite Wage Scale:	Scale 1: Scale 2: Scale 3: 100.00 0.00 0.00	Use Period Quantities Edit		
For every 8.00 hours v	vorked, pay 8.00 hours			
efault Shift Arrangements -		Execution		
Nork Hours per Shift: Shif	fts per Day: Days per Week:	Allow As-Built:	None 👻	
8.00	1.00 5.00			
Default Properties				
Account Code:	1020 🛫	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:	L.	Tag 5:	•	
Quote Group Tag:	-	Tag 6:	•	
Minority Goal Allowance:	100.00	Tag 7:	•	
Phase Code:		Tag 8:	•	
		Tag 9:		
When man-count changes:	Change UM / Man-Hour	Tag 10:		
	Change Days	Tag 11:		
		Tag 12:		
Suspend:		Tag 13:		
		Tag 14:		
		Tag 15:		
		18g 13.		

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:	Scale 1: Scale 2: Scale 3: 100.00 0.00 0.00	Us	e Period Quantiti	es
For every 8.00 hours v	vorked, pay 8.00 hours			
Default Shift Arrangements		Execut	tion	
Work Hours per Shift: Shif	ts per Day: Days per Week:		Allow As-Built:	None
8.00	1.00 5.00			
Default Properties				
Account Code:	1110 🖌		Tag 1:	Estima
Cost Curve:	Linear 🔹 👻		Tag 2:	Roady
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

	(continued)
Cost curve type	Definition
	more characteristic of subcontracted work 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	d.
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%.

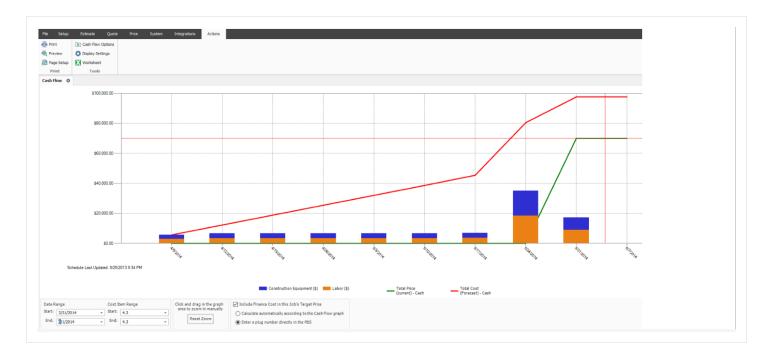
	From Duration %	To Duration %	Value %
÷	0	50	5
	50	50	5
	50	50	10
	50	50	10
	50	100	30
	100	100	10
	100	100	10
	100	100	20

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.

b Properties	Foundation Setup Data * Initial		Bid Wizard	Resources	Integrations	Resource Assemblies	Cost Item Assemblies Assem	Standard Tables blies	Reports Reports
ash Flow	Job Prop	erties O							
Overview	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Folder	Tags Pricing	Schedule	Cash Flo	w Equip
◯ At the		day: 25 s	Amount Retainag	of each billing ge is released:	0.	ld by owner as t the end of th n a specific da	e retainage: e job ite:		
At the	end of the job month on this d	day: 25	Amount Retaina subcont	of each invoid geis released ractors and ve	endors:	t is withheld by the end of the a specific date	y you as retain job 2:	nage: 5	days .00 % quipment),
	y mual interest ra mual interest ra				ds revenue):	8.00	OPa	ties ay Quantity precast (T/O)) Quantity
Reporting Peri Period setti	iods ing for cash flow	w: Day	•				Dates	/ Start / Finis	h •

Cash Flow Display Settings

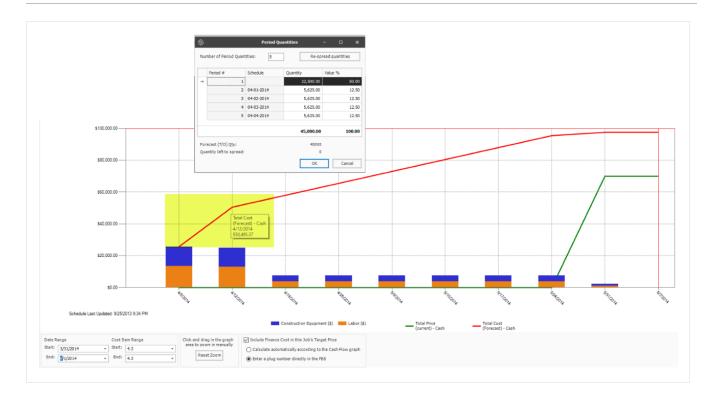
The <u>Cash Flow Display Settings</u> allow you to control what information displays on the Cash Flow graph.

Settings: Pr	revious -	Cost Categories				Resources			
_	is text as a custom report title:		Estimated	As-Built	Planned To Date	Resource Utilization			_
Example cash	flow ^	Labor				Summarize resources by:	Resource Type		\sim
	Ŷ	Owned Equipment				-	This job's utilized re All Library resource		
Period \	Week 🗸	Rented Equipment				Value	Qty Cost	AB Qtv	AB Cost
Cost Items		Supplies				Labor		,	
Total Co (Forecas	st)	Materials				Construction Equipment			
Current	ice	Subcontract				Installed Equipment			
Total Co (Forecas		Fees				Supply			
C Total Pri (current)	ice	Allowance							
Cash Flo		Custom Category1							
Finance	Cost	Undefined				Quantity:	Cost		
As-Built Total Co						None ~	Stacked Bar	~	
CE-Total Earned (l Cost					As-Built Quantity:	As-Built Cost: None	~	

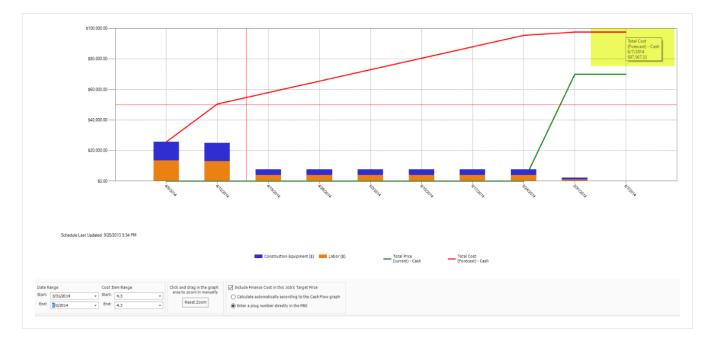
Cash Flow example

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.

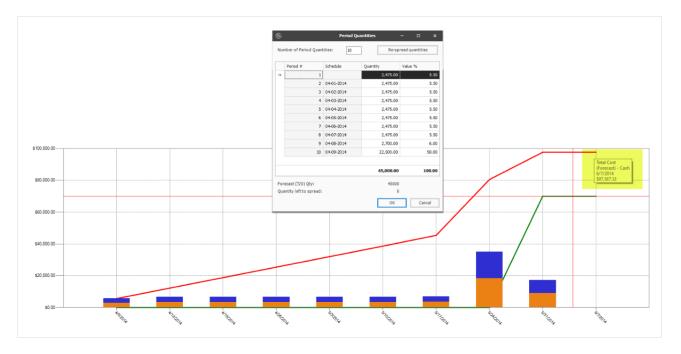
A reason why half of the project's cost is being used during the first period could be that resources available to perform the project happen to be mostly available during the front end of the project.



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.

ost Item Setup				×
Default Pay Rules	Scale 1: Scale 2: Scale 3:	Period Quantities		
Composite Wage Scale:	Scale 1: Scale 2: Scale 3: 100.00 0.00 0.00	Use Period Quantit	ies Edit	
For every 8.00 hours v	vorked, 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:	· · · · · · · · · · · · · · · · · · ·		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 C	ode 🖮	Description			Start	Finish	Forecast (T/O) Quantity
■ 4.3		Install Aggr	egate Base		3/31/2014	5/26/2014	45,000.0
	8		Period Qu	antities	-	_	¢ -
	Nu	mber of Period Quan	tities: 5		Re-sprea	d quantities]
		Period #	Schedule	Quantity	Va	alue %	
		1	03-31-2014	22	,500.00	50.0	0
		2	04-01-2014	5	,625.00	12.5	0
		3	04-02-2014	5	,625.00	12.5	0
		4	04-03-2014	5	,625.00	12.5	0
	1	5		5	,625.00	<u>12.</u>	
				45,	,000.00	100.0	0
	For	ecast (T/O) Qty:			45000		
	Qui	antity left to spread:			0		
					ОК	Cancel	

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.

8		Period	Quantities	-	o x
Nur	mber of Period Quan	tities: 5		Re-spread o	quantities
	Period #	Schedule	Quantity	Valu	e %
\rightarrow			9,00	0.00	20.00
	2		9,00	0.00	20.00
	3		9,00	0.00	20.00
	4		9,00	0.00	20.00
	5		9,00	0.00	20.00
			45,00	0.00	100.00
For	ecast (T/O) Qty:		4	15000	
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 *
Quantity (Less Waste)	Composite Wage Scale: 80.00 20 0.00	[
Wastej	For every 8.00 hours worked, pay 8.00 hours	
	Default Shift Arrangements	
	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

Default Pay Rules			
	Scale 1:	Scale 2:	Scale 3:
Composite Wage Scale:	80.00	20.00	0.00
For every 10.00 hours v	vorked, pay	10.00 h	ours
Default Shift Arrangements –			

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

lost Item Setup		
Default Pay Rules		
	Scale 1:	Scale 2: Scale 3:
Composite Wage Scale:	80.00	20.00 0.00
For every 10.00 hours	worked, pay	10.00 hours
Default Shift Arrangements		
Work Hours per Shift: Shi	ifts per Day:	Days per Week:
10.00	1	5.00

- 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.

lost Item Setup		
Default Pay Rules		
	Scale 1:	Scale 2: Scale 3:
Composite Wage Scale:	100.00	0.00 0.00
For every 8.00 hours w	worked, pay	8.00 hours
Default Shift Arrangements		
Work Hours per Shift: Shi	fts 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.

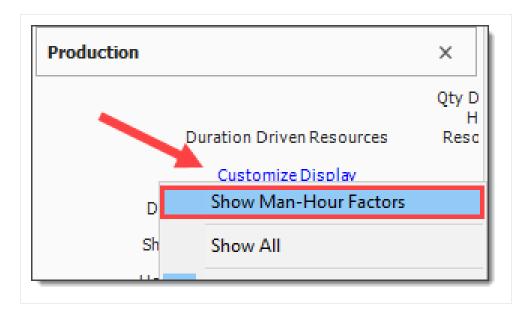
TIP Man-Hour Factors affect both Labor and Equipment Hours.

For example, if you predict production to be 20% slower due to weather concerns, you would type 1.2 in the weather factor field.

Man-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	
Factor Composite:	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

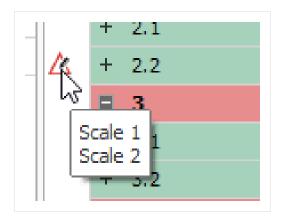
You may have noticed when you made changes on the Cost Item Setup tab, that the fields you changed and the Cost Item Setup tab became highlighted, indicating they were altered from their original state.

Default Pay Rules	Scale 1: Scale	2: Scale 3:
Composite Wage Scale:	80.00 20.0	
	vorked, pay 8.0) hours
Default Shift Arrangements		
Work Hours per Shift: Shif 8.00	ts per Day: Da	ys per Week: 5.00
0.00	1.00	5.00
Default Properties		
Account Code:		<i></i>
Cost Curve:	Linear	-
Worker's Comp Override:		•
Tag 1:		-
Tag 2:		•
Tag 3:		-
Tag 4:		-
Tag 5:		-
Quantity Driver:	Superior CI	-
Quote Group Tag:		-
Minority Goal Allowance:	100.00	
Phase Code:		
When man-count changes:	Change UM / 1	1an-Hour
	Change Days	
Suspend:		

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	
nd	+	Prime Bond	PRIM
dd-On	+	Price % Add-On	PRICE
icing	+	Job Financing	FINAM
gement	+	Job Management & Equipment	JOB N
xpense	+	General Expense	GENE
on	+ 1	Mobilization	1000
& Grubb	2	Clearing & Grubbing	2000
n	+ 2.1	Clearing	
Vipe 🛛 🖄	+ 2.2	Grading	
	3	Excavation	3000
	+ 3.1	Excavate	
	+ 3.2	Haul	
	-		

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.

) Fili	gdol [Search F	or] ··· Saved	views: Previous View	-	Co	ost C	Category	Scale 1 S	cale 2
					~	То	tal	\$28.00	\$40.8
	Row	Code	Resource Assembly	Description		>	Labor	\$28.00	\$40.8
	NU		Assembly			>	Owned Equipment	\$0.00	\$0.
	+ 1	1 LL2		Laborer		>	Rented Equipment	\$0.00	\$0.
Ą	+ 2	2 LO1		Operator Class 1		>	Supplies	\$0.00	\$0.
		3 EL988		Loader 988	1.	>	Materials	\$0.00	\$0.
*	\mathbf{X}					>	Subcontract	\$0.00	\$0.
						>	Fees	\$0.00	\$0.0
						>	Allowance	\$0.00	\$0.
							Custom Category 1	\$0.00	\$0.
							Undefined	\$0.00	\$0.0
						Bill	ling Rate	\$28.00	\$40.8
						Bill	ling Rate Markup	\$0.00	\$0.
					-	Rill	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 💾	•						Training Jo	ob - Estimate	
File	Setup	Estimate	Quote Pri	ice	Execution	System	Actions		
M		😑 Display F	Parent Informatio	on 🏂	Highlight Unique	(Delta) Res	ource Fields	🛓 Edit Reso	ource
	100	😇 Display B	Billing Rate	83	Highlight Unique	(Delta) Cos	t Item Fields	💻 Insert Su	ibord
Split	Default Data Bloc							🔏 Break Co	st All
Edit				View					
Cost B	rea <mark>kd</mark> own	Structure (CBS)) Register	Cos	t Item Record	0			
CBS Co	de:	Optional Code:	Description:				Foreca	st (T/O) Qty:	Un
r - E		202 4362	Apphalt Con-	croto He	+ Mix Tupo A			25 000 00	Te

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.

n cry	g columns he	ie to group						Find: Sea	rch For]	
	Row Number	≞_	Code	Resource Assembly	Description	Quantity	Unit of Mea	Unit Cost	Waste % Add-on	Qua (Les 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		
ı				13						

To enter work hours manually for the employed resource, you can change the Cost Driver option to CI Quantity or Fixed.

	Row 🖹		Code	Resource Assembly	Description	Quantity	Unit of Mea	Unit Cost	Cost Driver	Waste % Add-on	Quantity (Less Waste)
,	+	1	LL2		Laborer	0.50	Each	\$29.00	CI Duration 👻		
	+	2	LO1		Operator Clas	1.00	Each	\$29.94	A Description		
	+	3	EL988		Loader 988	1.00	Each	\$73.75	CI Duration		
									CI Quantity		
									Fixed 6		
									Scheduled Perio	ias	

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.

ag	columns here to grou	p						Find:	[Search For]		Saved views: P
	Row 🚋	Code	Resource Assembly	Description	Quantity	Unit of Mea	Unit Cost	Work Hours	Pay Hours	Waste % Add-on	Cost Driver
П	+	LLL2		Laborer	0.50	Each	\$29.00	80	60.00		CI Quantity
	+	2 LO1		Operator Clas	1.00	Each	\$29.94	120.00	120.00		CI Duration
	+	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.

CBS	Code:	Optio	onal Code:	Description:						Forecast (T/O) Qty: J	nit of M	leasure: Ui	nit Cost:	Total Cos	t:	Currency:	
	2.2			Clearing							50.00	Jubic Ya	rd -	\$1,156.70		\$57,835.17	U.S. Doll	ar
PI As	ssignment:	PI Lin	ne Number:	PI Description:							0	ost Seg	ment: Pa	y Quantity:	Cost Sour	rce:	Alternate	
201	0102 -	20		Clearing & Grub	bing						E	irect Co	ost –	50.00	Detail	٠	BASE	
Cos	t Item Summar	y i	🔔 Detail : \$1	,156.70 🛱 P	lug : \$0.00 🛛 💭 Q	uote : \$0.00	Allocation						Production					×
Drag	columns here t	to grou	up			Find: [Sear	ch For]	Saved	views: Previo	us View							tored	Qty Driv
	Row Lumber		up Code	Resource Assembly	Description	Find: [Sear	unit of Mea	Saved Unit Cost	views: Previo Work Hours	us View Pay Hours	Waste % Add-on	C D		Duration Driven	Resources <u>ze Display</u>	Duration Res		Qty Driv Hou Resour
	Row .			Resource Assembly	Description		Unit of Mea	Unit	Work	Pay	Waste %					Duration I Res (x 1	Driven ources	Hou
g	Row .	1	Code	Resource Assembly		Quantity	Unit of Mea	Unit Cost	Work Hours	Pay Hours	Waste %	0 D		Customia	ze Display	Duration I Res (x 1	Driven Durces 2000)	Resour
<u>v</u>	Row Number -	1 2	Code	Resource Assembly	Laborer	Quantity 0.50	Unit of Mea Each Each	Unit Cost \$29.00	Work Hours 240.00	Pay Hours 240.00	Waste %	0 D		Customia Days:	ze Display 40.00	Duration I Res (x 1	Driven Durces 2000) 48.00	Hou Resour

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 Code:	Descripti	ion:						Fo	orecast (T/O) Qty	: Unit of Me	asur
	2.2			Clearing								500.	00 Cubic Yard	1
PI A:	signmer	it:	PI Line Number:	PI Descri	iption:								Cost Segm	ent:
201	0102	~	20	Clearing	& Grubbing								Direct Cos	t
Cos	t Item Su	mmary	y 🍃 Detail : :	\$106.39	₩ Plug : \$0.00 (🖵 Quote : \$0.00	Allocation	1						
Drag	columns	here t	to group					Find: [S	Search For]	··· Save		vious View	-	
	≞			Resource Assembly	Description	Quantity	Unit of Mea	Unit Cost	Work Hours	Pay Hours	Waste % Add-on	Cost Driver	Quantity (Less Waste)	F
4	+	1	LL2		Laborer	0.50	Each	\$29.00	80.00	80.00		Fixed		
	+	2	L01		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

+	Genera	Qpen
+ 1	Mobiliz:	New
D 2	Clearin 🚫	Delete
B 3	Excava 😞	Cut
8 4	10" PVC	Сору
+ 4.1	Furnis	Paste
□ 4.2	Excav +	<u>Fill Down</u>
	8	Link this field to Excel
	Æ	UnLink from Excel
		Indent
		Outdent
	-=	Insert
	1	Insert Subordinate
	H	Insert Dependent Cost Item
	-	Insert Cost Item Assembly
	-	Insert Cost Item Assembly as Subordinate
	12	Split
	s 🕹	Split by Cost Type
	20	Insert Resource
	12	Insert Resource Assembly
	24	Toggle Suspended
		Go To Cost Allocation Item

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

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

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

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.

Cas	t Breakdown	More	schare (OBS) Register	Quote Compar	son & Award - Cost	Rema	Cost Item Rec	ord O										
085	Code	0,05	ional Code:	Description						Panecest (7)(3) Qty	U	at of M	easure.	U	it Cents	Total (Deets	Currency	
8	1	641	0100	Habilante	n					14	6 5	re Sa			\$23,318.02		\$23,318.02	U.S. Del	ar in
P[A	signet	PLU	ine Number:	PiDescript	iem:						Co.	et Seg	nert:	Pa	Quantity:	Cost 5	louroe	Alternate	
14	1000 +	н		Hoblicate	n						1.15	Head Co	at .		1.00	Detail		8452	
C ₀	it Item Summary	,	2- Details	\$23,318.42	🟺 /%g : \$500.00	Quere : \$500.00	Blocation							tan it	our Factors				х
2.00	columna here t	- 91	нр						Saved views:	Previous View			P				Factor Name		Faders
	Rev Norber		Code	Resource	Description	Quantity Game (Caster)	Viarie % All-on	Qr. h.	Unit of Measure		Wark Players		Pay				Factor 1		E
		3 1	errr		Tractor Truck			1.00	Each	1.00		0.00	56				Fedor 2	_	1.00
	+	2.0	ET.T		Loubey Trafer	_		L.00	Each	1.00	1	686	14				Fador 3		1.00
	*	1.3	171		Teamster			1.00	Each	1.00	38	6.00	26				Factor 4		LH
٠									_								Fedor 3		1.00
																	Fector 6		1.00
														b -	8 - B -	1	8.2	1.1	. 2
1		-											-	_	_	incel	< Prev	-	Net >

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.

CBS Position Code	Description		ecast 0) Qua
+ 1	Mobilization		
2	Clearing & Grubbing		
+ 2.1	Clearing		
+ 2.2	Grading		
□ 3	Excavation		
+ 3.1	Excavate		
+ 3.2	Haul		
□ 4	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	✓
+ 4.1	Furnish Pipe Materials	×
+ 4.2	Excavate-Install-Backfill	32
		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.

ag o	olumns here to grou	ip.						Find:	[Search For] ····	Saved views: Cost Iten	Adjustment View -
	BS 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
1	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	\$0.00
1	3.5.3	Crane	1.00	Lump Sum	\$105,690.00		\$0.00	0.00	\$0.00	0.00	\$0.00
2	3.6	034100 - Precast Structural Concrete	2,800.00	SQFT	\$128,640.00						
1	3.6.1	Precast Panels	27.00	EA	\$64,320.00		\$0.00	0.00	\$0.00	0.00	\$0.0
1	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						
1	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	\$0.00
1	4.1.2	Precast Concrete Caps	1.00	Lump Sum	\$170,882.67		\$0.00	0.00	\$0.00	0.00	\$0.00
l	4.1.3	Steel Embeds	1.00	Lump Sum	\$170,882.67		\$0.00	þ	\$0.00	0.00	\$0.00
1	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	\$0.00
-	4.1.4.2	Additional Month	0.00	Month	\$0.00		\$0.00	0.00	\$0.00	0.00	\$0.0
No.	4.1.4.3	Netting on Exterior	0.00	Lump Sum	\$0.00		\$0.00	0.00	\$0.00	0.00	\$0.00
2	5	DIV 05 - METALS		Lump Sum	\$854,880.00						
1	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								
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	0.0
+ 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	0.0
■ 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.
+ 3.6.1	Precast Panels	27.00	EA	\$64,320.00		\$0.00	0.00	\$0.00	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	oduction		
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	8.8
Composite Wage Scale: 80.00 20.00 0.00		Hours	80.00	88.00
For every 10.00 hours worked, pay 10.00 hours		Man-Hours	320.00	352.00
		Equip-Hours	200.00	220.00
Default Shift Arrangements				
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	1.1
		Acre/Hour	0.13	0.1
		Acre/Man-Hr	0.03	0.03
		Acre/Equip-Hr	0.05	0.05

Notes

Added man-hour factor due to hard soil cond

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



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 🗎 Code	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

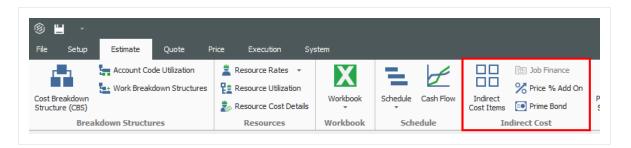
2. User-Defined Indirect Cost Items: Any cost item you create in the CBS Register that is not assigned to a pay item is considered indirect cost.

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.

cos	t Breakdown	Stru	ucture (CE	85) Register	Cost Item Reco	nd ©												*
CBS	Code:	Opt	tional Code	: Description:						Forecast (T/	0) Qty:	Unit of M	easure:	Un	nit Cost:	Total Cost:	Currency:	
														v				v
														Ŧ				
		JOE	B MANAGE	ME Job Manageme	nt & Equipment						1.00	Lump Su	n	•	\$157,096.28	\$157,09	5.28 U.S. Dollar	
PIA	ssignment:	PIL	ine Numbe	r: PI Description:								Cost Seg	ment:	Pa	y Quantity:	Cost Source:	Alternate:	
	÷											Job Ove	head	~	1.00	Detail	* BASE	-
Cos	st Item Summar	у	Detail	: \$157,096.28	Plug : \$0.00	⊃ <u>Q</u> uote : \$0.0	0 Allocation	1					[Produ	ction			×
														Frouu	cuon			^
Drag	g columns here	to gr	oup		/		[Search For]	S	aved views:	Previous View		•	ן ו	Produc			Factored Duration Driven	
	Pow	-	oup Code	Description	Quantity			··· S Work Hours	Pay	Previous View Waste % Add-on	Quantity (Less Wa	,	Produ Facto	Frodu	Duration	Driven Resources	Duration Driven Resources	
				Description Project Superinten	Quantity	Find: Unit of Measure	[Search For]	Work	Pay	Waste %		,		Froduc	Duration Cust	omize Display	Duration Driven Resources (x 1.0000)	
	Pow	1	Code	-	Quantity	Find: Unit of Measure Each	[Search For] Unit Cost	Work Hours	Pay Hours	Waste %		,			Duration <u>Cust</u> Days:	100.00	Duration Driven Resources (x 1.0000) 100.0	C.
	Row Number =	1 2	Code	Project Superinten	Quantity	Find: Unit of Measure Each	[Search For] Unit Cost \$42.53	Work Hours 800.00	Pay Hours 800.00	Waste %		,			Duration Cust Days: Shifts:	100.00	Duration Driven Resources (x 1.0000) 100.0 100.0	
	Row Number = +	1 2 3	Code LSS 1 LSSEC	Project Superinten Secretary	Quantity d 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 %		,		[Duration Cust Days: Shifts: Hours:	00000 100.000	Duration Driven Resources (x 1.0000) 100.0 100.0 800.0	
	Row Number = + +	1 2 3 4	Code LSS 1 LSSEC LSPE	Project Superinten Secretary Project Engineer	Quantity J 1.00 1.00 1.00	Find: Unit of Measure Each 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 %		,		Mar	Duration Cust Days: Shifts:	100.00	Duration Driven Resources (x 1.0000) 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.

	(ENERAL EX	PE General E	xpense					1.00	Lump S	lum	•	\$1,000.00	\$1,000	.00 U.S. Dol
PIA	ssignment: P	I Line Numb	er: PI Descrip	tion:						Cost Se	gment	:	Pay Quantity:	Cost Source:	Alternati
										Job Ov	erhead	•	1.00	Detail	* BASE
Cg	st Item Summary	💁 Deta	il:\$1,000.00	🟺 Plug : \$0.00 🛛 🔎	Quote : \$0.00	Allocation					Res	ource	Employment Break	down	
Drag	columns here to	group			s	aved views:	Previo	ous View		- 0	Cost	Categ	ory		Scale 1
	Row -		Resource		Quantity	Waste 9	P/_		Unit of	_	✓ 1	otal			\$1,000.00
	Number	Code	Assembly	Description	(Less Waste)	Add-on		Quantity	Measur		>	Lab	or .		\$0.00
÷	+ 1			General Office Supp	1	.00	0.00	1.00	Lump S	um +	,	Own	ned Equipment		\$0.00
*										_	,	Ren	ted 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	11
	📇 Unlink Field	Subordinate Cost Item	Ę
		📑 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).

Cos	st Breakdown Stru	cture (CBS) Register O Pay Item	& Proposal Register					
Drag	columns here to gro	up						
	CBS Position Code =	Description	Cost Segment	Pay Item Assignment	Pay Item Position Code			
		JOB						
-	+	Prime Bond	Business Over	-				
- [+	Price % Add-On	A Description					
	+	Job Financing	Business Overhea	Business Overhead				
	+	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 Breakdown Struc	ture (CBS) Register O								
g columns here to grou	P								
CBS Position Code in-	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	5,492.3
+	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	
P 1	SITEWORK & ROADWAY	200	1.00	Each	\$2,464,161.56	\$2,464,161.56		U.S. Dollar	2,158.
+ 1.1	Mobilization	6410100	1.00	Lump Sum	\$11,909.51	\$11,909.51		U.S. Dollar	80.
+ 1.2	Clearing & Grubbing	201 0102	30.00	Acre	\$3,918.50	\$39,184.97		U.S. Dollar	80.
1.3	Undassified Excavation	202 0 183	50,000.00	Cubic Yard	\$4.68	\$233,915.81		U.S. Dollar	291.

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.

106	ntification						_
	Table Name:	EXAMPLE: GENERAL CONST	Edit Name	Delete			
las	t Maintenance:	A Table Name					-
	erromeenomee.	EXAMPLE: EARTHWORK					
Bon	d Rate Layers	EXAMPLE: GENERAL CONST	RUCTION				
	From	EXAMPLE: PAVING			\$1,000		
<i>→</i>		EXAMPLE: PIPE		- 1		10.80000	
		EXAMPLE: UNDERGROUND	UTILITIES	- 1		8.20000	
		No Bond Required				7.00000	
		×				5.00000	
		\$10,000,000.01		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 Attention
Choose what type of Dependent Cost Item to add:
Based on Job's Price
O Based on Job's Finance Cost
○ Based on Bond Table
O Based on Direct Costs
○ Based on Indirect Costs
O Based on CBSMan Hours
O Based on CBS Equipment 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
	JOB	
+	Job Management & Equipment	JOB MANAGEMENT & E
+	General Expense	GENERAL EXPENSE
+	Prime Bond	PRIME BOND
1	Price % Add-On	PRICE % ADD-ON
+ 1	Mobilization	1000

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

Cost Breakd	own Structure	(CBS) Registe	er -	Price % Add-Or	Record	0
CBS Code:	Descrip Price %	otion: 6 Add-On				
Description	Dependency					
Drag columns h	nere to group					
Descriptio	n		Rate	Account Code		
Ø Office Ov	rerhead		4.0	0 🛃		
*						

- 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.

Description Dependency Cost Categorization Allocation Drag columns here to group Image: Cost Categorization Image: Cost Categorization Image: Cost Categorization	CBS Position	Code: Descrip	otion: Cost Add-On		
Drag columns here to group	<u>D</u> escription	Dependenc <u>y</u>	Cost Categorization	Allocation	
Description Curre Total Cost	Dene celumne	here to group			

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

Toggle Include All	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

CB	S Position Code:	Descript	tion:					Total Cost:		Current	:y:	Alter	nate:
		Direct C	ostAdd-On					\$5,70	01.36	U.S. D	olar •	BASE	
PI /	Assignment:	PI Line Nu	mber: PI Description							Cost Se	egment:	Pay (Quantity:
										Job Ov	erhead 🔹		1.0
De	escription Dep	endenc <u>y</u>	Cost Categorization	Allocation		Cost	Breakdown						×
Dra	ag columns here to	group	Saved vi	ews: Standa	ard View 👻	Cost C	Category		Sub		Rate		Cost
	Description			Currency	Total Cost (Forecast)	V To	tal		\$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
*						\rightarrow	Owned Equipment		\$38	,555.52	0.00		\$0.00
Ť						\rightarrow	Rented Equipment			\$0.00	0.00		\$0.00
							Supplies			\$0.00	0.00		\$0.00
) ×	Materials		\$3	,276.00	0.00		\$0.00
						\rightarrow	Subcontract			\$0.00	0.00		\$0.00
) >	Fees		1	\$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
1	ЈОВ	
F	Prime Bond	PRIME BOND
F	Price % Add-On	PRICE % ADD-ON
F	Job Financing	FINANCE EXPENSE
F	Indirect Cost Escalation	INDIRECT COST ESCALATION
-	Direct Cost Escalation	DIRECT COST ESCALATION
-	Indirect Cost Add-On	INDIRECT COST ADD-ON
F	Job Management & Equipment	JOB MANAGEMENT & EQUIPMENT
+	General Expense	GENERAL EXPENSE
÷	Direct Cost Add-On	DIRECT COST ADD-ON
+ 1	Mobilization	641 0100
	Mobilization Day Two	
+ 24.1.2		
+ 24.1.2 ▼ + 25	Day Two	641 0 100
+ 24.1.2 V + 25 + 26	Day Two Prime Bond	641 0100 PRIME BOND
+ 24.1.2 + 25 + 26 + 27	Day Two Prime Bond Price % Add-On	641 0100 PRIME BOND PRICE % ADD-ON
+ 24.1.2 + 25 + 26 + 27 + 28	Day Two Prime Bond Price % Add-On Job Financing	641 0100 PRIME BOND PRICE % ADD-ON FINANCE EXPENSE
+ 24.1.2 + 25 + 26 + 27 + 28 + 29	Day Two Prime Bond Price % Add-On Job Financing Indirect Cost Escalation	641 0100 PRIME BOND PRICE % ADD-ON FINANCE EXPENSE INDIRECT COST ESCALATION
+ 24.1.2 + 25 + 26 + 27 + 28 + 29 + 30	Day Two 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
	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: Pos	S sition (Code	1		Description			orecast 70) Quantit	y	Unit of Measur		Un	it Cost	Total Cost (Forecast)
-	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	ost	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	Quant	ity	Unit of Measure	Work Hours	Pay Hours	Unit Co	ost	Total Cost (Forecast)	
	≜	+	1	Field	Office Clerk	1.	00	Each	4.00	4.00	\$38.	00	\$152.00	
	Δ	+	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	\$905.00
			1	Desc	ription	Quant	ity	Unit of Measure	Work Hours	Pay Hours	Unit Co	ost	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	
+	5.4				Misc. Expenses				1.00	Each			\$2,765.00	\$2,765.00
+	5.5				Supervision				1.00	Each			\$4,769.00	\$4,769.00

Step by Step — Add user-defined indirect cost items

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

- 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		Job O	verhead			1	1.00	Each	Į.		\$31,740.0	00 \$ 3:	1,740.00
-	3.1		Job	Trailer			1	1.00	Each	1	t i	\$30,240.0	00 \$30	0,240.00
		Row Number =	Code	Resource Assembly		Quantity (Less Waste)	Waste % Add-on	Qua	antity	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		Utiliti	jes			1	1.00	Lump) Sum		\$1,500.0	00 \$:	1,500.00
		Row Number =	Code	Resource Assembly		Quantity (Less Waste)	Waste % Add-on	Qua	antity	Unit of Measure	Work Hours	Pay Hours	Unit Cost	Total Cos (Forecast
	\rightarrow	+ 1			Electricity	1.00	0.00		1.00	Lump			\$1,500	\$1,500.0

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 Fill Down		-			Assembly		2 Resource	14	CBS Tree Filter Mode:		
	review	🕀 New 📲 Copy 🔀 Split	Indent 🔿	용 Unlink I	-	bordinate Cost Iter	_	te Assembly	Resource Ass	embly Expand /	Filter Clear CBS Tree 2 Forward CBS Tree		
e	Export to Excel	😢 Delete Paste 📩 Split by (Cost Type 🛛 🖛 Outdent			pendent Cost Item				Collapse *	* Filter Filter Paparo Cos free		
	Print	Edit		Workbo	ok		Inser	t			Filter to CBS Level		
Job	Properties	Cost Breakdown Structure (CBS) Register 🛛								Filter to Terminal Cost Items		
Drag	columns here to g	group									Filter to Direct Cost Items		
	CBS .		Optional	Forecast	Unit of		Tablest			Hours	Filter to Indirect Cost Items		WBS: CE
	Position Code	. Description	Code	(T/O) Quantity	Measure	Unit Cost	Total Cost (Forecast)	Allocated	Currency	(Duration driven)	Filter by Cost Source Plug	Subject Cost Cate	(Civil Eng System)
	•	JOB		20.00	Mie	\$3,996,575.15	\$79,931,503.08		U.S. Dollar	527,454.			
	+	Prime Bond	PRIME BOND	1.00	Lump Sum	\$312,587.53	\$312,587.53		U.S. Dollar		Filter by Cost Source Quote		BOND
	+	Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum	\$3,785,175.55	\$3,785,175.55		U.S. Dollar		Filter by Cost Source Detail		TAXES
	+	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$974,798.06	\$974,798.06		U.S. Dollar		Filter to Schedule Relations		FEES
	+	Indirect Cost Escalation	INDIRECT COST ESCALAT	1.00	Lump Sum	\$2,131.11	\$2,131.11		U.S. Dollar		Filter by Resource		LABOR 1
	+	Direct Cost Escalation	DIRECT COST ESCALATION	1.00	Lump Sum	\$687,306.87	\$687,306.87		U.S. Dollar		Filter by Resource Assembly		LABOR I
	+	Indirect Cost Add-On		1.00	Lump Sum	\$46,251.26	\$46,251.26		U.S. Dollar		Filter by Resource Account	2.00	LABOR S
	+	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$1,449,959.93	\$1,449,959.93		U.S. Dollar			2.00	LABOR S
	= 1	SITEWORK & ROADWAY	200	1.00	Each	\$68,690,789	\$68,690,789.87		U.S. Dollar	520,482.	Filter by Resource Type		PAVEME
÷	+ 1.1	Mobilization	641 0 100	1.00	Lump Sum	\$11,909.51	\$11,909.51		U.S. Dollar	80.	Filter by Unique (Delta) Resources		MOBILIZ
	+ 1.2	Clearing & Grubbing	201 0 102	10.00	Acre	\$3,918.50	\$39, 184.97		U.S. Dollar	80.	Filter by Unique (Delta) Cost Items		CLEARI
	¤ 1.3	Unclassified Excavation	202 0 183	50,000.00	Cubic Yard	\$4.68	\$233,915.81		U.S. Dollar	291.	Filter Cost Items with Excel Links		COMMO
	+ 1.3.1	Excavation	1.3.1		Cubic Yard	\$3.00	\$149,922.88		U.S. Dollar	125.	Filter Allocation Distributions Subordinates		COMMO
	+ 1.3.2	Embankment	1.3.2		Cubic Yard	\$1.68	\$83,992.94		U.S. Dollar	166.			EMBANK
	□ 1.4	Aggregate Base	303 5912	45,000.00		\$1,487.10			U.S. Dollar	519,564.	, , , , , , , , , , , , , , , , , , ,		UNTREA
	+ 1.4.1	Furnish & Haul Base Materia		45,000.00		\$11.54	\$519,513.30		U.S. Dollar		00 12.20.090		BUY MAT
	+ 1.4.2	Finegrade Subgrade	1.4.2	400,000.00	Square Yard	\$100.00	\$40,000,000.00		U.S. Dollar	168,757.	77 11.70.300		FINEGR

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	СҮ
+	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 Co	st Is inherit target Pay Item Assignment
	ermine allocation percentages?
• by Quantity	
O proportionately base	d on
O by Percentage	
O by Unit Cost (drives	the Allocation 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 5) (FC=3,		CY	229.8
2.1	Box Culvert Footing	✓	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

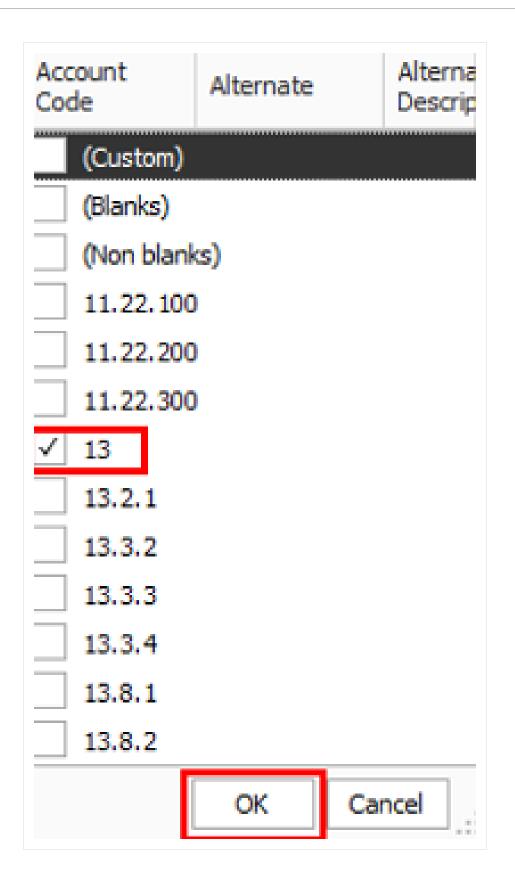
8. The **Box Culvert Footing** item just gained all of the **Concrete Batch Plant's** distribution cost items (highlighted in purple). Navigate back to the **CBS Register**.

CBS Position Code ៉	Description	Include	Unit of Measure	Forecast (T/O) Quantity	CY Quantity	Allocation Percentage
1.3	Long Haul Excavation		CY	160, 196.24	0.00	
2	Structural Concrete (Class 5) (FC=3,		CY	229.87	0.00	
2.1	Box Culvert Footing	\checkmark	CY	52.84	52.84	
2.1.1	Erect & Strip Footer		SFCA	597.00	0.00	
2.1.2	Place Footer Concrete		CY	52.84	0.00	
2.1.3	Concrete Batch Plant		CY	52.84	0.00	
2.1.3.1	Buy Raw Materials		CY	52.84	0.00	
2.1.3.2	Batch/Mix/Haul Concrete		Day	0.95	0.00	
2.2	Box Culvert Walls		CY	87.86	0.00	
2.2.1	Erect & Strip Wall		SFCA	5,757.00	0.00	
2.2.2	Erect & Strip Bulkheads		SFCA	131.79	0.00	
			C 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
	□ 1	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
	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	\checkmark	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 Pos	IS sition Code	Description	Include	Unit of Measure	Forecast (T/O) Quantity	CY Quantity
4.3	3.2	Column, round	✓	Each	3.00	60.51
4.3	3.2.1	Erect & Strip column forms		SECA	508.94	1 0.00
4.3	3.2.2	Install embeds		EA	9.00	0.00
4.3	3.2.3	Place Column Concrete		CY	60.51	0.00
4.3	3.2.4	Rub & Patch		SF	508.94	0.00
4.3	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	60.5
4.4.2.1	Erect & Strip column forms		SFCA	508.94	1 0.00
4.4.2.2	Install embeds		EA	9.00	0.0
4.4.2.3	Place Column Concrete		CY	60.51	0.0
4.4.2.4	Rub & Patch		SF	508.94	0.0
4.4.3	Pier cap	\checkmark	CY	18.67	18.6
4.4.3.1	Erect & Strip Pier		SFCA	382.50	0.00
4.4.3.2	Erect & Strip Bulkheads		SFCA	28.00	0.0
4.4.3.3	Install embeds		EA	6.00	0.0

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	0.00
6	Drilled Shaft Foundation (60") (Structure # 2929 - Drilled Shaft Foundation)	\checkmark	LF	306.00	222.53
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		СҮ	222.53	0.00
7	Drilled Shaft Foundation (72") (Structure # 2929 - Drilled Shaft Foundation)	~	LF	300.00	0.00
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.

8	Project Indirect Costs		Lump Sum	1.00	0.00
7.5	Pour Concrete		CY	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		b	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	Include	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.



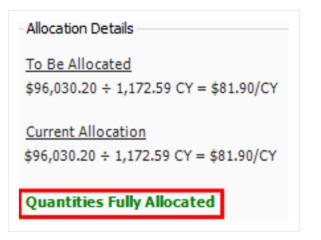
6.4.3 Cost Allocation to By Unit Cost

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?
🔿 by Quantity
O proportionately based on
🔿 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:
		Ψ.		
		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.

CB Por	S sition Code	Description		Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
		JOB		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	Structural Concrete (Class S) (F	C=3,00	229.87	CY	\$377.25	\$86,719.63
	2.1	Box Culvert Footing		52.84	CY	\$209.15	\$11,051.63
+	2.1.1	Erect & Strip Footer		597.00	SFCA	\$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	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

- 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	
How do you want to determine allocation percentages?	
by Quantity	
O proportionately based on]
O by Percentage	
○ 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 a	determine a	allocation percentages?	
O by Quantity			
proportionately b	ased on		*
O by Percentage		Shifts (Duration driven)	-
O by Unit Cost (driv	on the Alle	Shifts (Non-Duration driven)	
O by Unit Cost (driv	res the Allo	Shifts (Total)	
		Subcontract Total Billing Amount	
ag columns here to gro	up	Subcontract Total Cost	
	ap	Supplies Total Billing Amount	
CBS	Descriptio	Supplies Total Cost	•
Position Code	beschpte		

9. Filter the Account Code column to 13. Once done, click OK.

Account Code	Alternate	Alternate Descriptic
(Custom)		
(Blanks)		
(Non blank	:s)	
11.22.100		I
11.22.200		
11.22.300		I
✓ 13		
13.2.1		I
13.3.2		
13.3.3		I
13.3.4		
13.8.1		
13.8.2		
[ОК	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)	\checkmark	LF
6	Drilled Shaft Foundation (60") (Structure # 2929 - Drilled Shaft Foundation)	\checkmark	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	\checkmark	Each
4.3.1	Footer	\checkmark	CY
4.2.5	West Wing Wall	\checkmark	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
□ 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**.

S 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 CBSMan Hours
O Based on CBSEquipment 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.

÷	Direct Cost Add-On	1.00	Lump Sum	\$0.00	
10.1	Maintenence	1.00	Each	\$76,467.24	\$
10	Equipment Related Indirects	1.00	Each	\$76,467.24	\$
9.2	Batch/Mix/Haul Concrete	21.11	Day	\$2,570.96	\$
9.1	Buy Raw Materials	1,172.59	CY	\$35.62	\$
9	Concrete Batch Plant	1,172.59	CY	\$81.90	\$
8.1	Crane Service	30.00	Day	\$1,871.89	\$
8	Project Indirect Costs	1.00	Lump Sum	\$56,156.73	\$

- 4. In the CBS Position Code Description, enter the description Small Tools & Supplies.
- 5. Enter in the cost item, "ST&S".

Description	Currer	cy Total	Cost (Forecast)
	U.S. 0		

6. In the Cost Breakdown default data block, set the labor rate as 5%.

Cost Breakdown					
Cost (Category	Subject Cost	Rate	Cost	
r To	otal	\$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	Dependency	Co	st Categorization	✓ <u>A</u> llocation				
Allocate	this Item's Cos	t						
Allocation distributions inherit target Pay Item Assignment								
How do yo	u want to deter	mine a	llocation percentag	es?				
🔿 by Qua	ntity							
propor	tionately based	on			*			
O by Percentage			Forecast (T/O) Qu	antity	1			
🔵 by Unit	Cost (drives th	ne Allo	Hours (Duration dr	2				
			Hours (Non-Duration Hours (Total)	on ariven)				
			Labor Total Billing A	Amount	ł			
Drag columns l	nere to group		Labor Total Cost					
CBS Position (Des	criptio	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	D	
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 с	ancel

- 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
	JOB	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. Dolla
= 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
2	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. Dolla
+ 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. Dolla
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
3	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?
	O by Quantity
	opportionately based on
	O by Percentage
	by Unit Cost (drives the Allocation Item's Forecast (T/O) Quantity)

4. Once done, click **OK** to return to the CBS Register.

ſ	ОК	Cancel	< Prev	Next >
L				

5. All of the distribution cost items are gone, but the quantity and the total cost of the **Concrete Batch Plant** has not changed.

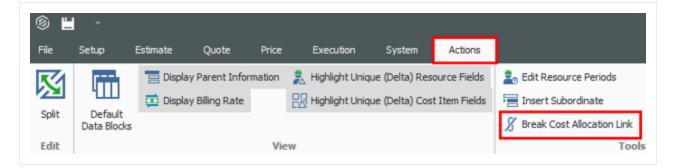
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Currency
8	Project Indirect Costs	1.00	Lump Sum	\$56,156.73	\$56,156.73	U.S. Dollar
+ 8.1	Crane Service	30.00	Day	\$1,871.89	\$56,156.73	U.S. Dollar
9	Concrete Batch Plant	1,172.59	сү	\$81.90	\$96,030.20	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
10	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

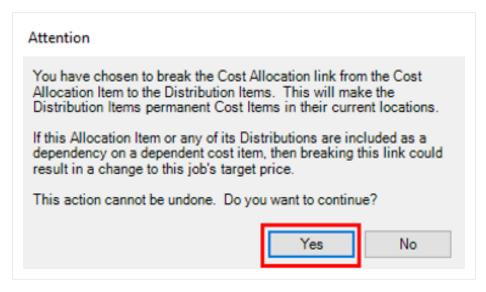
To make a Distribution a permanent part of the CBS, and permit its costs and quantities to be directly editable under the cost item(s) to which it has been distributed, break the Cost Allocation link.

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.

6	Drilled Shaft Foundation (60") (Struct	306.00	LF
6.1	Buy Reinforcing Steel	47,482.52	b
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 Breakdown	Structure (CBS)	Register	Cost Item	Record	Θ	
CBS Code:	Optional Code:	Description:				
9		Concrete Batc	h Plant			
PI Assignment:	PI Line Number:	PI Description	:			
•						
Cost Item Summar	y 🍃 <u>D</u> etail : \$8	31.90 🗳 Plu	g:\$0.00	Quote	: \$0.00	Allocation
Allocate this	Item's Cost					
Allocation di	stributions inherit t	arget Pay Item A	ssignment			
How do you wa	nt to determine allo	cation percentag	es?			
 by Quantity 						
	ately based on			~		
O by Percenta	ge					
by Unit Cos	t (drives the Alloca	tion Item's Fore	cast (T/O) Qu	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:

01	st Breakdown Structure (CBS) Registe	er P	rice % Add-On Record	0			
B	S Code: Description: Price % Add-On						Total Co: \$9,082.
e	scripton Dependency				Cost Item Setup		
a	g columns here t 5igd au [Search For]	··· Sa	red views: Previous View	-	Properties		
				-		U.S. Dollar	•
	g columns here (Bigdau [Search For] Description	San	Account Code	*			•
			Account Code	-	Currency: Account Code:		•
	Description	Rate	Account Code	-	Currency:		

LOSI	breakd	own Structure	(CoS) F	register	Direct Cost	Add-On Record	0								
BSF	Position (Code: Descript	ion:										Т	otal Cos	t: A
		Direct Co	ostAdd	-On									:	\$8,845.4	7 BASE
Des	cription	Dependency	Cost C	Categorization	Allocation				Cost	Breakdown					
rag	Sinden [Search For]		Saved views:	Previous Vi	ew	•	ľ	Cost (Category	Subject	Cost	Rate	C	ost
	-			_	-	Total Cost	4		✓ Te	otal	\$130,	759.83	2.25		\$2,948.49
	Descriptio	on		1	Curre	(Forecast)	Ċ	d	>	Labor	\$58,	969.83	5.00		\$2,948.49
	Small Too	ols			U.S. Dollar	\$5,8	96.98	11	>	Owned Equipment	\$68,	251.92	0.00		\$0.00
۶İ	Safety &	Training		1	U.S. Dollar	\$2.9	948.49	Ľ.	>	Rented Equipment		\$0.00	0.00		\$0.00
, İ								11.	>	Supples		\$0.00	0.00		\$0.00
1								11	>	Materials	\$3,	276.00	0.00		\$0.00
								1	>	Subcontract		\$0.00	0.00		\$0.00
								1	>	Fees	\$	262.08	0.00		\$0.00
								1	>	Allowance		\$0.00	0.00		\$0.00
										Custom Category1		\$0.00	0.00	•	\$0.00
										Undefined		\$0.00	0.00	→	\$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.

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:

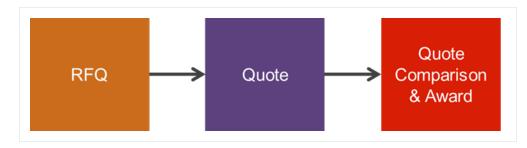
- 1. Creating and publishing Requests for Quote (RFQs)
- 2. Updating quotes with vendor/subcontractor pricing
- 3. Comparing and awarding quotes

InEight Estimate has a separate form to manage each step:

- 1. Request for Quote (RFQ) Register
- 2. Quote Register

TIP

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 columns here to group

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 🛛 🝸
1 3	Paint Existing Steel Bridge Structure	1.00	Lump Sum	Structural Painting
14	Process Equipment	1.00	Each	Process Equipment Install
17	Toll Booth	1.00	Each	Commercial Work
+ 18	Guardrail Type 2	1,000.00	Linear Feet	Guardrail Work
+ 19	Guardrail Type 3A	200.00	Linear Feet	Guardrail Work
+ 20	Type 4 Signs	1,000.00	Square Feet	Sign Work

8.2 REQUESTS FOR QUOTE

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

8.2.1 Request for Quote (RFQ) Register Overview

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



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

Cost Breakdown Structure (CBS) Register Resource Rate Register Request for Quote (RFQ) Register O											
ra	g columns here to gr	oup									
	Description 🛓	Status	Response Deadline Date	Response Deadline Time	Published Date	RFQ Instructions	Buyer's Special Terms	Tag 1	Tag 2	Tag 3	Notes
	Guardrail Items	New	1/3/2020	11:00 AM		D	D				D
÷						D	D				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.

Description \equiv	Status	Response Deadline Date
Guardrail Items	Now	1/2/2020
	<u>O</u> pen	
Ð	<u>N</u> ew	
8	<u>D</u> elete	
*	Cu <u>t</u>	
5	Сору	
B	<u>P</u> aste	
+	<u>F</u> ill Down	
8	Link this field	to Excel
ES.	UnLink from	Excel

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.

JC:	scription						Status
GL	uardrail Items						New Published Date
Re	sponse Deadline Date:	7/29/2009	- Respons	e Deadline Tim	e: 11:00 AM		
Lin	e Items Terms & Con	ditions Ve	ndor Companies Attac	hments Set	up		
Re	esources Cost Items						
ra	g columns here to group						Saved views: Standard View 🗸
	CBS Position Code 듴	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	
*							

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

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

8.2.3.1 Line Items

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

Line Items		Terms & Con	ditions Vend	dor Companies	Attachme	ents Setu	p		
Re	sources	Cost Items							
		here to group							
	CBS Position	Code ៉	RFQ ID	Quote Group Tag	0	optional Code	Description	Quantity	Unit of Measure
<i>→</i>	CBS Position 6.1	Code 🐂	RFQ ID	Quote Group			Description Guardrail Typ	Quantity 1,000.00	
>	Position		-	rug	: 1	ode	•		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 D	eadline Date: 7/29/2	009 - R	esponse Deadlin	e Time: 1	1:00 AM									
Line Items	Terms & Conditions	Vendor Companies	Attachments	Setup										
Buyer's Spec	cial Terms & Conditions													
Any penalite	es assessed by the own	er due to quality contro	l compliance devia	tions by th	e supplier wi	ill be deducted	from the sup	lier's payment						~
														~
-RFQ Instruc	tions													
Please conta	act site super John Smit	h @ 623-555-6982 for	delivery instructio	ns.										~
														~
									ОК	Cancel	New	< F	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.

ine Item	s Terr	ns & Conditions	Vendor Companies	Attachmen	ts Setup	
rag colur	ins here t	o group				
Vend	or	Contact	<u>=</u>	Status	Publish Item Quantities	Vendor Phone
> SUB1	8	SUB 18 Mel Bla	nk	New	✓	111-222-3232
SUB4	ł	SUB4 Harry Be	elefony	New	\checkmark	111-222-1111
Ven1	8	Ven 18 CARRIE	= Matty	New	\checkmark	111-333-3434

The following options are particularly noteworthy:

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

8.2.4 Attachments

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

Line Items	Terms & Co	nditions Vendo	r Companies	Attachments Se	etup				
rag column	s here to group							Saved views:	Previous View
File Na	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					
lesponse D	eadline Date: 7	7/29/2009 -	Re	sponse Deadlin	ie Time: 🛛	11:00 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: O	BS Position Code	•			
✓ Include ✓ Include		s Ferms & Conditions				
✓ Publish ✓ Publish ✓ Publish						

8.2.6 Publish an RFQ

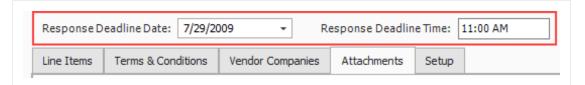
Once created, InEight Estimate allows you to generate a Microsoft Word RFQ template that can be faxed or manually sent via email to the supplier or subcontractor.

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	ine Items Terms & Conditions		Vendor Companies	Attachmen	its 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 B	elefony	New	✓	111-222-1111
	Ven 18	Ven 18 CARRI	E Matty	New	✓	111-333-3434
ı			1	~		

- 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

RE	QUES	TFORQU	
Job: Training Job	Training Job - Maricopa County	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:	111-123-2134 222-123-1234	Phone: Mobile Phone: Fax: Email:	111-122-1111 222-112-2211
Job Information		- Maricopa County No. TM2924	
Job Type:		d General Engineering	
Job Type: Job Location:	I-10 MP 100		
City:	Phoenix	10 Mil 120	
County:	Maricopa		
State / Province:	Arizona		
Country:	United State	25	
Bid Location:	Engineer's	Office	
Bid Date:	1/8/2020		
Bid Time:	10:00 PM		
	n: English		
Measurement Syster			

- 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.

890		REO from InFight (Corporation - SKIP	for Training Job - Infrastructure: Training Job - Maricona County No. TM2924 - Message (HTML)	1						
		Charlie Bravo Charlie Bravo FQ from InEight Corporation - SKIP for Training Job - Infrastructure: Training Job - Maricopa County No. TM2924 REQUEST FOR QUOTATION Ame: Tom Cross Example Prime Contractor 1 400 First Street Suite 4000 Hometown, AZ 889004 Phone: The Phone:									
File Messag	e Insert	Options Format	Text Review	Help Q Tell me what you want to do							
° · 🖋	Times New Ro	✓ 12 ✓ B	I <u>U</u>	² · ▲ · ≔ · ⊨ · ≔ ≖ … ₅ ❷ ρ8 0 · ♂ ↓ ┡ · ⊮·							
\triangleright	To	Charlie Bravo									
Send	Cc										
	Subject RFQ	from InEight Corporati	ion - SKIP for	Training Job - Infrastructure: Training Job - Maricopa County No. TM2924							
			P								
		REQUEST FOR QUOTATION In the second sec									
Job: Training Jo	b-1 Training Job - N	Maricopa County No. TM2	2924								
TO:			Imat Text Review Help Image: Tell me what you want to do B I I Image: Tell me what you want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image: Tell me want to do Image:								
	Harry Deletery			Tank Orang							
Name:											
Company:	600 First Street Suite 6000		Company:								
	Hometown, AZ o	69000		Holletowii, Az 663004							
Phone:	111-222-1111		Phone:	111-122-1111							
Mobile Phone:											
Fax:	222-221-2212		Fax:	222-112-2211							
Email:	charlieb1234@	example.com	Email:								
Job Informat	ion:	Training Job 1									
Job mormat	ion.		ona County No. Th	M2924							
Owner:			topa county rec. rn								
Job Type:			ral Engineering								
Job Location:											
City:		Phoenix									
County:											
State / Province:											
Country:											
Bid Location:											
Bid Date:											
Bid Time:		5.00 AM									
Request for Q	uote (RFQ) I	nformation:									
Publication Date:	8/21/2020 3:57 F	PM									
Response Deadli	ne Date: 7/20/2/	009 11:00 AM									
veshouse negati	ne Date. 1729/20	000 11.00 Au									

8.3 QUOTES

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

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

8.3.1 Sample Received Quote Scope Sheet

Overview – Received Quote Scope Sheet

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

Receive	d	
Quote Scope	Sheet	
ATE: 12/19/2019 ROJECT: TRAINING JOB TRAINING JOB - MARICOPA COUNTY NO. CATION: PHOENIX, AZ	TM2924	
E CONCRETE: FORM, SUPPLY AND INSTALL		
 Vertical Curb; Curb and Gutter; Valley Gutter 4" thick broom finish walk with wire mesh; ram Flow-Through planer slab and walls 8" thick crosswalk paving with rebar 36" x 36" colored aggregate finish (1 location only @ 16) 	ıp w/ domes pattern broom finish a	nd 18" x 36" pattern
	Price:	\$203,300
OFFSITE IMPROVEMENTS 1. Curb and Gutter 2. HC Ramps w/ domes; planter w/ rebar 3. 36" x 36" patterned finish walk w/ wire mesh		
 Layout of lines and grades Site grading Aggregate base and/or compaction; sand cushion Sealants, caulking and waterproofing; precast items Misc post footings and masonry wall footings Supply of embedded iron or metal Demolition Traffic control and pedestrian protection UNLIFICATIONS GC will provide a concrete pump washout area 5% retention will be released 45 days after completion Alternate Price to furnish and install 4" aggregate by others. Price based on rock being placed prior	base under parking	\$24,650 structure lab. Sand d grade beams. \$24,100
is proposal is good for thirty (30) days from the data herein, after w ht to review the proposal for any changes in price. Please call me ck		

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	<u>1</u>	RFQ Description	Quote Status	Seller	Company	Quote Total	Awarded Total	Currency
	Aggregates		Aggregates	Accepted	Example Vendor 1 Pat Rob	Example Vendor 1	\$402,192.00	\$402,192.00	U.S. Dollar
	Aggregates		Aggregates	Accepted	Examples Vendor 4 DBE Les	Example Vendor 4	\$0.00	\$0.00	U.S. Dollar
	Aggregates		Aggregates	Accepted	Example Vendor 2 Stan Mark	Example Vendor 2	\$0.00	\$0.00	U.S. Dollar
4	Asphalt Materials			Accepted	Example Vendor 1 Pat Rob	Example Vendor 1	\$1,115,97	\$1,102,50	U.S. Dollar
1	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

Header	Record	•			•								Total	2	
		Pipe Materials			1					 Optional Code: Date: 	7/20/2023		Extended Price: Item Taxes:	U	\$0. \$0.
	Vendor:	1128354 Albe	rta Ltd 0010 🔳	Vendor Name:	1128354 Alberta Ltd	Vendor F	hone:	780-920-3163		Source:		•	Quote Tax: Bond:		
	Contact:	<ad-hoc con<="" td=""><td>tact></td><td>First Name:</td><td></td><td>Contact</td><td>Office:</td><td></td><td></td><td>Currency:</td><td>U.S. Dollar</td><td>•</td><td>Item Conditions:</td><td></td><td>\$0.</td></ad-hoc>	tact>	First Name:		Contact	Office:			Currency:	U.S. Dollar	•	Item Conditions:		\$0.
Prim	ary Email:			Last Name:		Contact M	obile:			Status:	Incomplete		Special Conditions:		
Exte	rnal Ref.:									Ignore:	Reason:		Total:		\$0.0
Resour	ces Co:	st Items	3							Special Terms & Co	onditions				×
rag co	lumns here	to group				Saved views:	Stand	dard View	- P	Buyer's Special Term	ns & Conditions	4			
Co	de 🖮	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	✓									$\hat{}$
>										Special Conditions A	djustments:	\$0.00			
											-	ly 💿 Using Weighted Average awarded quotes in Comparab			
													Saved views: Stand	dard View	- ,O
											Scope Item		Included Amount	% of Total	
										Special Terms & Condit	tions Qualifications	Packages Taxes Vendo	or's Profile Setup Minority		
_												OK	Cancel New	< Prev	Next >

8.3.4 Header Block

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

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

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

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

8.3.4.1 Quote records

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

Des	cription:	Asphalt !	Materia	s						^	
										\sim	
	Vendor:	1128354	Albert	aLt 🔳 🕚	Vendor Name:	1128354 Alberta Ltd	Vendor Phone: 780-92		0-3163		
	Contact:	Alberta -	Frank	Ma 🔳	First Name:	Frank	Contact Office				
Prima	ry Email:	Frankma	tty@gr	nail.com	Last Name:	Matty	Contact Mobile:				
External Ref.:) -		Address B	ook Register - Library				1
				Actions							
			Dra	g columns here to	group				× Enter text t	to search	\
				Vendor ID	Vendor Nam	e <u> </u>	Vendor Type Ta	ax ID	Tax Jurisdiction	Address 1	
			\rightarrow	+ 0010087554	1 Alliance Ge	omatics LLC	Z001 4	51564451	4803300400	1261A 120th Ave NE	
							1 NP Vendor 1	2345	abc	90th Street	
				+ <u>1 NP - Vende</u>	or 2 1_NP - Vend	or 2	I_INP Vendor I				
				+ <u>1 NP - Vende</u> + <u>1 NP - Vende</u>		or 2	1_NP Vendor 1.				
				+ <u>1 NP - Vende</u> + <u>1 NP - Vende</u>	or1 1_Vendor1 or1 1_Vendor1		-				
				+ <u>1 NP - Vende</u> + <u>1 NP - Vende</u> + <u>0010099994</u>	or 1 1_Vendor 1 or 1 1_Vendor 1 or 1 1_Vendor 1 10X Enginee	red Materials LLC	1_NP Vendor 1_NP Vendor 2001 8:	24568213	1516913100	1162 Mancheser Ave	
			1	+ <u>1 NP - Vende</u> + <u>1 NP - Vende</u>	or 1 1_Vendor 1 or 1 1_Vendor 1 or 1 1_Vendor 1 10X Enginee		1_NP Vendor 1_NP Vendor 2001 8:	24568213 24568213	1516913100 1516913100	1162 Mancheser Ave 1162 Mancheser Ave	

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

8.3.5 Price Block

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

8.3.6 Quote Record Tabs

8.3.6.2 Resources & Cost Items

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

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

g columns here	to group							Find:	[Search Fo	n] m	Saved views: Pre	vious View	-
Package	Code 🖳	RFQ ID	Quote Group	Optional Code	Description	No Split	Free	Awarded	Du	Quantity	Unit of Measure	Unit Price	Extended Price
	3.1	3.1		3.1	Excavation, scrapers	~			1	50,000.00	Cubic Yard	\$0.00	\$0.0
P1	3.2	3.2		3.1	Excavation, trucks	~			1	50,000.00	Cubic Yard	P1	P1 \$200,000.0
P1	3.3	3.3		3.2	Embankment				1	50,000.00	Cubic Yard	P1	P1
P1	3.4	3.4			Rock Excavation	✓			1	3,000.00	Cubic Yard	P1	P1

Cost item tags and user defined fields

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

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

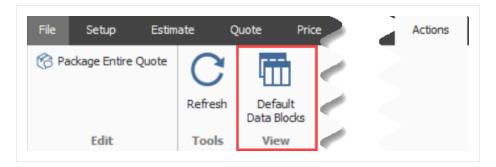
Quote Record	0																				
Header																		Total			
Descripti	or: Guard Ra	il Items										Optional Cod	e:					Extended Pri	ice:		\$30,200
Cont	act: Example	Sub #2 №	lel Blank		0 🗈 🛛 F	Phone:	: 111-222-3232			Date:			Item Taxes:			\$0.					
Company Na	me: Example	Sub #2			Mobile			Source:					Quote Tax:								
First Na	me: Mel					Fax: 2	22-222-111	1				Currenc	y: U.S.	Dollar			•	Bond: Item Conditions: Special Conditions:		\$0.0	
Last Na	me: Blank					Email:							s: Recei								
External R													e: R								
Excernal K	e											sgriot		cason.				Total:			\$30,200.
Resources Cos	st Items																				
Drag columns here	to group																	Sav	ed views: Sta	ndard View	
Code 🚋	RFQ ID	Tag 11	Tag 12	Tag 13	Tag 14	Tag 15	Tag 16	Tag 17	Tag 18	Tag 19	Tag 20	Tag 21	Tag 22	Tag 23	Tag 24	Tag 25	User Defined 1	User Defined 2	User Defined 3	User Defined 4	User Defined 5
→ 6.1			**			Concre.	10	1/	~			**	**	2.5	27			plastic casing	Denned J	Denned 4	Denned J
6.2	_				rive	conde.	•						_				THUR Opp	plastic casing			4
*																					

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.

Duye	er's Special Terms	s & Conditions								
										^
	/endor's Special T	Ferms & Conditions	5							~
<u> </u>	render a opeciar i	critis a condition.	3							~
Sper	cial Conditions Ad	djustments:		\$0.00						
		-								
Dist	tribute Special Cou		enly 🔍 Usi	na Weighted	Average					
	tribute Special Con	0	enly) Usi		_	Totals				
		nditions: O Ev			_	Totals				
∠ I		nditions costs for			_		aved views:	Standa	ard View	-
∠ I	nclude Special Co	nditions costs for	unawarded q		nparable		aved views: Amount	L	ard View % of Total	Notes
∠ I	columns here to	nditions costs for group	unawarded q	uotes in Con	nparable	Sa		L		Notes
∠ I	columns here to	nditions costs for group	unawarded q	uotes in Con	nparable	Sa		L		Notes
∠ I	columns here to	nditions costs for group	unawarded q	uotes in Con	nparable	Sa		L		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.

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

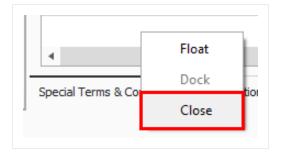
Drop the data block on top of an arrow where you wish to land the data block.

Qualifications		×
Bond Vendor can provide a BOND for all work quoted Bonding Company: Bonding Agent: Bonding Phone:		Â
Add Bond Cost to the Quote Cost of BOND to be added to quoted price: Rate/\$1,000: Bond Cost: \$0.00	* Special Terms & Conditi × Buyer's Special Terms & Conditions	•
Insurance Vendor is INSURED as required by applicable law Insurance Company: Insurance Agent:	Vendor's Special Terms & Condi Special Conditions Adjustments: V S >	
Qualifications Packages Taxes Vendor's Profile !	Setup Minority	rev Next >

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

Header Description:	Pipe Materials								^	Optional Code:		
	r pe r atenaro								~		7/20/2023	
Vendor:	1128354 Alberta Ltd 0010	Vendor Name:	1128354 Alberta	Ltd	Vendor Phone:	780-920	-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	k Conditions					×	Re	source 🔹 🕨	Qua	lifications		
Buyer's Special Ter	ms & Conditions					^		≠ to ç	Bon	d /endor can provid	e a BOND for	all work quote
						-1		Code 🚊 🛛 RF	Bond	ding Company:		
Vendor's Specia	I Terms & Conditions					_		1 1	B	Bonding Agent:		
								2 2	в	onding Phone:		
pecial Conditions	Adjustments:	\$0.00					→	A		Add Bond Cost to	the Quote	
istribute Special	Conditions: O Evenly O U	sing Weighted Average	•						Cos	t of BOND to be a	dded to quote	ed price :
Include Special	Conditions costs for unawarded	quotes in Comparable	Totals							Rate/\$1,000:	•	\$0.00
Orag columns here	to group		Saved v	iews: Standard	d View	•				Bond Cost:		\$0.00
Row =	Scope Item	Ouote Group 😑	Included	Amount	% of Total	Nc				irance		
Number —	•									/endoris INSURE	-	oy applicable
										Insurance Com	ipany:	
										Insurance A	Agent:	

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 Term	ns & Conditions					
						1
Vendor's Special	Terms & Conditions					~
						1
						~
pecial Conditions A	djustments:	\$0.00				
Vietelbute Central C						
Distribute Special Co	onditions: O Eveniy	Using Weighted Average	je			
Include Special Control	onditions costs forunaward	ed quotes in Comparab	le Totals			
Drag columns here to	o group		Sa	aved views:	Standard View	- 7
Drag columns here to Row	scope Item	Quote Group 🚊	Sa	Amount	Standard View	Notes
Row _		Quote Group 🚊				
Row _		Quote Group 🚊		Amount	% of Total	
Row _		Quote Group 🚊		Amount		
		Quote Group 🚊		Amount	% of Total	
Row Number =	Scope Item		Included	Amount	% of Total	
Row _	Scope Item			Amount	% of Total	

8.3.8.4 Qualifications

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

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

8.3.8.5 Packages

Using the Packages feature 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).

rks inc. ble St	Phone (758) 555-985
	Parking Structure
December 4, 2009	Addendum 1-6
Description of Work	Price
DEMOLITION, EXCAVATION AND GRADING Site Clearing of trees and bushes Demo of AC Paving, Concrete Curbs and Walks Sawcut AC Paving and Concrete Remove storm drain, SS, CB's, MH & pole base Rough grade parking structure pad, commerica Place 12" non-expansive fill Fine grade pads Demo and remove 16th street curbs and paving Grade for new roadway Grade for exterior concrete sidewalks 2 mobilizations	pad
ASSISSTED PARKING LOT (PARTIAL) Site Clearing of trees and bushes Demo curbs, excavate for paving Demo median on 16th Street, place temporary Patch pave parking lot with 3" AC over 6" AB Key Exclusions: slurry seal, striping, fending, PAVING (PARTIAL) Place aggregate base for AC Paving, curbs and	concrete work, lighting \$139,900.00
Place 5" asphait concrete section Key Exclusions: slurry seal, striping, fending,	concrete work
OTHER ITEMS Load out stockpiled clean spoils Grade, fabric, place 4 ^e AB for contractor parkin Excavate Duct Bank Patch pave AC outside pave area (500 SF)	g (63,000 SF) \$26.00/CY \$0.85/SF \$5,900.00 \$8.00/SF
Excavator) 3. Any trenching for footings of building 4. Any temporary fencing or trench plat 5. Any export of materials other than sp 6. Spoils over 12" in diameter will be of 7. Any structure demolition or removal. 8. Any and all landscape repair, installal	Is defined as unable to be removed by CAT D6 or CAT 325 or masonry structures. ng. editcally included offhauls. hauled at an additional agreed to cost. (Concrete, asphalt, fencing, trees, buildings, signs, masonry)

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.

																Total	
Description: Site	e work										~ Op	otionalCo	de:			Extended Price:	
											~	D	ate:		-	Item Taxes:	
Vendor: Civ	ilworks Inc Ver	07	6 1	Vendor Name:	Civilworks Inc.	Vendor	Phone: 480	555 5698				Sou	rce:		•	Quote Tax: Bond:	
Contact: Civ	ilworks Inc Joł	n Jacobs	6 1	First Name:	John	Contac	t Office:					Curre	ncy: U.S. Dollar		•	Item Conditions:	
rimary Email: jaco				Last Name:		Contact	Mobile:						tus: Received			Special Conditions:	
External Ref.:											_		ore: Reason:				
External Rel:												Ign	ore: Reason:			Total:	
sources Cost It	ems												Packages				
								Saved vi	ews: Previous V	/iew		10	Drag columns here t	a graup			Saved views
ckage 😐												1					Saveu views
		Quote	Optional							Extende	d		Code 🚞	Description	Amount		
Package 🚊	Code 📃	Group	Code	Description	No Split	Duration	Quantity	Unit of Measure	Unit Price	Price		Curn	P1	Demo,Exav,Grading		=	
P1 (Demo,E)	cav,Grading)												P2 → P3	Assisted Parking Lot	\$43,535.00	4	
P1	1.3.1		1.3.1	Excavation	\checkmark	1	50,000.00	0 Cubic Yard	P1	P1 \$1	150,780.00	U.S.	→ P3	Paving	\$139,000.00	2	
P1	1.4.2		1.4.2	Finegrade Subgrad	e 🗸	1	400,000.00	0 Square Yard	P1	P1		U.S.	*				
P1	1.5		303 4263	Asphalt Concrete H	ot 🗸	1	35,000.00	0 Ton	P1	P1		U.S.					
P1	1.6		1.3.1	Grading	\checkmark	1	1.00	0 Cubic Yard	P1	P1		U.S.					
P2 (Assisted	Parking Lot)																
P2	4.1	Process Equi	700	Process Equipment		1	1.00	0 Each	P2	P2 \$	\$43,535.00	U.S.					
P2	4.2.1		4.2.1	Remove & Dispose		1	2.00	0 Each	P2	P2		U.S.					
P2	5.1.1		0220	Site Preparation	\checkmark	1	1.00	0 Lump Sum	P2	P2		U.S.					
P3 (Paving)																	
P3	1.7		1.3.1	Paving	\checkmark	1	1.00	0 Cubic Yard	P3	P3 \$1	139,000.00	U.S.					

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**).

Des					
	cription	≞ ▼	RFQ Description	Quote Status	Seller
→ Pipe	Materials			Received	Example Vendo
🖄 Pipe	Materials			Received	Example Vendo
Pipe	Materials			Received	Example Vendo
🖄 Pipe	Materials			Received	Example Vendo

- 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	ts		01			
Company Name:	Example Vendor 1						

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

Re	Resources Cost		: Items			
Dra	g columns	here to	o group			
	Code 🛓		Quote	Group ៉	Desc	iption
<u>/4</u>	MPP 10		Pipe Ma	aterials	Pipe	10" PVC SDR21
	MPP24		Pipe Ma	aterials	Pipe 3	24" PVC SDR35
	MPR36		Pipe Ma	aterials	Pipe I	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	Packages						
Draj	g columns here	e to group					
	Code 🖦	Description	Amount				
	P1	On Site	\$200,000.00				
÷	P2	Off Site	\$300,000.00				
*							

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

les	ources	Cost	Items						Pa	ckages		
ag	columns h	ere to	gro Ejnd: [S	earch For]	··· Saved vie	ws: Previous	s View 👻		Drag	g columns here	e to group	
	Package		Code	RFQ ID	Quote	Optional Code	Description	No		Code 🛓	Description	Amount
T	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
. 1									\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.

Det	ai	Example Pipe Ma	le Vendor 1 aterials	Exampl WBE Pipe Ma	le Vendor 6 aterials	Example Vendor 1 Pipe Materials for site improvments		
t	\$22.51	<i>∂</i> P1	\$290,000.00	<i>∂</i> P1	\$300,000.00	@ P1	\$200,000.00	
t	\$52.84	Ø P2	\$126,000.00	Ø P2	\$125,000.00	@ P2	\$300,000.00	
							<u> </u>	
54	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	11/13	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.	
	Award
🔗 P2 \$300,000. 🔒	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

8.3.8.6 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 Pric	e				
Quote Tax Add Taxes to the Taxes to be addec Tax Rate: Total Tax:	to Awarded Total a 0.00 \$450.00	as a Percentage o	of Total:			
Special Terms & Co	nditions Qualificat	ions Packages	Taxes Ver	ndor's Profile	Setup	Minority

8.3.8.7 Seller's Profile

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

	ok Notes				
Example	save for trainin	g as needed.			
Alternate C	ontact Informa	tion			
Name:					
Email:					
Phone:					
Fax:					

8.3.8.8 Setup

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

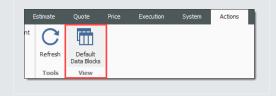
Setup				×
Current Status				
RFQ Status:				
Last Update: 5/5/2020 7	:05:03 PM			
Quote Origin: WMFarr				
Tags				
Tag 1: Pipe	Ŧ			
Tag 2:	Ŧ			
Tag 3:	-			
Notes				~
				 \vee

8.3.8.9 Minority

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

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

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



8.3.9 Create a Quote from RFQ

TIP

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**).

Dra	g columns here to gr	oup				
	Description	≞.▼	RFQ Description	Quote Statu		Seller
÷	Pipe Materials			Recei	ved	Example Vendo
4	Pipe Materials			Recei	ved	Example Vendo
	Pipe Materials			Recei	ved	Example Vendo
ß	Pipe Materials			Recei	ved	Example Vendo
*						

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

	ructure (CBS) Register 🛛 🔘		
leader			
Description:	Pipe Materials for site improve	ements.	
Contact:	Example Vendor 1 Pat Rober	ts	0 1
Company Name:	Example Vendor 1		

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

Re	sources	Cost	Items			
Dra	g columns	here to	o group			
	Code 🖮		Quote (Group ៉	Desc	ription
<u>/4</u>	MPP10 MPP24		Pipe Ma	aterials	Pipe	10" PVC SDR21
			Pipe Ma	aterials	Pipe	24" PVC SDR35
	MPR36 Pipe Ma			terials	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		
Dra	g 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.

pg columns here to grotijind: [Search For] ···· Saved views: Previous View · · Drag columns here by grotijind: [Search For] ···· Saved views: Previous View · · Drag columns here by grotijind: Code by		
Padage Code RFQ ID Group F Code Description No Code _		
pt little	Description	Amount
P1 7 Pipe Materials 800 0220 10 Inch PVC Force Main	OnSite	\$200,000.0
P2 - 8 Pipe Materials 800 0330 24 Inch PVC Gravity Se P2	Off Site	\$300,000.0

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

Detail		Exampl Pipe Ma	e Vendor 1 sterials	Exampl WBE Pipe Ma	e Vendor 6 aterials	Example Vendor 1 Pipe Materials for site improvments		
Î	\$22.51	<i>∂</i> P1	\$290,000.00	<i>∂</i> P1	\$300,000.00	@ P1	\$200,000.00	
:	\$52.84	Ø P2	\$126,000.00	Ø P2	\$125,000.00	@ P2	\$300,000.00	
54	28,694		\$416,000.00		\$425,000.00		\$500,000.00	
54	28,694		\$416,000.00		\$425,000.00		\$500,000.00	
\$4	28,694		\$0.00		\$0.00		\$0.00	
<u>54</u>	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	11/13	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.	
	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.

	e Record 🛛														
Head	er														
		Asphalt Materials											Optic	onalCode:	
	Contact:	Example Vendor	2 Stan Mark			0 1	Phone:	111-133-	-2123				_	Date:	
		Example Vendor				- 10	Mobile							Source:	
			6												
	First Name:							222-123-	-2134						U.S. Dollar
	Last Name:	Mark					Email:							Status:	Received
	External Ref.:													Ignore:	Reason:
Drag o	olumns here to g	roup									Saver	d views: Previous V	iew	- P	Buyer's Special Terms & Conditions
	Code 🚊 🛛 🕻	Quote Group 🚋	Description	No Split	Free	Awarded	Duration	n (Quantity	Unit of Measure	Unit Price	Extended Price	Currency	Default Tax Rate	
c		Asphalt Materials	Asphalt Mix (Finish)	~				1	35,000.00	Ton	\$34.00	\$1,190,000.00	U.S. Dollar		Seller's Special Terms & Conditions
	AAM /		Fine Aggregate	✓				1	1,860.00	Ton	\$7.00	\$13,020.00	U.S. Dollar		
<u>×</u> •		Asphalt Materials									-				
<u>×</u> •		Asphalt Materials									L				Special Conditions Adjustments:

8.3.12 Duplicating an Existing Quote

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

Step by Step — Duplicate an existing quote

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

Cost Breakdown Structure (CBS) Register Quote Register Quote Comparison & Award - Resources 0												
Drag columns here to group Finds: [Bearch For] Saved views: Standard View										lard View		
Resource 🖭 De				Unit of Unit Cost Measure (Scale 1)		Plug	Detail	Example Vendor 1 Asphalt Materials	Example Vendor 2 Asphalt Materials	Example Vendor 3 Pipe Materials	Example DBE Pipe Ma	e Vendor 4 terials
	MAAM	Asphalt Mix (Finish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	🛊 🖉 🔺 \$31.	0 🔗 \$35.70	\$34.13		\$34.13
	MAFA	Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	\$ \$7.3	5 🔗 \$7.35	\$8.19		\$8.19
÷	MPP 10	Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3	8 \$3.28	\$12.60	10	\$13.65
	MPP24	Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20	\$ \$20.48	\$25.20	10	\$22.05
	MPR36	Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$34	3 \$34.13	831.50	10	\$32.55
		Scope Items										
		Summary										
		Minority Type									•	DBE
		Quoted Total				\$1,406,973.75	\$0.00	\$1,171,100.2	\$1,325,646.00	\$266,616.00		\$271,471.20
		Comparable Total	<			\$1,406,973.75	\$1,406,973.75	\$1,308,747.3	0 \$1,463,292.60	\$1,535,943.15	\$1	,540,798.35

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

-0	Print Preview Export to Excel	9 I	y Quote Group Il Quote Groups Il Quote Items	Set All to R	lot Reviewed	Edit Resource			kage Entire Quote t Package		Unlock	Quoted Items Unit Price Substitute Values	
Cos	Print st Breakdown S	tructu	Layout re (CBS) Regist	Quote Grou er Quot	e Register	Quote Con	1parison & Award -	Resources ©	Quines				View
Drag	g columns here to	group											
	Resource E Code	-	Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Vendor 1 Asphalt Materia	Example Vendor 2 Asphalt Materials	Example Vendor 1 Pipe Materials for site improvements	Example Vendor 4 DBE Pipe Materials
\rightarrow	маам		Asphalt Mix (Fini	sh)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	🔋 🖉 🛛 \$31.50	& \$35.70	\$34.13	\$34.
	MAFA		Fine Aggregate		1,860.00	Ton	\$7.25	\$8.19	\$8.19	🛊 🔗 🛛 \$7.25	8 \$7.35	\$8.19	\$8.
	MPP10		Pipe 10" PVC SDP	321	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3.28	\$3.28	8 \$12.60	🚦 🔗 🛛 💲 🕄 🕄
	MPP24		Pipe 24" PVC SDP	135	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20.48	\$20.48	8 \$25.20	🕴 🔗 🛛 \$22.
	MPR36		Pipe RCP 36 In		1,024.00	Linear Feet	\$32.55	\$34.13	\$34,13	\$34.13	\$34.13	8 \$31.50	🔋 🔗 🛛 \$32.
			Scope Items										
			Summary										
			Minority Type										🙄 D
			Quoted Total					\$1,406,973.75	\$0.00	\$1,171,100.70	\$1,325,646.00	\$266,616.00	\$271,471.
			Comparable Tr	otal <				\$1,406,973.75	\$1,406,973,75	\$1.308.747.30	\$1,463,292,60	\$1,535,943,15	\$1,540,798

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

	ote (RFQ) Register	Quote Register	Quote Record										
Header Description:	Asphalt Materials												
beschption	Approx Protections												
Vendor:	<ad-hoc vendor=""></ad-hoc>	•	Vendor Name:					1	/endor Phone:				
Contact:	<ad-hoc contact=""></ad-hoc>	•	First Name:					(Contact Office:				
Primary Email:			Last Name:					C	ontact Mobile:				
External Ref.:													
Resources Co	ost Items												
Drag columns here	to group									Save	d views:	Standard \	/iew
Code 🖮	Quote Group 🚞	Description	No Split	Free	Awarded	Duration	Qua	antity	Unit of Measure	Unit Price	Extended		Currency
MAAM	Asphalt Materials	Asphalt Mix (Finish)	· ·		\checkmark		1	35,000.00	Ton	\$30.00	\$1,05	0,000.00	U.S. Doll
							1	1,860.00	Top	\$6.90		2,834.00	u o pall
MAFA	Asphalt Materials	Fine Aggregate	\checkmark		\checkmark		-	1,000.00	TOT	40.50	\$1	2,031.00	U.S. Doll
MAFA *	Asphalt Materials	Fine Aggregate						1,000.00		40.30	ŞI	2,031.00	0.5.00
	Asphalt Materials	Fine Aggregate						1,000.00		40.50	ŞI	2,001.00	0.5. 00
	Asphalt Materials	Fine Aggregate						1,000.00			Ş1.	2,001.00	0.5. Do
	Asphalt Materials	Fine Aggregate						1,000.00			\$1	2,031.00	0.5.00
	Asphalt Materials	Fine Aggregate						1,000.00			\$1	2,031,00	U.S. Doi
	Asphalt Materials	Fine Aggregate						1,000.00			\$1	2,031,00	0.5.00
	Asphalt Materials	Fine Aggregate						1,000,00			51	2,031,00	0.5. Doi
	Asphalt Materials	Fine Aggregate						1,000,00			51	2,031,00	0.5.00
	Asphalt Materials	Fine Aggregate						1,000,00			51	2,051:00	U.S. Do
	Asphalt Materials	Fine Aggregate						1,000,00			\$1	2,03100	U.S. Do
	Asphalt Materials	Fine Aggregate						1,000,00			\$1	2,051:00	U.S. Doi
	Asphalt Materials	Fine Aggregate						1,000,00			51	2,051:00	U.S. Do
	Asphalt Materials	Fine Aggregate									51	2,03100	0.5.00

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.
Quote Name: Aggregates	Seller Name: Example Vendor 4 - Lester Slim	
Resource Code	Description	Unit Price
MBR	Aggregate Base Rock	\$8.15
MDIRTB	Dirt Class B	FREE
	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	 Your quotes display with the vendor name plus the quote description. Awarded items have an award symbol I f an item is designated as No Split, it has a chain link icon I have a lock and Locked items have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol I have a lock symbol next to the award symbol next to the award symbol I have a lock symbol next to the award symbol next to the award symbol I have a lock symbol next to the award symbol I have a lock symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to the award symbol next to t
4	Cost Source Type	The cost source can either be a Plug or Detail type.

Overview – Quote Comparison and Award Form

	Quote Group Tags Minority Setup Attachments Setup		uotes	Resources	Cost Items	Reports Reports									
					anson & Award	Reports									
	roup(s)	×	1	Register	oup							4			3 Find:
	Description 📃 Electrical Work	Reviewed		CBS Position Code	Description		Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items	HD Engineering Group Concrete, Sitewor
\checkmark	Guardrail Work			18	Guardrail Type	2	1,000.00	Linear Feet	\$24.00	\$24,000	\$25,000.00	\$50,000.00	🔋 🔗 🛛 \$24,000.00	\$25,000.00	850,000
	Sign Work			19	Guardrail Type	3A	200.00	Linear Feet	\$31.00	\$6,200.00	\$7,000.00	\$7,000.00	\$6,200.00	\$5,000.00	\$7,000
					Scope Items										
			→		Summary										
					Minority Type										
					Quoted Total						\$32,000.00	\$0.00	\$30,200.00	\$31,000.00	\$50,000
					Comparable Tot						\$32,000.00	\$57,000.00	\$30,200.00	\$31,000.00	\$57,000

8.4.2 Edit Mode

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

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

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

uote Gro	up(s)	< D1	ag columns here to grou	Þ							Find: [3	Search For] …	Saved views: Star	iderd 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 Concrete Contractors	Case Construction Concrete Formoork
	Concrete, Sitework			formwork	Quantity					40.000.000.00	Concluse Placement		Concrete Placement	
	Concrete, Structural	1	3.4.1	place and finish		Lump Sum	\$2,317,240.00	\$2,317,240.00	\$3,281,200.00	\$7,525,200.00	\$7,525,400.00	\$285,000.00	\$2,525,200.00	
	Doors & Windows		3.9.2	Scope Items	1.00	Lump Sum	\$285,000.00	\$285,000.00	\$375,500.00	\$285,000.00	\$285,000.00	\$285,000.00	\$294,000.00	\$548,567.00
-	Electrical													
	Finishes (Div 9)			Summary										
	Fire Protection			Minority Type										
	Foundations			Quoted Total Comparable Total					\$3,656,700.00	\$0.00 \$2,810,200.00	\$285,000.00	\$2,525,200.00	\$294,000.00 \$2,819,200.00	\$2,865,807.00 \$2,865,807.00
	HVAC			Comparable Local	<				\$3,656,700.00	\$2,810,200.00	\$2,810,200.00	\$2,810,200.00	\$2,819,200.00	\$2,865,807.00
	Landscaping Work													
	Masonry													
	Plumbing													
	Rebar Install													
H	Scaffolding													
-	Sheet Metal	-												
E I	Sitework													
	Steel													

8.4.3 Substitute Values

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

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

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

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

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

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

									HD Engineering Group Concrete, Sitework
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	2	\$24,000.00		\$25,000.00	\$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		\$15,000.00	1	\$15,000.00	\$13,000.00
27.1	Electrical Work	1.00	Each	\$5,000.00		\$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
C	^{C2} ₂₀₀ Unit Price	Scope Items	🚠 Set Substitute Ranking
Edit Prices	Substitute Values	💬 Ignored Quotes	m Default Data Blocks
		View	

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

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

Substitute Ranking	×
rded Splittable Quote est Splittable Quote	
201	
ОК	Cancel
	rded Splittable Quote est Splittable Quote iil

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

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

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

8.4 Quote Comparison & Award

Print Print	风 Quote Groups	🖗 Set Al	to Rev	iewed		🖉 Edit (Quote	Lock	💬 Que	ted Items	Scope	e Items	🔓 Set Subs	titute Ranking		Session	Recap				
🗟 Preview	All Items	ᅅ Set Al	to Not	Reviewed		🕴 Awar	ď	🔒 Unlock	C200 Unit	Price	💬 Ignor	ed Quotes				Auto Av	ward +				
Export to Excel					Edit	n Awar	d And Lock	💮 Edit Pac	kage 📴 Sub	stitute Value:	s 📌 Confi	gure Totals			efault ta Blocks						
Print	Layout	Quote (Group	Status	Cost Items		Quot	es			-	View	w			Tool	5				
Cost Breakdown	Structure (CBS) Reg	ister	Requ	est for Quot	e (RFQ) Regis	ter	Request f	or Quote (RF	Q) Record	Quote R	egister	Quote	Comparison &	k Award - Cost ite	ems ©						
Quote Group(s)		×	Drag	g columns here	to group															F	ind:
	cription 🛓 Revie	ewed		CBS Position Code	Descript	ion		<u>.</u>	Forecast (T/O) Quantity	Unit of Me	Unit Cost	Total Cost (Forecast)		Plug	Detail		le Sub #2 Rail Items	Example S Guard Rail		HD Engineering Group Concrete, Sitew	
Elec	trical work 2			18	Guardr	ail Type 2			1,000.00	Linear	\$24.00	2	\$24,000.00	\$25.00	\$25.0	0 :0	\$24.00	0	\$25.00	e \$	50.00
Elec	trical work 3			19	Guardr	ail Type 3	A		200.00	Linear	\$31.00	2	\$6,200.00	\$35.00	\$35.0	0 10	\$31.00	Ø	\$30.00	\$	
Guar	rdrail Work			17	Toll Bo	oth			1.00	Each	\$40,00	2	\$40,000.00	\$25,000.00	\$25,264.5	5	\$25,264.55	10 \$	40,000.00	\$25,2	
Pipe	Materials				Scope	Items															
Sign	Work				Summa	ary															
					Minor	ity Type															
					Quote	ed Total								\$57,000.00	\$25,264.5	5	\$30,200.00	\$	71,000.00	\$50,00	00.00
					Comp	arable Tota	el .	<	1					\$57,000.00	\$57,264.5	5	\$55,464.55	ş	71,000.00	\$82,26	64.55
					Awar	ded Total								\$0.00	\$0.0	0	\$30,200.00	ş	40,000.00	5	\$0.0 0
					Quote	ed Items To	tal							\$57,000.00	\$25,264.5	5	\$30,200.00	\$	71,000.00	\$50,00	00.00
					Specia	al Condition	s							\$0.00	\$0.0	0	\$0.00		\$0.00	1	\$0.00
			\rightarrow		Last L	Jpdate										7/29	/2009 2:21:	11/13/2	019 9:0	11/13/2019	1:0

8.4.4 Display Ignored Quotes

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

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

Example Vendor 2 Asphalt Materials	Pipe Materials for site DBE	le Vendor 4 aterials
 \$1,311,975.0 \$13,671.0 	1 <u>A</u> ward Award And Lock	1,990.00
	Lock	6,150.00 3,331.20
	Edit <u>Q</u> uote Duplicate Quote	-
D	Ignore Quote Ignore Quote Package Entire Quote	DBE
\$1,325,646.0	Edit Package Edit Resource	1,471.20 0,798.35

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

(Currer	ncy:	U.9	S. Dolla	r	•	
	Sta	tus:	Ign	ored			
	Ign	ore:	\checkmark	Reaso	n:	•	
	Par	kage	26		_	A Description	F
	Fat	каус				Do Not Use	Ц
	Drag) colur	nns	here to	o gro	Non Compliant	d:
tend ce		Code	=		De		
	\rightarrow						П
							Ш
						×:	
_							_

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

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

🕈 Award	Cock		Quoted I	tems 🛛 📨 Zero Ite	ms 📌 Config	ure Totals	Session	Recap	
🍐 Award And L	Lock 🔓 Unio		200 Unit Price	😰 Scope It	ems 🚠 Set Su	bstitute Ranking	Auto A	ward 👻	
		Edit Prices	Substitute	e Values 😥 Ignored	Quotes 🛗 Defau	t Data Blocks			
				View			Too	s	
te Compariso	on & Award - C	ost items 🛛							•
					Find: [Search For]	Sived views:	Previous View	-
Unit of Measure	Unit Cost	Total Cost (Forecast)		Detail	Example Sub #3 Sign Items	Example Su Guard Rail I		an, le Sub #4 DBE n Items	Example Sub #1 Guard Rail Items
Linear Feet	\$24.00	\$24,000	\$25,000.00	\$25,000.00	\$25,000.	00 🏌 🔗 🖇 \$2	4,000.00	\$25,000.00	\$25,000.0
Linear Feet	\$31.00	\$6,200.00	\$7,000.00	\$7,000.00	\$7,000.	00 🚦 🔗 🛭 \$	6,200.00	\$7,000.00	\$6,000.0
Square F	\$13.00	\$13,000	\$15,000.00	\$13,000.00	\$11,000.	00 <i>\$</i> .	13,000.00 🚦	\$13,000.00	\$13,000.00
					ଯ			Ø	
					\$500.	00		Ø	
					Ø			Ø	
							0	DBE	
					D	C	<u>-</u>	D	B
			\$47,000.00	\$0.00	\$11,000.	00 \$3	0,200.00	\$13,000.00	\$31,000.0
			\$47,000.00	\$45,000.00	\$43,000.	00 \$4	3,200.00	\$45,000.00	\$44,000.00

8.4.5 Export Quote Comparison and Award to Microsoft Excel

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

ile	Home In	ert Page Layout	Formulas Di	ata Review	w View Auton	nate Help	Developer			모 Com	ments 🖻	Shar
aste	∑ Cut Copy ~ Format Painte ipboard	B 7 11 100	11 × A* A*	= = =			\$ ~ % 9 50 00 Conditional For Formatting ~ Tal	ole ~ Styles ~	Insert Delete Format	sort & Find & Analyze ar * Filter * Select * Data	Sensitivity Sensitivity	
L	• 1	× ✓ fr CBS										
	E	F	G	н	- I		1		K	L L	M	N
		al Cost					Cooper Outdoor Advertising Inc		WonderBoyB			
Unit	\$24.00				Guard Rail Items				Guard Rail Items \$562,344,000.0			
	\$24.00		\$25,000.00 \$7,000.00	\$25,000.00	Ð	\$24,000.00	20 P1		\$562,344,000.00 \$145,272,200.00			
			\$0.00 \$0.00	\$0.00 \$0.00		\$30,200.00 \$0.00		\$31,000.00 \$0.00				
			\$0.00	\$0.00		\$0.00		\$0.00	\$0.0	0 \$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				
			\$0.00 \$32,000.00	\$0.00 \$0.00		\$0.00 \$30,200.00		\$0.00 \$31,000.00				
			\$32,000.00	\$32,000.00		\$30,200.00		\$31,000.00				
			\$32,000.00	\$32,000.00		\$30,200.00		\$31,000.00				
			\$0.00	\$0.00		\$30,200.00		\$0.00				
					5/11/2023 2:38:01 A	M	7/24/2023 11:24:01 PM		6/2/2023 12:29:38 AM	6/2/2023 12:37:37 AM		

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	Pr	ice System	Integr	ations	Actions				
📑 Print	💭 By Quote Group		۵.			ate Quote		All Items	Unit Price	Scope Iter
neview	All Quote Groups	9		5	💋 Ignore	e Quote	C	🔗 Quoted Items	Substitute Value	s 🔛 Ignored Q
Export to Excel	All Quote Items		Edit Resource	Edit Quote			Edit Prices	💌 Unquoted Items	💯 Zero Items	🔊 Configure
Print	Layout		Resources						View	
Quote Companyor	n & Award - Resource	es Ø								
Quote Group(s)	🙂 Export sp	readshe	et to			_			× Saved	views: Standar
Deso Test	ription $\leftarrow \rightarrow \vee$	↑ ┨	> This PC >	Downloads	5		5	Search Downloads	5	
Asph	alt Mate Organize 🔻	- N	lew folder						- 0	
Pipe I	Material	isk (C:)	* ^ Nam	e			Тур	e	Size ^	
	Git P	rojects	* Ves	terday (2)					-	
	📙 Som	pliance	1 _		rol Columns	List.xlsx	Mid	rosoft Excel Work	47	
	Con	trol		mproved.xls				crosoft Excel Work	16	
	Estin		∼ Las	t week (1)) ————					
	Sche	dule	1	Contacts_091	14202305160	9.xlsx	Mic	crosoft Excel Work	10	
	🕹 Dow	nloads	v < - r	cupuliu ana	,		F0.	2-1-1	~	
	E:	le name	Quote Comp	arison and A	ward 092120				~	
			Excel files (*.x						~	
	5440	cr type	alloci mes (ik	/						
	∧ Hide Fol	ders				1		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	 Quote Item Tool tip displays details including: Unit Price Extended Price Bond Taxes Special Conditions an indicator for a delta quote item

Monty Mesure Mesure Gradeal Gradeal Concrete Floament Concrete Flo	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 \$ \$00.00 \$ \$175,500.00 \$ \$285,000.00 \$ \$285,000.00 \$ \$294,000.00 \$\$533,508.40 \$ \$206,000 \$ \$294,000.00 \$\$533,508.40 \$ \$206,000.00 \$ \$206,000.00 \$206,000.00 \$206,000.00		a cara quart	(T/O) Quantity	Measure		(Forecast)				Concrete Formwork		Concrete Formwork	
Scope Items 2011 Processor (2400) Summary Provide Train Statistics Diff Processor (2400) Minority Type Provide Train Statistics Diff Processor (2400) Notes Diff Provide Train Statistics Diff Provide Train Statistics Quicted Train \$3,656,700.00 \$2,855,600.00 \$2,255,200.00 \$2,2490,600.00		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 Entrance Entrance Mixed Table 0 <t< td=""><td></td><td>place and finish</td><td>1.00</td><td>Lump Sum</td><td>\$0.00</td><td>\$0.00</td><td>\$375,500.00</td><td>\$0.00</td><td>\$285,000.00</td><td>\$385,000.00</td><td>\$\$294,000.00</td><td>\$553,508.49</td><td><u> </u></td></t<>		place and finish	1.00	Lump Sum	\$0.00	\$0.00	\$375,500.00	\$0.00	\$285,000.00	\$385,000.00	\$\$294,000.00	\$553,508.49	<u> </u>
Minority Type Device (2, 155, 78) Device (2, 155, 78) Notest Device (2, 155, 78) Device (2, 155, 78) Quicted Total \$3,656,700.00 \$2,855,000.00 \$2,252,200.00 \$2,949,662,119		Scope Items											
Minority Type Special Condition: \$1,0 Notes D		Summary						4				Quote Tax: 1	\$18,537.92
Traves		Minority Type						•					
		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 < \$3,656,700.00 \$2,525,200.00 \$2,810,200.00 \$2,810,200.00 \$2,819,200.00 \$2,892,622.19					0		\$3,656,700.00	\$2,525,200.00	\$2,810,200.00	\$2,810,200.00	\$2,819,200.00	\$7,892,622.19	

8.4.7 Configure Totals

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

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

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

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

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

8.4.8 Adding Notes to Quote Comparison & Award

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

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

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

Print Preview	Ģ	By Quote Group	Set All to F	iot Reviewed	Edit Resource		Duplic Duplic Ignor		-	rage Entire Quote Package	및 Aw 일급 Aw	ard ard And Lock	Lock	Edit Prices	Quoted Items Unit Price	😰 So	ro Items ope Items	∑ ² Configuri	titute Ranking	 Session Recap Auto Award + 	
Export to Ex	icel R	All Quote Items													Substitute Values		nored Quotes	🛗 Default 🛙	lata Blocks		
Print		Layout	Quote Grou	up Status	Resources					Quotes						Vie	zw			Tools	
ost Breakdow	wn Struc	ture (CBS) Regist	er Quot	e Register	Quote Con	parison & Aw	ard - Re	esources @													
ag columns her	re to grou	IP.														Find	: [Search Fo	r] …	Saved views	Previous View	
Resource Code	1	Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)	F	Plug		Detail		ple Vendor 1 alt Materials	Example V Asphalt M	endor 2 aterials	Example Vendor 1 Pipe Materials for site improvements	Example DBE Pipe Mat	Vendor 4 erials				
MAAM		Asphalt Mix (Fini	sh)	36,750.00	Ton	1	31.50	\$3	94.13	\$34.1	3 1 6	\$31.5	0	\$35.70	\$34.13		\$34.13				
MAFA		Fine Aggregate			Ton		\$7.25		8.19			\$7.2		\$7.35	\$8.19		\$8.19				
MPP 10		Pipe 10" PVC SD	R21	12,600.00	Linear Feet	4	13.65	\$	3.28	\$3.2	8	\$3.2		\$3.28	812.60	10	\$13.65				
MPP24		Pipe 24" PVC SD	R35	3,000.00	Linear Feet	4	22.05	\$2	0.48	\$20.4	UT .	\$20.4		\$20.48	825.20	10	\$22.05				
MPR36		Pipe RCP 36 In		1,024.00	Linear Feet	4	32.55	\$3	94.13	\$34.1	3	\$34.1.		\$34.13	831.50	10	\$32.55				
		Scope Items																			
		Summary																			
		Minority Type														•	DBE				
		Quoted Total						\$1,406,97	3.75	\$0.0	0	\$1,171,100.7	\$1,3	25,646.00	\$266,616.00	5	271,471.20				
		Comparable T	iotal <					\$1,406,97	3.75	\$1,406,973.7	5	\$1,308,747.3	\$1,4	63,292.60	\$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	✓	None	
	Minority Type	✓	None	
ø	Notes	\checkmark	None	
	Extended Price		None	
	Item Taxes		None	
	Quote Tax		None	
	Bond		None	
	Item Conditions		None	
	Quoted Items Total		None	
	Special Conditions		None	
	Quoted Total	✓	None	
	Substitute Values		None	
	Comparable Total	✓	Ascending	
	Awarded Total		None	

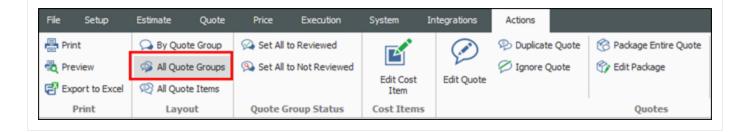
6. Select OK.

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

Personale line de la contraction de la contracti	for site pipe Materials OBE pipe Materials \$34.13 \$34.13 \$8.19 \$8.19 \$12.60 \$	Saved views: Previous Wew	
Colda Decotion Count Maximum Maximum Pig Detail Pig Detail Maximum Pig Detail Detail Detail Detail	for site pipe Materials OBE pipe Materials \$34.13 \$34.13 \$8.19 \$8.19 \$12.60 \$		
MARA Pree Aggregable 1,660.00 Ton \$72.25 68.19 \$77.25 \$77.25 \$77.55 \$87.97 MPP10 Pree 27 Pric Const1 12,0000 Incer Feet \$13.16 \$13.28 \$13.27 \$13.28	\$8.19 \$12.60 \$25.20 \$25.20		
Open DP /rec SDR11 1220000 Unew Fet 13.33 13.33 13.37 <th13.37< th=""> 13.37 13.37</th13.37<>	\$12.60 \$ % \$13.65 \$25.20 \$ % \$22.05		
VPD24 Ppc 24* Pvc 20130 1,000.00 Unew Freet \$22.05 \$20.40	\$25.20 🕇 🔗 \$22.05		
NPR36 Pipe RCP 36 in 1,024.00 User Feet \$32.25 \$34.13 \$54.01			
Scope Rems Summary	\$31.50 🛊 🔗 \$32.55		
Summary			
Minority Type			
	B		
Comparable Total \$1,406,973.75 \$1,406,973.75 \$0.60 \$1,535,943.15 \$1,	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.



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

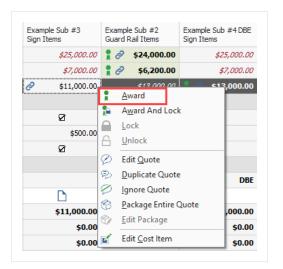
	Name	Definition
1	Totals per Quote Group	Ability to see the Awarded Total Plug, Detail and Quote amount per Quote Group
2	Total Awarded Amount	Visibility into the Total Awarded Amount per Quote Group
3	Comparable totals	Better visibility into the Comparable totals per Quote Group
4	Expand/Collapse	Expand/Collapse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

	Print	🔉 By Quote	Group	2	2	(. #)	💫 Duplic	ate Quote	😚 Pad	kage Enti	re Quote	Award	1		G	Quoted It	ems	💯 Zero Items
1	Preview	🦈 All Quote	Groups	9			💋 Ignore	e Quote	🎲 Edit	Package	1	Award	And Lock	<u> </u>		🔝 Unit Price		🛐 Scope Items
X	Export to Excel	👰 All Quote	Items		Edit Resource	e Edit Quote								Ed	lit Price	s	Values	s 💬 Ignored Quote
	Print	Layou	t		Resources				Qu	iotes								View
05	t Breakdown Str	ructure (CBS) Regis	ter	Quote Co	mparison & Awa	rd - Reso	ources ©										
ag	g columns here to g	roup													Find:	[Search For]		Saved views:
	Quote Group		<u>-</u>	Plug		Detail		Quote		Quote (Group Total							
•	 Asphalt Materi 	als			\$0.00)	\$0.00	\$1,17	1,100.70		\$1,171,10	0.70		-(1				
	Resource Code	🛓 Descript	ion			Utilization Count	Unit of Measure		Unit Cost (Scale 1)		Plug		Detail			mple Vendor 1 halt Materials		ple Vendor 2 alt Materials
	MAAM	Asphalt	Mix (Finis	h)		36,750.00	Ton			\$31.50		\$34.13		\$34.13	* * 4		ð	\$35.70
	MAFA	Fine Age	regate			1,860.00	Ton			\$7.25		\$8.19		\$8.1	2 1 4	§ \$7.25	Ø	\$7.35
		Scope	Items															
		Summa	ary															
		Minori	ty Type		_													
		Quote	d Total		2						\$1,269	327.15		\$0.00)	\$1,171,100.70		\$1,325,646.00
1		Comparable Total									\$1,269	327.15	\$1,26	9,327.1	5	\$1,171,100.70		\$1,325,646.00
		Award	ded Total	: \$1,17	L, 100. 70							\$0.00			.00 \$1,171,100.70			\$0.00
ţ	 Pipe Materials 				\$0.00)	\$0.00 \$271,471.20				\$271,471.20							
	Resource Code	E Description						Unit of Uni Measure (Sc			Plug		Detail		Example Vendor 3 Pipe Materials		DBE	ple Vendor 4 Materials
	MPP 10	Pipe 10"	PVC SDR	21		12,600.00	Linear Fe	eet		\$13.65		\$3.28		\$3.28	8	\$12.60	16	\$13.65
	MPP24	Pipe 24"	PVC SDR	35		3,000.00	Linear Fe	eet		\$22.05		\$20.48		\$20.48	8	\$25.20	16	\$22.05
	MPR36	Pipe RCF	9 36 In			1,024.00	Linear Fe	eet		\$32.55		\$34.13		\$34,13	e	\$31.50	10	\$32.55
		Scope	Items															
		Summa	ary				_											
		Minori	ty Type				3										0	DBE
		Quote	ed Total								\$137	646.60		\$0.00)	\$266,616.00		\$271,471.20
		Comp	arable To	otal	<						\$137	646.60	\$13	7,646.60)	\$266,616.00		\$271,471.20
		Award	ded Total	: \$271.4	71.20							\$0.00		\$0.00)	\$0.00		\$271,471.20

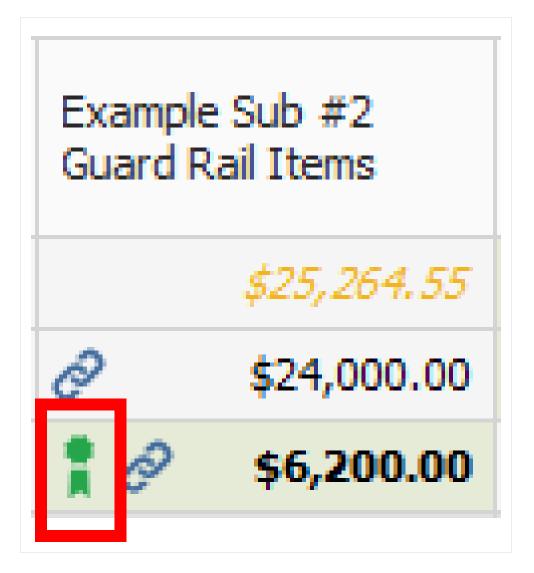
You can scan through all the quote groups in the estimate and see if you are carrying the most appropriate quote. You can also review the Totals per Quote Group and better analyze the risks in the estimate based on whether the cost is a plug number, detailed estimate or a quoted value.

8.4.10 Compare and Award Quotes

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



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



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

CBS Position Code	Description	Forec (T/O) Quan	Unit of Me	Unit Cost	Total Cost (Fore	Plug	Detail	Example Sub #2 Guard Rail Items		le Sub #1 Rail Items
17	Toll Booth	1.00	Each	\$40,000	🔎 \$40,0	\$25,000.00	\$25,264.55	\$25,264.55	10	\$40,000.00
18	Guardrail Type 2	1,000.00	Linear	\$25.00	₽ \$25,0	\$25,000.00		\$24,000.00	10	\$25,000.00
19	Guardrail Type 3A	200.00	Linear	\$30.00	₽ \$6,00	\$7,000.00	\$7,000.00	\$6,200.00	10	\$6,000.00
20	Type 4 Signs	1,000.00	Square	\$15.00	\$15,0	\$15,000.00				
27.1	Electrical Work	1.00	Each	\$5,000.00	\$5,000	\$5,000.00				
	Summary									
	Minority Type									
	Quoted Total					\$77,000.00	\$25,264.55	\$30,200.00		\$71,000.00
	Comparable Total	<				\$77,000.00	\$99,764.55	\$72,964.55		\$88,500.00
	Awarded Total					\$20,000.00	\$0.00	\$0.00		\$71,000.00
	Quoted Items Total					\$77,000.00	\$25,264.55	\$30,200.00		\$71,000.00
	Special Conditions					\$0.00	\$0.00	\$0.00		\$0.00
	Last Update							7/29/2009 2:21:	11/1	3/2019 9:0

NOTE

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

8.4.10.1 Open Status

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

columns here to g 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	Find: [HD Engineering Group Concrete, Sitework
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	\$24,000	\$25,000.00		\$24,000.00	\$25,000.00	\$50,000.0
19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	\$6,200.00	\$7,000.00	\$7,000.00	\$6,200.00	\$6,000.00	\$7,000.0
	Scope Items									
	Summary									
	Minority Type									
	Quoted Total					\$32,000.00	\$0.00	\$30,200.00	\$31,000.00	\$50,000.0
	Comparable Total	<				\$32,000.00	\$57,000.00	\$30,200.00	\$31,000.00	\$57,000.0

8.4.10.2 Award Status

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

uote Reg	ister Qu	ote Compari	son 8	Award - Cost ite	ms O													
uote Gro	oup(s)	×	Drag	columns here to gro	up										Find: [Search For]	Saved view	vs: Previous View	-
✓ ✓	Descri h	Reviewe		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 Wor	k V		17	Toll Booth	1.00	Each	\$40,000.00	S40,000.00	\$25,000.00	\$25,264.55	\$25,264.55	🔋 🔗 🛛 \$40,000.00	\$25,264.55	\$25,264.55	\$25,264.55	\$25,264.55	\$25,26
 Image: A set of the	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	\$7,00
				20	Type 4 Signs	1,000.00	Square F	\$15.00	\$15,000.00	\$15,000.00			\$13,000.00	8 \$13,000.00				& Off \$300,00
				27.1	Electrical Work	1.00	Each	\$5,000.00	\$5,000.00	\$5,000.00					83,500.00		\$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.

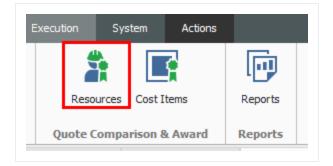
Quote Gro	up(s)	×
\checkmark	Description 🖮	Reviewed
\checkmark	Electrical Work	
\checkmark	Guardrail Work	\checkmark
 Image: A set of the	Sign Work	✓

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

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

Step by Step — Compare and award quotes

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



- 3. Under Quote Groups, select Aggregates.
- 4. Review the quotes to determine the lowest bidder:
 - MDIRTB is marked as Free for Example Vendor 4 and their quote is not 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.

🖗 Set All to Review	wed	🖉 🖗 Dupi	icate Quote	🛞 Package Entire	Quote 🚦 Awar	d 🔒		Quoted Items	📧 Zero Items	2 Configure Totals	Session Recap
🙊 Set All to Not Re	eviewed		re Quote	🕜 Edit Package	🏚 Awar	d And Lock	Unlock C	Unit Price	Scope Items	Set Substitute Ra	anking 🌹 Auto Award -
	Edit Cost Item	Edit Quote					Edit Price	Substitute Value	s 🗩 Ignored Quotes	Default Data Bloc	ks
Quote Group St	atus Cost Items			Quotes					View		Tools
Quote Cor	mparison & Award - Cost	items O									
columns here to grou	ip.								Find: [Search For] Saved vie	ews: Previous View +
CBS Position Code =	Description	Forecast (T/O) Quantity	Unit of Measure		Total Cost (Forecast)	Plug	Detail	Harmon Construction Concrete, Sitework	Eagle Concrete Corp. Concrete, Sitework	Barton Concrete Services, Inc. Concrete, Sitework	C&H Concrete Construction, Inc. Construction, Elitework
.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
1.1.3	Curb and Gutter	1,250.00	LF	\$34.51	\$43,133.12	\$43, 133. 12	\$43,133.12	@ P1	@ P1	@ P1	Lock All Unlock All
3. 1. 4	Valley gutter	50.00	LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	@ P1	@ P1	@ P1	P
. 1.5	Handicap ramps	159.00	SQFT	\$9.89	\$1,572.47	\$1,572.47	\$1,572.47	@ P1	@ P1	@ P1	C Edit Quote
3. 1.6	Truncated domes	1.00	Lump Sum	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	@ P1	@ P1	@ P1	P Duplicate Quote
3. 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
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
3. 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. 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 P1	@ P1	\$1,306.20	\$1.306.20

8.4.12 Incomplete Quotes

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

Edit Cost Item	Duplicate (Dignore Qu Edit Quote	ote 🎲 Edit Pad		1 Award	ock	Edit Prices	nit Price	Scope Items 🔒 Si Ignored Quotes 🛗 D	onfigure Totals et Substitute Ranking efault Data Blocks	 Session Recap Auto Award -
Cost Items			otes					View		Tools
Quote Compa	rison & Award - Cost item	s Q								
columns here to grou	up						Find:	[Search For] ···	Saved views: Pre	vious View
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Natomas Masonry, Inc. Masonry	Marquis Masonry Masonry	* H.P. Construction Inc. Masonry
4.1.1	CMU Walls	1.00	Lump Sum	\$485,922.27	\$485,922.27	\$400,000.00	\$400,000.00	🔋 🔗 P1 \$512,648.00	\$526,724.53	♂ P1 \$766,352.00
4.1.2	Precast Concrete Caps	1.00	Lump Sum	\$14,577.67	\$14,577.67	\$12,000.00	\$12,000.00	1 @ P1	\$12,375.47	@ P1
4.1.3	Steel Embeds	1.00	Lump Sum	\$12,148.06	\$12,148.06	\$10,000.00	\$10,000.00	🕻 🖉 P1	\$0.00	& P1
	Scope Items									
	Demolition									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 (Group 🖗	Set All to R	eview	ed	E .	(\mathcal{A}^{2})	🕾 Duplicate Quote	Package	e Entire Quote	🗍 Award	🔒 Lock	(C) 🖗	Quoted Items	🖾 Zero Items 🛛 💈	Configure Totals	Q Sea	sion Recap
🖗 All Quote G	iroups 🔅	Set All to N	ot Rev	leved		2	🖉 Ignore Quote	💮 Edit Pac	ikage	🏦 Award And Lo		500	Unit Price	📝 Scope Items 🛛 🔨	Set Substitute Ranking	🛔 Aut	o Award +
🕘 All Quote I	tems				Edit Cost Item	Edit Quote						Edit Prices	Substitute Values	🛞 Ignored Quotes 🛛	Sefault Data Blocks		
Layout		Quote Grou	p Sta	tus	Cost Items			Qu	uotes					View		т	ools
ost Breakde	own Struct	ure (CBS) R	enist	er Ø	Quote Comp	arison & Awa	ard - Cost items										
Quote Grou			-											Find: [Search	For]		Previous Vi
Quote Group	p(s)	×	Dra	g columns	here to group									Find: [Search		d views:	Previous vi
	Description Concrete,			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	
	Concrete,	Sitework		4.1.1		CMU Walls		1.00	Lump Sum	\$1,879,709.33	\$1,879,709.3	\$4,400,000.0	\$1,708,825.67	🕴 🔗 P1 \$512,648.0	0 🔗 P1 \$766,352.00	ð	\$0.0
	Concrete,	Structural		4.1.2		Precast Concr	rete Caps	1.00	Lump Sum	\$170,882.67	\$170,882.6	\$12,000.0	\$12,000.00	🏌 🔗 P1	🔗 P1	2	\$0.0
	Doors & W	indows		4.1.3		Steel Embeds		1.00	Lump Sum	\$170,882.67	\$170,882.6	\$10,000.0	\$10,000.00	🕇 🔗 P1	& P1	ð	\$0.0
	Electrical					Scope Item	s										
	Finishes (D	iv 9)				Demolition											
	Fire Protec	tion				Caulking, Si	ealants & Backer Rod										
	Foundation	10				Scafolding									ন্দ্র		
	HVAC					Shoring/Bra	scing							\$15,000.0	0 🗆		
	Landscapir	ig Work				Testing/Ins	pection										
v	Masonry					Summary											
	Plumbing					Minority ⊤y	pe									0	MB
	Rebar Inst	all				Notes								D	D		D
	Scaffolding	,				Quoted Tot	tal					\$4,422,000	\$1,708,826.67	\$512,648.0	\$574,764.00		\$0.0
	Sheet Meta	el la	→			Comparable	e Total 🛛 <					\$4,422,000	\$1,730,826.67	\$512,648.0	\$574,764.00	61	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.

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

Overview – Quote Record – Scope Items

	cial Terms & Conditi	ions					×
Que	ote Tax		Item	Tax			
Add	d Taxes to the Quote:	🔿 Yes 💿 No	Ad	id Item Taxes to ea	ch item's price		
тах	ES to be added to av	varded TOTAL as a % of total :					
		Tax Rate: 🕨 0.00					
	т	otal Tax: \$0.00					
Buw	ver's Special Terms & Co	onditions					
FIXE	tribute Special Conditi	& Conditions to Seller's awarded total (any cor ion:) Evenly) Using weight ions costs forunawarded quotes i	ed average		\$0.00]	
Drag	g columns here to grou	qı		Find: S	earch For] ····	Saved views:	Previous View -
	Row -	cope Item	Quote Group	Included	Amount	% of Total	Notes
	Number 📃 Sc	ope nem					
÷		ermits	Electrical Work	✓			
÷	1 Pe		Electrical Work Electrical Work		\$500.00	14.29	í
÷	1 Pe 2 Su	ermits			▶ \$500.00	14.29	í
÷	1 Pe 2 Su 3 Te	ermits urveying and Layout	Electrical Work		\$500.00	14.29	
÷	1 Pe 2 Su 3 Te	ermits urveying and Layout emporary Traffic Control Devices	Electrical Work Electrical Work		\$500.00 \$950.00	14.29	

Overview – Quote Comparison and Award – Scope Items

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

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

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

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

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

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

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

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

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

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

8.5.1 Scope Item Setup

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

un	dation Setup [Jata Regist	er Quote Grou	up Tag Record	0							
	Descripti	ion: * Ele	ectrical Work									
	Award Stat	us: Con	mplete									
	Review	ed:										
	Last Review	ed:										
Quote Last Changed:												
	Jote Last ending	cu.										
	g columns here to											
			1		Amount		% of Total					
	g columns here to	o group Scope Item	1	, , ,		\$0.00	% of Total					
	g columns here to Row =	o group Scope Item Permits			•	\$0.00 ;500.00	% of Total					
	g columns here to Nou =1	o group Scope Item Permits Surveying a			► ► \$	1	% of Total					
	g columns here to Nou = 1 2	o group Scope Item Permits Surveying a Temporary	and Layout) 	- 4	500.00	% of Total					
	g columns here to Nu = 1 2 3	Scope Item Permits Surveying a Temporary Trench and	and Layout Traffic Control Devices) 	- 4	\$0.00	% of Total					
	g columns here to Nu = 1 2 3 4	Scope Item Permits Surveying a Temporary Trench and Painting Ele	and Layout Traffic Control Devices Backfill for Electrical Wo	rk	• ¢	\$0.00 \$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 Number 🗎	Scope Item	Amount	% of Total
1	Permits	\$0.00	
2	Surveying and Layout	\$500.00	
3	Temporary Traffic Control Devices	\$0.00	
4	Trench and Backfill for Electrical Work	\$0.00	
5	Painting Electrical Equipment	\$0.00	
6	Temporary Power and Lighting	\$300.00	
6	remporary 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.

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 DB
Aggregates		Aggregates	Received	Example Vendor 2
Asphalt Materials			Received	Example Vendor 1
Asphalt Materials			Received	Example Vendor 2
Concrete, Sitework			Ignored	HD Engineering Group
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



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

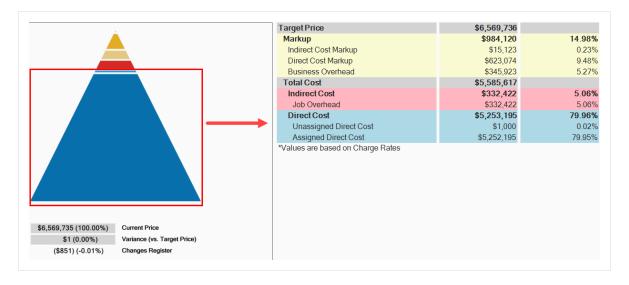
9.1 JOB MARKUP (PROFIT)

On the Data Map ^{ADDATA MAP} 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.

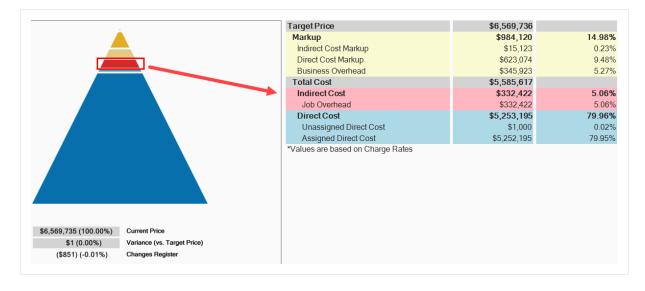
9.1.1 Target Price

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.



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.

		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	79.969
		Unassigned Direct Cost	\$1,000	0.02%
		Assigned Direct Cost	\$5,252,195	79.95%
		*Values are based on Charge Rates		
	Current Price			
\$6,569,735 (100.00%)	ourient nee			
\$6,569,735 (100.00%) \$1 (0.00%)	Variance (vs. Target Price)			

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	 The left side of the screen displays several cost classifications: Target Profit Business Overhead Job Overhead Direct Cost
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 Bi	id Quantities a	nd Charge Rate Mari	up)					
🗸 🛕 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	(un)		17.62				
A Indirect Cost Markup		\$15,122.66	\$15,122.66	0.23				(ap)						
📥 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				
B 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						233.23				
V 🛕 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		5.06										
Prime Bond	\$0.00	\$47,148.68	\$47,148.68	0.72	Markup as % of	All Supplies C	losts		3	571.02				
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	Markup per Mani					\$36.80				
Job Overhead I		\$175,296.28		2.67	Markup per Man	lour				\$36.80				
V 📥 Direct Cost	\$5,252,19		\$5,253,19	79.96	Markup per Equi	oment hour				\$61.84				
Direct Cost Items	\$5,252,19	\$1,000.00	\$5,253,19	79.96										
													Refn	esh Summary Data

TIP 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.

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
🗸 🛕 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 🕲						
Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Pricing
Calculate Cost Billing Distribut Indiv Top la	Amount g Amount	Pay Item Prices us ed Cost/Billing An pries ries	-					
Using Keep Categor	Pay Item by g Weighted I ing Markup v ize Business ect Cost		sts					

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.

Descriptio	n		Assigned	Unassigned	Total	% of Target
🗸 🔺 Pri	ice Bre	eakdown Structure				
- 🗸 👗	Targ	jet Price	\$5,252,19	\$645,755.99	\$5,897,950.68	100.00
~	<u> </u>	Markup	\$0.00	\$315,692.95	\$315,692.95	5.35
	v]	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
	v]	Business Overhead	\$0.00	\$315,692.95	\$315,692.95	5.35
		Price % Add-On	\$0.00	\$265,407.78	\$265,407.78	4.50
		Job Financing	\$0.00	\$33,105.26	\$33,105.26	0.56
		Indirect Cost Escala	\$0.00	\$2,131.11	\$2,131.11	0.04
		Direct Cost Escalation	\$0.00	\$15,048.80	\$15,048.80	0.26
		Business Overhead	\$0.00	\$0.00	\$0.00	0.00
~		Total Cost	\$5,252,19	\$330,063.05	\$5,582,257.73	94.65
	¥]	Indirect Cost	\$0.00	\$329,063.05	\$329,063.05	5.58
	`	🖌 📥 Job Overhead	\$0.00	\$329,063.05	\$329,063.05	5.58
		Prime Bond	\$0.00	\$43,789.75	\$43,789.75	0.74
		Indirect Cost A	\$0.00	\$5,888.67	\$5,888.67	0.10
		Direct Cost Add	\$0.00	\$104,088.34	\$104,088.34	1.76
		Job Overhead I	\$0.00	\$175,296.28	\$175,296.28	2.97
	× /	Direct Cost	\$5,252,19	\$1,000.00	\$5,253,194.68	89.07
		Direct Cost Items	\$5,252,19	\$1,000.00	\$5,253,194.68	89.07

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.

Description	Dependency	Allocation			Co	st Breakdown				>
Drag columns	here to group	Save	d views: Previ	ous View 🔹 🔎	Cos	t Category	Subject Cost	Rate		Cost
Descripti	on		Currency	Total Cost (Forecast)	ð 🗸	Total	\$102,786	12.73		\$13,081.83
→ Direct Co	vet Markum		U.S. Dollar	\$13,081.82		> Labor	\$57,792.70	15.00		\$8,668.9
*	and the heap		0.0.000	*13,00 2.02		 Owned Equipment 	\$41,455.92	10.00		\$4,145.5
*						Rented Equipment	\$0.00	0.00		\$0.0
						> Supples	\$0.00	0.00		\$0.0
						> Materials	\$3,276.00	8.00		\$262.0
						> Subcontract	\$0.00	0.00		\$0.0
						> Fees	\$262.08	2.00		\$5.2
						> Allowance	\$0.00	0.00		\$0.0
						Custom Category 1	\$0.00	0.00	-	\$0.0
						Undefined	\$0.00	0.00	-4	\$0.0

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 (based on Bid quantities)											
Markup as % of	All Costs (Target Price - Target Profit)	11.11									
Markup as % of	All Labor Costs	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 Pri	Price Status Cost Source		Resou	rce Utilization	Mino	rity Goals	Subcontract Stat	tus 🛛 🔪	endor Status			
Cost	Source Anal	ysis (base	d on Bid quant	ities)									
	Detail				Plu	g *		Quote Tota			otal		
			Amount	%	An	nount	%	Amount	%	An	nount	%	
	Direct C	Cost	\$5,156,491.67	97.95	\$64,6	00.00	1.23	\$43,200.00	0.82	\$5,264,	291.67	100.00	
	Indirect (Cost	\$638,694.52	98.62	\$5,3	38.76	0.82	\$3,570.19	0.55	\$647,	603.46	100.00	
	т	otal	\$5,795,186.19	98.03	\$69,9	938.76	1.18	\$46,770.19	0.79	\$5,911,	895.14	100.00	

* 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 Utilization Analysis (based on T/O quantities)											
Total Manhours		26,838.86									
Total Equipmer	t 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 (hours per shift times 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.

Markup Analysis	Price Status	Cost Source	Resource Utilization	Minority Goals	Subcontract Sta	atus Vendor Status	s	
Vendor Anal	ysis (based on	Bid quantities)					
Number of Ven	dors	2						
Total Vendor A	mount	\$1,442,571.90						
% of Target Pr	ice	21.96						
Company Name		Contact	Phon	e	Amount	Currency	Percent	Street Address
Example Vendor	4 DBE	Slim, Leste	r 111-	122-1321	\$271,471.20	U.S. Dollar	4.13	400 Fourth Street
Example Vendor	1	Roberts, P	at 111.	123-2134	\$1,171,100.70	U.S. Dollar	17.83	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.

Proposal R	ecap - Training Jo	b			
	Current	Target	Forecast	Variance	
Price:	\$6,455,450.00	\$6,506,904.35	\$6,462,850.00	\$51,454.35	ADD
Profit:	\$599,221.88	\$650,676.22	\$655,858.61	\$5,182.39	СИТ
Margin%:	9.28	10.00	10.15	\$10,653.01	сит

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 🚋	Pay Item Number	Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Unit Price (current)	Total Price (current)	% Margin
1	200	SITEWORK & ROADWAY					\$51,369.60	
+ 1.1	641 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 📻 🕇	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.

IU	em Recap - 2000 Clearin	ig && Grubbing		n	Item Recap - 3000 Excavation						
		Balanced Unit	Current Unit			Balanced Unit	Current Unit				
	Price:	\$4,985.70	\$4,994.91		Price:	\$2.86	\$2.86				
A	Profit:	\$515.91	\$525.12	A	Profit:	\$0.29	\$0.29				
	Total Cost:	\$4,469.79	\$4,469.79		Total Cost:	\$2.57	\$2.57				
Å	Business Overhead:	\$245.35		۸	Business Overhead:	\$0.15					
Å	Job Overhead:	\$1,681.60		1	Job Overhead:	\$0.91					
Å	Unassigned Direct Cost:	\$0.00		-	Unassigned Direct Cost:	\$0.00					
4	Assigned Direct Cost:	\$2,542.84		-	Assigned Direct Cost:	\$1.52					

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

Actions		
Link Field	O Assigned Direct Cost Only	✓ Overwrite Locked Pay Items
📇 Unlink Field	🔦 Balanced Bid 👻	Custom Auto Price
Workbook	Auto	Price

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

Unit 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 profit from Excavation was put onto Clearing & Grubbing.

It	em Recap - 2000 Clearin	ig && Grubbing		I	em Recap - 3000 Excava	ITION	
		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	A	Profit:	\$0.29	(\$1.05)
	Total Cost:	\$4,469.79	\$4,469.79		Total Cost:	\$2.57	\$2.57
٨	Business Overhead:	\$245.35		1	Business Overhead:	\$0.15	
٨	Job Overhead:	\$1,681.60			Job Overhead:	\$0.91	
A	Unassigned Direct Cost:	\$0.00		A	Unassigned Direct Cost:	\$0.00	
A	Assigned Direct Cost:	\$2,542.84	1		Assigned Direct Cost:	\$1.52	1

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.

lob Proper	ties 🛛					
Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Pricing
Calculate Cost Billing Distribut Indivi	Amount g Amount	ay Item Prices u ed Cost/Billing A ries				
Markup Op Markup O Using	Pay Item by: Weighted D	:	sts			
	ect Cost	Overhead as:				
Unit	Markup (curr	ecap Forecast M ent) x Forecast (otal Cost/Billing	T/O) Quantity			

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	Insert (O Assigned Co	st Only 📃 Or	erwrite Locked	Pay Items	🍢 🖷 Defa	ult Data Blocks		🛗 Bid Wizard		
đ	Preview	🕑 Delete 👔	Paste	Lock Quantities	📇 Unlink Field 🗧	Insert Subordinate	🔨 Balanced Bid	- ≣ o.	stom Auto Price			pare Alternate Scenario		Reset Round	ing Precision	
e	Export to Excel	}< Cut ∏	Fill Down	✓ Lock Prices			Unbalanced	Bid			apse *		Configure Pric Categories	te 👔 Import DOT F	ay Item File	
	Print		Edit		Workbook	Insert		Auto Pri	æ		v	iew		Tools		
Pa	v Item & Propo	sal Register (2													
Drag columns here to group																
	Pay Item Number	Lock Quantity	Lock Price	Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Currency	LABOR Cost	LABOR Cost Distribution	LABOR Markup	LABOR Markup %	LABOR Price (balanced)	LABOR Price (current)	Unit Price (current)	Total Price (current)
\rightarrow	+ 1			EARTHWORK AND UTIL	ITIES 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	\$7,427.79	25.00	\$37,138.96	\$34,430.26	\$97,253.00	\$97,253.00
				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
	+ 3			1 Athenti Piercando									\$0.00	\$0.00	\$216,300.00	\$216,300.00
				SITE CONCRETE	1.	00 1.00	Lump Sum	U.S. Dollar	\$0.00	\$0.0	\$0.00	0.00	\$0.00			
	+ 3							U.S. Dollar U.S. Dollar	\$0.00 \$7,163.88	\$0.0		25.00	\$8,954.84	\$8,099.23	\$42,300.00	\$42,300.00
	+ 3 + 4			SITE CONCRETE	1.	00 1.00	Lump Sum				\$1,790.97					\$42,300.00 \$39,900.00
	+ 3 + 4 + 5			SITE CONCRETE FENCING	1.	00 1.00	Lump Sum Lump Sum	U.S. Dollar	\$7,163.88	\$0.0	0 \$1,790.97 0 \$0.00	25.00	\$8,954.84	\$8,099.23	\$42,300.00	

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 = T	Lock Price	Pay Quantity	Forecast (T/O) Quantity
+ 202 0183	Unclassified Excavation		50,000.00	50,000.00
+ 641 0100	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.

C	st	Breakdown				
Co	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		\$0.00
	>	Rented Equipment	\$0.00	0.00		\$0.00
	>	Supplies	\$0.00	0.00		\$0.00
	>	Materials	\$3,276.00	-30		(\$1,000.00)
	>	Subcontract	\$0.00	0.00		\$0.00
	>	Fees	\$262.08	0.00		\$0.00
	>	Allowance	\$0.00	0.00		\$0.00
		Custom Category1	\$0.00	0.00	•	\$0.00
		Undefined	\$0.00	0.00	->	\$0.00

- To make a cut, enter a negative value, i.e. -1000
- 7. Press the **Tab** key, and your adjustment will be reflected on the left-hand side.

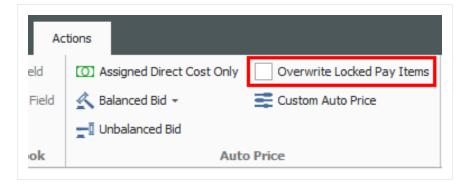
<u>D</u> e:	cription Dependency		Cost Categorization	Allocation		
Drag	g columns l	here to group				
	Description Small Tools Safety & Training		-	E Curre		Ac Co
				U.S. Dollar	\$5,896.98 \$2,948.49	
				U.S. Dollar		
÷	Cut			U.S. Dollar	(\$1,000.00)	
*						

- 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.

8	Auto Price Warning	- x
Variance due to rounding	precision	
across the unlocked pay	it your Target Price by spreading the tota items in accordance with your selected p ns' rounding precision, a variance still exis	ricing method.
	Initial rounding variance:	(\$84.43)
attempting to sp	till remaining as a variance after read the initial rounding variance ionately into each unlocked item:	(\$0.03)
Turn off this warning	about rounding variances for ALL JOBS.	
	ariances due to rounding by specifying g ed items, and by unlocking items with a q	
	Undo AutoPricing	Close

- 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	27 IIIII FVC GIAVILY SEWEL (SDR.)	<i>.</i> ,	3,000.00	3,000.00	LINCO
	+ 800 0400		9	90	4 Foot Diameter Manhole	F 2	Open	16.00	Eac
•	+ 501(A) 1306		10	100	Structural Excavation & Backfill	6	New	00.00	Cubi
•	+ 506(A) 1322		11	110	Steel Reinforcement	Ø	Delete	00.00	Pour
•	+ 503(A) 1313		12	120	Retaining Wall			50.00	Cubi
•	+ 600 0300		13	130	Paint Existing Steel Bridge St		Cu <u>t</u>	1.00	Lun
•	+ 700		14	140	Process Equipment		Cop <u>v</u>	1.00	Each
•	+ 1000		15	150	Removal of Underground Storage	т	Paste	2.00	Each
	+ 1010		16	160	Disposal of Contaminated Soi	+	<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	N.	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 <u>Es</u>	timate	Q	uote	Price Exe	cution	ı Syster	n	Actions					
Print	Г	Open	*	Cut	+ Fill Down		Lock P	rices	🗸 Link Field	O Assign	ed Direct Cost (Only Overwrite	e Locked	
Preview		New	Ē	🖶 Copy 🔁 Toggle Suspende		ended	d		Junlink Field	🔨 Balanc	ed Bid 👻	Custom A	Custom Auto Pric	
Export to		Delete			Lock Quantiti				CD	- Unbala				
Print		Delete	e 📄 Paste		Edit		\sim		Workbook		Auto Price			
Pay Item &	Proposal	Penister	0		Luit				WORDOOK			Autornee		
-	-	-												
Proposal R	lecap - Tra	aining Job	•											
		Current		Target	Foreca	ast	Variance	1						
Price: \$6,455,450.00		450.00	\$6,	514,915.53	.53 \$6,462,850.00		\$59,465.53)					
Profit: \$592,026.02		2,026.02	\$651,491.55 \$658,609		.04	04 \$7,117.49								
Margin%: 9.17			10.00 10.				\$13,693.38 CUT							
Margin%:		9.17		10.00	10.	.19	\$13,693.38	СUT						
Margin%:		9.17		10.00	10.	.19	\$13,693.38	СUT						
Margin%:	here to gro			10.00	10.	.19	\$13,693.38	СЛТ						
	n			10.00 L P	Row =	Line	Des	CUT			Pay Qua	Forecast (T/O) Quantity		
rag columns Pay Item	n	Lock		L	Row _	Line	. Des		1			(T/O)	Meas	
rag columns Pay Iten Number	n 0100	Lock		L	Row =	Line Nu	. Des	cription	1		Qua	(T/O) Quantity	Meas	
Pay Iten Number + 641 (m 0100 0102	Lock		L	Row =1	Line Nu 10	. Des Mot	cription vilization aring &	n		Qua 1.00	(T/O) Quantity 1.00	Meas	
Pay Iten Number + 641 (+ 201 (+ 202 (+ 303)	n 0100 0102 0183 5912	Lock		L	Row = 1	Line Nu 10 20	. Des Mot Clea Unc Agg	cription nilization aring & lassifier	n Grubbing d Excavation Base		Qua 1.00 10.00	(T/O) Quantity 1.00 10.00	Meas Lump Acre	
Pay Iten Number + 641 (+ 201 (+ 202 (+ 303 3 + 303 -	m 0100 0102 0183 5912 4263	Lock		L	Row 1 Nu 1 2 3 4 5	Line Nu 10 20 30 40 50	. Des Mot Clei Unc Agg	cription vilization aring & lassifie regate halt Co	n Grubbing d Excavation : Base oncrete 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 Item Number + 641 (+ 201 (+ 202 (+ 303) + 303 · + 413	m 0100 0102 0183 5912 4263 4263 (B) 0464	Lock		L	Row = 1 Nu = 1 2 3 4 5 6	Line Nu 10 20 30 40 50 60	. Des Mot Clea Unc Agg Asp 36	cription aring & lassifie regate halt Co Inch R	n Grubbing d Excavation : Base oncrete Hot Mix Typ RCP Culvert Class	ш	Qua 1.00 10.00 50,000.00 40,000.00 38,000.00 1,000.00	(T/O) Quantity 1.00 10.00 50,000.00 45,000.00 35,000.00 1,024.00	Ton Ton Ton Linea	
Pay Iten Number + 641 (+ 201 (+ 202 (+ 303 3 + 303 -	m 0100 0102 0183 5912 4263 (B) 0464 0220	Lock		L	Row 1 Nu 1 2 3 4 5	Line Nu 10 20 30 40 50	. Des Mot Cle: Unc Agg 36 10 1	cription vilization aring & lassifier halt Co Inch PV	n Grubbing d Excavation : Base oncrete Hot Mix Typ	; III 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	Meas Lump Acre Ton Ton Linea	

• Open the pay item record and checking/unchecking the Suspend box

ay Item & Proposa	integrater i	ay Item Record 🛛 🕲					
Pay Item Number: *	800 0400						Line Number: 90
Description:	4 Foot Diameter Ma	anhole					Alternate: BASE
							Suspend:
Quantity							\
Lock Quantity: Pa	ay Quantity:	Forecast (T/O) Qty:	Unit of Measure:	Qty Variance:	Qty Variance %:	Qty Variance Group:	
	16.00	16.00	Each •	- 0.00	0.00	Even Run	
Price							

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