

PROJECT COST MANAGEMENT



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INTERMEDIATE INTRODUCTION

Course Description

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

Course Objectives

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

- Review and report on project information
- Integrate with MS Excel and scheduling software (MS Project or Oracle Primavera)
- Manage quotes and use additional time-saving tools

How to Use this Manual

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

Lessons

The following lessons are covered in this course:

	Course Lessons
Lesson	Торіс
Lesson 8	Quote Management
Lesson 9	Reporting
Lesson 10	Data Reproduction
Lesson 11	Excel Integration
Lesson 12	Schedule Integration
Lesson 13	Cash Flow
Lesson 14	InEight Estimate Calculators
Lesson 15	Cost Item Assemblies

Lesson Format

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

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

Call-Outs

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

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

NOTE Notes are for critical information you need to know.

Ongoing Use

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

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LESSON 8 – QUOTE MANAGEMENT

Lesson Duration: 60 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Create and publish RFQs
- Define quote pricing
- Compare and award quotes
- Create and analyze scope items

Lesson Topics

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8.1 QUOTE MANAGEMENT OVERVIEW

8.1.1 Quote Management Workflow

When you make the decision to send out RFQs (Requests for Quote), as the estimator you will outline the specifications for the request, select the vendors you wish to contact, and issue the request for quotes.

When you receive quotes back from vendors, you can enter their pricing into InEight Estimate, where you can compare them, award them, and update your CBS costs in one fluid process without the need to re-enter data in multiple locations. InEight Estimate lets you enter multiple vendor quotes to enable price comparison.

TIP

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

InEight Estimate provides a built-in workflow for managing your quotes, consisting of three steps:

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

InEight Estimate has a separate form to manage each step:

- 1. Request for Quote (RFQ) Register
- 2. Quote Register
- 3. Quote Comparison & Award



8.1.2 Quotes and Quote Groups

Typically, an estimate contains two types of quotes:

- 1. Quotes for resources (materials, equipment) purchased or rented from suppliers.
- 2. Quotes for subcontracted work.

In InEight Estimate, quotes from suppliers are managed at the resource level. In other words, you can use material resources to represent the items purchased from the supplier.

For the cost items in your project that you plan to subcontract, you can manage quotes at the cost item level, using the cost items themselves as the descriptions on the quote request.

You can use Quote Groups to group together multiple resources or cost items that will be sent in an RFQ package. Using quote group tags can save a great deal of time generating packages of items to request quotes for.

8.1.2.1 Resource Level Quote Groups

Resource Rate Register 🛛 🔘

When sending out quotes, you may want to organize your resources into groups based on the type of material, such as pipe, aggregate, or concrete. When creating Requests for Quote, you will be able to select your pre-defined quote group and it will bring all the related resources along with it. You can assign quote groups using a pre-defined tag called a Quote Group in the Resource Rate Register.

Below is an example of resources with a quote group assigned:

NC.3	ource Rut	c Register	•								
All	Labor	Construction	Equipment	Rented Construct	ion Equipment	Installed Ma	aterial	Installed Equipment	Suppli	es	Unique
Drag) columns he	ere to group									
	Resource Code	<u>1</u>	Description		Quote Group		Resour Descrip	rce File Ition		Unit Mea	of sure
	+ IECT		Cooling Tow	ers	Process Equipm	nent Install	Standa	rd Installed Equipment F	Rate	Each	ı
	+ IEFC		Feeder Con	trols	Landscaping W	/ork	Standa	rd Installed Equipment F	Rate	Each	ı
	+ IEHS		Heating Sys	tem	Process Equipm	nent Install	Standa	rd Installed Equipment F	Rate	Each	ı
	+ IEPHP		Pump High P	ressure	Commercial Wo	ork	Standa	rd Installed Equipment F	Rate	Each	ı
	+ IERMT		Raw Materia	al Tank	Concrete Mate	rials	Standa	rd Installed Equipment F	Rate	Each	ı
	+ IERS		Recovery S	ystem	Process Materi	als	Standa	rd Installed Equipment F	Rate	Each	ı
	+ IEST		Separator T	ank	Process Materi	als	Standa	rd Installed Equipment F	Rate	Each	ı

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

Со	st Breakdown Struc	ture (CBS)	Register	Resource Rate Reg	ister R	equest for Quote	(RFQ) Register 🛛 🕲				
Dra	g columns here to grou	ıp									
	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
\rightarrow						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	<u>=</u>		Status	Response Deadline Date
÷	Guardrail It	ome		Nou	1/2/2020
*	L	2	<u>0</u>	pen	
Ŧ		Đ	N	ew	
		8	D	elete	
		*	C	u <u>t</u>	
		٦	C	ору	
		Ē.	<u>P</u> a	aste	
		+	<u>F</u> i	ll Down	
		묊	Li	nk this field	d to Excel
		E.	<u>U</u> 1	nLink 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.

🗎 Pu 🕀 Cr	iblish eate Quote										
Pi	ocess										
Requ	est for Quote (RFC	() Register	1 st for Quote	e (RFQ) Recor	d ©				(3	
-Des	cription		•			-		-5	Status	<u> </u>	
Gu	ardrail Items							^		New	
									Published Date		
						_		· · ·			
Res	nonse Deadline Dat	e: 6/28/2019	* Respons	se Deadline Tim	e: 11:00:00 AM						
The state	There a Contract of Contract o										
Line	e Items Terms & C	Conditions Selle	er Companies Attacr	nments Setur	2						
Res	cources Cost Iten	IS									
Drag	columns here to gro	up			Fi	nd: [Search Fo	r] …	Saved views: Pr	revious View		-
	CBS Position Code 들	RFQ ID	Quote Group 🚊 Tag	Optional Code	Description	Quantity	Unit of Measure	Currency	Tag 1	Tag 2	Tag 3
>	18	18	Guardrail Work	1500 0 100	Guardrail Typ	1,000.00	Linear Feet	U.S. Dollar	Estimat	Guardrail	
	19	19	Guardrail Work	1500 0200	Guardrail Typ	200.00	Linear Feet	U.S. Dollar	Estimat	Guardrail	
*											
4											►
						ОК	Cance	el New	. < Pr	ev	Next >

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

Cost Item Identification	
Use the following field: CBS Position Code	•
Please select from the following options:	
Create RFQ from scratch	🛆 Description
O 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?	

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.

Lin	e Items	Terms & Con	ditions Sel	ler Companies	Attachm	ents Se	up				
Re	sources	Cost Items									
Dra	g columns	here to group			Find:	[Search F	or]	· Sa	aved views: Pr	evious View	•
	CBS Position	Code 🖹 🔻	RFQ ID	Quote Group Tag	1	Optional Code	Descriptio	n	Quantity	Unit of Measure	Currency
\rightarrow	18		18	Guardrail Wo	rk	1500 0100	Guardrail	Тур	1,000.00	Linear Feet	U.S. Dollar
	19		19	Guardrail Wo	rk	1500 0200	Guardrail	Tvn	200.00	Linear Feet	U.S. Dollar

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.

Line Items	Terms & Conditions	Seller Companies	Attachments	Setup	
Buyer's Spec	ial Terms & Conditions –				
Any penaltie	s assessed by the owne	er due to quality contr	ol compliance dev	ations by the supplier will be deducted from teh supplier's	s payment.
					~
RFQ Instruct	tions				~
RFQ Instruct	tions Ict site super John Smith	n @ 623-555-7862 for	delivery instruction	rs.	~

8.2.3.3 Seller Companies

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

	sponsed	eaunie Date. 1/3/202	20	· ·	Response Dead	line line:	11:00 AM			
Lin	e Items	Terms & Conditions	Seller Co	mpanies	Attachments	Setup				
Dra	g columns	here to group								
	Compan Name	у	<u>-</u>	First Name	Last Name	Status	Publish Item Quantities	Publish by Fax	Fax	Publish by Email
\rightarrow	Example	Sub #1 Harry Belefor	ny	Harry	Belefony	New	✓	\checkmark	222-221-2	~
	Example	Sub #2 Mel Blank		Mel	Blank	New	✓	~	222-222-1	\checkmark
	Example	Sub #3 Frank Matty		Frank	Matty	New	✓	~	222-222-3	\checkmark
*										

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.

Respon	se Deadline Date:	1/3/202	20	• Re	esponse Deadl	ine Time:	11:00 AM		
Line Ite	ns Terms & Co	nditions	Seller Co	mpanies	Attachments	Setup			
)rag colu	imns here to group)							
-									
File	Name 📃	Descrip	otion	Location	File Type	File	e 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.

ResponseD	eadline Date: 1/3/20	20 👻 I	Response Deadl	ine Time:	11:00 AM	
Line Items	Terms & Conditions	Seller Companies	Attachments	Setup		
	Tag 1:	•	Notes			
	Tag 3:	-]			
RFQ Publica	ation Settings					
Cost Item I	Identifier: CBS Pos	sition Code 🛛 👻				
 ✓ Include ✓ Include ✓ Include ✓ Include 	RFQ Instructions Buyer's Special Terms Notes Attachments	& Conditions				
 ✓ Publish ✓ Publish ✓ Publish 	Item Quantities By Fax By Email					

8.2.6 Publish an RFQ

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

When you complete all of the fields that are required for this RFQ, you are ready to publish the RFQ, To do so, select all of the vendors that you want to receive the RFQ and click **Actions > Publish** on the RFQ Record ribbon.

Step by Step — Create and Publish an RFQ

- 1. Open your job.
- 2. From the InEight Estimate landing page, select the **Quote** tab.
- 3. Select Request for Quote (RFQ).
- 4. From the Actions tab, click on the **New** icon to create a new RFQ.
- 5. Select **Create RFQ from Quote Group Tag(s)**, leaving the checkboxes checked to only show quote groups and resources that are being used.
- 6. Select a **description** from the panel.

New RF	Q
Cost Item Identification	
Use the following field: CBS Position Co	de 🔹 👻
Please select from the following options:	
○ Create RFQ from scratch	Description [Uncheck All]
Oreate RFQ from Quote Group Tag(s)	Blanks]
Only show Quote Group tags that are currently utilized in this job	Commercial Work Concrete Materials Cuardrail Work
On the resulting RFQ record, only list resources with utilization currently greater than zero	Landscaping Work Manhole Materials None
O Create RFQs using Default Seller data	Painting Materials Pipe Materials Process Equipment Install
This option scans the job for all Resources and Quote Groups utilized in the job. For any that are listed in the Address Book as 'Default Quotes' for the Sellers you select on the subsequent selection register, a new RFQ record will be added for each Seller listing their default items.	 Process Equipment install Process Materials Sign Work Structural Painting Aggregates
✓ Create separate RFQ records for	

7. Click **OK**.

- The Request for Quote (RFQ) Record is created with two aggregate line items
- The Description field is automatically filled with the name of the quote group

Description – Aggregates]								
Response Deadline Date: 12/27/2018 - Response									
Line Items	Terms & Cor	nditions	Seller Co	ompanies	Attack				
Resources	Cost Items								
Drag columns	here to group								
Code 🗎	Quot Tag	Quote Group Tag		Description					
→ MBR	Aggre	egates		Aggregat	e B				
MDIRTB	Aggre	egates		Dirt Class	В				

8. In the Response Deadline Date field, select **a date** two weeks from today, and for the Response Deadline Time, type a **time stamp** (e.g. 2:00 pm).

Response D	eadline Date:	1/31/20)20 -	Response Deadl	ine Time:	2:00 PM
Line Items	Terms & Con	ditions	Seller Companies	Attachments	Setup	

- 9. Select the Terms & Conditions tab.
- 10. Create and type in any special conditions in the Buyer's Special Terms & Conditions field.
- 11. Type in instructions in the RFQ Instructions field.

Response De	Response Deadline Date: 1/31/2020 - Response Deadline Time: 2:00 PM									
Line Items	Terms & Conditions	Seller Companies	Attachments	Setup						
Buyer's Special Terms & Conditions										
Prices are go	Prices are good for the duration of the contract Vices are good for the duration of the contract Vices are good for the duration of the contract Vices are good for the duration of the contract 									
RFQ Instruct	ions									
All items to be	e delivered to jobsite by	supplier's trucks			^					
					~					

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



- 13. Click on the Address book icon, and then select vendors.
- 14. Click OK.
- 15. Make sure **Publish by Fax** is checked for all sellers, and that they all have Fax numbers.
 - Also make sure Publish by Email in unchecked for each vendor

Re	sponse Dea	dline Date: 1/31/20	- 120	Response	e Deadline T	ime: 2:00 PM]				
Lin	e Items 1	Ferms & Conditions	Seller Compan	es Attachr	nents Se	tup					
Dra	g columns he	re to group				Find: [Search F	or]	Saved views	Previous	hew	٣
	Company Name	Ŀ	First Name	Last Name	Status	Publish Item Quantities	Publish by Fax	Fax	Publish by Email	Phone	Mobile Phon
	Example Ve	ndor 1 Pat Robert	s Pat	Roberts	New		×	222-123-1		111-123-2	
	Example Ve	ndor 2 Stan Mark	Stan	Mark	New	×	~	222-123-2		111-133-2	
	Commenter Ma	nder 4 DRE Leater	Cim Lootor	Clim	Manu			222.122.1		111 122 1	

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

Company =	First Name	Last Name
Example Vendor 1 Pat Roberts	Pat	Roberts
Example Vendor 2 Stan Mark	Stan	Mark
Example Vendor 4 DBE Lester Slim	Lester	Slim

17. Under the Actions tab of the record, select Publish to create your RFQ document.

6	-							
File	Setup	Estimate	Quote	Price	Execution	System	Actions	
📑 Pu	blish							
🕀 Cr	eate Quote							
Pr	ocess							
Cost Breakdown Structure (CBS) Register				Re	Request for Quote (RFQ) Register			Request for Quote (RFQ) Record

• MS Word opens the file automatically for you to review; and from here you can either print it or send it in an email as an attachment

Job: Training Job Traini TO: Company: Date Set 100 Hoi	ing Job - Maricopa County N	Io. TM2924 FROM:										
TO: Name: Par Company: Ext 100 Hoi		FROM:										
Name: Par Company: Exe 100 Hoi			TO: FROM:									
	it Roberts ample Vendor 1 0 Tenth Street imetown, AZ 889060	Name: Company:	Tom Cross Example Prime Contractor 1 400 First Street Suite 4000 Hometown, AZ 889004									
Phone: 111 Mobile Phone: Fax: 222 Email:	1-123-2134 2-123-1234	Phone: Mobile Phone: Fax: Email:	111-122-1111 222-112-2211									
Job Information:	Job Information: Training Job											
Owner:	Example Own	ner										
Job Type:	Highway and	General Engineering										
Job Location:	I-10 MP 100 f	to MP 120										
City:	Phoenix											
County:	Maricopa											
State / Province:	Arizona											
Country:	United States	5										
Bid Location:	Engineer's Of	ffice										
Bid Date:	1/6/2020											
Bid Time:	10:00 PM											
Measurement System:	English											

18. Click **OK** to save the RFQ Record.

8.2.7 RFQ Email Draft

When sending out Requests for Quotes (RFQ) on a bid, it is essential to be able to effectively communicate the project requirements to potential subs or suppliers to ensure you have good quote coverage within your estimate. Email RFQs open as a draft email message, giving you, the sender, the opportunity to control specifically what is sent and customize the message before sending it out to subs and suppliers.

	Marco and a second						161	182/ 1/0	
	↑ ↓ ₹	RFQ from InEight C	Corporation - SKIP	for Training Job - Infrastructure: Tr	aining Job - Maricopa C	ounty No. TM2924 - Me	essage (HTML)	63	- • ×
File Messag	je Insert	Options Format	Text Review	Help Q Tell me what y	ou want to do				
1°0 - 🥩	Times New Ro	✓ 12 <	I U 🖌	· <u>A</u> · <u>I</u> · <u>I</u> ·	<u>←</u> → … _№	8 98 0 -	ℤ- !	↓ № -	•
Send	Send Cc								
	Subject RFQ	from InEight Corporati	on - SKIP for	Training Job - Infrastructure: Training J	ob - Maricopa County N	lo. TM2924			
			R	EQUEST FOR Q	υοτατιο	N			
Job: Training Jo	ob-1 Training Job - M	laricopa County No. TM2	924						
TO:			FROM:						
Name: Company:	Name: Harry Belefony Name: Company: Example Sub #1 Company: 600 First Street Suite 6000 Hometown, AZ 889006		Tom Cross Example Prime Contractor 1 400 First Street Suite 4000 Hometown, AZ 889004						
Phone: Mobile Phone: Fax:	111-222-1111 222-221-2212	AMARINE T	Phone: Mobile Phone: Fax:	111-122-1111 222-112-2211					
Email:	charlieb1234@e	example.com	Email:						
Job Informat	tion:	Training Job-1 Training Job - Maric	opa County No. Th	12924	_				
Owner:		Example Owner							
Job Type:		Highway and Gener	al Engineering		1				
Job Location:		I-10 MP 100 to MP	120						
City:		Phoenix							
County:		Maricopa							
State / Province:	3	Arizona			_				
Country:		United States			-				
Bid Location:	Bid Location: Engineer's Office			-					
Bid Date:		1/6/2020			-				
Request for G	Quote (RFQ) I	nformation:							
Publication Date	: 8/21/2020 3:57 P	M							
Response Deadl	ine Date: 7/29/20	009 11:00 AM							

8.3 QUOTES

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

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

8.3.1 Sample Received Quote Scope Sheet

Overview – Received Quote Scope Sheet

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



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	Quote Register 🔘											
Dra	Drag columns here to group											
	Description 📃	RFQ Description	Quote Status	Seller	Company	Quote Total	Awarded Total	Currency				
	Aggregates	Aggregates	Accepted	Example Vendor 1 Pat Rob	Example Vendor 1	\$402,192.00	\$402,192.00	U.S. Dollar				
	Aggregates	Aggregates	Accepted	Examples Vendor 4 DBE Les	Example Vendor 4	\$0.00	\$0.00	U.S. Dollar				
	Aggregates	Aggregates	Accepted	Example Vendor 2 Stan Mark	Example Vendor 2	\$0.00	\$0.00	U.S. Dollar				
2	Asphalt Materials		Accepted	Example Vendor 1 Pat Rob	Example Vendor 1	\$1,115,97	\$1,102,50	U.S. Dollar				
4	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, Seller's Profile, Setup, and Minority.								
Hea	ader					_			Total	
------	-----------------	------------------	-----------------------	-----------------------	---------------	---------	----------	--	---	-------------
	Description	Pipe Materials				E		Optional Code:	Extended Price: 2	\$250,744.0
	Contact	Example Vendor 4	DBE Lester Slim 🛛 🔒 🔳	Phone:	111-122-1321	-		Date:	Item Taxes:	\$12,537.2
	Company Name	Example Vendor 4	DBE	Mobile:				Source:	Quote lax:	
	First Name	Lester		Fax:	222-132-1234			Currency: U.S. Dollar	Item Conditions:	\$0.
	Last Name	Slim		Email:				Status: Received	Special Conditions:	
	External Ref							Ignore: Reason:		1000 001 0
_	Diterioriteri								lotal:	\$263,281.2
Res	sources Cost I	tems 3						Special Terms & Conditions		×
)rag	columns here to	group Find	[Search For] ···	Saved views	Previous View	v	-	Buyer's Special Terms & Conditions		
	Code 🖦	Quote Group ៉	Description	No Solit	Free	Awarded	Duration			\bigcirc
4	MPP 10	Pipe Materials	Pipe 10" PVC SDR21			~		Seller's Special Terms & Conditions		
	MPP24	Pipe Materials	Pipe 24" PVC SDR35	 ✓ 		✓				^
	MPR36	Pipe Materials	Pipe RCP 36 In	✓		✓				~
*								Special Conditions Adjustments:	\$0.00	
								Distribute Special Conditions: Evenly U	sing Weighted Average	
								Include Special Conditions costs for unawarded	quotes in Comparable Totals	
								Drag columns here to group Find	[Search For] ··· Saved views: Previous View	-
								Row Number 🔚 Scope Item	Quote Group ៉ Included Amount % of Total	

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.

8.3.5 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

8.3.6.1 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

	Resources	Cost Items												
٥	rag columns	here to group							Find:	[Search For]	Saved views: Pre	vious View	-
	Package	Code	RFQ ID	Quote Group 😑	Optional Code	Description	No Split	Free	Awarded	Du	Quantity	Unit of Measure	Unit Price	Extended Price
		3.1	3.1		3.1	Excavation, scrapers	~			1	50,000.00	Cubic Yard	\$0.00	\$0.00
	P1	3.2	3.2		3.1	Excavation, trucks	\checkmark			1	50,000.00	Cubic Yard	P1	P1 \$200,000.00
	P1	3.3	3.3		3.2	Embankment	\checkmark			1	50,000.00	Cubic Yard	P1	P1
	P1	3.4	3.4			Rock Excavation	\checkmark			1	3,000.00	Cubic Yard	P1	P1

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
- Seller's Profile
- Setup
- Minority

File	Setup	Estimate	Quote	Price	Execution	System	Actions
🌄 New	Commitment	C					
		Refresh	Default Data Blocks				
	Edit	Tools	View				

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

Buye	er's Special Terms (& Conditions						
							^	
_							~	<u></u>
∠ s	Geller's Special Tern	ns & Conditions						.
							0	
_								_
Spec	cial Conditions Adjı	ustments:	\$0.00					
Spec Dist	cial Conditions Adji ribute Special Cond	ustments: ditions: Evenly 	\$0.00) Using Weighted Aver	age				
Spec Disti Ir	cial Conditions Adji rribute Special Cono nclude Special Cono	ustments: ditions:	\$0.00) Using Weighted Aver ded quotes in Compara	age ble Totals				
Spec Dist] Ir Drag	cial Conditions Adju ribute Special Cono nclude Special Cono g columns here to gr	ustments: ditions:	\$0.00) Using Weighted Aver ded quotes in Compara Find: [Searc	age ble Totals h For] …	Saved views:	Previous View	Ţ	
Spec Dist] Ir Drag	cial Conditions Adju tribute Special Cont nclude Special Cont g columns here to gr Row Number	ustments: ditions: ditions costs for unaward roup Scope Item	\$0.00) Using Weighted Aver ded quotes in Compara Find: [Searc Quote Group =	age ble Totals h For] ··· Included	Saved views:	Previous View % of Total	• Notes	
Spec Dist]Ir Drag	cial Conditions Adju tribute Special Conc nclude Special Conc g columns here to gr Row Number = 1	ustments: Evenly C ditions: ® Evenly C ditions costs for unaward roup Scope Item Mobilization	\$0.00) Using Weighted Aver ded quotes in Compara Find: [Searc Quote Group <u></u> Sign Work	age ble Totals h For] ···· Included	Saved views:	Previous View % of Total	• Notes	
Spec Disti]Ir Drag	cial Conditions Adju tribute Special Control g columns here to gr Row Number = 1 1 2	ustments: ditions: Evenly C ditions costs for unaward roup Scope Item Mobilization Survey/Layout	\$0.00) Using Weighted Aver ded quotes in Compara Find: [Searc Quote Group Sign Work Sign Work	age ble Totals h For] ··· Included / /	Saved views:	Previous View % of Total 4.55	• 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.



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

	ode 🚊 🛛 RFC	Q ID Quote Group	- Optional Code	Description	No Sp	lit Free	Awarded	Duration	Quantity	Unit of Measur
2	0	Sign Work	1600 0230	Type 4 Signs	[✓			1 1,000.00	Square Feet
					[
_		•								
pe	cial Terms & Co	nditions						×		
Buy	er's Special Term	s & Conditions			Special	Terms & Conditions		^		
					L <u>-</u>			0		_
2	Seller's Special Te	rms & Conditions								Ť
								^		-
	sial Canditiana A	diustas entre	¢0.00					~		- 11 au
	cial Conditions A	ajustments:	\$0.00							
Dis	tribute Special Co	nditions:	Using Weighted Ave	erade						+
Dis	tribute Special Co Include Special Co	nditions:	Using Weighted Ave ed quotes in Compar	erage rable Totals						+
Dis] : Dra	tribute Special Co Include Special Co ag columns here to	nditions:	Using Weighted Ave ed quotes in Compar Find: [Sea	erage rable Totals rch For] …	Saved views:	Previous View		.		•
Dis Dra	itribute Special Co Include Special Co ag columns here to Row Number =	nditions:	Using Weighted Ave ed quotes in Compar Find: [Sea Quote Group 🛓	rage rable Totals rch For] … Included	Saved views:	Previous View % of Total	Notes	•		÷
Dis Dra →	tribute Special Co Include Special Co ag columns here to Row Number =1	nditions: Evenly nditions costs forunaward group Scope Item Mobilization	Using Weighted Ave ed quotes in Compar Find: [Sea Quote Group Sign Work	erage rable Totals rch For] ··· Included	Saved views: Amount	Previous View	Notes	•		+
Dis Dra	tribute Special Co Include Special Co ag columns here to Number = 1 2	nditions: Evenly ditions costs forunaward group Scope Item Mobilization Survey/Layout	Using Weighted Ave ed quotes in Compar Find: [Sea Quote Group Sign Work Sign Work	rape rable Totals rch For] ···· Induded	Saved views: Amount \$500.00	Previous View % of Total 4.55	Notes	•		÷

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

Description:	Sign Items					Opt	ionalC	Code:		
Contact:	Example Sub #3 Frank Matty	🕒 🔳 🛛 Pho	one: 1	11-333-3434			I	Date:		
Company Name:	Example Sub #3	Mo	bile:				So	urce:		
First Name:	Frank		Fax: 2	22-222-3232			Curre	ency:	U.S. Dollar	
Last Name:	Matty	En	nail:				St	atus:	Received	
External Ref.:							Ig	nore:	Reason	:
ecial Terms & Co	nditions					2	×	Reso	urces Cos	st Items
uyer's Special Term	s & Conditions						^	Drag o	columns here	to group
						$\hat{}$		(Code 🛓	RFQ ID
Seller's Special Te	erms & Conditions							→ 2	20	
						0		*		
ecial Conditions A	djustments: \$0	.00								
istribute Special Co	nditions: (i) Evenly () Using	Weighted Average								
] Include Special Co	onditions costs for unawarded quo	tes in Comparable Tota	als							
rag columns here to	group Find:	earch For] ····	Save	ed views: Previ	ous View	•				
Row Number =	Scope Item Que	ote Group 🛓 🛛 In	cluded	Amount	% of Total	Notes				

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

8.3.8.2 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.

luye	er's Special Terms	& Conditions						
								0
2 s	eller's Special Ter	ms & Conditions						Ť
								^
	int on a distance with		±0.00					~
pec	ial Conditions Adj	justments:	\$0.00					
N 1 - 4								
Dist	ribute Special Con	iditions: Evenly 	Using Weighted /	Average				
_ Ir	ribute Special Con nclude Special Con	iditions: Evenly ditions costs for unaward) Using Weighted A led quotes in Comp	Average parable Totals				
_ Ir Drag	ribute Special Con nclude Special Con g columns here to g	iditions:) Using Weighted A led quotes in Comp Find: [S	Average parable Totals Search For] …	Saved views:	Previous View	-	
_ Ir Drag	ribute Special Con nclude Special Con g columns here to g Row Number =	nditions:) Using Weighted A led quotes in Comp Find: [5 Quote Group	Average parable Totals Search For] ··· Included	Saved views:	Previous View % of Total	- Notes	
_ Ir Drag	ribute Special Con Include Special Con g columns here to g Row Number = 1	iditions: Evenly Inditions costs for unaward roup Scope Item Mobilization) Using Weighted A led quotes in Comp Find: [5 Quote Group Sign Work	Average parable Totals Search For] ···· included	Saved views:	Previous View	Notes	
_ Ir Drag	ribute Special Con Include Special Con g columns here to g Row Number = 1 2	ditions: Evenly ditions costs for unaward group Scope Item Mobilization Survey/Layout) Using Weighted A led quotes in Comp Find: [5 Quote Group Sign Work Sign Work	Average parable Totals Search For] ···· Included	Saved views: Amount \$500.00	Previous View % of Total 4.55	Notes	
_ Ir Drag	ribute Special Con Include Special Con g columns here to g Number = 1 2 3	ditions: Evenly ditions costs for unaward group Scope Item Mobilization Survey/Layout Temporary Traffic contr) Using Weighted A led quotes in Comp Find: [S Quote Group Sign Work Sign Work . Sign Work	Average parable Totals Search For] ··· Included ··· ·· ···	Saved views: Amount \$500.00	Previous View % of Total 4.55	Notes	

8.3.8.3 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		
Seller can provide a	BOND for all work quoted	
Bonding Company:		
Bonding Agent: AM	IERICAN	
Bonding Phone:		
Add Bond Cost to t	ne Quote	
Cost of BOND to be ad	ded to quoted price :	
Rate/\$1,000: 🕨	\$30.00	
Bond Cost:	\$330.00	
Seller is INSURED as	a required by applicable law	
Insurance Comp	pany:	
Insurance Ag	gent: AMERICAN	
Insurance Ph	one:	
License		
Seller is LICENSED t	o perform all work quoted	
Lice	nsor:	
C	Class:	
	ID: EZ-License-A1	
Special Terms & Conditio	ns Qualifications Packages Taxes Seller's Profile Setup Mind	ority

8.3.8.4 Packages

Using the Packages feature allows you a way to arrange quotes into a collection which makes sense for packaging your quotes. You can determine how to intake quotes from subcontractors and classify them into a package grouping.

By creating a Package code within the Packages block, and giving it a dollar value, you can then assign that package code to one or many quote records. In this case, the subcontractor provided quotes for both on site and off-site concrete work. You can then determine which individual quotes go with the on site or off-site package. The Package Amount field carries over to the Extended Price field under the Cost Items tab.

Res	sources	Cost Items						Pa	ckages				
rag	; columns he	re to group Find:	[Search For] Sa	ved views: Previou	s View	-	Dra	g columns here	to group		Find: [Search For	.]
	Package	Code 🖮	RFQ ID	Unit Price	Extended Price	Currency	Default Tax Rate		Code 📃	Description	Amount		
T	P1	3.1		P1	P1 \$200,000,00	U.S. Dollar	0.00		P1	On Site	\$200,000.00		
	P1	3.2		P1	P1	U.S. Dollar	0.00		P2	Off Site	\$30,000.00		
	P1	4.1		P1	P1	U.S. Dollar	0.00	∣→					
ł	P1	4.2		P1	P1	U.S. Dollar	0.00						
	P1	4.3		P1	P1	U.S. Dollar	0.00						
1	P2	5.1		P2	P2 \$30,000.00	U.S. Dollar	0.00						
,	P2	• 5.2		P2	P2	U.S. Dollar	0.00						
	P2	20		P2	P2	U.S. Dollar	0.00						
ĸ									2				
										- different Ourskiefer	-	Collecto Des éta - Colece	Minarik
							+) op		ruruuris Qualifica	auons Fackages Taxes	sellers riollie Setup	1*III IOFTU

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

8.3.8.5 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.

Add Item Taxe	s to each Item's	Price			
Quote Tax] Add Taxes to t	he Quote	tal as a Percent	age of Total		
Tax Rate:	 0.00 		age of fotal.		
Total Tax:	\$0.00				

8.3.8.6 Seller's Profile

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

Seller's Profile				2	×
Address Book Notes					
ExampleSave for tra	aining AS NEEDED				^
					v
Alternate Contact Info	ormation				
Name:					
Email:					
Phone:					
Fax:					
Mobile:					

8.3.8.7 Setup

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

				×
Current Status				
RFQ Status:				
Last Update: 5/5/2020 7	7:05:03 PM			
Quote Origin: WMFarr				
Taos				
Tag 1: Pipe	~			
Tag 2:				
Tay 2:	*			
Tag 3:	Ψ.			
Notes				
				^
				~

8.3.8.8 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		×
Minority B	isiness Enterprise	
Seller	ualifies as the following type of MINORITY BUSINESS ENTERPRISE on this job:	
DBE	DBE Certification:	
MBE	MBE Certification:	
WBE	WBE Certification:	
OBE1	OBE1 Certification:	
OBE2	OBE2 Certification:	
OBE3	OBE3 Certification:	
OBE4	OBE4 Certification:	
OBE5	OBE5 Certification:	
OBE6	OBE6 Certification:	
OBE7	OBE7 Certification:	

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



8.3.9 Create a Quote from RFQ

Walk through the steps of creating a quote from an RFQ.



To create a quote from scratch, click the **New** icon on the Quote Register and fill in the quote details and seller fields manually.

Step by Step — Create a Quote from RFQ

- 1. Open your job.
- 2. From the InEight Estimate landing page, select the **Quote** tab.
- 3. Select Request for Quote (RFQ).
- 4. Open the **RFQ record** for which you've received quotes (e.g. Aggregates RFQ).



5. Select the Seller Companies tab and select the sellers for whom you need to create quotes.



- 6. From the Actions menu, select Create Quote.
 - InEight Estimate will create quotes for each of the sellers you selected



• A prompt indicates how many quotes were created, then click OK



- 7. Close the RFQ Record and the RFQ Register.
- 8. To open the Quote Register, select Quote from the InEight Estimate landing page.
- 9. Select **Quotes** from the Quote Management section.
 - The quotes that you created from RFQ are now listed on the Quote Register

Que	ote Register 🛛			
Drag	g columns here to group			
	Description 🚊	RFQ Description	Quote Status	Seller
\rightarrow	Aggregates	Aggregates	Accepted	Example Vendor 1 Pat Roberts
	Aggregates	Aggregates	Accepted	Example Vendor 4 DBE Lester Slim
	Aggregates	Aggregates	Accepted	Example Vendor 2 Stan Mark

8.3.10 Enter Quote Details

Now that you have quotes created, you can enter pricing.

Step by Step — Enter Quote Details

- 1. Open the Quote Record for a seller.
- 2. On the Resources tab, make sure No Split is <u>un</u>checked for all items.

3. Also on the Item Resources & Cost Items tab, now enter the following **unit prices** for the resources:

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

4. Click **OK** to close the Quote Record.

Step by Step — Create a Multi-packages Quote

- 1. From the InEight Estimate landing page, select the **Quote** tab.
- 2. Click on the **Quotes** icon under Quote Management.
- 3. Double click on an item (e.g. Pipe Materials).

Cos	st Breakdown St	ructure (CBS) R	egister	Quote Register	0	Quot	e Record
Drag	g columns here to g	jroup					
	Description	≞ ▼	RFQ Description		Quo Stat	te us	Seller
\rightarrow	Pipe Materials	_			Rece	eived	Example Vendo
◬	Pipe Materials				Rece	eived	Example Vendo
	Pipe Materials				Rece	eived	Example Vendo
◬	Pipe Materials				Rece	eived	Example Vendo
*							

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

Cost Breakdown Str	ucture (CBS) Register 🛛 🕲	Quote Regist	ter Quote Re	cord 🕲	
Header					
Description:	Pipe Materials for site improve	ements.			
Contact:	Example Vendor 1 Pat Rober	rts			0 🗉
Company Name:	Example Vendor 1				

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

Re	sources	Cost	Items	
Drag	g columns	here to	group	
	Code 🛓		Quote Group ៉	Description
<u>/4</u>	MPP 10		Pipe Materials	Pipe 10" PVC SDR21
	MPP24		Pipe Materials	Pipe 24" PVC SDR35
	MPR36		Pipe Materials	Pipe RCP 36 In
*				

- 8. Add a cost item under Cost Items.
- 9. Then, add another cost item under Cost Items.
- 10. On the Packages tab, enter the following 2 new records:
 - 1. Code: **P1**
 - 2. Description: On Site
 - 3. Amount: \$200,000
 - 4. Code: **P2**
 - 5. Description: Off Site

6. Amount: **\$300,000**

Pa	ckages		
Dra	g columns here	e to group	
	Code 📃	Description	Amount
	P1	On Site	\$200,000.00
\rightarrow	P2	Off Site	\$300,000.00
*			

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

Re	sources Cost	Items					_	Pa	ckages		
Dra	g columns here to	groEjnd: [Sea	arch For]	··· Saved view	ws: Previous	view -		Dra	g columns here t	o group	
	Package	Code	RFQ ID	Quote Group	Optional Code	Description	Na		Code 🛓	Description	Amount
	P1	7		Pipe Materials	800 0220	10 Inch PVC Force Main			P1	OnSite	\$200,000.00
0	P2 -	8		Pipe Materials	800 0330	24 Inch PVC Gravity Se			P2	Off Site	\$300,000.00
*								\rightarrow			

- 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.

Detai	i	Exampl Pipe Ma	e Vendor 1 aterials	Exampl WBE Pipe Ma	le Vendor 6 aterials	Example Vendor 1 Pipe Materials for site improvments			
1	\$22.51	🖉 P1	\$290,000.00	🔗 P1	\$300,000.00		\$200,000.00		
t .	\$52.84	🔗 P2	\$126,000.00	🔗 P2	\$125,000.00	Ø P2	\$300,000.00		
							•		
\$42	8,694		\$416,000.00		\$425,000.00		\$500,000.00		
\$42	8,694		\$416,000.00		\$425,000.00		\$500,000.00		
\$42	8,694		\$0.00		\$0.00		\$0.00		
\$42	8,694		\$416,000.00		\$425,000.00		\$500,000.00		
	\$0.00		\$0.00		\$0.00		\$0.00		
		11/1	3/2019 4:1	11/1	3/2019 4:4	11/1	3/2019 4:3		

• The Package Price can quickly be modified in the Quote Comparison and Award form by selecting the Edit Package action in the Actions tab or by using the right click context menu.



8.3.11 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.

C	st Breakdown Struc	ture (CBS) Register	Quote	e Register	Quote Com	Quote Comparison & Award - Resources 🔹											
Dra	ag columns here to grou	p								F	nd: [Search For]	··· Saved views	: Sta	andard View			
	Resource 🛓	Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Ve Asphalt Ma	endor 1 terials	Example Vendor 2 Asphalt Materials	Example Vendor 3 Pipe Materials	Exam DBE Pipe I	ple Vendor 4 Materials			
	MAAM	Asphalt Mix (Finish)		36,750.00	Ton	\$31.50	\$34.13	\$34.13	10	\$31.50	835.70	\$34.13		\$34.13			
	MAFA	Fine Aggregate		1,860.00	Ton	\$7.25	\$8.19	\$8.19	10	\$7.25	87.35	\$8.19		\$8.19			
÷	MPP 10	Pipe 10" PVC SDR21		12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28		\$3.28	\$3.28	812.60	10	\$13.65			
	MPP24	Pipe 24" PVC SDR35		3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48		\$20.48	\$20.48	\$25.20	10	\$22.05			
	MPR36	Pipe RCP 36 In		1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13		\$34.13	\$34.13	831.50	10	\$32.55			
		Scope Items															
		Summary															
		Minority Type											0	DBE			
		Quoted Total					\$1,406,973.75	\$0.00	\$1,17	1,100.70	\$1,325,646.00	\$266,616.00		\$271,471.20			
		Comparable Total	<				\$1,406,973.75	\$1,406,973.75	\$1,30	8,747.30	\$1,463,292.60	\$1,535,943.15		\$1,540,798.35			

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

÷	Print	🔉 By Quote Group	😪 Set All to I	Reviewed	۵.		iplicate Quote 🔗 Pa	dkage Entire Quote	Award	🔒 Lock 🛛 🔜 🦽	Quoted Items	💷 Zero Items	
à	Preview	🛸 All Quote Group	Set All to	Not Reviewed		2 10 19	nore Quote 🛛 🖉 Ed	it Package	Award And Lock	G Unlock	🔝 Unit Price	Scope Items	
e	Export to Excel	🗐 All Quote Items			Edit Resource	Edit Quote				Edit Price	Substitute Values	s 💬 Ignored Quo	
	Print	Layout	Quote Gro	up Status	Resources			Quites				View	
Cos	st Breakdown S	tructure (CBS) Regi	ster Quol	te Register	Quote Con	nparison & Award -	Resources ©						
Drag	g columns here to	group											
	Resource E	E. Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Vandor 1 Asphalt Materia	Example Vendor 2 Asphalt Materials	Example Vendor 1 Pipe Materials for site improvements	Example Vendor 4 DBE Pipe Materials	
÷	маам	Asphalt Mix (F	inish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	🕴 🖉 🕴 \$31.50	& \$35.70	\$34.13	\$34.1	
	MAFA	Fine Aggrega	e	1,860.00	Ton	\$7.25	\$8.19	\$8.19	🛊 🔗 🛛 \$7.25	8 \$7.35	\$8.19	\$8.1	
	MPP10	Pipe 10" PVC	SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28	\$3.28	\$3.28	8 \$12.60	13.6	
	MPP24	Pipe 24" PVC	SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48	\$20.48	\$20.48	825.20	🔋 🔗 🛛 \$22.0	
	MPR36	Pipe RCP 36 I	n	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13	\$34.13	\$34.13	831.50	\$ \$32.5	
		Scope Item	s										
		Summary											
		Minority Ty	æ									🕗 DE	
		Quoted Tol	al				\$1,406,973.75	\$0.00	\$1,171,100.70	\$1,325,646.00	\$266,616.00	\$271,471.2	
		Comparable	Total				\$1 406 973 75	\$1 406 973 75	\$1 308 747 30	\$1 463 292 60	\$1 535 943 15	\$1 540 798 3	

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

• Check the default data blocks for any information you want to add to your duplicate quote.

ost Breakdown St	ructure (CBS)	Register (uote Registe)	r Qu	iote Comparison 8	& Award - Re	sources	Quote Re	cord ©				-
Header												Total	
Description:	Asphalt Mate	rials(Copy)						Optional	Code:			Extended Price:	\$1,062,834.0
Contact	<ad-hoc add<="" td=""><td>tress></td><td>۱</td><td>Phone</td><td></td><td></td><td></td><td></td><td>Date:</td><td></td><td>-</td><td>Item Taxes:</td><td>\$53,141.7</td></ad-hoc>	tress>	۱	Phone					Date:		-	Item Taxes:	\$53,141.7
Company Name:				Mobile	-			Sc	ource:		•	Quote Tax:	
First Name:				Fax				Curr	rency: L	U.S. Dollar	•	Item Conditions:	\$0.0
Last Name:				Email				s	tatus: R	Received		Special Conditions:	
External Ref.:								Ig	nore:	Reason:		Total:	\$1,115,975.7
Resources Cost I	ems							Minority					×
ran columns here to r	roup	Find: Search For.		Saved view	s: Previous View		-	Minority Busine	ss Enterp	orise			
			Ontrand					Seller quali	fies as th	ne following type of MINORIT	TY BUSINESS ENTERPRISE	on this job:	
Code 🛓 🕴	FQ ID	Quote Group 🖮	Code	Description	n	No Split	Free	O DBE DBE	E Certifica	ation:			
>								MBE MBE	E Certifica	ation:			
								WBE WBE	E Certific	ation:			
								O OBE1 OBE	E1 Certific	cation:			
								O OBE2 OBE	E2 Certifi	cation:			
								0.0852 085		antian.			
								0 0000 000		cation.			
								O OBE4 OBE	E4 Certifi	cation:			
								OBES OB	ES Certifi	cation:			
								OBE6 OBE	E6 Certifi	cation:			
							۰.	Special Terms 8	& Conditio	ons Qualifications Packag	es Taxes Seller's Profi	e Setup Minority	
											ОК	Cancel New	< Prev Next >

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

Exercise 8.1 — Quote Management

When you receive quotes from vendors, you will need to record their pricing and conditions in their InEight Estimate quote records. In this exercise, you will practice entering quote details. Enter the following Quote Record details, using the Training Job:

Quote Name: Aggregates	Seller Name: Example Vendor 2 - Stan Mark	
Resource Code	Description	Unit Price
MBR	Aggregate Base Rock	\$7.45
MDIRTB	Dirt Class B	Not Quoted (delete)
	Special Instructions Seller is NOT willing to split	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
	Enocial Instructions Coller is NOT willing to split i	itoma

Special Instructions Seller is NOT willing to split items.

Resource Code	Description	Unit Price
Quote Name: Aggregates	Seller Name: Example	Vendor 4 - Lester Slim
Resource Code	Description	Unit Price
MBR	Aggregate Base Rock	\$8.15
MDIRTB	Dirt Class B	FREE
	Collogia NOT willing to	andit it a man

Special Instructions Seller is NOT willing to split items.

You should end up with the following results

Description	RFQ Description	Seller	Contact Name	Quote Total
Aggregates	Aggregates	Example Vendor 4 DBE Lester Slim	Slim, Lester	\$408,834.56
Aggregates	Aggregates	Example Vendor 2 Stan Mark	Mark, Stan	\$373,719.94
Aggregates	Aggregates	Example Vendor 1 Pat Roberts	Roberts, Pat	\$402,192.00

Congratulations, you have completed this exercise!

8.4 QUOTE COMPARISON & AWARD

Now that you've received quotes and entered pricing information, you will compare them to determine which is the preferred vendor or contractor to carry their pricing in your estimate. The Quote Comparison & Award forms improve visibility into comparative analytics, while increasing efficiencies in populating the estimate with quoted values.

The Quote Comparison & Award screen is designed to closely match the layout of a vendor comparison sheet. It's designed to show all scope items with prices provided by multiple vendors and substitute pricing where items have been excluded.

Now that you've entered contextual quote information in the Quote Register, the Quote Comparison & Award screen provides you with the ability to make better, and more efficient determinations for awarding the quote.

8.4.1 Quote Comparison & Award Overview

To open the Quote Comparison & Award form, select **Quote > Quote Comparison & Award**.

	Name	Definition
1	Resource and Cost Item Filter	You can show either your quoted resources or cost items.
2	Quote Group Filter	This section provides checkboxes to further filter your items. The Quote Group Filter allows you to mark the quotes as reviewed.
3	Quote Description and Vendor	 Your quotes display with the vendor name plus the quote description. Awarded items have an award symbol If an item is designated as No Split, it has a chain link icon Awarded and Locked items have a lock symbol next to the award symbol
4	Cost Source Type	The cost source can either be a Plug or Detail type.

Overview – Quote Comparison and Award Form

Address Book	Quote Group Tags	Request For Quote (RFQ) Quote Manage	Quotes ement	Resources Quote Comp	Cost Items	Reports Reports									
Quote C	omparison & Award - C	Cost items 🛛	Quot	e Register											
Quote	Group(s) 2	×	Dra	ag columns here to g	oup							±			Find: [Sea
	Description 📄	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, Sitework
✓	Guardrail Work			18	Guardrail Type	2	1,000.00	Linear Feet	\$24.00		\$25,000.00	\$50,000.00	🔋 🔗 🛛 \$24,000.0	0 🔗 \$25,000.00	\$50,000.00
	Sign Work			19	Guardrail Type	ЗА	200.00	Linear Feet	\$31.00	\$6,200.00	\$7,000.00	\$7,000.00	🚦 🔗 🛛 \$6,200.0	0 🔗 \$6,000.00	\$7,000.00
					Scope Items										
			→		Summary										
					Minority Type										
					Quoted Total						\$32,000.00	\$0.00	\$30,200.0	9 \$31,000.00	\$50,000.00
					Comparable Tot	al <					\$32,000.00	\$57,000.00	\$30,200.0	9 \$31,000.00	\$57,000.00

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 Comp	arison & Award - Cos	t iten	is O											
Quote Grou	p(s)	×	Drag columns here to gro	.p					-		Find: [Search For] …	Saved views: Sta	nderd View 👻
	Description 😑	Re A	CBS Position Code 🖮	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detai	C&H Concrete Construction, Inc. Conc. Le Plecement	Khopp Construction Concrete Formwork	Morin Concrete Contractors Concrete Placement	Case Construction Concrete Formwork
	Concrete, Sitework		/ 3.4.1	formwork	1.00	Lump Sum	\$2,317,240.00	\$2,317,240.00	\$3,281,200.00	\$2,525,200.00	\$7,525,100.00	Ø 2525100	\$2,525,200.00	\$2,317,240.00
v	Concrete, Structural		3.4.2	place and finish	1.00	Lump Sum	\$285,000.00	\$285,000.00	\$375,500.00	\$285,000.00	1 🖓 \$285,000.00	\$285,000.00	8 \$294,000.00	\$548,567.00
	Doors & Windows			Scope Items										
	Electrical			Summary										
	Finishes (DIV 9)			Minority Type										
	Fire Protection			Quoted Total					\$3,656,700.00	\$0.00	\$285,000.00	\$2,525,200.00	\$294,000.00	\$2,865,807.00
	Foundations			Comparable Total	<				\$3,656,700.00	\$2,810,200.00	\$2,810,200.00	\$2,810,200.00	\$2,819,200.00	\$2,865,807.00
	HVAC													
	Landscaping Work													
	Masonry													
	Plumbing													
	Rebar Install													
	Scaffolding													
	Sheet Metal													
	Sitework													

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.

									HD Engin Group Concrete	eering e, Sitework
18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	9	\$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	Ψ.	\$15,000.00	t .	\$15,000.00		
27.1	Electrical Work	1.00	Each	\$5,000.00	Ψ.	\$5,000.00	1	\$5,000.00		

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

ntegrations	Actions							
(,m ²)	🖗 Duplicate Quote	🛞 Package Entire Quote	🗍 Award	Lock		Quoted Items	📨 Zero Items	🖆 Configure Totals
Ž	🖉 Ignore Quote	💮 Edit Package	🚔 Award And Lock	🔒 Unlock	CCI	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	ų	\$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	in Default Data Blocks
		View	

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

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

9	Substitute Rank	ing X
Awa Low	irded Splittable Quote vest Splittable Quote ail	
Plug)	
	OK	Cancel
	OK	Cancel

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

Example Vendor 1 Pipe Materials for s improvement 2	ite	Architectural Designs, Inc. Electrical Work
♂ P1 \$300,000.	.00	
	.00	
\$4,200.	00	
	H	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.

Prie Cost E	nt oview port to Excel Print Greakdown Si	Quote Gr All Items Layout	oups 😡 S Qu Qu	Set All	to Reviewed to Not Reviewed Froup Status Request for (Cost 1	it (tems	Edit Qi Award	uote I And Lock Quote Request for	Lock	Quoi	ed Items Price titute Values Quote R	 Ignor ∑ⁿ Confi egister 	e Items ed Quotes gure Totals Viev Quote Q	Set Subs	titute Ranking Dat & Award - Cost ite	efault a Blocks) Session Auto Av Tools	Recap ward +			
Quot	e Group(s)			×	Drag columns	here to gro	up															Find:
	Descr Electr	ription 😑	Reviewed		CBS Position	Code	Description			1	Forecast (T/O) Quantity	Unit of Me	Unit Cost	Total Cost (Forecast)		Plug	Detail	Examp Guard	le Sub #2 Rail Items	Exampl Guard I	e Sub #1 Rail Items	HD Engineering Group Concrete, Sitework
	Electr	rical work 2			18		Guardrail	Type 2			1,000.00	Linear	\$24.00	P	\$24,000.00	\$25.00	\$25.00	10	\$24.00	Ø	\$25.00	\$50.00
	Electr	rical work 3			19		Guardrail	Type 3A			200.00	Linear	\$31.00	2	\$6,200.00	\$35.00	\$35.00	10	\$31.00	0	\$30.00	
	Guard	drail Work			17		Toll Booth				1.00	Each	\$40,00	2	\$40,000.00	\$25,000.00	\$25,264.55		\$25,264.55	10	\$40,000.00	
	Pipe 1	Materials					Scope Iter	ms														
	Sign \	Work					Summary															
							Minority T	ype														
							Quoted Te	otal								\$57,000.00	\$25,264.55		\$30,200.00		\$71,000.00	\$50,000.00
							Comparab	ble Total		<						\$57,000.00	\$57,264.55		\$55,464.55		\$71,000.00	\$82,264.55
							Awarded	Total								\$0.00	\$0.00		\$30,200.00		\$40,000.00	\$0.00
							Quoted It	tems Tota	əl							\$57,000.00	\$25,264.55		\$30,200.00		\$71,000.00	\$50,000.00
							Special Co	onditions								\$0.00	\$0.00		\$0.00		\$0.00	\$0.00
					→		Last Upda	ate										7/29	/2009 2:21:	11/1	3/2019 9:0	11/13/2019 1:0

8.4.4 Display Ignored Quotes

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

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

Example Vendor 2 Asphalt Materials	Example Vendor 1 Pipe Materials for site improvements	Example Vendor 4 DBE Pipe Materials
81,311,975.0°	• Award	
\$13,671.0	Award And Lock	
	Lock	1,990.00
	 <u>U</u> nlock	6,150.00
	Edit Quote	3,331.20
5	Duplicate Quote	_
4	🖉 🛛 lgnore Quote	
	😚 🛛 <u>P</u> ackage Entire Q	uote DBE
	🖗 <u>E</u> dit Package	2
\$1,325,646.0 \$1,463,292.6	Edit <u>R</u> esource	0,798.35

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

0	Curre	ncy: U.S	S. Dollar		*				
	Sta	tus: Ign	ored						
	Ign	ore: 🗹	Reason:		*				
	Day	kagas		A Description					
	Pag	kayes		Do Not Use	H				
	Drag	; columns	here to gr	o Non Compliant	d:				
tend ce		Code 🛓	D	2					
	÷				П				
				×					

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.

			\$47,000.00	\$45,000.00	\$43,000.00	\$43,3	200.00	\$45,000.00	\$44,000.0
			\$47,000.00	\$0.00	\$11,000.00	\$30,2	200.00	\$13,000.00	\$31,000.0
					D	D		D	D
							•	DBE	
					Ø			Ø	
					\$500.00			Ø	
					Ø			Ø	
Square Till	\$15.00	¥10,000	<i>Q10,000.00</i>	\$15,000,000	Ç (11,000,000	φ10γ		\$15,000,00	\$10,00010
Square F	\$13.00	O \$13,000	\$15,000,00	\$13,000,00	\$11,000,00	\$13	oon on 📍 🛦	\$13,000,00	\$13,000.0
Linear Feet	\$31.00	> \$6,200,00	\$23,000.00	\$25,000.00	\$25,000.00	1 0° 324,0 2 00 56.0	200.00	\$25,000.00	\$25,000.0
Linear Feet	\$24.00	(Forecast)	\$25,000,00	\$25,000,00	\$25,000,00			\$25 000 00	
Unit of	Unit Cost	Total Cost		Detail	Example Sub #3	Example Sub #	#2 Exan	yle Sub #4 DBE	Example Sub #1
					Find: [Search For]		ved views:	Previous View	-
te Compariso	on & Award - C	ost items 🛛							•
				View			Tools		
		Edit Prices	Substitut	e Values 🗭 Ignored	Quotes 🛗 Default D	ata Blocks			
Award And I	Lock 🔓 Unlo		200 Unit Price	Scope It	ems 🔄 🚹 Set Subst	itute Ranking	📍 Auto Aw	ard 👻	
Award	Lock		(2) Quoted I	tems 🛛 🖾 Zero Iter	ms ∑ [≠] Configure	Totals	Session F	Recap	

8.4.5 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

ĥ.	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	C&H Concrete Construction, Inc. Concrete Placement	Knopp Construction Concrete Formwork	Morin Concrete Contractors Concrete Placement	* Case Construction Concrete Formwork	
	formwork	1.00	Lump Sum	\$2,339,113	\$2,339,113.70	\$3,281,200.00	\$2,525,200.00	\$2,525,200.00	\$2,525,200.00	\$2,525,200.00	\$2,339,113.70	
	place and finish	1.00	Lump Sum	\$0.00	\$0.00	\$375,500.00	\$0.00	\$285,000.00	\$285,000.00	\$ \$294,000.00	\$553,508.49	
	Scope Items										Unit Price: \$2,017,240	0.00
	Summary						2				Quote Tax: \$18,537.5	92
	Minority Type						•				Special Conditions: \$1	,000.00
	Notes								D	D	0	
	Quoted Total					\$3,656,700.00	\$0.00	\$285,000.00	\$2,525,200.00	\$294,000.00	\$2,892,622.19	
	Comparable Total	<		1		\$3,656,700.00	\$2,525,200.00	\$2,810,200.00	\$2,810,200.00	\$2,819,200.00	\$7,892,622.19	

8.4.6 Configure Totals

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

	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	
A Dptic	ons	Bottom			
	<u> </u>	Ŭ			

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

8.4.7 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	5	斗 By Quote Group	🖗 Set All to F	Reviewed	٠.	(A) 8	Duplicate Qu	ote 🛞 Pa	ckage Entire Quote	1	Award	e Lock	-1	💬 Quoted Items	585	Zero Items	🔊 Configure Totals	Session Recap	
🖏 Preview	1	🛸 All Quote Groups	🖓 Set All to I	Not Reviewed		L E	Ignore Quot	e 🕜 Ed	t Package	1	Award And Lock	🔒 Unlock	CG1	🔛 Unit Price	R	Scope Items	🚹 Set Substitute Ranking	📍 Auto Award 👻	
🛃 Export to	to Excel	🖄 Al Quote Items			Edit Resource	Edit Quote							Edit Prices	Substitute Value	s 💬	Ignored Quoter	🛗 Default Data Blocks		
Print		Layout	Quote Gro	up Status	Resources				Quotes						1	fiew		Tools	
Cost Break	kdown Stru	ucture (CBS) Regist	er Quot	e Register	Quote Cor	nparison & Awa	d - Resourc	es O											
Drag columns	s here to gr	oup													Fir	id: [Search F	ar] ··· Saved views	Previous View	-
Resourc	ce 🛓	Description		Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug		Detail	Ę	Example Vendor 1 Asphalt Materials	Example V Asphalt M	lendor 2 aterials	Example Vendor 1 Pipe Materials for site improvements	Examp D6E Pipe M	le Vendor 4 aterials			
MAAM		Asphalt Mix (Fini	sh)	36,750.00	Ton	\$3	1.50	\$34.13	\$34	1.13	\$31.5	e	\$35.70	\$34.13		\$34.13			
> MAFA		Fine Aggregate		1,850.00	Ton	\$	7.25	\$8.19	\$	8.19	🖁 🤗 🛛 \$7.2	5 @	\$7.35	\$8.19		\$8.19			
MPP 10		Pipe 10" PVC SD	R21	12,600.00	Linear Feet	\$1	3.65	\$3.28	\$3	3.28	\$3.2	1	\$3.28	\$12.60	10	\$13.65			
MPP24		Pipe 24" PVC SD	R35	3,000.00	Linear Feet	\$2	2.05	\$20.48	\$20	7. 48	\$20.4	1	\$20.48	825.20	10	\$22.05			
MPR36		Pipe RCP 36 In		1,024.00	Linear Feet	\$3	2.55	\$34.13	\$31	8.13	\$34.1	1	\$34.13	8 \$31.50	10	\$32.55			
		Scope Items																	
		Summary																	
		Minority Type													0	DBE			
		Quoted Total					\$,406,973.75	\$0	0.00	\$1,171,100.7	\$1,3	25,646.00	\$266,616.00		\$271,471.20			
		Comparable T	otal <				\$,406,973.75	\$1,406,973	3.75	\$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.

Capt Selle Quot Mino Note Exte	ion r te Description rity Type is inded Price	Visible V V V V V V V V V V V V V V V V V V V	Sort None None None None None None None
Selle Quot Mino Note Exte	r te Description rity Type ss inded Price		None None None None
Quot Mino Note Exte	te Description rity Type Is nded Price		None None None
Mino Note Exte Item	rity Type Is Inded Price	✓ ✓	None None
Note Exte Item	nded Price		None
Exte Item	nded Price		
Item	_		None
	Taxes		None
Quot	te Tax		None
Bond	ł		None
Item	Conditions		None
Quot	ted Items Total		None
Spec	ial Conditions		None
Quot	ted Total	\checkmark	None
Subs	titute Values		None
Com	parable Total	\checkmark	Ascending
Awa	rded Total		None

6. Select OK.

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

st Breakdown	m Structur	e (CBS) Register	Quote Register	Quote Cor	nparison & Award - I	Resources Ø													
g columns here	e to group												Find	I: [Search Fo	r] —	Saved vie	ws: Previous	View	
Resource Code	<u>k.</u>	Description	Utilization Count	Unit of Measure	Unit Cost (Scale 1)	Plug	Detail	Example Asphalt M	Vendor 1 Materials	Example Vendor 3 Asphalt Materials	2	Example Vendor 1 Pipe Materials for site improvements	Example DBE Pipe Mat	Vendor 4 terials					
маам		Asphalt Mix (Finish)	36,750.00	Ton	\$31.50	\$34.13	\$34.13	10	\$31.50	A \$35	5.70	\$34.13		\$34.13					
MAFA		Fine Aggregate	1,860.00	Ton	\$7.25	\$8.19	\$8.19	10	\$7.25	8 \$	7.35	\$8.19		\$8.19					
MPP 10		Pipe 10" PVC SDR21	12,600.00	Linear Feet	\$13.65	\$3.28	\$3.28		\$3.28	\$2	3.28	8 \$12.60	10	\$13.65					
MPP24		Pipe 24" PVC SDR35	3,000.00	Linear Feet	\$22.05	\$20.48	\$20.48		\$20.48	\$20	2, 48	8 \$25.20	:0	\$22.05					
MPR36		Pipe RCP 36 In	1,024.00	Linear Feet	\$32.55	\$34.13	\$34.13		\$34.13	\$34	<i>t. 13</i>	8 \$31.50	10	\$32.55					
		Scope Items																	
		Summary											_						
		Minority Type							D.		_		<u></u>	DBE					
		Ousted Total				¢1.406.972.75	60.00	Example I	Note		. 00	\$366,616,00		271 471 20					
		Comparable Total	4			\$1,406,973,75	\$1,406,973,75				2.60	\$1,535,943,15	51	540,798,35					
						+-,,	+					+-//-		,,					

8.4.8 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

Overview – Quote Groups Layout (continued)

	Name	Definition
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 Q	uote Group		٠.	(.*)	🖓 Dupli	cate Quote	😚 Pac	kage Enti	re Quote	Award			. 5	Quoted Ite	ems	📨 Zero Item
b, i	Preview	🦈 All Q	uote Groups	9		2	💋 Ignor	e Quote	🕎 Edit	t Package	1	Award	And Lock		21	🔐 Unit Price		📝 Scope Iter
ř e	Export to Excel	🙊 All Q	uote Items		Edit Resourc	e Edit Quote								Edit	Prices	Substitute	Values	💬 Ignored Q
	Print	La	yout		Resource	s			Q	uotes							V	liew
os	t Breakdown Str	ucture	(CBS) Regist	er	Quote Co	mparison & Awa	rd - Res	ources (•									
ag	columns here to gr	oup													Find: [Se	earch For]		Saved view
	Quote Group		<u>+</u>	Plug		Detail		Quote		Quote (Group Total							
, (Asphalt Materia 	als			\$0.0	0	\$0.00	\$1,1	71,100.70		\$1,171,1	100.70		(1)) —			
L						urbr	11-11-15		11-12-01-01			-		-	European	Mara da ant	E	Marada a D
	Code	≟_ Des	cription			Count	Measur	2	(Scale 1)		Plug		Detail		Asphalt N	Materials	Asphalt	Materials
	MAAM	Asp	halt Mix (Finish	1)		36,750.00	Ton			\$31.50		\$34.13	\$.	34.13	10	\$31.50	0	\$35.70
	MAFA	Fine	e Aggregate			1,860.00	Ton			\$7.25		\$8.19		\$8.19	10	\$7.25	P	\$7.35
		Sco	ope Items															
		Sur	mmary															
		M	linority Type															
		ç	outed Total	_(2						\$1,269	9,327.15	\$	\$0.00	\$1,3	171,100.70	\$1	,325,646.00
4		C	Comparable Tot	al	<						\$1,269	9,327.15	\$1,269,32	27.15	\$1,:	171,100.70	\$1	,325,646.00
-		A	warded Total:	\$1,17	1,100.70							\$0.00	4	\$0.00	\$1,:	171,100.70		\$0.00
Ę	 Pipe Materials 				\$0.0	0	\$0.00	\$2	71,471.20		\$271,4	71.20						
	Resource Code	🖹 Des	cription			Utilization Count	Unit of Measure	2	Unit Cost (Scale 1)	:	Plug		Detail		Example Pipe Mate	Vendor 3 erials	Example DBE Pipe Mat	Vendor 4
	MPP 10	Pipe	10" PVC SDR	21		12,600.00	Linear F	eet		\$13.65		\$3.28		\$3.28	Ø	\$12.60	10	\$13.65
	MPP24	Pipe	24" PVC SDR	35		3,000.00	Linear F	eet		\$22.05		\$20.48	\$.	20.48	Ø	\$25.20	10	\$22.05
	MPR36	Pipe	RCP 36 In			1,024.00	Linear F	eet		\$32.55		\$34.13	\$.	34.13	Ø	\$31.50	10	\$32.55
		Sco	ope Items															
		Sur	mmary															
		M	linority Type					3										DBE
		ç	Quoted Total				-				\$13	7,646.60	4	\$0.00	\$3	266,616.00	\$	271,471.20
		C	Comparable Tot	al	<						\$13	7,646.60	\$137,64	46.60	\$	266,616.00	\$	271,471.20
		A	warded Total:	\$271,4	71.20							\$0.00	4	\$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.

8.4.9 Compare and Award Quotes

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

Example Sub #3 Sign Items	Examp Guard	ole Sub #2 Rail Items	Example Sub #4 DBE Sign Items
\$25,000.00	10	\$24,000.00	\$25,000.00
\$7,000.00	10	\$6,200.00	\$7,000.00
∲ \$11,000.00	•	¢13 000 00	• 📣 ¢13,000.00
<mark>ا</mark>		Award And Lock	c
\$500.00 2	A <u>I</u>	<u>J</u> nlock	
	ଡ଼ା ହ <u>ା</u>	idit <u>Q</u> uote <u>)</u> uplicate Quote	DBE
D		gnore Quote	Junta
\$11,000.00		dit Package	,000.00
\$0.00	ef E	dit <u>C</u> ost Item	\$0.00

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

Examp Guard	ole Sub #2 Rail Items
	\$25,264.55
0	\$24,000.00
10	\$6,200.00

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

CBS Position Code	Description	Forec (T/O) Quan	Unit of Me	Unit Cost	Total Cost (Fore	Plug	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items
17	Toll Booth	1.00	Each	\$40,000	\$40,0	\$25,000.00	\$25,264.55	\$25,264.55	🚦 🔗 🛛 \$40,000.00
18	Guardrail Type 2	1,000.00	Linear	\$25.00	\$25,0	\$25,000.00		\$24,000.00	🛊 🔗 🛭 \$25,000.00
19	Guardrail Type 3A	200.00	Linear	\$30.00	\$6,00	\$7,000.00	\$7,000.00	\$6,200.00	\$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:	11/13/2019 9:0

NOTE

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

8.4.9.1 Open Status

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

Drag	g columns here to gro	up									Find: [Sear
	CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Example Sub #2 Guard Rail Items	Example Sub #1 Guard Rail Items	HD Engineering Group Concrete, Sitework
	18	Guardrail Type 2	1,000.00	Linear Feet	\$24.00	\$24,000	\$25,000.00		🚦 🔗 🛛 \$24,000.00	\$25,000.00	\$50,000.00
	19	Guardrail Type 3A	200.00	Linear Feet	\$31.00	\$6,200.00	\$7,000.00	\$7,000.00	🕴 🔗 🛛 \$6,200.00	\$6,000.00	\$7,000.00
		Scope Items									
		Summary									
		Minority Type									
		Quoted Total					\$32,000.00	\$0.00	\$30,200.00	\$31,000.00	\$50,000.00
\rightarrow		Comparable Total <					\$32,000.00	\$57,000.00	\$30,200.00	\$31,000.00	\$57,000.00

8.4.9.2 Award Status

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

iote Regi	pister	Quote	Comparis	on & Aw	ard - Cost ite	ns O													-
uote Gro	oup(s)		×	Drag colu	mns here to gro	up										Find: [Search For]	Saved vie	ws: Previous View	-
✓ ✓	Descri Electrical	iii. Work	Reviewe	CBS Pos	tion Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	.g	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
 Image: A set of the set of the	Guardrail	Work		17		Toll Booth	1.00	Each	\$40,000.00	\$40,000.00	\$25,000.00	\$25,264.55	\$25,264.55	\$40,000.00	\$25,264.55	\$25,264.55	\$25,264.55	\$25,264.55	\$25,264.5
×	Sign Work	k		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		\$50,000.00		
				19		Guardrail Type 3A	200.00	Linear Feet	\$30.00	\$6,000.00	\$7,000.00	\$7,000.00	\$6,200.00	🔋 🔗 🛛 \$6,000.00	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.00	\$7,000.
				20		Type 4 Signs	1,000.00	Square F	\$15.00	\$15,000.00	\$15,000.00			\$13,000.00	8 \$13,000.00				🔗 Off \$300,000.
				27.	1	Electrical Work	1.00	Each	\$5,000.00	\$5,000.00	\$5,000.00					\$3,500.00		83,700.00	
				→		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	\$385,764.5

8.4.9.3 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 Grou	ıp(s)	×
\checkmark	Description 🛓	Reviewed
\checkmark	Electrical Work	
\checkmark	Guardrail Work	\checkmark
 Image: A set of the 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. Open the **Training job**, and from the main InEight Estimate landing page select **Quote>Quote Comparison & Award**.
- 2. Select **Resources** on the Quote Comparison & Award ribbon.


3. Under Description, select Asphalt Materials.



- 4. Review the quotes to determine the lowest bidder:
 - Select the Configure Total icon in the tool ribbon to view additional captions
 - Both vendors have no split items for both resources.

Resource Code	Description		Utiliza Count	
MAAM	Asphalt Mix (Finish)		36,750.00	
MAFA	Fine Aggregate		1,860.00	
	Scope Items			
	Summary			
	Minority Type			
	Quoted Total			
	Comparable Total	<		
	Awarded Total			
	Quoted Items Total			
	Special Conditions			
	Last Update			

5. Example Vendor 1 has the lowest comparable amount, so award all to Vendor 1 by right clicking on the Example Vendor 1 Asphalt Materials and selecting **Award All**.



• By awarding Example Vendor 1 both resources, the award ribbon icon displays next to the unit price.

Detail	Exa Asp	ampl phalt	e Vendor 1 Materials	Example Vendor 2 Asphalt Materials			
\$34.13	1	ą	\$31.50	Ø	\$35.70		
\$8,19		ą	\$7.25	0	\$7.35		

- You could also change your mind and award Example Vendor 2 one of the resources. In this case, award resource code MAFA to Example Vendor 2.
- 6. Right click on \$7.35 under Example Vendor 2, and select Award.
 - You now have awarded resource code MAFA to Example Vendor 2.

Detail	Example Vendor 1 Asphalt Materials	Example Vendor 2 Asphalt Materials
\$34.13	🚦 🔗 🛛 \$31.50	\$35.70
\$8.19	\$7.25	🔋 🔗 🛛 \$7.35

8.4.10 Package Entire Quote

The Package Entire Quote function allows you to mark an entire quote as a package. This is beneficial if you are attempting to quickly update an existing detailed quote to a lump sum quote from the Quote Record or Quote Compare and Award form.

🖗 Set All to Review 🙊 Set All to Not Re	ed viewed Edit Cost Item	Edit Quote	uplicate Quote nore Quote	😚 Package Entire	e Quote 🚦 Awai	d And Lock 🔒 I	Lock Unlock Edit Price	Quoted Items Curit Price Substitute Value	 Zero Items Scope Items gnored Quotes 	Configure Totals	anking 👔 Auto Award + cks	
Quote Group Sta	tus Cost Items			Quotes					View		Tools	
Quote Con	aparison & Award - Cost	items O										•
columns here to group									Find: [Search For	.] Saved vi	iews: Previous View	•
CBS Position Code 🖹	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Plug	Detail	Harmon Construction Concrete, Sitework	Eagle Concrete Corp. Concrete, Stework	Barton Concrete Services, Inc. Concrete, Sitework	C&H Concrete Construction, Inc. Construction, Etimotek	_
3.1.1	Sidewalks	4,544.0	0 SQFT	\$9.89	\$44,939.07	\$44,939.07	\$44,939.07	♂ P1 \$206,000.00	₽1 \$242,500.00		Award All	
3.1.2	V curb	50.0	0 LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	@ P1	@ P1	8 P1	Award And Lock All	
3.1.3	Curb and Gutter	1,250.0	0 LF	\$34.51	\$43,133.12	\$43, 133. 12	\$43,133.12	@ P1	@ P1	& P1	CO LICK All	
3.1.4	Valley gutter	50.0	0 LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	@ P1	@ P1	@ P1		-11
3.1.5	Handicap ramps	159.0	0 SQFT	\$9.89	\$1,572.47	\$1,572.47	\$1,572.47	@ P1	@ P1	@ P1	Belit Quote	
3.1.6	Truncated domes	1.0	0 Lump Sum	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	@ P1	@ P1	@ P1	Duplicate Quote	
3. 1.7	Flow thru planter slab	125.0	0 LF	\$95.04	\$12,005.46	\$12,005.46	\$12,005.46	@ P1	@ P1	@ P1	Ignore Quote	
3. 1.8	Flow thru planter walls	125.0	0 LF	\$95.04	\$12,005.46	\$12,005.46	\$12,005.46	@ P1	& P1	& P1	A Package Entire Quote	
3.1.9	Median Infil	225.0	O CY	\$41.02	\$9,230.60	\$9,230.60	\$9,230.60	@ P1	@ P1	\$9,230.60	\$9,230.60	
3. 1. 10	Rolled curb adjacent to	50.0	0 LF	\$34.51	\$1,725.32	\$1,725.32	\$1,725.32	@ P1	@ P1	\$1,725.32	\$1,725.32	
3.1.11	Reinforcing	2,612,4	0 b	\$4,59	\$12,000.00	\$ \$12,000.00	\$1,306,20	@ P1	2 P1	\$1.305.20	\$1.306.20	

8.4.11 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	Edit Quote	Quote 🕜 Packag ote 🕜 Edit Pac	e Entire Quote kage	유 Award 한 Award And L	ock	Edit Prices	Quoted Items Jnit Price Substitute Values	Zero Items	Configure Totals Set Substitute Ranking Default Data Blocks	 Session Recap Auto Award +
Cost Items		Qi	iotes					View		Tools
Quote Comp	oarison & Award - Cost item	s 0								
columns here to g	roup						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 \$766,352.0
4.1.2	Precast Concrete Caps	1.00 Lump Sur		\$14,577.67	\$14,577.67	\$12,000.00	\$12,000.00	1 @ P1	\$12,375.47	& P1
4.1.3	Steel Embeds	Steel Embeds 1.00		\$12,148.06 🔎	\$12,148.06	\$10,000.00	\$10,000.00 <i>\$10,000.00</i>	🖁 🔗 P1	\$0.00	& P1
	Scope Items									
	Demolition									
	Caulking, Sealants &									
	Scafolding									Ø
	Shoring/Bracing							\$15,000.00	\$12,000.00	
	Testing/Inspection									
	Summary									
	Minority Type								🙆 МВЕ	
	Notes							D	D	D

Incomplete Quotes that are Scope Only can be viewed in the Quote Compare and Award form using the **Zero Items** toggle. These are quotes that have none of the Items priced. These quotes are displayed to the right of all the Comparable Quotes.

la By Quote	Group	💫 Set All to Re	view	red	TA P	P Duplicate Quote	e 🛞 Package	Entire Quote	🗍 Award	🔒 Lock	90	Juoted Items	⊠ Zero Itens 🖸	Configure Totals	Q Se	assion Recap
🖗 All Quote	Groups	💫 Set All to No	ot Re	viewed		🖉 Ignore Quote	🕎 Edit Pad	cage	👫 Award And Lor	ck 🔒 Unlock	10-1 10-1	Init Price	📝 Scope Items 🛛 🚺	Set Substitute Ranking	🛔 Ai	uto Award +
🕘 All Quote	Items				Edit Cost Item	Edit Quote					Edit Prices	Lubstitute Values	🗩 Ignared Quotes 🛛 🕋	efault Data Blocks		
Layout	£	Quote Group	p Sta	atus	Cost Items		Quotes					View			Tools	
ost Breakd	lown Stru	cture (CBS) Re	egisl	ter Ø	Quote Compa	arison & Award - Cost items 🛛 🕯	3									
Quote Group(s) × Drag column				ng columns	there to group								Find: [Search F	or] gave	d views:	Previous V
	Description Concrete	on 🖭		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	Marqui: Masonr	s Masonry V
	Concrete	, Sitework		4.1.1		CMU Wals	1.00	Lump Sum	\$1,879,709.33	\$1,879,709.33	\$4,400,000.00	\$1,708,825.67	🕴 🔗 P1 \$512,648.00		0	\$0.
	Concrete	e, Structural		4.1.2		Precast Concrete Caps	1.00	Lump Sum	\$170,882.67	\$170,882.67	\$12,000.00	\$12,000.00	🊦 🔗 P1		2	\$0.
	Doors & I	Doors & Windows 4.1.3		4.1.3		Steel Embeds	1.00	Lump Sum	\$170,882.67	\$170,882.67	\$10,000.00	\$10,000.00	🖁 🔗 P1	& P1	ð	\$0.
	Electrical					Scope Items										
	Finishes	(Div 9)				Demolition										
	Fire Prote	ection				Caulking, Sealants & Backer Rod								0		
	Foundati	ons				Scafelding								ন্দ্র		
	HVAC					Shoring/Bracing							\$15,000.00			
	Landscap	oing Work				Testing/Inspection								0		
\checkmark	Masonry					Summary										
	Plumbing					Minority Type									0	м
	Rebar In	stall				Notes							D	D		0
	Scaffoldi	ng				Quoted Total					\$4,422,000	\$1,708,826.67	\$512,648.00	\$574,764.00		\$0.0
	Sheet Me	tai	\rightarrow			Comparable Total <					\$4,422,000	\$1,730,826.67	\$512,648.00	\$574,764.00	6	1.730.826.

8.5 SCOPE ITEMS

During the bidding process, it's common for subcontractors and suppliers to provide a quote(s) for work during the tail end of the bidding process. These last-minute offers make it extremely difficult for you to evaluate and compare the various quotes and your ability to award them. With **scope items**, you can create and evaluate checklists and quote group exclusions, and account for them within the Quote Comparison and Award form.

You can view scope items as a checklist of items that break down the quote's scope of work into individual tasks to aid in the process of evaluating subcontractor and supplier quotes in greater detail. This can be used to ensure that certain items of work are included or excluded. If excluded, the scope items need to be properly accounted for by contractor awarding the quote.

Overview – Quote Record – Scope Items

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

Spec	ial Terms & Cond	litions					>
Que	ote Tax		- Item 1	Tax			
Add	Taxes to the Quot	te: 🔿 Yes 💿 No	Ado 🖂	d Item Taxes to ea	ach item's price		
ТАХ	ES to be added to	awarded TOTAL as a % of total :					
		Tax Rate: 🕨 0.00					
		Total Tax: \$0.00					
Buy	er's Special Terms 8	Conditions					
							,
∠ s	eller's Special Tern	ns & Conditions					
FIXE Dist	D COST to be adde ribute Special Cone nclude Special Cone	ed to Seller's awarded total (any cor dition :	mbination of items) : ed average in Comparable Totals	i	\$0.00		
Drag	g columns here to gr	roup		Find: S	earch For] ···	Saved views:	Previous View 👻
	Row Number 🖮	Scope Item	Quote Group	Included	Amount	% of Total	Notes
\rightarrow	1	Permits	Electrical Work	\checkmark			
	2	Surveying and Layout	Electrical Work		\$500.00	14.29	
	3	Temporary Traffic Control Devices	Electrical Work	\checkmark			
	4	Trench and Backfill for Electrical W	Electrical Work	\checkmark			
					\$950.00		

Overview – Quote Comparison and Award – Scope Items

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

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

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

Cost Break	down Structure (CB	S) Register	Quo	te Register	Quote Comparison & Award - Co	ost items	0								
Quote Gro	up(s)	×	Dra	Jrag columns here to group											
	Description ⊨_ Reviewed CBS Electrical Work Position Code Position Code			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
	Electrical work 2			27.1	Electrical Work		1.00	Each	\$4,200	Q	\$4,200.00	\$5,000.00	\$4,200.00	🔋 🔗 🛛 \$4,200.00	\$4,450.00
	Electrical work 3			6	Scope Items										-
	Guardrail Work				Permits										2 2
	Pipe Materials				Surveying and Layout									\$500.00	\$500.00
	Sign Work				Temporary Traffic Control Devic	es									Ø
					Trench and Backfill for Electrical	Work								B •	
					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
			→	6	Special Conditions							\$0.00	\$0.00	\$500.00	\$950.00
				0	Last Update									11/13/2019 1:0	11/13/2019 3:5

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

Qu	Quote Register 🔘												
Dra	g columns here to group							_					
	Description	<u>1</u>	RFQ Description	Quote Status	Seller	Company	Quote Total	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	items (0							
g columns here to	group									
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
27.1	Electrical Work		1.00	Each	\$4,200	\$4,200.00	\$5,000.00	\$4,200.00	\$4,200.00	\$4,450.00
	Scope Items									
	Permits									Ø
	Surveying and Layout								\$500.00	\$500.00
	Temporary Traffic Control Devices									Ø
	Trench and Backfill for Electrical Wor	'k								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.

ulli	uation Setup L	Atta Register	Quote Group Tay i			
	Descripti	on: * Electrical	Work			
	Award Stat	us: Complete	ł.			
	Review	ed:				
	Last Review	ed:				
Qu Drag	g columns here to	ed:				
Qu Drag	g columns here to Nu	ed: o group Scope Item		Amount		% of Total
Qu	g columns here to Nu = 1	ed: o group Scope Item Permits		Amount	\$0.00	% of Total
Qu	g columns here to Nu = 1 2	ed: o group Scope Item Permits Surveying and Lay	yout	Amount	\$0.00 \$500.00	% of Total
Qu	g columns here to Nu = 1 2 3	ed: o group Scope Item Permits Surveying and Lay Temporary Traffic	yout : Control Devices	Amount	\$0.00 \$500.00 \$0.00	% of Total
Qu	Row E Nu E 1 2 3 4	ed: o group Scope Item Permits Surveying and Lay Temporary Traffic Trench and Backfi	yout : Control Devices Il for Electrical Work	Amount	\$0.00 \$500.00 \$0.00 \$0.00	% of Total
Qu	Row =	ed: o group Scope Item Permits Surveying and Lay Temporary Traffic Trench and Backfi Painting Electrical	yout : Control Devices Il for Electrical Work Equipment	Amount Amount	\$0.00 \$500.00 \$0.00 \$0.00 \$0.00	% of Total

8.5.2 Scope Item Creation and Award

The following Step by Step assumes you are putting out an advertisement for bids for some electrical work on a project. You will add scope items with some fixed costs as a special condition, then will compare quotes in order to decide which vendor quote is the best deal.

Step by Step — Create and Award Scope Items

- 1. Open the Training Job.
- 2. Select the Setup tab.
- 3. Click on Foundation Data Setup in the Initialize section.
- 4. Select the **Quote Group Tags** tab to setup Scope Items within a Quote Group.
- 5. Create a new Quote Group Tag called Electrical Work and click OK.

Foun	idation Setu	ıp Data	Register 🕻)	
Acco	ount Codes	Tags	Work Break	down Structures	Quote Group Tags
Drag	columns here	to group			
	Description		≞_	Award Status	Utilized In Quotes
	+ Aggregat	es		Complete	✓
-	+ Asphalt M	laterials		Complete	✓
	+ Bridge Wo	ork		Complete	
	+ Commerci	al Work		Complete	
	+ Concrete	Beams		Complete	
	+ Concrete	Materials		Complete	
→	+ Electrical	Work		Complete	

- 6. Open Electrical Work and add the following Scope Items:
 - Permits
 - Surveying and Layout
 - Temporary Traffic Control Devices
 - Trench and Backfill for Electrical Work
 - Painting Electrical Equipment
 - Temporary Power and Lighting
- 7. Enter **500** in the Amount field for Survey and Layout, and **300** for Temporary Power and Lighting.
 - If any of these default columns are missing, click on one of the headers, and right click. Select **Column Chooser** and drag the item(s)over tto the header bar, then click **OK**

Row =	Scope Item	Amount	% of Total
1	Permits	\$0.00	
2	Surveying and Layout	\$500.00	
3	Temporary Traffic Control Devices	\$0.00	
4	Trench and Backfill for Electrical Work	\$0.00	
5	Painting Electrical Equipment	\$0.00	
6	Temporary Power and Lighting	\$300.00	

- 8. Click **OK**.
- 9. Select the **Estimate** tab.
- 10. Click on Cost Breakdown Structure (CBS).
- 11. Change your Saved Views to **Quote Group Setup View**.
- 12. Create a cost item Entry Gate with a subordinate Electrical Work.
- 13. Assign Quote Group Electrical Work to the Electrical Work cost item.

CBS Position Code 🖹 🕇	Description	Forecast (T/O) Quantity
2 6	Entry Gate	1.00
+ 26.1	Electrical Work	1.00

- 14. Select the **Quote** tab.
- 15. Click Request For Quote (RFQ) to open the RFQ Register.
- 16. Create an RFQ for the Electrical Work cost item by selecting the **New** icon on the Actions tab.
- 17. Select Create RFQ from Quote Group Tag(s) and select Electrical Work.

 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 	Description [Uncheck All] [Blanks] Aggregates Asphalt Materials Commercial Work Concrete Materials Guardrail Work Landscaping Work Manhole Materials None Description
 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? 	 Painting Materials Pipe Materials Process Equipment Install Process Materials Sign Work Structural Painting Electrical Work

18. Click OK.

19. Click on the Seller Companies tab and select the following Company Names:

- Architectural Designs
- HD Engineering Group
- 20. Highlight both companies and select Publish.
 - Make sure the appropriate boxes are checked and fields filled out for publishing either by fax or by email prior to publishing

📰 Publish				
💬 Create Que	ote			
Process				
Foundation S	etup Data Register		Quote Grou	p Tag Record
- Description -				
Electrical Wo	ork			
Response D	eadline Date: 1/2/20	19	•	Response De
Line Items	Terms & Conditions	Sell	er Companies	Attachment
Drag columns	here to group			
Compan	у	<u> </u>	First	Last
Name		_	Name	Name
Architec	tural Designs, Inc Jo	nes	. Jones	Hardy
→ HD Engi	neering Group Roger	C	Roger	Croon
*				

21. Assuming that you've already received quotes back from both companies, create a Quote from this RFQ for both companies by selecting the companies and selecting **Create Quote**.

E Publish		
Process		
Foundation Setup	Data Register	Quote Group Tag
Description Electrical Work	RFQ 'Electric Quote(s) cre	al Work' X
Response Deadlir	ne Date: 1/2/2019	OK

- 22. Click **OK** to close the RFQ record.
- 23. Select the **Quote >Quotes** tab to open the Quote Register.
 - Note the 2 quotes that were just created for Electric Work

Description	1	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 Pa
Aggregates		Aggregates	Received	Example Vendor 4 DBE
Aggregates		Aggregates	Received	Example Vendor 2 S
Asphalt Materials			Received	Example Vendor 1 Pa
Asphalt Materials			Received	Example Vendor 2 S
Concrete, Sitework			Ignored	HD Engineering Group
Electrical Work		Electrical Work	Received	Architectural Designs,
Electrical Work		Electrical Work	Received	HD Engineering Group

24. Open the Quote Record for HD Engineering Group and enter a Unit Price of **3,500**, which is based on the quote you received.

- 25. Select the **Special Terms & Conditions** tab and select the **Seller's Special Terms & Conditions** radio button.
 - You now have visibility for all of scope items for this quote

Row Number ≞	Scope Item	Quote Group 🚊	Inclusions	Amount	% of Total
1	Permits	Electrical Work	\checkmark		
2	Surveying and Layout	Electrical Work	\checkmark		
3	Temporary Traffic Cont	Electrical Work	\checkmark		
4	Trench and Backfill for E	Electrical Work	\checkmark		
5	Painting Electrical Equip	Electrical Work	\checkmark		
6	Temporary Power and L	Electrical Work	\checkmark		

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

ra	g columns here to g	jroup	Find: [Se	earch For]	··· Saved views: Previous View	-
	Row Number 🗎	Scope Item	Quote Group	Included	Notes	
	1	Permits	Electrical Work	\checkmark		
÷	2	Surveying and Layout	Electrical Work			
	3	Temporary Traffic Contr	Electrical Work	~		

- 27. Type **150** in the Amount field for Painting Electrical Equipment.
 - Notice how the 3 scope items you just excluded are now added to the Special Conditions total for the quote

Bond: Item Conditions:	
Item Conditions:	
	\$0.00
Special Conditions:	\$950.00

- 28. Click **NEXT** to move to the other Quote Record for Architectural Designs.
- 29. Enter a Unit Price of 3,700.
- Press Tab to move to the Special Terms & Conditions tab and select the Seller's Special terms
 & Conditions (at right) radio button.
- 31. Uncheck the Inclusions checkbox for Surveying and Layout
- 32. Add the amount 500.



- 33. Click OK.
- 34. Select the **Quote** tab.
- 35. Open the Quote Comparison and Award form, and select the Cost Items tab.
- 36. Under Quote Groups, select Electrical Work.

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

- You will notice that scope items with inclusions and exclusions on the quotes are now displayed in the Scope Items section. The Scope Items button needs to be pressed in the View section of the screen
- The total of all exclusions are now added to the Special Conditions section for each subcontractor

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

TIP

If your Special Conditions row is missing, click the Substitute Values icon on the Action tab. You can also rearrange the sequence as desired.

	- ooodaaaa		View	, -					
						Caption	Visible		Sort
					→	Minority Type		✓	None
						Quoted Total		✓	None
	11-11-6					Comparable Total		✓	Ascending
	Measure	Unit Cost	(Forecast)			Awarded Total		\checkmark	None
00	Each	±0.00	•	to o		Quoted Items Total		\checkmark	None
	Laci	\$0.00	<u> </u>	0.0		Special Conditions		✓	None
						Last Update		\checkmark	None
						Last Update			None

- Most importantly, this comparison including scope items makes it clear HD Engineering Group has provided a quote of \$4,450, while Architectural Design's quote is \$4,200
- 37. Right click on the quoted amount for Architectural Design and select **Award** to award the work to Architectural Design.

Architectural Designs, Inc. Electrical Work	HD Engineering Group Electrical Work
<pre>\$3,70</pre>	Award
ମ \$50 ମ ମ ମ ମ ମ ମ ମ ମ ମ	A <u>w</u> ard And Lock Lock Unlock Edit Quote Edit Cost Item Edit Package \$300.00
\$4,200.00	\$4,450.00
\$4,200.00 \$3,700.00 \$0.00	\$4,450.00 \$4,450.00 \$0.00
\$4,200.00 \$3,700.00 \$0.00 \$3,700.00 \$500.00	\$4,450.00 \$4,450.00 \$0.00 \$3,500.00 \$950.00

38. Click **Yes**, on the resulting prompt to mark the quote group as reviewed.

• The Architectural Design's quote is now awarded

Detail	Architectural Designs, Inc. Electrical Work	HD Engineering Group Electrical Work
\$4,200.00	🚦 🧷 🛛 \$4,200.00	\$4,450.00
	Ø	Ø
	\$500.00	\$500.00
	Ø	Ø
	Ø	Ø
	Ø	\$150.00
	Ø	\$300.00
\$0.00	\$4,200.00	\$4,450.00
\$4,200.00	\$4,200.00	\$4,450.00
\$0.00	\$4,200.00	\$0.00
\$0.00	\$3,700.00	\$3,500.00
\$0.00	\$500.00	\$950.00
	11/13/2019 1:0	11/13/2019 2:

8.6 QUOTE ITEM ADJUSTMENT

Quote items can be adjusted even after a quote has been awarded. This could happen on closing day when a vendor sends in a last minute discount. For example, vendor 3 has sent in a 10% discount on piping materials. This percentage discount is applied to the vendor 3 quote by entering the 10% in the Condition Adjustment column.

Step by Step — Quote Item Adjustment

- 1. From the Ribbon, select the **Quote** tab.
- 2. Under the Quote Comparison and Award section, select Resources.

- 3. Locate the Example Vendor 3 column.
- 4. Select the quote you want to edit under the Example Vendor 3 column. In the Ribbon, select the **Actions** tab.
- 5. Under the Quotes section, select **Edit Quote**. You can also right-click and select **Edit Quote**. This launches the Quote Record.

Resource Code	Description	Detail	Example Pipe Mai	e Vend terials	lor 3	Example DBE Pipe Mate	Vendor 4 erials
MPR36	Pipe RCP 36 In	\$34.13	0		\$31.50	10	\$32.55
MPP24	Pipe 24" PVC SDR35	\$20.48	Ø		A	0.0	433.05
MPP 10	Pipe 10" PVC SDR21	\$3.28	0		Award	Andloc	k
	Scope Items				A <u>w</u> aru	And Loc	ĸ
	Summary				Unloci	k	
	Minority Type				<u>o</u> mee		_
	Quoted Total	\$0.00	4	2	Edit Q	uote	
	Comparable Total <	\$137,646.60	\$	2	Duplic	ate Quot	e
	Awarded Total: \$271,	\$0.00		B	Ignore	Quote	0
	Quoted Items Total	\$0.00	4	100	Packa	ge Entire	Quote
	Special Conditions	\$0.00		S.	Edit Pa	аскаде	
	Last Update		7/14/2	20	Edit <u>R</u> e	esource	

6. You can make Condition Adjustments by a percentage or an amount. Select the field to adjust the percentage or amount of the **Condition Adjustments**.

F	ind: [Search For] …	Save	d views: Previous	View	•
Tax Rate	Condition Adjustment Percentage		Condition Adjustme Amount	nt	Total Price
5.00		10.00		(\$14,400.00)	\$136,800.00
5.00		0.00		\$0.00	\$75,600.00
5.00		0.00		\$0.00	\$32,256.00

NOTE If you enter a percentage, the amount is populated based on that calculation. This is the same for entering a Condition Adjustment Amount.

7. Items adjustments can be applied individually or by using the multi-edit function. Select multiple resources in the Quote Record, then right-click and select **Open**. This opens the **Quote Resource Item Record**.

Re	sources	Cost	Items				
Drag	g colum	ns here to	o group				
	Code	<u>-</u>	ration		Qu	antity	Unit of Measure
◬	MPP 10)		1		12,000.00	Linear Feet
	MPP24	1		1		3,000.00	Linear Feet
→	MPR3	5		1		1,024.00	Linear Feet
*	-		_				
	L2	<u>O</u> pen					
	8	<u>D</u> elete					
	8	Cut					
	9	Сору					
	Ē.	<u>P</u> aste					
	+	<u>F</u> ill Dov	vn				
	8	Link th	ese fields	; to	Exc	el:	
	<pre>M</pre>	<u>U</u> nLink	from Ex	cel			
		-					

8. As you populate the 10% discount adjustment to all of the items selected using the multi-edit tool, the amount value changes to **Varies**. This is because of the variance in the unit rates for each selected item.

anco				
tem		a		
Line Number	Code	Quantity	Unit of Measure	
/aries	Varies	Varies	Linear Feet 🔹	
ags				
Quote Group	Tag 1	Tag 2	Tag 3	
Pipe Materials 🛛 👻 👻	Varies -	Varies -	*	
Setup	Free Free	Condition Adjustment Amount: Percentage:	Varies -10.00	
Setup	Free	Condition Adjustment Amount: Percentage: Price	Varies -10.00	
Setup No Split Plug Unit Price:	Free Varies	Condition Adjustment Amount: Percentage: Price Unit Price:	Varies -10.00 Varies	
Setup No Split Plug Unit Price: DBE Allowance %:	Free Varies 60.00	Condition Adjustment Amount: Percentage: Price Unit Price: Extended Price:	Varies -10.00 Varies Varies	
Setup No Split Plug Unit Price: DBE Allowance %: Default Tax Rate %:	Free Varies 60.00 5.00	Condition Adjustment Amount: Percentage: Price Unit Price: Extended Price: Tax Rate:	Varies -10.00 Varies Varies 5.00	

9. Select **OK** to save the changes to the line items in the Quote record and to save the Quote.

Lesson 8 Review

- 1. When you receive responses to your RFQ, the next step is to enter their pricing in the
 - a. CBS Register
 - b. PBS
 - c. Quote Register
 - d. RFQ Register
- 2. On a Quote Record, No Split means
 - a. The quote must be combined with other quotes from the same vendor
 - b. All items on the quote must be purchased from that seller
 - c. You can't split the quote into multiple quotes
- 3. When a quote group is highlighted in yellow on the Quote Comparison & Award form, it signifies that
 - a. The quote group has changed since it was last marked as Reviewed
 - b. No quotes have been awarded for that quote group
 - c. There are some quotes in the quote group that contain substitute values

Lesson 8 Summary

As a result of this lesson, you can:

- Create and publish RFQs
- Define quote pricing
- Compare and award quotes
- Create and analyze scope items

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LESSON 9 – REPORTING

Lesson Duration: 30 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Run reports from the Reports menu
- Create and run reports from register forms

Lesson Topics

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9.1 REPORTS MENU

InEight Estimate provides a lot of out of the box reports, referred to as "canned" or "system" reports, that can help you review and analyze your estimate.

9.1.1 Non-Modal Report dialog box

The Reports dialog is docked along with the other forms and registers. You can continue to work with your estimate without being forced to close the Reports dialog box.

Reports					
CD 2sh Properties	Settinge: Default • Alternal	e Scenario: BASE			
Poundation Setup Data	Print Cost Item Selection Details Lavout Header Pool	ter'			
> 1 Resources					
> 12 Resource Assemblies	Filter by currency: No Filter *	Resource Engloyments			
- 📩 Cost Breakdown Structure	General	Ed Print Resource Employment Details			
CITS Summary	Group by In Grave y	Print resources in row number order			
CBS Details	in the second se	O Print resources in alphabetical order			
CIIIS Outline	Show Suspended Items	P Print resource costs			
Extensite Summary	⊠ Notes	CI Intel hours for hourly resources			
OBS-Cumency Comparison	Amarties	8.) · · · · · · · · · · · · · · · · · · ·			
> % Quotes	R when filtering, only include terminal cost items in	in Resource Types			
> 🛅 Price Breakdown Structure	total	2 Ad-hoc Employments			
> 🔝 Pay Item & Proposal	Exchange	Di Labor			
> 🔣 biling Rate Reports	7.858	The Constitution Register and			
> 🕀 Jab Trading	Cost item production field to Deys 🗸 🗸				
Extensite Comparison Report	Cost tem production field 2 (1967au)	Pill Kerced Construction Equipment			
Audit	Sector Contraction (Sector)	Distalled Material			
Job-Register	Cost Ren Led Field: Currency V	Distaled Equipment			
> 🎸 Ubrary Module		2 Supplies			
Custom Reports	Employment text field: Gamency v	2 Unique			
Saved itexs		P Resource Assemblies			
Budget Exports					
Schedule Exports					
Timesheet Exports					
Timesheet Imports					
Master Layout Settings					
Master Header Pooler Settings					

If the report becomes undocked, the job code shows in the reports dialog box header.

9.1.2 Adjustable Reports

Most of the reports within InEight Estimate can be adjusted to output the specific data and reporting format you need. Each report has its own set of output settings for configuring and formatting the report.

All InEight Estimate adjustable reports are accessed from the Reports menu. You may even run the same report multiple times and choose different output settings based on what you want to see or who the intended audience is.

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

- For a group of *estimators*, you may want to run a CBS Details Report that shows all cost and productivity data for a job
- For *field personnel*, you may want to run a CBS Details Report that shows no cost data, but all production and resource data
- Finally, for *executive management*, you may want to run a CBS Details Report that shows summary level information only

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

Step by Step — Get to Know the Reports Menu

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

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

2. Select **Reports**.

® 💾 -							_		
File Setup	Estimate	Quote	Price	Execution	System	Actions			
¢	-	Ě	***		🐔 Labor 🏭 Equipment		â		*
Job Properties	Foundation Setup Data 🔻	Pay Item & Proposal	Bid Wizard	Resource Rates ≠	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	Reports
	Initializ	ze			Resources		Assen	iblies	Reports

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



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

	D			Reports - Job Proj
\mathbf{v}		Re	ports	Cattioner Default
		o	Job Properties	Settings: Delaut
		1	Foundation Setup Data	Print Details Layout Header/Footer
	¥		Resources	
			Resource Register	Print to Printer
			Resource Changes	Drint Sattings
			Resource Rate Details	-Phili Setungs
			Resource Utilization	Printer: Adobe PDF
			Resource Utilization (Excel)	
			Resource Currency Comparison	
	>	Ϋ́	Resource Assemblies	
	>		Cost Breakdown Structure	
	>	۹	Quotes	
	>		Price Breakdown Structure	O Export to File
	>		Pay Item & Proposal	Export Settings
	>	-	Billing Rate Reports	
	>	\oplus	Job Tracking	File:

• On the right, when you select a report node on the left, note that it displays the Output Settings on the right side of the form, from which the report settings can be adjusted and the report can then be run

)	Reports - Job Properties
Reports	Sattinger Default
Job Properties	Settings, Derdate
Foundation Setup Data	Print Details Lavout Header/Footer
✓ [≜] Resources	
Resource Register	O Print to Printer
Resource Changes	- Print Settings
Resource Rate Details	Thirt Settings
Resource Utilization	Printer: Adobe PDF Change
Resource Utilization (Excel)	
Resource Currency Comparison	
> 🚰 Resource Assemblies	
> 📑 Cost Breakdown Structure	
> 🔁 Quotes	_
Price Breakdown Structure	○ Export to File
> 🔛 Pay Item & Proposal	Export Settings
Billing Rate Reports	
> 💮 Job Tracking	
Estimate Comparison Report	Format: PDF File V Options
Audit	
Job Register	

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

Setting	s: Defau	lt		Ŧ
Print	Details	Layout	Header/Footer	
	t to Printer			

• There are also Master Layout Settings and Master Header/Footer Settings located at the bottom of the left-hand side bar tree. Here you can define settings that will apply to all reports

	Estimate Comparison Report	Format: PDF File V Options
	Audit	
	Job Register	
>	Library Module	
	Custom Reports	
	Saved Views	
	Budget Exports	Preview
	Schedule Exports	
	Timesheet Exports	
	Timesheet Imports	
	Master Layout Settings	
	Master Header/Footer Settings	

9.1.3 Output Settings

This section provides a more detailed explanation of the output setting tabs.

9.1.3.1 Report Printing Options

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

9.1.3.2 Report Layout Settings

Many of the InEight Estimate adjustable reports include formatting options for the general layout of the report, located under the Layout tab of the report's output settings. Settings for the report include:

Orientation, Margins, Font, and Number Format.

Print Details	Layout Header/Footer				
Settings: Defaul Orientation Portrait Landscape Paper Size: Le	t (Letter)	~	Margins Left: 0.50	Top: 0.50 ਵ	Header: 0.25 🜲 Right: 0.50 🗣
Font			-Number Format	Decimal	Footer:
Header Level 1: Detail Level 1:	Arial Narrow, 8, Bold Arial Narrow, 8, Regular		Cost summary: Unit cost:	Precision 2	Figures
Header Level 2: Detail Level 2:	Arial Narrow, 8, Bold Arial Narrow, 8, Regular		Quantity: Percent:	2	
			Use thousan	ds separator / symbol alues as blank	
			Currency: As-	Entered	•

9.1.3.3 Report Header/Footer Settings

Many of the InEight Estimate adjustable reports include the option to define and insert headers and footers into the report. You can add information to the left, middle, or right of the header and footer sections of the report.

- 1. Once you define headers and footers, you can save them for use on other reports.
- 2. You can add page, time, and date stamps as needed, as well as images (e.g., company logo).
- 3. You can also use brackets to have it "stamp" the report with the Job Code and Job Description.

4. You can enter your own information as desired.

Print Details Layout Header/Footer	
Settings: Default	
🗭 🚯 🔯 🚱 🔟 Insert Field 🗸	
Page Header 2	
Description des (frank anna anh.)	4
[Report Title]	Estimate Summary Report
[Company Name]	
Description: [Job Description]	

9.1.3.4 Report Detail Settings

Most reports have a Details tab with various options to configure what information is included on the report.

Overview	Minority Setup	Schedule
🖌 Job Code	Certification Authority	Schedule Setup
Description	Participation Goals	Cash Flow
✓ Status	Fuel Cost	Revenue Timing
✓ Notes	🖌 Fuel Type	Cost Timing
Security	Unit of Measure	Cost of Money
Estimate Protection	Cost per Unit of Measure	Quantities
Authorized Users	Job Tracking	Reporting Periods
Cover Sheet	Tracking Setup	✓ Dates
Identification Data	Percent Complete	-Equipment Maintenance
── ✓ Proposal Data	Forecast Methods	✓ Options
Cash Basis	✓ Time and Expense Items	Shift Arrangemen
Default Currency	Job Folder Tags	Benchmarking
Standard Shift Arrangements	Job Folder Tags	
Standard Wage Rate Composite		D dictinuity
Rules	Competitors	
Standard Rates		
Bond Rate Table	Pricing	
	Auto Price Options	
Kesource Hiter	Forecast Profit Calculation	

9.1.3.5 Save Output Settings

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

✓ Re	eports	* Set	tings: Esti	mate Summary	- Foreman	•	Alternate Sc	enario:
0	Job Properties		ciligs. Lou	nate saminary	1 of circular		BASE	
	Foundation Setup Data	Pri	nt Cost It	em Selection	Details	Lavout	Header/Footer	1
- 🗸 🚢	Resources		00000			- cayout		
	Resource Register		Print a con	tiguous range	of cost iter	ns:		
	Resource Changes		From:	5.1				-
	Resource Rate Details							
	Resource Utilization		To:	6.2				-
	Resource Utilization (Excel)							
	Resource Currency Comparison	n) Select cost	items to print	from the re	aister helov	v•	
-> 🖄	Resource Assemblies) 50/000 0051	items to prim	e nom enere	.gister berov		
~ ~	Cost Breakdown Structure	Dra			Find:	[Search Fo	r] …	Saved
	CBS Summary							
	CBS Details		Include	Position Co	de 🗎	Description		
	CBS Outline					Prime Bond		
~	Estimate Summary					Drive O/ Adv	1.0-	
	💿 Estimate Summary - Forem	an				Price % Add	1-On	
						Job Financir	na	

The following steps walk you through configuring the settings and formatting for two different reports.

Step by Step — Configure Report Output Settings (Report 1)

1. Open the Training Job and select Setup >Report>Resources.



2. Under Resources on the left side bar, select **Resource Utilization**.

•						Reports - Res	ource Utilizati	ion	
*	Re	ports	Settings:	Defau	lt		•		
	٥	Job Properties	-						
	1	Foundation Setup Data	Print	Details	Lavout	Header/Footer]		
~	2	Resources							
		Resource Register		o Printe	Printer				
		Resource Changes							
		Resource Rate Details	-Print Set	tungs —					
		Resource Utilization	Printe	r: \\HD	AZPrintSer	/.harddollar.local\M	ain Office	Change	
		Resource Utilization (Excel)							
		Resource Currency Comparison							

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

Print De	tails Layou	ut Header/Fo	oter	
O Print to I	Printer			
-Print Settir	igs			
Printer:	\\HDAZPrint	Serv.harddollar.lo	cal Main Office	Change
C Export to Export Set File:	o File tings PDF File	~	Options	
O Export to Export Set File: Format:	p File tings PDF File	~	Options	
C Export to Export Set File: Format:	p File tings PDF File		Options	
O Export to Export Set File: Format:	PDF File	~	Options	

4. On the Layout tab you can make adjustments based on your preferences.
| | A attact to a data a b | Margins | | |
|------------------------------------|---|--|---|-------------|
| Settings: Defau | t (Letter, Landscape) | • | Top: | Header: |
| Orientation | | | 0.50 🚔 | 0.25 |
| O Portrait | | | | |
| Landscape | | Left: | | Right: |
| Paper Size: Le | tter | 0.50 | H | 0.50 |
| | | | | |
| | | | | |
| | | | Bottom: | Footer: |
| | | | 0.50 🜲 | 0.25 |
| Foot | | Number Fo | rmat | |
| Handar Laval 1 | Arial Narrow 8 Bold | | Decimal | Significant |
| Treader Lever 1. | And Marrow, of Dold | | Precision | Figures |
| Detail Level 1: | Arial Narrow, 8, Regular | Cost summ | nary: 2 | 1 |
| | | Unit cost: | 2 | 1 |
| Header Level 2: | Arial Narrow, 8, Bold | | | |
| Header Level 2: | Arial Narrow, 8, Bold | Quantity: | 2 | 1 |
| Header Level 2:
Detail Level 2: | Arial Narrow, 8, Bold
Arial Narrow, 8, Regular | Quantity:

Percent: | 2 | 1
1 |
| Header Level 2:
Detail Level 2: | Arial Narrow, 8, Bold
Arial Narrow, 8, Regular | Quantity:

Percent: | 2
2
Dusands separator | |
| Header Level 2:
Detail Level 2: | Arial Narrow, 8, Bold
Arial Narrow, 8, Regular | Quantity:
Percent: Use the | 2
2
pusands separator
rrency symbol | |
| Header Level 2:
Detail Level 2: | Arial Narrow, 8, Bold
Arial Narrow, 8, Regular | Quantity:
Percent:
Use the
Use cu
Show z | 2
2
Dusands separator
rrency symbol
ero values as blank | |

5. Move to the Header / Footer tab. Remove the default **Report Title** from the first page Header only and enter **Resource Utilization** in the center Report Header box as a title that will appear on the first page only.

Print Details Layou	t Header/Footer		
Settings: Default		•	
🗑 🔂 🔯 🚱 茎	Insert Field 🝷		
Page Header			
Report Header (first page	only)	5	
Report Header (first page [Report Title] [Company Name] Job Code: Description:	only) [Job Code] [Job Description]	5	Resource Utilization

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

Settings: Default 6	
Print Details Layout Header/Footer	
Filter by currency:	-
Report Type	
Resource Utilization Summary	
O Resource Utilization Summary with Employed Cost	t Items

 You can choose to select the Hide Zero quantity/cost Resources Employments Details box if you prefer to have your printed report not show any resources that have a dollar value of zero



- You can choose if you want the report at a summary level, or if you want it to reference your cost items when you are looking at a resource
- If you choose Resource Utilization Summary with Employed Cost Items, it adds CBS position to the structure of the report
- You would select this if you wanted to see cost items and resources by the cost item

TIP The Details settings are "sticky" features, meaning they default to what was selected the last time.

- You can use grouping to group by different tags and user-defined fields. Most of them are related to the Resource Rate Register, for example: Geographic Area, Organizational Category, Wage Zone, etc. For this example, group by **Resource Organizational Category**.
- 10. Next, you can choose the resources you want to see. For this example, select the **Labor** and **Construction Equipment** Resource Types.

roup By		Resource Type
Insert page breaks between the outerm	oups	🖂 Labor
Resource Organizational Category		Construction Equipment
c Caldedadad S		Rented Construction Equipment
< no nela selectea >	~	Installed Material
< no field selected >	\sim	Installed Equipment
< no field selected >	~	Supplies
		Unique
< no field selected >	~	
< no field selected >	~	

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

Columns	Details
Show Currency column	Exclude details and only show subtotals
Show plug rate for non-hourly resources	Show Currency Summary
Show tax separately from plug rate for non-hourly resources	
Show hours for non-hourly duration driven resources	

- This is just one of many ways to organize and adjust your report.
- 11. Click **Run** to run the report.
 - This report can be helpful for seeing your utilization hours, broken down by regular time and overtime hours
- 12. Click the red X to close this page and open the Construction Equipment page.
- 13. Click the red **X** to close the Construction Equipment report.

Step by Step — Configure Report Output Settings (Report 2)

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

P	
Reports	
Reports	
8	
✓ Report	orts
o 1	Job Properties
<u>.</u>	Foundation Setup Data
🔶 👗 F	Resources
-> 🎦 F	Resource Assemblies
✓ 1 0	Cost Breakdown Structure
	CBS Summary
	CBS Details
	CBS Outline
>	Estimate Summary
_	CBS Currency Comparison
> 🔍 (Quotes
> 🔼 F	Price Breakdown Structure

2. Under Cost Breakdown Structure on the left side bar, select Estimate Summary.



3. Along with the Print, Details, Layout, and Header / Footer tabs, there is an additional tab called **Cost Item Selection**. Select this tab.

Setting	s: Default		Ŧ	Alternate Sco	enario
Print	Cost Item Selection	Details	Layout	Header/Footer	

- 4. The Cost Item Selection tab allows you to report on a selection of cost items:
 - Print a contiguous range of cost items: Allows you to print a series of cost items in a row. In this case, print just items: select 4.1 in the From field and 4.3.2 in the To field.
 - Select cost items to print from the register below: Allows you to use column filters to select the cost items to include in the report; leave this button unselected.
- 5. You can roll up your cost items to a certain CBS level for the report as well, depending on the level of detail you need.
- 6. On the **Details** tab, select **Days** for Cost item production field 1, and **Man-Hours / UM** for Cost item production field 2 (this report allows you to report on two production values).
- 7. Under **Resource Types**, uncheck all of the boxes except **Labor**, **ConstructionEquipment**, and **Installed Material**.

Print Cost Item Selection Details Layout Header/F	Footer
Filter by currency: No Filter General Group by: No Group Show Suspended Items Notes Awardee	Resource Employments Print Resource Employment Details Print resources in row number order Print resources in alphabetical order Print resource costs Print hours for hourly resources
When filtering, only include terminal cost items in total Fields 6	Resource Types Ad-hoc Employments Labor
Cost item production field 1: Days Cost item production field 2: Man-Hours/UM V	 Construction Equipment Rented Construction Equipment Installed Material
Cost item text field: Currency \checkmark	 Installed Equipment Supplies
Employment text field: Currency ~	Unique Resource Assemblies

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

Page Footer		
[Date Printed] [Time Printed]	Confidential - Internal Use Only	[Page # of Pages #]

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

Print	Cost Item Selection	Details	Layout	Header/Footer
Settin	gs: Default		-	
#	🛛 😰 🛞 🔤 🔤 Ins	sert Field 🔸	, L	63

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

Settings:	Default		
കിട	Custom	2	
	Default		
Page Heade	r		9

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

Save New Setting	s —		×
Name:	Estimate Summa	ry - Manager	
	ОК	Cance	L

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



9.1.4 Helpful Reports

9.1.4.6 PBS Summary

Under the Price Breakdown Structure Report node, the PBS Summary Report gives a good overview of how your price breaks down by cost category. This provides a high-level overview that is cost category driven, providing information based on the total value of the project.

When selecting your settings on the Details tab, a best practice is to select and include:

- Cost Categories
- Markup Rate
- Percentage of Cost

This allows you to see your costs and markup broken out by cost category.



TIP You can also select to show markup rate and what percentage the markup is of your cost.

9.1.5 Standard Proposal

Located under the Pay Item & Proposal report node, the Standard Proposal report can be used for contractors required to submit a pricing proposal to a client. It lists all the pay items with the client provided quantities and your final pricing. You can include subtotals (defined on the Pay Item & Proposal Register), cover sheet information, and a signature block.

Proposal

<u>Proposal</u> ABC Con	tractors Job Code: Description:	Training Job Training Job - Maricopa County No. TM2	924		
Line No.	Pay Item No.	Description Subtotal Description	Proposal Quantity	Unit of Measure Unit Price	æ Total Price
10	641 0100	Mobilization	1.00	Lump Sum 94,20	0 94,200.00
20	201 0102	Clearing & Grubbing	10.00	Acre 0.00	0.00
30	202 0183	Unclassified Excavation	50,000.00	Cubic Yard 7.4	9 374,500.00
40	303 5912	Aggregate Base	40,000.00	Ton 27.90	2 1,116,800.00
50	303 4263	Asphalt Concrete Hot Mix Type A	38,000.00	Ton 42.6	2 1,619,560.00
60	413(B) 0464	36 Inch RCP Culvert Class III	1,000.00	Linear Feet 123.7	7 123,770.00
70	800 0220	10 Inch PVC Force Main (SDR21)	12,000.00	Linear Feet 29.64	4 355,680.00
80	800 0330	24 Inch PVC Gravity Sewer (SDR35)	3,000.00	Linear Feet 63.26	6 189,780.00
90	800 0400	4 Foot Diameter Manhole	16.00	Each 4,532.3	5 72,517.60
100	501(A) 1306	Structural Excavation & Backfil	800.00	Cubic Yard 27.6	9 22,152.00
110	506(A) 1322	Steel Reinforcement	30,000.00	Pound 1.75	9 53,700.00
120	503(A) 1313	Retaining Wall	850.00	Cubic Yard 532.0	5 452,242.50
130	600 0300	Paint Existing Steel Bridge Structure	1.00	Lump Sum 100,215.0	0 100,215.00
140	700	Process Equipment	1.00	Each 1,946,884.6	5 1,946,884.65
150	1000	Removal of Underground Storage Tanks	2.00	Each 13,220.8	3 26,441.66
160	1010	Disposal of Contaminated Sol	800.00	Cubic Yard 30.20	24,160.00
170	1200 0100	Toll Booth	1.00	Each 30,994.27	7 30,994.27
180	1500 0100	Guardrail Type 2	1,000.00	Linear Feet 28.96	6 28,960.00
190	1500 0200	Guardrail Type 3A	200.00	Linear Feet 37.4	0 7,480.00
200	1600 0230	Type 4 Signs	1,000.00	Square Feet 15.6	8 15,680.00
21	001	Realignment of Water Line	1.00	Each 0.00	0.00
				GRAND TOTAL	L: 6,655,717.68

9.1.6 CBS Details

Under the Cost Breakdown Structure report node, the CBS Details report can be a helpful report for bid review. On the Details tab you can include or not include any of the information contained in the CBS

Register, including cost items with production, costs by category, shift arrangements, resources, and notes.

				To C	ost Item: 0.10								
			Cost Item								Un	it and Total Costs by Categ	ory
JS Position Ide D	X Description	Cost Source	F	orecast (T/O) Quantity UM		Unit Cost	Total Cost	Lab	or Owned Equip	ment Rented Equip	ment Mater	riala Supplies	Subcontrac
V	Nobilization	Detail		1.00 Lump S	Sum	11,909.51	11,909.51	2,449 2,449	51 8,9 51 8,9	160.00 160.00	0.00	0.00 0.00	0.00
Notes	; There are 10 loads. Figure M	ob in only. The next job v	ill pick up the	Mob out.									
	Added \$500 Contingency Allo	wance in case extra perm	its are require	d									
Pay Item Assignmer	nt: 541 0100 (Mobilization)												
Default Properties:	Account Code 1020	Cost Curve Linear		Tag 1 Estimator 1	Tag 2 Roadway		Tag 3	Tag 4		Tag 5			
	Optional Code 641 0100	Phase Code		Owner's Qty. 1.00	Quote Group	Quant	ty Driver Pay Item	Minority Allow 100.00%	WC C	override			
Default Pay Rules:	Wage Scale 1 100.00	Wage Scale 2 0.00		Wage Scale 3 0.00	Resource Work Hra 8.00	Resource	Pay Hrs 8.00	Default Shift Arrangemente	Work H	tra/Shift 8.00	Shifta/Day 1.00	Daya/Week 5.00	
Production:													
Duration	Daya 10.00	Shifta 10.00	Houra 80.00	Man-Houra 80.00	Equip-Houra 160.00	Cost/I	Duration	Cost/Day 1,190.95	Coat/Shift 1,190.95	CostHour 148.87	Cost/Man-Hr. 148.87	Cost/Equip-Hr. 74.43	
UM / Duration	UMDay 0.10	UWShift 0.10	UWHour 0.01	UNMan-Hr 0.01	UWEquip-Hr 0.01	Durat	ion / UM	Daye/UM 10.00	Shifte/UM 10.00	Houre/UM 80.00	Man-Hra/UM 80.00	Equip-Hra/UM 160.00	
Duration UM / Duration	Daye 10.00 UM/Day 0.10	Shifta 10.00 UM/Shift 0.10	Hours 80.00 UWHour 0.01	Man-Houre 80.00 UNMMan-Hir 0.01	Equip-Houre 160.00 UMEquip-Hr 0.01	Cost/I Dural	Duration ion / UM	Cost/Day 1,190.95 Days/UM 10.00	Cost/Shift 1,190.95 Shifta/UM 10.00	CostHour 148.87 Hours/UM 80.00	CostMan-Hr. 148.87 Man-Hre/UM 80.00	Cost/Equip-Hr. 74.43 Equip-Hrs/UM 160.00	
source Code D	escription		Quantity	Pay Hours UM		Unit Cost	Total Cost				Un	it and Total Costs by Categ	ory

9.1.7 Audit

Under the Job Tracking node, the Audit Report is a very important report to run during estimate review to make sure you didn't leave anything out of the estimate. It checks for a number of potential errors in the estimate, including:

- Zero Price Pay Items
- Zero-value cost items
- Pay items without Cost Items assigned
- Resources with a quantity of zero

Exercise 9.1 — Run a System Report

You can adjust InEight Estimate system reports to report on the particular information you need. Complete the following steps to configure and run the Pay Item Summary report, using the Training Job:

- 1. From the Reports window, expand the Pay Item & Proposal report node.
- 2. On the Reports tree, select Pay Item Summary.
- 3. On the Details tab, select a Pay Item Range from 303 4263 800 0220.
- 4. Choose to Include Assigned Cost Items.
- 5. Show Costs As: Unit.
- 6. Include Profit Analysis columns and Include Pay Item Price columns
- 7. Run the report.

ABC Contractors

You should end up with the following results

	Job Code: Training Job Description: Training Job - Maric	opa County No. TM2924									
	From Item: 303 4263				To Ite	m: 500 0220					
	Pay/Cost Item						Unit C	ost by Catego	ory		
Code	Description	Quantity UM	Assigned Direct Cost	Labor	Owned Equipment	Rented Equipment	Materiale	Supplies	Subcontract	Feee	Allowance
303 4263	Asphalt Concrete Hot Mix Type A	38,000.00 Ton	42.62	3.11	6.43	0.00	31.50	0.00	0.00	1.58	0.00
	5 Asphalt Concrete Hot Mix Type A	38,000.00 Ton	1,619,430.35	3.11	6.43	0.00	31.50	0.00	0.00	1.58	0.00
	5.1 Furnish & Haul Hot Mix	38,000.00 Ton	1,492,382.18	1.43	4.77	0.00	31.50	0.00	0.00	1.58	0.00
	5.2 Install Hot Mix Type A	38,000.00 Ton	127,048.17	1.68	1.66	0.00	0.00	0.00	0.00	0.00	0.00
413(B) 0464	36 Inch RCP Culvert Class III	1,000.00 Linear Feet	66.42	19.60	13.48	0.93	30.82	0.00	0.00	1.59	0.00
	6 36 Inch RCP Culvert Class III	1,000.00 Linear Feet	66,416.79	19.60	13.48	0.93	30.82	0.00	0.00	1.59	0.00
	6.1 Furnish RCP Materials	1,000.00 Linear Feet	32,361.33	0.00	0.00	0.00	30.82	0.00	0.00	1.54	0.00
	6.2 Excavate RCP Trench	1,815.00 Cubic Yard	8,183.20	4.85	3.34	0.00	0.00	0.00	0.00	0.00	0.00
	6.3 Install RCP Pipe	1,000.00 Linear Feet	11,735.94	6.45	5.29	0.00	0.00	0.00	0.00	0.00	0.00
	6.4 Backfill RCP Pipe	1,550.00 Cubic Yard	14,136.32	8.31	4.86	0.93	0.00	0.00	0.00	0.05	0.00
	SUBTOTAL: SITEWORK & ROADWAY		1,685,847.14	137,894.00	257,768.56	926.90	1,227,820.31	0.00	0.00	61,437.36	0.00
800 0220	10 Inch PVC Force Main (5DR21)	12,000.00 Linear Feet	22.51	4.56	4.72	0.00	12.60	0.00	0.00	0.63	0.00
	7 10 Inch PVC Force Main (SDR21)	12,000.00 Linear Feet	270,163.37	4.56	4.72	0.00	12.60	0.00	0.00	0.63	0.00
	7.1 Furnish 10 Inch PVC Materials	12,000.00 Linear Feet	158,760.00	0.00	0.00	0.00	12.60	0.00	0.00	0.63	0.00
	7.2 Excavate-Install-Backfill 10 Inch PVC	12,000.00 Linear Feet	111,403.37	4.56	4.72	0.00	0.00	0.00	0.00	0.00	0.00
	Extended Totals By Category		1,956,010.51	192,599.77	314,466.16	926.90	1,379,020.31	0.00	0.00	68,997.36	0.00

Congratulations, you have completed this exercise!

9.2 REGISTER REPORTS

At any time, you can print a report of the data in the currently displayed register using the Print or Preview option available from the Actions tab for the register you are in.

® 💾 -						
File Setup	Estimate	Quote	Price	Execution	System	Actions
🖶 Print	🕂 New	📱 Сору	🛒 Spl	it	빠 Indent	📇 Link Field
🗟 Preview	🛞 Delete	📄 Paste	🚉 Spl	it by Cost Type	Jutdent 🔶	📇 Unlink Fie
🛃 Export to Excel	° Cut	+ Fill Down	🔁 Toj	ggle Suspended		
Print			Edit			Workbook
Cost Breakdown S	tructure (CB	5) Register	0			
CBS Tree (Filter M	lode)	×	Drag	columns here to	group	

The data that prints is the data currently displayed on the register form. The report will print whatever columns are displayed on the register; if you have customized the display in the register, the report prints that data. In other words, register reports are entirely customizable.

By creating Saved Views, you can report the data on a register form in several different variations.

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

Step by Step — Create a Register Report

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

File	Estimate	Quote	Price	Execution System	
٥	-	Ě	***	Labor	â
Job Properties	Foundation Setup Data 👻	Pay Item & Proposal	Bid Wizard	Resource Rates Materials Assemblies	Cost Ite Assembli
	Initializ	ze		🕵 Labor	Ass
				🔛 Construction Equipment	
				hented Construction Equipment	
				Installed Materials	
				🎭 Installed Equipment	
				🛠 Supplies	
				🚋 Unique	
					_

- 2. From the drop-down list, select Labor.
- 3. From your Saved Views drop down menu on the Resource Rate Register, select the **Print View** for Summary view.



- 4. Notice this view includes utilization hours
- 5. Right-click on a column header and select **Column Chooser**.

Maint. Man-H		Organizational Category	Geogra Area
C	₽ ↓	Sort Ascending	
C	Z ↓	Sort Descending	
C		Clear All Sorting	
((Group By This Colum	n
C		Hide This Column	
0		Remove All Columns	
		Go To Column (Ctrl	+G)
(Column Chooser	
(+A+	Best Fit	

- 6. From the Customization window, drag-and-drop the Minority Percent, Unique Sales Tax, (Scale 2), and Maint. Man-Hour Factor columns into the register.
- 7. Close the Customize window.
- 8. Sort the **Utilization Count** column by clicking on the column header twice so that you see the bars descending.

} Resource Code	Utilization Count	l1.	Maint. Man-H	Organizational Category
+ LL2		8,946.59	0.00	Laborer
+ LO2		4,734.02	0.00	Operator
+ LT1		3,611.05	0.00	Truck Driver - Team
+ LO1		1,640.00	0.00	Operator
+ LO4		1,484.63	0.00	Operator
+ LC2		1,188.73	0.00	Carpenter
+ LO3		889.33	0.00	Operator
+ LSSUPT		800.00	0.00	Supervision
+ LSSEC		800.00	0.00	Supervision
+ LSPE		800.00	0.00	Supervision
+ LL3		721.33	0.00	Laborer
+ LIW1		594.37	0.00	Iron Worker

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

- 9. Click on the **Saved Views** drop-down menu and select the **Save disc** icon to save the view.
- 10. Name the view Labor Utilization View, and then click OK to save the customized view.
- 11. From the **Actions** menu, select **Preview** to review the report before printing.

INEIGHT - P/ E101 - Trainin	AUL TRIPPI ng Job KLSample Trainir	ıg Job		Labor	Register	
Resource Code	Description	Utilization Count	Unit of Measure	Unique Sales Tax	Minority Percent	Maint. Man-Hour Factor
L01	Operator Class 1	680.00	Hour	0.00	0.00	0.0
LL2	Laborer	590.00	Hour	0.00	0.00	0.0
LSSUPT	Project Superintendent	560.00	Hour	0.00	0.00	0.0
LSSEC	Secretary	560.00	Hour	0.00	0.00	0.0
L03	Operator Class 3	220.00	Hour	0.00	0.00	0.0
LL3	Labor Foreman	200.00	Hour	0.00	0.00	0.0
L04	Operator Foreman	110.00	Hour	0.00	0.00	0.0
LT1	Teamster	100.00	Hour	0.00	0.00	0.0

9.2.1 Register Report Output Settings

Within the Preview for a register report, there are several options to choose from to configure the output of your report.

9.2.1.1 Page Setup

While in the Preview mode, selecting **File > Page Setup** provides setup options for the page format:

- Page Size (legal, letter, etc.)
- Paper Width & Height
- Orientation (portrait or landscape)
- Page Margins (left, right, top, bottom)

9.2.1.2 Exporting to Document

Using the Export function allows you to identify a Print range, Image quality, Password Security, and more. Selecting **File > Export Document** prints an Adobe Acrobat (*.pdf) report.

Exercise 9.2 — Create a Custom Register Report

You can configure the columns in your registers for reporting and run your own custom reports. Complete the following steps to configure and run a report from the CBS Register, using the Training Job:

- 1. Select Estimate>Cost Breakdown Structure (CBS).
- 2. Under Saved Views, Select CBS Simple View.
- 3. Hide the **Optional Code column**.
- 4. Add back in the Man-Hours (Total) and Man-Hours / UM columns.
- 5. Now add back in the Labor Total Cost, Owned Equipment Total Cost, and Materials Total Cost categories for reviewing the estimate.
- 6. Save the View (create your own name for the view).
- 7. Select **Preview** to view the report.

You should end up with the following results

ABC Contr Training Jo	racting Inc bTraining Job - Maricopa Co	unty No. TM2	924									
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Man-Hours (Total)	Unit Cost	Labor Total Cost	Total Cost (Forecast)	Man-Hours otal incl. Maintenan	ied Equipment Total	Man-Hours/ UM	Materials Total Cost	Currency
	JOB	20.00	Mile	27,993.15	\$306,883.14	\$907,442.76	\$6,137,662.81	28,438.44	\$1,062,750.40		\$3,393,700.70	U.S. Dollar
	Prime Bond	1.00	Lump Sum		\$48,686.14	\$0.00	\$48,686.14		\$0.00		\$0.00	U.S. Dollar
	Price % Add-On	1.00	Lump Sum		\$309,475.27	\$0.00	\$309,475.27		\$0.00		\$0.00	U.S. Dollar
	Job Financing	1.00	Lump Sum		\$0.00	\$0.00	\$0.00		\$0.00		\$0.00	U.S. Dollar
	Indirect Cost Escalation	1.00	Lump Sum		\$0.00	\$0.00	\$0.00		\$0.00		\$0.00	U.S. Dollar
	Direct Cost Escalation	1.00	Lump Sum		\$11,026.79	\$12,026.79	\$11,026.79		\$0.00		(\$1,000.00)	U.S. Dollar
	Indirect Cost Add-On	1.00	Lump Sum		\$0.00	\$0.00	\$0.00		\$0.00		\$0.00	U.S. Dollar
	Job Management & Equipment	1.00	Lump Sum	2,400.00	\$157,096.28	\$91,176.28	\$157,096.28	2,400.00	\$65,920.00	2,400.00	\$0.00	U.S. Dollar
	GeneralExpense	1.00	Lump Sum	0.00	\$4,200.00	\$0.00	\$4,200.00	0.00	\$0.00	0.00	\$0.00	U.S. Dollar
	Direct Cost Add-On	1.00	Lump Sum		\$109,544.08	\$15,676.56	\$109,544.08		\$19,450.89		\$66,546.70	U.S. Dollar
1	Mobilization	1.00	Lump Sum	0.00	\$75,000.00	\$50,000.00	\$75,000.00	0.00	\$0.00	0.00	\$25,000.00	U.S. Dollar
2	Clearing & Grubbing	10.00	Acre	0.00	\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	U.S. Dollar
3	Unclassified Excavation	50,000.00	Cubic Yard	3,964.29	\$9.95	\$110,467.00	\$497,466.56	4,115.48	\$302,999.56	0.08	\$0.00	U.S. Dollar
3.1	Excavation, scrapers	50,000.00	Cubic Yard	1,250.00	\$3.00	\$33,170.48	\$149,922.88	1,325.00	\$116,752.40	0.03	\$0.00	U.S. Dollar

Cost Breakdown Structure (CBS) Register

Congratulations, you have completed this exercise!

Lesson 9 Review

- 1. The ______ Report gives a good overview of how your price breakdowns by cost category.
 - a. Estimate Summary
 - b. PBS Summary
 - c. Audit
- 2. The ______ Report is a very important report to run during bid review to make sure you didn't leave anything out of the estimate.
 - a. CBS Details
 - b. Audit
 - c. Pay Item Summary
- 3. A best practice is to always set your Print output setting to **Preview** so you can review before printing.
 - a. True
 - b. False

Lesson 9 Summary

As a result of this lesson, you can:

- Run reports from the Report menu
- Create and run reports from register forms



LESSON 10 – DATA REPRODUCTION

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Create a job from an existing job or template
- Create a template
- Reproduce estimate data using the Bid Wizard
- Reproduce estimate data using copy/paste
- Add cost items to a job using the CBS Bid Wizard
- Utilize the Snapshot function

Lesson Topics

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10.2 Templates
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10.3.1 Bid Wizard Updates 148
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10.6.3 Editing a Job Snapshot
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10.1 COPY AN EXISTING JOB

As you build an estimate, you may want to reuse pay items, cost items, or resources from a previous estimate. When you plan to reuse the majority of content within a job, you can simply make a copy of the existing job.

Using the **Create a new Job from... Existing Job** option on the Backstage View creates an exact replica of the existing job, including the job's properties, pay items, cost items, and resources.

The following Step by Step walks you through how to make a copy of an existing job.

Step by Step — Copy an Existing Job

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

🛛 💾 🕞													ibrary - Estimate
File Setup	Estimate	Exec	ution	System	Integrations	Actions							
¢	-	2	圕			🐔 Labor		a l		÷	†4†		
Job Properties	Foundation Setup Data 👻	Address Book	Trench Calculator	Shift Rate Calculator	Resource Rates *	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	User Roles	Access Control	Reports	
	Master I	nitializatio	on		P	laster Resourc	es	Master As	semblies	Roles and Pe	rmissions	Reports	

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

e							Library - Estimate	
Start	Create a new 2	lob from						
New								
Open						F A		
Save								
Close Job	Scratch	Template	Existing Job	Bid Wizard	Archive	Snapshot	Primavera	US Cost
Close All Jobs								
Jobs								
Library								
Templates								
Snapshots								
Archive / Restore								
Settings								
Exit								

3. The Job Register displays a list of your existing projects; select the Training Job and click **OK**.

- 4. On the New Job dialog, in the Code field, type Infra Job Copy with your initials.
- 5. To copy the cost details from the existing job to the new job, verify that the **Copy Cost Details** checkbox is selected
 - If you wanted to copy just the cost item structure without cost details, you would uncheck the box.
- 6. Uncheck the check for copying the PBS Changes Log.
- 7. Click **OK** to create the new job.

9	New Job from 'Training Job'					
Code: *	Infra Job Copy					
	Copy Cost Details					
	Copy PBS Changes Log					
	Copy RFQ's, Quotes and Commitments					
	OK Cancel					

The new job opens with the Job Properties form active, so you can begin to modify the new job as needed. If you look through the tabs on the Job Properties form, you will find that it looks exactly like the job from which it was copied. Other forms, such as the Pay Item & Proposal Register and the CBS Register, also look the same in both jobs until you make modifications in one job or the other.

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

10.2 TEMPLATES

Job Templates provide you the ability to maintain a list of template jobs that can be used to create new jobs. As your company grows and increases the number of projects, the need to standardize the

estimating process increases to ensure consistency and reduce the chance of information being overlooked.

In InEight Estimate you can create job folders and store them in a separate register as templates. This allows you to store cost items in master templates separate from the jobs in your Job Register.

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

Step by Step — Create a Template

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

©	
Start	Templates
New	
Open	
Save	
Close Job	Template Register
Close All Jobs	

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



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

el	lect the source job:							
rag	g columns here to group			Find: [Search For]	Sa	ved views: Previo	us View	
	Code	<u>h.</u>	In Use	Description	Status	Schedule	Location	City
÷	E101 - Training Job KL			Sample Training Job	Bidding	Microsoft Proj	90th Street & Shea	Scotts
	Training Job		 Image: A second s	Training Job - Maricopa County No. TM2	Bidding	Microsoft Proj	I-10 MP 100 to MP	Phoenix
		2						
		2						

NOTE

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

• A prompt appears to give your new template a Job Code

Code: *	
	🗹 Copy Cost Details
	🗹 Copy PBS Changes Log
	Copy RFQ's, Quotes and Commitments
	OK Cancel

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

o Properti	ies Ø									
verview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking				
Code:	099KL									
cription:	Sample Training Job									

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

ile	Setup	Estimate	Execution	System	Actions		
	Print Preview	C Open	Close	Ē			
X	Export to Excel	😣 Deleti	2	Create Temp from Job	late		
	Print	1	Edit	Tools			
er	nplate Registe	r 0					
rag) columns here to	group					
	Code		<u> </u>	In Use	Description	Status	Schedule
. 1	Smal Project Ter	molate Kl			Sample Training Job	Bidding	Microsoft Proj

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



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



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

Job Register
Find: [Search For] … Saved views: Previous View ~
Use Description Status Schedule Location
Sample Training Job Bidding Microsoft Proj 90th Street
Sample Training Job Bidding Microsoft Proj 90th Street
Sample Training Job Bidding Microsoft Proj 90th Street
Training Job - Mancopa County No. TM2 Bidding Microsoft Proj 1-10 MP 10

10.2.1 Archive and Restore Templates

The templates feature gives you the ability to archive and restore templates, enabling templates to become portable. You can move templates between different environments. You can also backup the templates similarly to the Jobs Archive and Restore function.

Step by Step — Archive and Restore a Template

- 1. Click File to open the Backstage View.
- 2. Select Archive / Restore.
 - Several options appear for archiving and restoring your jobs, templates, and library
- 3. Select Archive Template.
 - The Template Register appears
- 4. Select the Small Project Template [your initials] template you previously made, then click OK.
- 5. When prompted to include attachments, click Yes.
 - The Save As window appears
- 6. Browse to where you want to save the job, then click Save.
- 7. Select **Restore Template** from the Archive / Restore page of the Backstage View to begin restoring the template.
- 8. Browse to the archived template and select it.
- 9. Click **Open**.

- If the template already exists, a prompt will appear asking if you want to overwrite it
 - To overwrite it, select Yes
 - If you select **No**, you will be prompted to save it under a new Template Code

10.3 BID WIZARD

InEight Estimate's Bid Wizard is a powerful tool that can help automate the process of setting up estimates by copying information that already exists in other InEight Estimate job folders. The Bid Wizard can be used to create new projects, create a new job from an existing template, or to add to projects that are already underway.

Rather than copying every part of an existing job, the Bid Wizard gives you more flexibility and control over which parts of a job you want to duplicate, e.g., pay items or cost items or both.

In most cases you will be copying cost items, but if you have a project with pay items that are commonly used, you can copy them into a new project. If you select pay items, you will be able to select cost items as well.

The following Step by Step walks you through how you can use the Bid Wizard to create a new job by importing pay items and their associated costs from an existing job.

Step by Step — Use the Bid Wizard

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

I 🗄 🗧 🔸													ibrary - Estimate
File Setup	Estimate	Exec	ution	System	Integrations	Actions							
6 D			A.	\$	۲	🐔 Labor		2	===	4	114	l in the second se	
			HH 1	1661		🟭 Equipment	i i	33 L		G	1.11	· 🕞	
Job Properties	Foundation Setup Data 👻	Address Book	Trench Calculator	Shift Rate Calculator	Resource Rates *	Materials	Resource Assemblies	Cost Item Assemblies	Standard Tables	User Roles	Access Control	Reports	
	Master I	nitializati	on		1	laster Resourc	es	Master As	semblies	Roles and Pe	ermissions	Reports	

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

e	Library - Estimate
Start	Create a new Job from
New	
Open	
Save	
Close Job	Scratch Template Existing Job Bid Wizard Archive Snapshot Primavera US Cost
Close All Jobs	
Jobs	
Library	
Templates	
Snapshots	
Archive / Restore	
Settings	
Exit	

• The Bid Wizard – Step 1 dialog displays

9	Bid Wizard	×
Step 1: What would you	like to do?	
Oreate a new job:		
New Code:		
Description:		
○ Add to existing job:	[Select Source Job]	
		Next > Cancel

TIP

Notice that you can either create a new project or add to an existing project.

- 3. Type **E101 Bid Wizard** (with your initials) in the New Code field.
- 4. Type Bid Wizard Example in the Description field.
- 5. Click the **Next** button.
 - The Bid Wizard Step 2 dialog displays
- 6. Choose Select cost items and click Next.

9	Bid Wizard X
Step 2 of 5: What	should fill the new Job?
⊖ Select pay items	from a source Job folder (or import them from an electronic file), and optionally, copy their corresponding cost items.
Select cost items	from a source Job folder.
	C Back Next Cancel
	< Dack Next > Caller

- The Bid Wizard Step 3 of 4 dialog displays
- You use this step to indicate which source you want to pull your setup data from (the library or your source job)
- 7. For all selections, select **Copy from source job**.
- 8. Check the Also copy all non-utilized resources checkbox.
- 9. Select **Copy from source job** under Unassigned Cost Items and Markup, and the **Copy Markup** box is automatically selected.

Job Properties	Job Properties contains the Overview, Security,			
○ Copy from Master Job Properties	Cover Sheet, Cost Basis, Minority Setup and Fuel			
Opy from source job	Cost for the job.			
Foundation Setup Data	Foundation Setup Data contains the Account Codes			
O Copy from Master Foundation Setup Data	Tags, Quote Group Tags, Units of Measure,			
Copy from source job	Areas, Wage Zones, Organization Categories and Weather Tags.			
Resources and Resource Assemblies	Resources and Resource Assemblies that are			
Copy utilized Resources and Resource Assemblies from source job	utilized by Cost Items in the source job(s) are copied by default. Optionally, all Resources and Resource Assemblies can be copied from the source job(s) into the new job.			
Also copy all non-utilized resources				
Jnassigned Cost Items and Markup	Unassigned Cost Items are those cost items in the			
○ Copy from Master CBS	CBS that are not assigned to specific pay items,			
Copy from source job	Expense, and others.			
🔽 Copy Markup				
Norkbook	The workbook contains data that is used to link			
○ Copy from Library	fields in Estimate to cells in Excel. The workbook containing the data that you want to			
● Copy from source job	use for linking with Excel can be copied from the Library or the source job.			

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

3				Bid Wizard			o x
Step 4 of	4: Choose the s	ource Cos	t Items to c	copy.			
Source Job	: [Select Source Jol	•] •					
Drag columns he	ere to group			Find: [Search For]	Saved views: S	tandard View	•
Include	CBS Position Code	🚊 Des	cription			Optional Code	Forecast (T/O) Quantit
(Þ

- The Job Register opens
- 12. Find and select Training Job.
- 13. Click OK.
 - This screen displays the cost items of the source job (Training Job). All items are automatically selected
- 14. Use the Toggle Include All button to exclude all selections.
| S | tep 4 | of 4: Cl | hoose th | e source Cost I | tems to copy | <i>I</i> . | | | | | |
|-----|----------|-----------|------------------|-----------------|------------------|------------------------|-----------------|--------------|------------------------|-------------|---------------|
| | Source . | Job: Tra | aining Job | • | | | | | | | |
| rag | ı column | s here to | group | | Find | : [Search For. |] | Saved views: | Standard View | I | - |
| | Include | 2 | CBS
P ≞_
C | Descr | Optional
Code | Forec
(T/O)
Quan | Unit of
Meas | Unit
Cost | Total
Cost
(Fore | Curre | Accou
Code |
| ÷ | | | 1 | Mobilization | 641 0 100 | 1.00 | Lump Sum | \$11,909.51 | \$11,909.51 | U.S. Dollar | 1020 |
| | | | 2 | Clearing & | 201 0 102 | 10.00 | Acre | \$3,793.70 | \$37,936.97 | U.S. Dollar | 1110 |
| | | | 3 | Unclassifie | 202 0183 | 50,000.00 | Cubic Yard | \$4.79 | \$239,582.64 | U.S. Dollar | 1122 |
| | | | 3.1 | Excavat | 3.1 | 38,227.74 | Cubic Meter | \$3.90 | \$149,236.48 | U.S. Dollar | 1122. |
| | | | 3.2 | Embank | 3.2 | 42,432.79 | Cubic Meter | \$2.13 | \$90,346.16 | U.S. Dollar | 1122. |
| | | | 4 | Aggregate | 303 5912 | 45,000.00 | Ton | \$15.15 | \$681,696.99 | U.S. Dollar | 1120 |
| | | | 4.1 | Furnish | 4.1 | 45,000.00 | Ton | \$11.54 | \$519,513.30 | U.S. Dollar | 1120. |
| | | | 4.2 | Finegra | 4.2 | 400,000.00 | Square Yard | \$0.18 | \$73,352.36 | U.S. Dollar | 1180 |
| | | | 4.3 | Install A | 4.3 | 45,000.00 | Ton | \$1.97 | \$88,831.33 | U.S. Dollar | 1120 |
| | ÷ | | 4.3.1 | Place | 4.3.1 | 45,000.00 | Ton | \$1.55 | \$69,716.92 | U.S. Dollar | 1120. |
| | | | | | | | | | | | • |

- 15. Select the checkboxes to include **Mobilization**, **Clearing & Grubbing**, and **Unclassified Excavation**.
- 16. Notice that when selecting Unclassified Excavation, that cost item's subordinates are automatically selected

S	tep 4	4 of 4:	Choose the	e source Cost I	tems to copy	-						
	Sourc	e Job:	Training Job	*								
)rag	; colun	nns here	to group		Find:	[Search For.]	Saved views:	Standard View	1	-	
ſ	Inclu	de	CBS P ≞_ C	Descr	Optional Code	Forec (T/O) Quan	Unit of Meas	Unit Cost	Total Cost (Fore	Curre	Accou Code	JIN
T		\checkmark	1	Mobilization	641 0 100	1.00	Lump Sum	\$11,909.51	\$11,909.51	U.S. Dollar	1020	
		\checkmark	2	Clearing &	201 0 102	10.00	Acre	\$3,793.70	\$37,936.97	U.S. Dollar	1110	
1		\checkmark	3	Unclassifie	202 0 183	50,000.00	Cubic Yard	\$4.79	\$239,582.64	U.S. Dollar	1122	
		\checkmark	3.1	Excavat	3.1	38,227.74	Cubic Meter	\$3.90	\$149,236.48	U.S. Dollar	1122.	1
		\checkmark	3.2	Embank	3.2	42,432.79	Cubic Meter	\$2.13	\$90,346.16	U.S. Dollar	1122.	2
			4	Aggregate	303 5912	45,000.00	Ton	\$15.15	\$681,696.99	U.S. Dollar	1120	
			4.1	Furnish	4.1	45,000.00	Ton	\$11.54	\$519,513.30	U.S. Dollar	1120.	1
			4.2	Finegra	4.2	400,000.00	Square Yard	\$0.18	\$73,352.36	U.S. Dollar	1180	
			4.3	Install A	4.3	45,000.00	Ton	\$1.97	\$88,831.33	U.S. Dollar	1120	
			4.3.1	Place	4.3.1	45,000.00	Ton	\$1.55	\$69,716.92	U.S. Dollar	1120.	2
												,

- 17. Click **Finish** to add the new job.
 - An Attention prompt appears asking, "Do you want to adjust Pay Rules and Shift Arrangements of the copied cost items?"
 - Typically, you will want to use the shifts and payment rules of your new destination job.
- 18. Select Adjust the pay rules and shift arrangements to match the destination.

9	Attention
You have ordered	one or more cost items to be copied by the Bid Wizard.
Do you want to O Keep the orig	adjust Pay Rules and Shift Arrangements of the copied cost items?
Adjust the pa	y rules and shift arrangements to match the destination
Never ask me	this question again
	ОК

- 19. Click OK.
 - A help bubble appears letting you know the job has been created, and that you can use the ribbon tabs on the Estimate landing page to open any form
- 20. Close the help bubble by selecting the **X** in the upper right corner.



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

Cos	st Breakdown Structu	re (CBS) Register 🛛 🕲			
Drag	g columns here to group				
	CBS Position Code 😐	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure
÷		ЈОВ		1.00	Lump Sum
	+	Prime Bond	PRIME BOND	1.00	Lump Sum
	+	Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum
	+ Job Financing		FINANCE EXPENSE	1.00	Lump Sum
	+	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum
	+	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum
	+	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum
	+	Job Management & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum
	+	General Expense	GENERAL EXPENSE	1.00	Lump Sum
	+	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum
	+ 1	Mobilization	641 0 100	1.00	Lump Sum
	+ 2	Clearing & Grubbing	201 0102	10.00	Acre
	3	Unclassified Excavation	202 0183	50,000.00	Cubic Yard
	+ 3.1	Excavation	3.1	38,227.74	Cubic Meter
	+ 3.2	Embankment	3.2	42,432.79	Cubic Meter

10.3.1 Bid Wizard Updates

While using the Bid Wizard, the Include option is left unchecked by default. A filter is applied to bring in pay items when using the Bid Wizard. The Toggle Include All button only selects the filtered list of items instead of all items.

When the filter criteria is modified, the selected items remain checked even if some of the items might not be visible in the view. When the view is changed, the selected items remain checked.

Tags and UDF fields are included in the **Bid Wizard Selection** register for the cost items and Pay Item & Proposal selection registers. This lets you filter the list of cost items based on a tag or UDF.

When you select the **Toggle Select All** button, only filtered items are included which allow you to include scopes of work relevant to your estimate without having to manually select all items needed.

haq	colur	ins her	to-group				58	ved views:	Standa	nd Vilew	-
	Indu	de	Pay Item Number	Tag 8	Tag 9	Teg 10	User Defined 1	User Defin	ed 2	User Defined 3	Us
	+	1	501(A) 1306				EarthWork				
	+	1	506(A) 1322								
	+	1	503(A) 1313				Special Constructi				
P.	+	\mathbf{I}	600 0300								

10.4 COPY ESTIMATE DATA USING EDIT COMMANDS

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

To copy and paste cost history from one job to another, it is beneficial to see the jobs side by side. The following steps walk you through the process.

Step by Step — Copy Estimate Data Using Edit Commands

- 1. Click the **File** tab from the Estimate landing page and open the **E101 Bid Wizard** job you just created.
- 2. Open the **Training Job** (if you do not still have it open).

3. Make sure the CBS is open for both jobs by going to the Estimate menu and selecting **Cost Breakdown Structure (CBS)**.



4. Since you have both jobs open and they are in their own application window, align them to be side by side by using the **minimize icons** of each job or utilizing Windows align functionality.

			-	đ	×
				鱼	∎ ?
					^
					•
]	Saved views:	Standard View			•
lv	Hours		Hours		

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

i 💾 🔹								3 💾 -							
e Setup Estim	ate Quote Price Execution	System Integrations	Actions More Act	ions		金田(File Setup Estima	te Quote Price			Actions More Act	ions		童目
st Breakdown ucture (CES)	Workbook Schedule Cash Flow	Indirect Cost Items	Breakdown ture (PBS)	Scenario:	- Reports		C s	Cost Breakdown Structure (CBS)	Workbook Schedule	Cash Flow	Indirect Cost Items	Breakdown ture (PBS)	e Scenario: mates	• Reports	
eakdown Struc R	es Workbook Schedule	Indirect Cost Over	rhead and Pr	Alternates	Reports		^ E	Breakdown Struc Ro	workbook Sci	hedule	Indirect Cost Ove	rhead and Pr	Alternates	Reports	
ost Breakdown Structu	ure (CBS) Register 🛛 🔘							Cost Breakdown Structu	re (CBS) Register 🛛 🔘						
ag columns here to group		Find:	[Search For] ····	Saved views:	Previous View	-	0	Trag columns here to group			Find	[Search For] ····	Saved views:	Standard View	
CBS Position Code	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	AJ	CBS Position Code	Description		Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
•	JOB		20.00	Mie	\$3,633,147	\$72,662,954		→ ■	308			1.00	Lump Sum	\$5,643,071	\$5,643,071
	Prime Bond	PRIME BOND	1.00	Lump Sum	\$47,119.07	\$47,119.07		+	Prime Bond		PRIME BOND	1.00	Lump Sum	\$5,492.11	\$5,492
	Price % Add-On	PRICE % ADD-ON	1.00	Lump Sum	\$295,371.61	\$295,371.61			Price % Add-On		PRICE % ADD-ON	1.00	Lump Sum	\$23,005.49	\$23,005
	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$0.00	\$0.00		+	Job Financing		FINANCE EXPENSE	1.00	Lump Sum	\$0.00	\$0
	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum	\$0.00	\$0.00		+	Indirect Cost Escalation		INDIRECT COST ESCAL	1.00	Lump Sum	\$0.00	\$0
	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum	\$19,131.77	\$19,131.77		+	Direct Cost Escalation		DIRECT COST ESCALAT	1.00	Lump Sum	\$0.00	\$0
	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$59,476.54	\$59,476.54		+	Indirect Cost Add-On		INDIRECT COST ADD-ON	1.00	Lump Sum	\$3,280.16	\$3,280
+	Job Management & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum	\$125,896.28	\$125,896.28		+	Job Management & Equipm	ient	JOB MANAGEMENT & E	1.00	Lump Sum	\$125,896.28	\$125,896
+	General Expense	GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,200.00		+	General Expense		GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,200
	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$104,203.16	\$104,203.16			Direct Cost Add-On		DIRECT COST ADD-ON	1.00	Lump Sum	\$5,788.58	\$5,788
+ 1	Mobilization	641 0100	2.00	Lump Sum	\$11,909.51	\$23,819.02		+ 1	Mobilization		641 0 100	1.00	Lump Sum	\$11,909.51	\$11,905
+ 2	Clearing & Grubbing	201 0 102	10.00	Acre	\$3,793.70	\$37,936.97		+ 2	Clearing & Grubbing		201 0102	10.00	Acre	\$3,793.70	\$37,936
3	Unclassified Excavation	202 0 183	50,000.00	Cubic Yard	\$4.94	\$246,901.12		□ 3	Unclassified Excavation		202 0183	50,000.00	Cubic Yard	\$4.79	\$239,582
+ 3.1	Excavation	3.1	38,227.74	Cubic Meter	\$4.10	\$156,554.96		+ 3.1	Excavation		3.1	38,227.74	Cubic Meter	\$3.90	\$149,236
+ 3.2	Embankment	3.2	42,432.79	Cubic Meter	\$2.13	\$90,346.16		+ 3.2	Embankment		3.2	42,432.79	Cubic Meter	\$2.13	\$90,346
4	Aggregate Base	303 5912	45,000.00	Ton	\$15.15	\$681,696.99	1.	*							

 On the CBS of the Training Job, click the row header on cost item 4 – Aggregate Base and press Ctrl+C to copy the cost item.

\rightarrow	■ 4	Aggregate Base	303 5912
	+ 4.1	Furnish & Haul Base Material	4.1
	+ 4.2	Finegrade Subgrade	4.2
	4.3	Install Aggregate Base	4.3
	+ 4.3.1	Place Aggregate Base	4.3.1
	+ 4.3.2	Blue Top Aggregate Base	4.3.2

- TIP When you copy a superior cost item, all of its subordinates are automatically copied.
- 6. On the CBS of the E101 Bid Wizard job, click the row header on the first blank register row, and press **Ctrl+V** to paste the cost item.

	+	1	Mobilization	641 0 100	1.00	Lump Sum
	+	2	Clearing & Grubbing	201 0 102	10.00	Acre
		3	Unclassified Excavation	202 0183	50,000.00	Cubic Yard
	+	3.1	Excavation	3.1	38,227.74	Cubic Meter
	+	3.2	Embankment	3.2	42,432.79	Cubic Meter
•						

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

9	Attention
You have order to the Cost Ite	red one or more cost items to be copied and inserted as subordinates to m at CBS Position Code <job>.</job>
 Do you want Keep the c Adjust the 	to adjust Pay Rules and Shift Arrangements of the copied cost items? original pay rules and shift arrangements a pay rules and shift arrangements to match the destination
Never ask	me this question again OK Cancel

• You can see in the destination job's CBS that you've added the Aggregate Base cost item, along with its subordinate cost items and all cost and productivity detail

j 💾 -															
le Setup Estir	nate Quote Price Execution		Actions More Ac	tions		金田(File Setup Estima	ite Qu			Actions More	Actions		金田
			Alternat	e Scenario:						▓⊒⊭		Alten	nate Scenario: E	. 问	
st Breakdown ructure (CBS)	Workbook Schedule Cash Hor	Cost Items 💽 Stru	cture (PBS) 🚖 🛃 Alte	rnates	Reports			Structure (CBS)	· / *	forkbook Schedule Cash Hor	Cost Items 💽 Struc	ture (PBS) 🚖 👫	lternates	Reports	
eakdown Struc R	Res Workbook Schedule	Indirect Cost Ov	erhead and Pr	Alternates	Reports		^	Breakdown Struc Re	es Wo	orkbook Schedule	Indirect Cost Ove	rhead and Pr	Alternates	Reports	
st Breakdown Structs	ure (CBS) Register O							Cost Breakdown Structu	re (CBS) R	egister O					
g columns here to group		Find	: [Search For] ···	Saved views:	Previous View	-		Drag columns here to group			Find:	[Search For] ···	Saved views	: Standard View	
CBS Position Code	Description	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	A	OBS Position Code	Descriptio	on.	Really Optional Code	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)
	308		20.00	Mie	\$3,633,147	\$72,662,954		•	308			1	.00 Lump Sum	\$14,870,33	\$14,870,3
	Prime Bond	PRIME BOND	1.00	Lump Sum	\$47,119.07	\$47,119.07		+	Prime Be	ond	PRIME BOND	1	.00 Lump Sum	\$12,328.94	4 \$12,3
	Price % Add-On	PRICE % ADD-ON	1.00) Lump Sum	\$295,371.61	\$295,371.61			Price %	Add-On	PRICE % ADD-ON	1	.00 Lump Sum	\$60,524.65	5 \$60,5
	Job Financing	FINANCE EXPENSE	1.00	Lump Sum	\$0.00	\$0.00		+	Job Fina	ancing	FINANCE EXPENSE	1	.00 Lump Sum	\$0.00	0
	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum	\$0.00	\$0.00		+	Indirect	t Cost Escalation	INDIRECT COST ESCAL	1	.00 Lump Sum	\$0.00)
	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum	\$19,131.77	\$19,131.77			Direct G	ost Escalation	DIRECT COST ESCALAT	1	.00 Lump Sum	\$0.00	5
	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	\$59,476.54	\$59,476.54		+	Indirect	t Cost Add-On	INDIRECT COST ADD-ON	1	.00 Lump Sum	\$11,005.99	9 \$11,0
+	Job Management & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum	\$125,896.28	\$125,896.28		+	Job Man	nagement & Equipment	JOB MANAGEMENT & E	1	.00 Lump Sum	\$125,896.28	\$125,8
+	General Expense	GENERAL EXPENSE	1.00	Lump Sum	\$4,200.00	\$4,200.00		+	General	Expense	GENERAL EXPENSE	1	.00 Lump Sum	\$4,200.00	\$4,
	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	\$104,203.16	\$104,203.16			Direct G	ost Add-On	DIRECT COST ADD-ON	1	.00 Lump Sum	\$19,422.52	2 \$19,4
+ 1	Mobilization	641 0 100	2.00	Lump Sum	\$11,909.51	\$23,819.02	-	+ 1	Mobiliza	ation	641 0 100	1	.00 Lump Sum	\$11,909.5	1 \$11,9
+ 2	Clearing & Grubbing	201 0 102	10.00	Acre	\$3,793.70	\$37,936.97		+ 2	Clearing	& Grubbing	201 0 102	10	.00 Acre	\$3,793.70	\$37,9
3	Unclassified Excavation	202 0 183	50,000.00	Oubic Yard	\$4.94	\$246,901.12		3	Unclassi	ified Excavation	202 0 183	50,000	00 Cubic Yard	\$4.75	\$239,5
+ 3.1	Excavation	3.1	38,227.7	4 Cubic Meter	\$4.10	\$156,554.96		+ 3.1	Excava	ation	3.1	38,227	.74 Cubic Meter	\$3.90	\$149,2
+ 3.2	Embankment	3.2	42,432.7	Oubic Meter	\$2.13	\$90,346.16		+ 3.2	Embani	kment	3.2	42,432	79 Cubic Meter	\$2.1	3 \$90,3
a 4	Aggregate Base	303 5912	45,000.00	Ton	\$15.15	\$681,695.99		→ □ 4	Aggrega	ate Base	303 5912	45,000	.00 Ton	\$15.1	\$681,6
+ 4.1	Furnish & Haul Base Material	4.1	45,000.00) Ton	\$11.54	\$519,513.30		+ 4.1	Furnish	n & Haul Base Material	4.1	45,000	.00 Ton	\$11.54	4 \$519,5
+ 4.2	Finegrade Subgrade	4.2	400,000.00	Square Yard	\$0.18	\$73,352.36		+ 4.2	Finegra	ade Subgrade	4.2	400,000	.00 Square Yan	d \$0.18	\$73,3
■ 4.3	Install Aggregate Base	4.3	45,000.00) Ton	\$1.97	\$88,831.33		□ 4.3	Install	Aggregate Base	4.3	45,000	.00 Ton	\$1.9	7 \$88,8
+ 4.3.1	Place Aggregate Base	4.3.1	45,000.00) Ton	\$1.55	\$69,716.92		+ 4.3.1	Place	e Aggregate Base	4.3.1	45,000	.00 Ton	\$1.5	\$ \$69,7
+ 4.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard	\$0.05	\$19,114.42		+ 4.3.2	Blue	Top Aggregate Base	4.3.2	400,000	.00 Square Yan	d \$0.03	5 \$19,1
= S	Asphalt Concrete Hot Mix Type A	303 4263	35,000.00) Ton	\$42.62	\$1,491,580.59		*							

TIP

You can also drag and drop cost items from one CBS to another instead of copying and pasting.

TIP Copied cost items are considered Job Overhead until they are assigned to a pay item

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



10.5 CBS BID WIZARD

You can also use the Bid Wizard to add cost items while you are in the CBS Register. The following steps walk through using the CBS Bid Wizard.

Step by Step — Use the CBS Bid Wizard

- 1. Click the File tab from the Estimate landing page and open the E101 Bid Wizard job you created.
- 2. From the Estimate tab, select Cost Breakdown Structure (CBS).
- 3. Create a new cost item by typing New in the Description column on the bottom row of the CBS
- 4. Highlight the **New** row.

×.	9	new		1.00	Caul
1.		New		1.00	Each
+	4.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard
+	4.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton
	4.3	Install Aggregate Base	4.3	45,000.00	Ton
+	4.2	Finegrade Subgrade	4.2	400,000.00	Square Yard
+	4.1	Furnish & Haul Base Material	4.1	45,000.00	Ton
	4	Aggregate Base	303 59 12	45,000.00	Ton

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

I 🗑 💾 🕘						
File Setup Estir	nate Quote i	Price Execution	System Integrations	Actions	More Actions	
E Schedule Selection	∢▶ Swap →	📸 Bid Wizard	∑ Unit / Total Confirmation			+
🖅 Unschedule Selection	😑 Remove 👻	Subtotal Calculator	😳 Refresh Benchmarks			
📲 🛤 Calculate Plug Days	C Update -	Quantity Checking	产 Add Quote	Add Level One Cost Items *	Add Subordinate Cost Items *	Import / Update CBS +
Schedule	Batch Operations		Tools		Data Source	

- The Bid Wizard window opens
- 6. Click in the Source Job column on the New cost item row.

New	1.00	Each	[Select Source J •
Blue Top Aggregate Base	400.000.00	Square Yard	[Select Source Job]
Place Aggregate Base	45,000.00	Ton	[Select Source Job]

- 7. From the Source Job drop-down list, select **Training Job**.
- 8. Scroll to the right of the Source Job column and click in the **Source CBS Position Code** column on the New Cost item row.
 - A source CBS Register window appears
- 9. Select CBS position code 5 Asphalt Concrete Hot Mix Type A from the register.

Drag	g columns here to group	Find: [Search For]	··· Saved views:	Previous View	-
	CBS Position Code 😑	Description	Really Optional Code	Unit of Measure	Forecast (T/O) Quantity
	4.2	Finegrade Subgrade	4.2	Square Yard	. *
	■ 4.3	Install Aggregate Base	4.3	Ton	
	4.3.1	Place Aggregate Base	4.3.1	Ton	
	4.3.2	Blue Top Aggregate Base	4.3.2	Square Yard	
\rightarrow	5	Asphalt Concrete Hot Mix Type A	303 4263	Ton	
	5.1	Furnish & Haul Hot Mix	5.1	Ton	
	5.2	Install Hot Mix Type A	5.2	Ton	
	6	36 Inch RCP Culvert Class III	413(B) 0464	Linear Feet	
	6.1	Furnish RCP Materials	6.1	Linear Feet	
	6.2	Excavate RCP Trench	6.2	Cubic Yard	
	6.3	Install RCP Pipe	6.3	Linear Feet	
	6.4	Backfill RCP Pipe	6.4	Cubic Yard	
•					•
				ОК	Cancel

10. Click **OK**.

11. Click **Finish** on the Bid Wizard.

- An Attention prompt displays, asking if you want to make adjustments
- Keep the default options selected: Make Adjustments according to their quantity drivers and cost drivers and Adjust the pay rules and shift arrangements to match the destination
- 12. Click OK.

§ Att	ention
You have ordered one or more cost items Wizard.	, or just their details, to be copied by the Bid
Do you want to adjust cost items and co quantumes : O Do not make adjustments	sst details based on the destination
Make adjustments according to their	quantity drivers and cost drivers
Do you want to adjust Pay Rules and SI O Keep the original pay rules and shift Adjust the pay rules and shift arrang	ift Arrangements of the copied cost items? arrangements ements to match the destination
Never ask me this question again	
	OK Cancel

- You can see that cost item 5 and its subordinates are now imported into your existing job.
- You could choose a new name for the cost item, or name it Asphalt Concrete Hot Mix Type A to match the original cost item

		4.3	Install Aggregate Base	4.3	45,000.00	Ton
	+	4.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton
	+	4.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard
ı		5	Asphalt Concrete Hot Mix Type A		1.00	Each
	+	5.1	Furnish & Haul Hot Mix	5.1	1.00	Ton
	+	5.2	Install Hot Mix Type A	5.2	1.00	Ton

10.6 SNAPSHOTS

A job snapshot is a copy of an estimate that provides read-only access to the job as it existed at a specific point in time. You can now filter the Snapshot register to jobs containing snapshots.

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

10.6.1 Snapshot Register

The Snapshot Register is where you will view individual snapshots for specific jobs.

Step by Step — Snapshot Register

- 1. Click the File tab to open the Backstage View. In the panel, select Snapshots.
- 2. From the Snapshots form, select the Snapshot Register tab.



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

	Co	de	1	Description
\rightarrow	+ E101 - Training Job KL		j Job KL	Sample Training Job
	+	+ Training Job		Training Job - Maricopa County No. TM2924

10.6.2 Creating a New Job Snapshot

Step by Step — Create a New Job Snapshot

You can create a Job Snapshot from an existing Job.

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

File Setu	ıp Estim	ate Execution	System	Action	ns				
📳 Print	ें: Load	👸 Create Job Snap	shot	20			C Refresh		
🖏 Preview	े ह Edit	🔆 Delete All Job Sn	apshots	*			🟥 Create Ne	ew Job from Sn	apshot
	💣 Delete			Expand / Collapse 👻	Filter to Job with Snapsho	os Clear ots Filter			
Print		Edit			View			Tools	
Snapshot Register 🔹									
Drag columns l	here to group								
Code	1	Description			Last Saved		Version	In Use	Status
→ + E101 - Training Job KL Sample Training Jo			Job		11/12/	2019 2:23:1	19.2.0.27	✓	Bidding
+ Traini	ng Job	Training Job - M	laricopa Co	unty No. TM	2924 11/13/	2019 7:40:1	19.2.0.27		Bidding

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

6	Attention
Unsaved da before takin	ata will not be stored in the snapshot. Save the job 1g a snapshot?
E101 - T	raining Job KL
	OK Cancel Unselect All

- 3. A New Job Snapshot [Job Code Here] dialog box appears. From there, you can add a Snapshot comment.
 - If you want to Include all Attachments that have been stored in the Job Folder with this Snapshot, select the check box, otherwise uncheck the box.
 - If you want to Use Job's current User Access restrictions for this Snapshot, select this radio button.
 - If you want to Remove User Access restrictions for this Snapshot and allow read-only access to all users, select this radio button
 - If you want to Specify User Access restrictions for this Snapshot (default selection), select this option
 - Then use the Add and Remove buttons to specify user access using Active Directory.

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

9	New Job Snapshot [E101 - Training Job KL] — 🗆 🗙
Job:	E101 - Training J Job Description: Sample Training Job
Snapshot Comment:	<add comment="" here=""></add>
\rightarrow	Include all Attachments that have been stored in the Job Folder with this Snapshot
	User Access Ouse Job's current User Access restrictions for this Snapshot Remove all User Access restrictions for this Snapshot Specify User Access restrictions for this Snapshot User - karen.loftus@ineight.com User - paul.trippi@ineight.com Remove
	OK Cancel

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

Success!	
Successf	ully created Job Snapshot for Job: 'E101 - Training Job KL'.
Never	offer this help again
	ОК

10.6.3 Editing a Job Snapshot

Step by Step — Edit a Job Snapshot

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

\rightarrow	-	E101	Traini	ng Job KL	Sample Training Job	
			Snaps	hot Comment	t	Date
	+	→ Train	 ing	Load		/13
	1	Iran		<u>E</u> dit		
			്ര	<u>D</u> elete		
			Ē	<u>C</u> reate N	ew Job from Snapshot	

- 3. The same sort of dialog box opens up as when you created the Snapshot. In this case, from the Edit Job Snapshot [Job Code Here] dialog box, modify the Snapshot Comment and the User Access options as needed.
 - If you want to Include all Attachments that have been stored in the Job Folder with this Snapshot, select the check box. Otherwise, uncheck the box
 - If you want to Use Job's current User Access restrictions for this Snapshot, select this radio button
 - If you want to Remove User Access restrictions for this Snapshot and allow read-only access to all users, select this radio button
 - If you want to Specify User Access restrictions for this Snapshot (default selection), select this option
 - Then use the Add and Remove buttons to specify user access using Active Directory. (Users with current access to the job default onto the list.)
- 4. Click **OK** to update the snapshot.

10.6.4 Deleting a Job Snapshot

Step by Step — Delete a Job Snapshot

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

	Co	de		≣	-	Description
÷	- E101 - Training Job KL				KL	Sample Training Job
			Snapsh	not Co	mment	🚊 🛛 Date Crea
	→ <add u<br="">Comm + Training Job</add>		Indate	ed.com Load Edit	201	
			ೆ	<u>D</u> elet	e	
				đ	<u>C</u> reat	e New Job from Snapshot

3. Click OK

8	Delete Jol	b Snapsho	t					
Are you sure you want to delete this Job Snapshot?								
<add -="" [e101="" comment="" job="" kl_201911<="" td="" training="" updated=""></add>								
	ОК	Cancel	Unselect All					

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

0								
File	Setu	ıp Estin	nate	Execution	Syste	m	Action	ns
📑 Pri	nt	ें, Load	ò	Create Job Snap	oshot		14	
🗟 Preview 🛛 🧦 Edit		🔆 Delete All Job Snapshots				*		
		💣 Delete				Col	pand / apse *	Filter to with Sna
Pri	nt			Edit				View
Snaps	shot Re	egister 🛛						

10.6.5 Loading a Job Snapshot

When you load an existing Snapshot, it loads into Estimate as any other job.

Step by Step — Load a Job Snapshot

- 1. Click the File tab to open the Backstage View, then select Snapshots.
- 2. From the Snapshots form, select the Snapshot Register tab.
- 3. On the Snapshot Register, click the inicon next to the desired job to display the list of snapshots.
- 4. Right-click on the individual snapshot you want to load and select Load.

- E			Code 🛓 Description			Last Saved		Version	In Use
\rightarrow = E101 - Training Job KL Sample Training Job				11	11/13/2019 8:25:3		19.2.0.27	\checkmark	
		Snapshot Comment	<u> </u>	Date Created			Version		
<add comment="" here="" updated=""></add>			11/13/2019 3:31:54 PM 19.2.0.27						
	→	Comment #2		11/13/2019 3:5	1.70	Load	10 2 0 27		_
+ 1	Traini	ing Job	Training Job - Maricopa Co	unty No. TM292		Loau			
						<u>E</u> dit			F
				6	8	<u>D</u> elete	2		
			0	÷,	<u>C</u> reat	e New Job f	rom Snapsho	t	
+	1	→ Traini	→ Comment #2	Anapshot Comment Image: Comment with the second	→ Comment #2 11/13/2019 3:32 Training Job Training Job - Maricopa County No. TM292	Sinaparot comment	Sinapshot Comment	Sinaparot comment	Shapshot comment

To identify a snapshot in Estimate as a read-only snapshot:

- The job name is preceded by the label SNAPSHOT: centered on the top of the toolbar
- A red banner shows the specific snapshot information at the bottom of the screen

NOTE A snapshot can be modified, but it cannot be saved as it is read-only.



Exercise 10.1 — Data Reproduction

Now that you have learned how to utilize the Bid Wizard, complete the following steps using the Bid Wizard and Copy & Paste features.

- 1. Open the Bid Wizard by clicking the Bid Wizard icon from the More Actions tab.
- 2. Choose the **Create a new job** radio button.
- 3. Type **BW Exercise** (with your initials) in the **New Code** field and type **Exercise** in the Description field.
- 4. Choose **Select cost items.**
- 5. For all selections, choose **Copy from source job**.
- 6. Select the Also copy all non-utilized resources checkbox.
- 7. Select **Copy from source job** under Unassigned Cost Items and Markup, and the Copy Markup box is automatically selected.
- 8. Find and select **Training Job** and click **OK**.
- 9. Use the **Toggle Include All** button to exclude all selections.
- 10. Select the checkboxes to include Cost Items 4-7.
- 11. Click **Finish** to add the new job.
- 12. Select Adjust the pay rules and shift arrangements to match the destination.
- 13. Open the **CBS** to see the cost items that were brought in.

14. Open the **Infra Job Copy** with your initials that you created earlier in this lesson.

15. Copy **Cost items 8 and 9** and paste them into the BW Exercise job.

You should end up with the following results

CBS Position Code 🚊	Description	Optional Code	Forecast (T/O) Quantity	Unit of Measure	
+	Indirect Cost Escalation	INDIRECT COST ESCAL	1.00	Lump Sum	
+	Direct Cost Escalation	DIRECT COST ESCALAT	1.00	Lump Sum	
+	Indirect Cost Add-On	INDIRECT COST ADD-ON	1.00	Lump Sum	
+	Job Management & Equipment	JOB MANAGEMENT & E	1.00	Lump Sum	
+	General Expense	GENERAL EXPENSE	1.00	Lump Sum	
+	Direct Cost Add-On	DIRECT COST ADD-ON	1.00	Lump Sum	
□ 1	Aggregate Base	303 5912	45,000.00	Ton	
+ 1.1	Furnish & Haul Base Material	4.1	45,000.00	Ton	
+ 1.2	Finegrade Subgrade	4.2	400,000.00	Square Yard	
□ 1.3	Install Aggregate Base	4.3	45,000.00	Ton	
+ 1.3.1	Place Aggregate Base	4.3.1	45,000.00	Ton	
+ 1.3.2	Blue Top Aggregate Base	4.3.2	400,000.00	Square Yard	
2	Asphalt Concrete Hot Mix Type A	303 4263	35,000.00	Ton	
+ 2.1	Furnish & Haul Hot Mix	5.1	35,000.00	Ton	
+ 2.2	Install Hot Mix Type A	5.2	35,000.00	Ton	
3	36 Inch RCP Culvert Class III	413(B) 0464	<u>1,024.00</u>	Linear Feet	
+ 3.1	Furnish RCP Materials	6.1	1,024.00	Linear Feet	
+ 3.2	Excavate RCP Trench	6.2	1,858.56	Cubic Yard	
+ 3.3	Install RCP Pipe	6.3	1,024.00	Linear Feet	
+ 3.4	Backfill RCP Pipe	6.4	1,587.20	Cubic Yard	
4	10 Inch PVC Force Main (SDR21)	800 0220	12,000.00	Linear Feet	
+ 4.1	Furnish 10 Inch PVC Materials	7.1	12,000.00	Linear Feet	
+ 4.2	Excavate-Install-Backfill 10 Inch PVC	7.2	12,000.00	Linear Feet	
5	24 Inch PVC Gravity Sewer (SDR35)	800 0330	3,000.00	Linear Feet	
□ 5.1	Excavate 24 Inch PVC	8.1	3,000.00	Linear Feet	
+ 5.1.1	Excavate 24 Inch PVC 0-6 ft Depth	8.1.1	1,390.00	Cubic Yard	
+ 5.1.2	Excavate 24 Inch PVC 6-10 ft Depth	8.1.2	3,610.00	Cubic Yard	
+ 5.2	Furnish & Install 24 Inch PVC	8.2	3,000.00	Linear Feet	
+ 5.3	Backfill 24 Inch PVC	8.3	4,520.00	Cubic Yard	
6	4 Foot Diameter Manhole	800 0400	16.00	Each	
+ 6.1	Furnish 4 ft Manhole Materials	9.1	16.00	Each	
+ 6.2	Excavate-Install-Backfill Manhole	9.2	16.00	Each	

Congratulations, you have completed this exercise!

Lesson 10 Review

- 1. From the New option on the Backstage View, which of the following options are available for creating a new job? (Select all that apply)
 - a. Scratch
 - b. Template
 - c. Import
 - d. Existing Job
 - e. Historic
 - f. Bid Wizard
- 2. Which of the following job reproduction options lets you pick and choose which cost items you want to import into your new job?
 - a. Template
 - b. Bid Wizard
 - c. Existing Job
 - d. Archive
- 3. Which of the following options allows you to add cost items from another project when working in the CBS Register?
 - a. Bid Wizard
 - b. CBS Bid Wizard
 - c. Template
 - d. Existing Job

Lesson 10 Summary

As a result of this lesson, you can:

- · Create a job from an existing job or template
- Create a template

- Reproduce estimate data using the Bid Wizard
- Reproduce estimate data using copy/paste
- Add cost items to a job using the CBS Bid Wizard
- Utilize the Snapshot function

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LESSON 11 – EXCEL INTEGRATION

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Export data from InEight Estimate to Excel
- Link a field in InEight Estimate to Excel
- Update a linked InEight Estimate field with Excel data

Lesson Topics

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11.1 LINKING TO EXCEL

11.1.1 InEight Estimate Workbook

Every job has its own Excel workbook embedded within it for doing side calculations and take-offs. You can link your calculations to fields in InEight Estimate to automatically update them into your estimate. When you create a new job from scratch, the Library Master Workbook is copied to create a new embedded Excel workbook for the job.

The workbook comes with some pre-defined take-off and analysis worksheets, or you can create your own. Simply open the appropriate worksheet, plug in your values, and Excel will calculate your results. To open your job's workbook, select the Estimate tab, then click on the Workbook icon under the Workbook section.



• The embedded Excel workbook for the job opens.

8	5.0																		Train
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29 30 31 32 33 34 35 36 37 38																			
را Ready	+	Instruct	ions	Table of C	ontents	A.J	Haul Cost	B_H	auler Calo	ulator	C_Ha	ul Take	Off	D_P	roduc	tion Rate	Calcu	lator	E,A

11.1.2 Linking to and from Excel

InEight Estimate's linking capabilities with Excel can be done in one of two ways. A field in InEight Estimate can be populated with a value from Excel, or a cell in Excel can be populated with the data from an InEight Estimate field. This two-way linking functionality allows you to make quick work of complex chores to perform spreadsheet-based take-off or formula-driven analysis.

6	36 Inch RCP Culvert Class III	413(B) 0464	<u>1,024.00</u>	Linear Feet
+ 6.1	Furnish RCP Materials	6.1	1,024.00	Linear Feet
+ 6.2	Excavate RCP Trench	6.2	1,858.56	Cubic Yard

The following example walks through how to link a simple take-off calculation into InEight Estimate from Excel. It is a take-off to determine the size of a concrete foundation.

Step by Step — Link Estimate to Excel

- 1. Open the **Training** Job and from the Estimate tab, open the **CBS Register**.
- 2. For this example, create a new cost item in the blank row at the bottom of the CBS register and name it **Concrete Foundation**.

Concrete Foundation	1.00	CY

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

	Α	В	С	D	E	F	G
1	Concrete T	ake-off					
2							
3	Length	10	yards				
4	Width	10	yards				
5	Height	0.5	yards				
6							
7							
8							
9							
10							
11							
12							
	• •	Instruc	tions	Table of Co	ntents	Concrete T	ake-Off

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

	Α	В	С
1	Concrete 7	ake-off	
2			
3	Length	10	yards
4	Width	10	yards
5	Height	0.5	yards
6	Volume	=sum(B3*E	B4*B5)
7			

• Your Volume Total should be 50 cubic yards

1	Α	В	С
1	Concrete T	ake-off	
2			
3	Length	10	yards
4	Width	10	yards
5	Height	0.5	yards
6	Volume	50	CY
7			

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



- Go back to the CBS Register and right click on the Concrete Foundation cost item Forecast (T/O) Quantity field.
- 8. From the resulting right click menu, select Link this field to Excel.
 - You can also link the field by selecting the field and then selecting Link Field from the Actions tab

			Training Job - Estimate						
Execution	System	Integrations	Actions	More Action	s				
n	➡ Indent	👗 Link Field	• 🗮 Cost Item	ı	- Assembly	🇞 Resource			
	🖛 Outdent	🖧 Unlink Field	🔚 Subordina	ate Cost Item	🔁 Subordinate Assembly	Resource Assem			
Suspended			🕂 Depender	nt Cost Item					
		Workbook			Insert				

						Find
	Optional Code	Forecast (T/O) Quantity	Uni Me	it of asure	Unit Cost	Total Cost (Forecast)
	06420	1.00	Lun	np Sum	\$2,100.00	\$2,100.00
	08210	1.00	Lun	np Sum	\$1,000.00	\$1,000.00
	09640	1.00	Lun	no Sum	\$1,800.00	\$1.800.00
	12510	1.00	Ľ	<u>O</u> pen		
	15300	1.00	Ð	<u>N</u> ew		
	16510	1.00	\otimes	<u>D</u> elete		
	1500 0 100	1,000.00	℅	Cu <u>t</u>		
	1500 0200	200.00	٦	Cop <u>v</u>		
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e	CO1	1.00	+	Fill Down		
	UNASSIGNED DIRECT C	1.00	Д.	Link this field to	Excel	
osts	UNASSIGNED	1.00	周	UnLink from Ex	cel	
	UNASSIGNED	1.00	-			
	UNASSIGNED	1.00		Outdoot		
	UNASSIGNED	1.00		Outdent		
		1.00		Insert		
the Water		1.00		Insert Su <u>b</u> ordin	ate	
		1.00	H.	Insert Depende	nt <u>C</u> ost Item	
		1.00		Insert Cost Iten	n <u>A</u> ssembly	
		1.00	긑	Insert Cost Iten	n Assembly as <u>S</u>	ubordinate
			\mathbb{N}	Split		

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

Link to Excel - - × When linking to Excel you can choose to have the data in Excel update an Estimate field or have the data in Estimate update a named cell in Excel. • • • Update Estimate Field from Excel • • • • • Update Estimate Field from Excel • • • • • Update Excel Cell from Estimate • • • • • Update Excel Cell from Estimate • • • • • • Update Excel Cell from Estimate •				
When linking to Excel you can choose to have the data in Excel update an Estimate field or have the data in Estimate update a named cell in Excel. • Update Estimate Field from Excel • Image: Content of the estimate field or have the data in Estimate update a named cell in Excel. • Update Estimate Field from Excel • Image: Content of the estimate field from Excel • Update Excel Cell from Estimate • Image: Content of the estimate field from Excel • Update Excel Cell from Estimate • Image: Content of the estimate field from Excel • O_Item 1VolCY_StructuralConcTakeOff • O_Item3AreaSF_StructuralConcTakeOff • O_Item4VolCY_StructuralConcTakeOff • O_Item4VolCY_StructuralConcTakeOff • O_Item4VolCY_StructuralConcTakeOff • O_Item5VolCY_StructuralConcTakeOff • O_Item5VolCY_StructuralConcTakeOff • O_Item5VolCY_StructuralConcTakeOff • O_Item5VolCY_StructuralConcTakeOff • O_TotAreaSF_StructuralConcTakeOff • O_	Link to Excel			×
Update Estimate Field from Excel Update Excel Cell from Estimate Update Excel Cell from Estimate Field to Link: Forecast (T/O) Quantity O_Item1VolCY_StructuralConcTakeOff O_Item2VolCY_StructuralConcTakeOff O_Item3VolCY_StructuralConcTakeOff O_Item4VolCY_StructuralConcTakeOff O_Item4VolCY_StructuralConcTakeOff O_Item4VolCY_StructuralConcTakeOff O_Item4VolCY_StructuralConcTakeOff O_Item5VolCY_StructuralConcTakeOff O_Item5VolCY_StructuralConcTakeOff O_Item5VolCY_StructuralConcTakeOff O_TotVolCY_StructuralConcTakeOff O_Item5VolCY_StructuralConcTakeOff O_TotVolCY_StructuralConcTakeOff O_Concel OK Cancel OK Cancel	When linking to Excel you ca Excel update an Estimate fie Estimate update a named co	an choose to ha ald or have the ell in Excel.	ave the da data in	ta in
Update Excel Cell from Estimate	Update Estimate Field f	rom Excel	¢۳	
Field to Link: Forecast (T/0) Quantity O_Item1VolCY_StructuralConcTakeOff	O Update Excel Cell from B	stimate	62	
O_Item1VolCY_StructuralConcTakeOff O_Item2AreaSF_StructuralConcTakeOff O_Item2VolCY_StructuralConcTakeOff O_Item3AreaSF_StructuralConcTakeOff O_Item3VolCY_StructuralConcTakeOff O_Item4AreaSF_StructuralConcTakeOff O_Item4VolCY_StructuralConcTakeOff O_Item4VolCY_StructuralConcTakeOff O_Item4VolCY_StructuralConcTakeOff O_Item5VolCY_StructuralConcTakeOff O_Item5VolCY_StructuralConcTakeOff O_TotAreaSF_StructuralConcTakeOff O_TotAreaSF_STUCATERS Pick from Excel OK Cancel	Field to Link: Forecast (T	(0) Quantity		
Prorate to Superior Item Quantity Group Cell Names by Worksheet Auto-Refresh Cell Names OK Cancel	O_Item2AreaSF_Structural O_Item2VoICY_Structural O_Item3VoICY_Structural O_Item3VoICY_Structural O_Item4AreaSF_Structural O_Item4VoICY_Structural O_Item5VoICY_Structural O_Item5VoICY_Structural O_TotAreaSF_Structural O_TotAreaSF_Structural O_TotVoICY_Structural Volume	ConcTakeOff xncTakeOff ConcTakeOff concTakeOff xncTakeOff concTakeOff ConcTakeOff ncTakeOff ncTakeOff cTakeOff		>
Group Cell Names by Worksheet C Cell Names OK Cancel	Prorate to Superior Item	Quantity		
C Auto-Refresh Pick from Excel	Group Cell Names by W	orksheet		
OK Cancel	C Auto-Refresh Cell Names	Pick fro	m Excel	
		OK	Canc	el

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

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

11.1.3 Update Links

When data in InEight Estimate or Excel changes, you can quickly update all links, in just the currently active job or in all open jobs. Simply select one of the following options from the Workbook drop-down list on the Estimate tab.

E	Estimate Quote	Price Execution	Syste	m	Actio	ns Mor	e Actions		Т
5	Account Code Utilization Work Breakdown Structures	Resource Rates	• n tails	Worl	kbook	Schedule	Cash Flow	Indirect Cost Items	ات %
akdow wn Stro re to gr	vn Structures ructure (CBS) Register	Resources		X ≰⁰ ¶≩	Open Upda Upda	Job Workbo te Current Jo te All Open .	ook ob From Wor Jobs From W	kbook orkbook	ire
de 🗎	de Description			6 ²³	Upda Upda	te Workboo te Workboo	k From Curre ks From All C	nt Job)pen Jobs	t of asu
	Prime Bond Price % Add-On		PRIM	8 % A	Delete	e Broken Lin	ks in All Ope	n Jobs 1.00 Lt	ip Imp

11.2 BUILT-IN SPREADSHEET

Most of the time, a cloud-based deployment of the Microsoft Office products, including Excel, are installed on new laptops or machines as the default installation option for Office 2016. Estimate's Excel integration relies on an on-premise (according to Microsoft) installation of the Microsoft Office products.

Estimate supports the option to use spreadsheet control for those that do not have the on-premises version of Microsoft Excel installed. You can switch between the Embedded workbook and the spreadsheet control from the Configuration Tool.

This option lets you use the functionality of the embedded workbook without having an on-premises installation of Microsoft Excel.

Follow the step by step below to change to the **Built-In Spreadsheet** option.

Step by Step – Built-In Spreadsheet

1. From the Windows Start Menu, search for **Configuration Tool**. The Estimate Configuration window opens.

NOTE If Estimate has been directly installed on your machine, the Estimate Configuration window will appear. If you cannot find your Estimate Configuration, contact support.

- 2. Select the **File** tab.
- 3. Under the Spreadsheet data box, select the **Spreadsheet Application** drop-down arrow.
- 4. Select the option **Built-In Spreadsheet**.

Vetwork Database Fi	e API	SAP	Support				
Attachment Settings							
Enable Linked At (inked attachment)	tachments (Its are not s	Only aved inside	e Estimate jobs)				
C Enable Linked Att (job folder attachr	tachments a ments are sa	ind Job Fol wed inside	lder Attachments Estimate jobs)				
Location for Job Fold	ler Attachme	ents:					
C:\Users\Sunitha Ja	n'AppData	\Local\InE	ight/Clients/10.20	0.21.4\8004\E	NDBUIL	ov/]
Archive Settings							
Default Format:	stimate Arch	vive File - B	BACPAC			~	
Spreadsheet							
Spreadsheet Applic	ation: Bui	t-in Spread	Isheet			Ŷ	ľ
	Mc	rosoft Exce	street.				-
	-		enternet.				1

11.3 CURRENCY IN JOB TRACKING EXCEL IMPORT

The currency function lets you import actuals in different currencies while you work in multiple currencies within a job.

Job Trac	Xing Column	Excel Column
- Note	es	
3ob	Tracking Column	Excel Column
Not		None Selected
- Cun	rency	
Job	Trading Column	Excel Column
Cur	rency	None Selected
- Dep	ense Fields	
Job	Tracking Column	Excel Column
Resource		None Selected
Des	oription	None Selected
Que	with	None Selected
Uni	t of Measure	None Selected
Teg	1	None Selected
Tag	2	None Selected
Teg	3	None Selected
Not	2	None Selected
644	ble	None Selected
Cor	minert	None Selected
- Dep	ense Costs	

Lesson 11 Review

- 1. The Export to Excel feature is available on all register forms in the system and allows you to export the data currently displayed on a register form to an Excel worksheet.
 - a. True
 - b. False
- 2. You can use the ______ tool to easily select a group of items to copy.
 - a. Customize
 - b. Workbook
 - c. Cell Select
 - d. Excel Select
- 3. In order to link an Excel field to InEight Estimate, the Excel field must be:
 - a. Named
 - b. Highlighted
 - c. Tagged
 - d. Selected

Lesson 11 Summary

As a result of this lesson, you can:

- Export data from InEight Estimate to Excel
- Link a field in InEight Estimate to Excel
- Update a linked InEight Estimate field with Excel data


LESSON 12 – SCHEDULE INTEGRATION

Lesson Duration: 45 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Set up scheduling options
- Update schedule from InEight Estimate
- Update InEight Estimate from schedule
- Manage changes between estimate and schedule

Lesson Topics

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Lesson 12 Summary	
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12.1 PRIMAVERA

12.1.1 Scheduling Options

Prior to sending information from InEight Estimate to Primavera, you need to make sure the proper settings are in place.

12.1.1.1 Job Properties Schedule Tab

Primavera scheduling options are configured on the **Setup > Job Properties > Schedule** tab.

	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Fold	ler Tags	Competitors	Pricing	Schedule	Cash Flow
Integrated Schedule: Primavera 📄 Always use Plug Days when updating Estimate from the schedule												
Schedule Currency: U.S. Dollar +												
Cost Item R	oll Up	Login Options	Mapping Options	Resources	Expense Co	sts Actuals	Tags	Activity	Calendars			
 Total scheduled days for all rolled up cost items Note: When rolling up cost items for scheduling purposes, the Plug Days of the superior cost item will be recalculated when a change is made to the scheduled days of a subordinate. To force immediate recalculation of Plug Days for superior cost items, use the 'Recalculate Plug Days' button or the 'Calculate Plug Days' command on the 'Tools' menu in the CBS Register. Recalculate Plug Days 												

- At the top of the Schedule tab, the Integrated Schedule must be set to Primavera
- As a default, the Always use Plug Days when updating InEight Estimate from the schedule checkbox is not selected (on a job by job basis, this box can be checked later for jobs in which an estimator does not want updates from Primavera to change the duration and therefore the cost of your cost items in InEight Estimate)
- On the Schedule tab, there are several sub-tabs that need to be set up correctly to produce

correct data behavior and ensure the correct passing of data to Primavera

Job Proper	ties 🛛						
Overview	Security	Minority Setup					
Integrated Schedule C	Schedule: urrency:		Primavera - U.S. Dollar -				
Cost Item	Roll Up	Login Options	Mapping Option	s Resources			

Step by Step — Login Options Tab

- On the Schedule > Login Options tab of Job Properties, select the Use these login settings radio button.
 - If pre-defined login settings were required, the Use pre-defined login settings radio button would be selected instead
 - The Instance will remain set to -Default-
 - Database selection will be **pmdb** during training.
- 2. Type your user name in the User Name field.
- 3. Type your password into the Password field.
 - You will have your own login settings specific to your company

verview	Security	Cover Sheet	Cost Basis	Minority Se	etup	Fuel Cost	Job 1	Tracking	Job Fold	ler Tags	Competitors	Pricing	Schedule
integrated	Schedule:	[Primavera	- Always us			ays use	e Plug Days when updating Estimate from the schedule				e schedule	
chedule Currency: U.S. Dollar			U.S. Dollar		•								
Cost Item	Roll Up	ogin Options.	Mapping Optic	ons Resou	irces	Expense Co	osts	Actuals	Tags	Activity	Calendars		
Ouset	Use these login settings: Instance: Database:			-Default-			•]					
			User Name:	admin									
			Password:	**********	********								
O Usep	Usepre-defined loginsettings:						~						

12.1.1.2 Mapping Options Tab

The Mapping Options tab contains options critical to downstream applications. It will have the following settings selected by default:

- 1. The **CBS Position Code** is selected as the field to populate the Primavera WBS Code and Activity ID fields.
- 2. The **Manage the Primavera WBS structure in InEight Estimate...** radio button is selected for the initial push from InEight Estimate to P6.
 - This means the WBS structure in Primavera will be controlled by the structure of superior and terminal cost items in InEight Estimate.
 - Selecting the other option would cause the WBS structure to be controlled in Primavera. Only terminal cost items would be sent from InEight Estimate to Primavera and all hierarchal structure (WBS Elements) would be created in Primavera manually
 - This option can be changed later, on a job-by-job basis.
- 3. The **Update the Project's Planned Start Date in Primavera from the Forecast Start Date** option is checked.
 - This will automatically pull the Forecast Start Date from the Job Properties > Cover Sheet tab to become the Planned Start Date in Primavera.

NOTE You should double-check to make sure the right Start Date is defined on the Job Properties > Cover Sheet tab.



12.1.1.3 Resources Tab

The Resources tab dictates how resources are mapped between InEight Estimate and P6.

	Section	Name
1	Update Primavera Resources from Estimate	 Provides options for sending InEight Estimate resources to Primavera. Typically, you would select the Update scheduled resources only option to send only resources that are employed on cost items The Update all of this job's resources option updates Primavera with all of the resources in your project's Resource Rate Register
2	Map Resource Types to Primavera	Specify whether your resources will import into Primavera as Resources or Roles.
3	Update Primavera Budgeted Units when using Plug Days	Allows you to specify how to handle Budgeted Units for items that use Plug Days.
4	Update Primavera Cost Accounts from Estimate Account Codes	Checking this box causes assigned account codes to import into Primavera as Cost Accounts.
5	Update Price/Unit on Primavera Resource Assignments	Checking the boxes in this section will cause the Charge Rate costs of your resources to import into Primavera along with your resources.

12.1.1.4 Overview – Resources Tab

Cost Item Roll Up Login Options	Mapping Options	Resources	Expense Costs	Actuals	Tags	Activity Calendars		
Update Primavera Resources from O Update all of this job's resources Update scheduled resources Do not update Primavera resources	only sources		Update Primavera Budgeted Units when using Plug Days: Adjust Budgeted Units to match Plug Duration Maintain Budgeted Units to match (non-plug) Work Hours Update Primavera Cost Accounts from Estimate Account Codes: Update Primavera Cost Accounts on Resource Assignments					
Map Resource Types to Primavera	:		Update Price	/ Unit on Pr	imavera R	esource Assignments:		
Labor:	Resource	•	👿 Labor					
Construction Equipment:	Resource	-	🔽 Construc	Construction Equipment				
Rented Contruction Equipment:	Resource	-	👿 Rented (Contruction	Equipme	nt		
Installed Material:	Resource	-	👿 Installed	Material			G	
Installed Equipment:	Resource	•	✓ Installed	Equipment	t			
Supplies:	Resource	•	Supplies					
Unique:	Resource	•	🔽 Unique					

12.1.1.5 Expense Costs Tab

The Expense Costs tab is useful for bringing costs in from InEight Estimate that are not connected to resources, for example, your plugged and/or quoted cost items. This tab is optional, and it is not required to make selections here.

Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Fo	der Tags	Competitors	Pricing	Schedule	Cash Flow
Integrated Schedule C	Schedule:		Primavera U.S. Dollar	•	Always use Plug Days				stimate from the	e schedule		
Schedule C	Roll Up	Login Options Co Owner Rente	U.S. Dollar Mapping Optio st Category Labor: d Equipment: d Equipment: Supplies: Materials: Subcontract: Fees: All	Resources Update Primar Primavera Exper HD01 Labor HD02 Owned Equ HD03 Rented Equ HD04 Supplies HD05 Materials HD05 Subcontract HD07 Fees HD07 Res	Expense Co vera Expense C ise Categor ipment ipment it	Actuals Costs from Est	Tags mate	Activity	Calendars			
	Allowance: Custom Category1:			HD09 Custom Ca HD10 Undefined	tegory1		•					
			Undefined:									

12.1.2 Schedule Cost Items

Before you can integrate with Primavera, your cost items need to be marked as Scheduled in InEight Estimate. This is done on the Cost Breakdown Structure (CBS) Register. From your Saved Views dropdown list in the CBS, the Schedule Setup View displays all of your schedule-related columns. There are a couple to keep in mind when you schedule your items:

- **Scheduled**: This column tells you which of your items are selected to be included in your Primavera schedule
- **Roll Up Schedule**: This column lets you check a box to roll up your estimate to the selected level when it imports into Primavera

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

Cos	st Breakdown Structu	re (CBS) Register 💿 Quote Register	Quote Compa	rison & Award -	Cost items				
Drag	g columns here to group								
	CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Sched 😑	Scheduled	Currency
÷	+ 7.1	Furnish 10 Inch PVC Materials	12,000.00	Linear Feet	\$13.23	\$158,760.00	HD.0000031	\checkmark	U.S. Dolla
	+ 7.2	Excavate-Install-Backfill 10 Inch PVC	12,000.00	Linear Feet	\$9.28	\$111,403.37	HD.0000032	\checkmark	U.S. Dolla
	8	24 Inch PVC Gravity Sewer (SDR35)	3,000.00	Linear Feet	\$52.82	\$158,461.37	HD.0000033	\checkmark	U.S. Dolla
	■ 8.1	Excavate 24 Inch PVC	3,000.00	Linear Feet	\$3.00	\$9,005.49	HD.0000034	\checkmark	U.S. Dolla
	+ 8.1.1	Excavate 24 Inch PVC 0-6 ft Depth	1,390.00	Cubic Yard	\$1.95	\$2,712.05	HD.0000035	\checkmark	U.S. Dolla
	+ 8.1.2	Excavate 24 Inch PVC 6-10 ft Depth	3,610.00	Cubic Yard	\$1.74	\$6,293.44	HD.0000036	\checkmark	U.S. Dolla
	+ 8.2	Furnish & Install 24 Inch PVC	3,000.00	Linear Feet	\$36.08	\$108,232.54	HD.0000037	\checkmark	U.S. Dolla
	+ 8.3	Backfill 24 Inch PVC	4,520.00	Cubic Yard	\$9.12	\$41,223.34	HD.0000038	\checkmark	U.S. Dolla
	9	4 Foot Diameter Manhole	16.00	Each	\$3,594.03	\$57,504.47	HD.0000039	~	U.S. Dolla
	+ 9.1	Furnish 4 ft Manhole Materials	16.00	Each	\$2,001.50	\$32,024.00	HD.0000040	✓	U.S. Dolla

The following steps walk you through scheduling your cost items.

Step by Step — Schedule a Cost Item in InEight Estimate

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



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

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

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

- 1. In the Training Job, from the Estimate tab, select Cost Breakdown Structure.
- 2. From the Saved Views drop-down list, select Schedule Setup View.
 - To schedule multiple cost items, you can highlight the row for each cost item that you want to schedule, using the Shift and Ctrl keys to select multiple rows.
- 3. Select additional cost items 4-Aggregate base, 5- Asphalt Concrete Hot Mix, and 6- 36-inch RCP Culvert Class.
 - TIP To schedule all cost items, highlight the JOB row.
- 4. Right click on the selected rows and select Schedule Selection.

Drad	columns here to group		Ð	New	orl
- ug			\otimes	<u>D</u> elete	
	CBS Position Code	Description	*	Cu <u>t</u>	thedule ID
<i>→</i>	+ 1	Mobilization	1	Cop <u>v</u>	D.0000011
	+ 2	Clearing & Grubbing	P	Paste	D.0000012
	∃ 3	Unclassified Excavation	+	<u>F</u> ill Down	D.0000013
	+ 3.1	Excavation	8	Link these fields to Excel	D.0000014
	+ 3.2	Embankment	8	UnLink from Excel	D.0000015
	∃ 4	Aggregate Base	⇒	Indent	D.0000016
	+ 4.1	Furnish & Haul Base Material	+	Outdent	D.0000017
	+ 4.2	Finegrade Subgrade	居	Insert	D.0000018
	■ 4.3	Install Aggregate Base		Insert Subordinate	D.0000019
	+ 4.3.1	Place Aggregate Base	ų,	Insert Dependent Cost Item	D.0000020
	+ 4.3.2	Blue Top Aggregate Base	긑	Insert Cost Item Assembly	D.0000021
	5	Asphalt Concrete Hot Mix Type A	긑	Insert Cost Item Assembly as Subordinate	D.0000022
	+ 5.1	Furnish & Haul Hot Mix		Calit	D.0000023
X	+ 5.2	Install Hot Mix Type A		Spin	D.0000024
	E 6	36 Inch RCP Culvert Class III	20	Insert <u>R</u> esource	D.0000025
	+ 6.1	Furnish RCP Materials	12	Ins <u>e</u> rt Resource Assembly	0.0000026
	+ 6.2	Excavate RCP Trench	2	Toggle Suspended	D.0000027
	+ 6.3	Install RCP Pipe		Go To Cost Allocation Item	D.0000028
	+ 6.4	Backfill RCP Pipe	3	Schedule Selection	D.000029
	□ 7	10 Inch PVC Force Main (SDR21)	6-		D.0000030
				Calculate Plug Davs	
	10	b		Subtotal Calculator	

- On the Schedule Cost Items dialog, you can select whether or not you want to roll up the selected cost items to a specific level of the CBS for scheduling purposes
- 5. Select Schedule selected cost items and their subordinates without rolling them up, then click OK.



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

12.1.2.6 Roll Up Schedule

For cost item 3 – Unclassified Excavation, your scheduler does not need all of your estimate details and wants to roll up your cost items to a higher level when they import into the Primavera schedule.

Follow the steps below to learn how to roll up your cost items for the schedule.

Step by Step — Roll Up Schedule

- 1. In the Training Job, from the Estimate tab select Cost Breakdown Structure.
- 2. From the Saved Views drop-down list, select **Schedule Setup View**.
 - Review your cost items to decide which cost items need to be rolled up
- 3. Select the **Roll Up Schedule** checkbox on the Unclassified Excavation cost item.

CB Po	s sition Code 🗎	Description	Scheduled	Roll Up Schedule
+	1	Mobilization	\checkmark	
+	2	Clearing & Grubbing	\checkmark	
	3	Unclassified Excavation	✓	✓
+	3.1	Excavation		
+	3.2	Embankment		
	4	Aggregate Base	\checkmark	
+	4.1	Furnish & Haul Base Material	✓	
+	4.2	Finegrade Subgrade	✓	
	4.3	Install Aggregate Base	✓	
+	4.3.1	Place Aggregate Base	\checkmark	
+	4.3.2	Blue Top Aggregate Base	\checkmark	

12.1.3 Update Primavera from InEight Estimate

Now that you have set up your Primavera options in Job Properties and scheduled your cost items in the CBS, you are ready to send your project information to Primavera.

When you first update Primavera from InEight Estimate, Primavera will create a new project automatically and load it with the following information from InEight Estimate:

	Data Sent from InEight Estim	nate to Primavera		
Data Type	InEight Estimate	Primavera		
Project Data	Job Code	Project ID		
	Job Description	Project Name		
Activity Data	CBS Position Code//Schedule ID	WBS Code / Activity ID		
	Description	WBS Element / Activity Name		
	Hours	Planned Duration (Hours)		
	Shift and Rate Rules	Activity Calendar		
	Cost Item Tags and UDFs	Activity Codes or UDFs		
	Cost Category Total Cost	Cost Category (custom text columns)		
Resource Data	Resource Code	Resource ID		
	Resource Description	Resource Name		
Cost Data	Resource Cost / Unit	Resource Price / Unit		
	Cost Category Total Cost	Expense Category Budgeted Cost		

NOTE Tags, resource data, and cost data only update in Primavera if selected in the Job Properties > Schedule settings.

The following steps walk you through updating Primavera from InEight Estimate to create a new schedule.

Step by Step — Update Primavera from InEight Estimate

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

I 🗑 💾 🕞					Trai	ning Job - Est	imate
File Setup	Estimat	te Quote	Price	Execution	System	Integrations	Actions
Cost Breakdown Structure (CBS)	5 2 5 2	Workbook	Sched	dule Cash Flow	Indirect Cost Items	Price Brea Structure	akdown (PBS)
Breakdown Str	uc Re	s Workboo	k 🧬	Update Primave	ra from Estimat	e Overhe	ad and Pr
Cost Breakdow	n Structur	e (CBS) Register	C 🚰	Update Estimate	from Primaver	a	
Drag columns here	e to group						Find: [Sea
CBS Position Cod	e 🗎	Description			Scheduled	Roll Up Schedule	WBS Element
+ 1		Mobilization			\checkmark		
+ 2		Clearing & Gru	bbing		\checkmark		
□ 3		Unclassified Ex	cavation		\checkmark	\checkmark	
+ 3.1		Excavation					
+ 3.2		Embankment					
□ 4		Aggregate Bas	e		\checkmark		\checkmark
+ 4.1		Furnish & Haul	Base Materi	ial	\checkmark		
+ 4.2		Finegrade Sub	grade		\checkmark		
4.3		Install Aggrega	ate Base		\checkmark		\checkmark

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

6	Update Primavera From Estimate
Choose the data t according to the S	o update in the linked Primavera schedule. Data will be updated chedule options specified in Job Properties.
WBS / Activit	ies (always updated)
Resources	
Expenses	
Cartuals	
Tags	
Schedule Rela	ationships
Please commit an	y changes in Primavera before clicking OK.
	OK Cancel

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

Attention	
Job 'Training Job' has cha saved changes will be ser job before updating Prima	anges that have not been saved. Only nt to Primavera. Would you like to save the vera?
Never ask me this que	stion again
	Yes No

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

8 Waiting for Primav	era Integration Server	
Status Status Loading Job	Job Code Training Job	Description Updating Pr
< <u> </u>		4

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

P6	P6 Professional 18	
		Login to P6 Professional 18 Login Name admin Password Language English (United States) • Database PMDB • CONNECT DISCONNECT
Copyrig Oracle : Other n	e (18.6.0.28204) ht (c) 1999, 2018. Oracle and/or its affiliates. All rights reserved. and Java are registered trademarks of Oracle and/or its affiliates. ames may be trademarks of their respective owners.	

6. In Primavera, open the project.



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

Is BID*BUILD Job	Project Name	Total Activities
	Enterprise	0
	BID*BUILD	0
	Is BID*BUILD Job	Is BID*BUILD Job Project Name Enterprise BID*BUILD

NOTE All projects created from InEight Estimate are created in the BID*BUILD folder by default.

- Your available projects are sorted by their job names.
- 8. Select the Training Job (with your initials) so that it is highlighted, and then select Open.

Select Project Portfolio	All Projects			✓	<u>O</u> pen
✓ Display			_	0	Cancel
Project ID	Is BID*BUILD Job	Project Name	Proje		
🛯 🐟 EPS		Enterprise	Ac		Users
📋 Training Job - B	Yes	Training Job - Maricopa Count	Activ		
A BID*BUILD		BID*BUILD	Ac	?	Help
🛅 R19	Yes	<unspecified></unspecified>	Activ		
💼 S1	Yes	Training Job - Maricopa Count,	Activ		
💼 Training Job21	Yes	Training Job - Maricopa Count,	Activ		
💼 AJL Sched Test	Yes	Training Job - Maricopa Count,	Activ		
📄 Test job3	Yes	Training Job - Maricopa Count,	Activ		
🛅 Training Job	Yes	Training Job - Maricopa Count	Activ		
٠ 🔲			÷.		
Access Mode			+		

- The WBS Layout displays for the project. You can see the breakdown structure imported from InEight Estimate with durations, rolled up as specified by the Roll Up Schedule option in InEight Estimate
- Initially, the start date for your activities is the start date defined on the Job Properties > Cover Sheet tab (these will change as activity relationships are defined)
- 9. Select the **Resources** tab to see the resources that imported for each activity, with their associated costs.

✓ Layout: Classic S	ichedule Layout	Filter:	AllActivities					
Activity ID	C Activity Name	Original Duration	Remaining S Duration	Schedule % Complete	Start	26	February 2020 02 09 16 23	March 2020 A 01 08 15 22 29 05
1	Mobilization	10.00	10.00	0%	03-Feb-20		Mobilizat	ion
2	Clearing & Grubbing	10.00	10.00	0%	03-Feb-20		Clearing	& Grubbing
3	Unclassified Excavation	25.83	25.83	0%	03-Feb-20			Unclassified Excavation
4.1	Furnish & Haul Base Material	45.00	45.00	0%	03-Feb-20			Furn
4.2	Finegrade Subgrade	40.00	40.00	0%	03-Feb-20			Finegrade
4.3.1	Place Aggregate Base	30.00	30.00	0%	03-Feb-20			Place Aggregate Base
4.3.2	Blue Top Aggregate Base	40.00	40.00	0%	03-Feb-20			Blue Top A
5.1	Furnish & Haul Hot Mix	29.17	29.17	0%	03-Feb-20			Furnish & Haul Hot Mo
5.2	Install Hot Mix Type A	29.17	29.17	0%	03-Feb-20			Install Hot Mix Type A
6.1	Furnish RCP Materials	5.00	5.00	0%	03-Feb-20		Furnish RCP M	aterials
6.2	Excavate RCP Trench	4.65	4.65	0%	03-Feb-20		Excavate RCP	Trench
6.3	Install RCP Pipe	4.10	4.10	0%	03-Feb-20		Install RCP Pipe	
6.4	Backfill RCP Pipe	9.92	9.92	0%	03-Feb-20		Backfill F	CP Pipe
<						• •		
		ook Steps	Feedback W	/Ps & Docs	Expenses Summa	агу		
General Status R	esources Codes Relationships Noteb						Project T	raining Job
General Status R	esources Codes Relationships Noteb ity 1 Mobilizatio	n						
General Status R Activi Resource ID Name	esources Codes Relationships Noteb tty 1 Mobilizatio Price / Unit Rate Ty	n pe F	ate Source	1ary Reso	u Budgeted Units	Actual Units	Remaining Units	Remaining Units / Time Role
General Status R Activi Resource ID Name ETLT.Lowboy	esources Codes Relationships Noteb ty 1 Mobilizatio Price / Unit Rate Ty railer \$33.60/h	n pe F	late Source	1ary Reso	u Budgeted Units 80.00	Actual Units	Remaining Units	Remaining Units / Time Role 8.00/d Truck
General Status R Activi Resource ID Name ETLTLOwboy T LT1.Teamster	ty 1 Mobilizatio Price / Unit Rate Ty railer \$33.60/h \$33.62/h	n F	Rate Source Override Iverride	1ary Reso	U Budgeted Units 80.00 80.00	Actual Units	Remaining Units 80.00 80.00	Remaining Units / Time Role 8.00/d Truck 8.00/d Truck Drive
General Status R Activ Resource ID Name CETLTLOWboy LT1.Teamster ETTT.Tractor Th	Codes Relationships Notet fty 1 Mobilizatio Price / Unit Rate Type rater \$33.60h \$30.62h \$30.62h ruck \$78.40/h	pe F	Rate Source Override Override	1ary Reso	u Budgeted Units 80.00 80.00 80.00	Actual Units 0.00 0.01 0.01	Remaining Units 80.00 80.00 80.00	Remaining Units / Time Role 8.00/d Truck 8.00/d Truck Drive 8.00/d Truck

12.1.4 Update InEight Estimate from Primavera

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

Update	InEight Estimate	e from Primavera
Data Type	Primavera	InEight Estimate
Activity Data	Start Dates	Start Dates
	Finish Dates	Finish Dates
	Relationships	Schedule Relationships
	Hours	Plugged Days

Complete the following steps to practice updating InEight Estimate from Primavera. You will create a scheduling relationship in Primavera, and then import the updated dates and relationships into InEight Estimate.

Step by Step — Update InEight Estimate from Primavera

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

Edit View P	roject Enterprise <u>T</u> ools <u>H</u> elp							
Activities								l
✓ Layout: Clas	sic Schedule Layout	Filter:	AllActivities	;				
Activity ID	C Activity Name	Original Duration	Remaining Duration	Schedule % Complete	Start	26	February 2020 March 02 09 16 23 01 08	2020 A
1	Mobilization	10.00	10.00	0%	03-Feb-20		Mobilization	
	Clearing & Grubbing	10.00	10.00	0%	03-Feb-20		Clearing & Grubbing	
	Unclassified Excavation	25.83	25.83	0%	03-Feb-20		Uni	classified Excavation
	Furnish & Haul Base Material	45.00	45.00	0%	03-Feb-20		-	Furni
	Finegrade Subgrade	40.00	40.00	0%	03-Feb-20		-	Finegrade
	Place Aggregate Base	30.00	30.00		03-Feb-20			Place Aggregate Base
	Blue Top Aggregate Base	40.00	40.00		03-Feb-20		-	Blue Top A
	Furnish & Haul Hot Mix	29.17	29.17		03-Feb-20			Furnish & Haul Hot Mix
	Install Hot Mix Type A	29.17	29.17		03-Feb-20		Install I	Hot Mix Type A
	Furnish RCP Materials	5.00	5.00		03-Feb-20		Furnish RCP Materials	
6.2	Excavate RCP Trench	4.65	4.65	0%	03-Feb-20		Excavate RCP Trench	
6.3	Install RCP Pipe	4.10	4.10	0%	03-Feb-20		Install RCP Pipe	
6.4	Backfill RCP Pipe	9.92	9.92		03-Feb-20		Backfill RCP Pipe	

- 3. Right click on one of the selected rows and select **Link Selected Activities** to create the Finish to Start relationship.
 - You may have to select the Relationship Lines button to show the linked activities in the graph on the right side of the screen.
- 4. To schedule this new relationship, select the Schedule button (or press the F9 key).
- 5. On the Schedule Project window, keep the default settings and select the **Schedule** button.

Project(s) to schedule	1	0	Cancel
Current Data Date	03-Feb-20	►	Schedule
	,		View Log
Project Forecast Start Date		?	Help
🔲 Set Data Date and Planned Start to P	roject Forecast Start during scheduling		Options
Log to file			
C:\Users\anthony.lamantia\Documen	nts\SchedLog.txt		

- 6. To update InEight Estimate with this change, go back to InEight Estimate and select Estimate tab.
- 7. Select Schedule>Update Estimate from Primavera.



8. On the Update InEight Estimate from Primavera prompt, keep the default **Update the estimate to stay in synch with the schedule** selected, then click **OK**.

Opdate Estimate from Primavera
This will update the cost items in this job with schedule dates, durations and descriptions from Primavera. This may change the duration of these cost items, which could affect their cost. Changes made to Resource or Cost data in Primavera will NOT affect Estimate. How do you wish to proceed?
Update the estimate to stay in synch with the schedule. Change the estimated work hours for all hourly resources employed on these cost items to reflect the new durations (this will change the cost item's cost).
Do NOT update the estimate. Instead, schedule these cost items using Plug Days. (Note: you can toggle the schedule between Plug Days and Estimated Days for each cost item directly in the Job's CBS.)
OK Cancel
Never ask me this question again

9. On the Schedule Setup View, you can see the Start and Finish dates updated from Primavera.

CBS Position Code 🗎	Description	Start	Finish	Early Start	Early Finish	Late Start	Late Finish
	JOB	2/3/2020	2/23/2021	2/3/2020	2/23/2021	2/3/2020	2/23/2021
+	Prime Bond						
+	Price % Add-On						
+	Job Financing						
+	Indirect Cost Escalation						
+	Direct Cost Escalation						
+	Indirect Cost Add-On						
+	Job Management & Equipment						
+	General Expense						
+	Direct Cost Add-On						
+ 1	Mobilization	2/3/2020	2/14/2020	2/3/2020	2/14/2020	2/3/2020	2/14/2020
+ 2	Clearing & Grubbing	2/17/2020	2/28/2020	2/17/2020	2/28/2020	2/17/2020	2/28/2020
□ 3	Unclassified Excavation	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
+ 3.1	Excavation	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
+ 3.2	Embankment	3/2/2020	4/6/2020	3/2/2020	4/6/2020	3/2/2020	4/6/2020
□ 4	Aggregate Base	4/6/2020	11/9/2020	4/6/2020	11/9/2020	4/6/2020	11/9/2020
+ 4.1	Furnish & Haul Base Material	4/6/2020	6/8/2020	4/6/2020	6/8/2020	4/6/2020	6/8/2020
+ 4.2	Finegrade Subgrade	6/8/2020	8/3/2020	6/8/2020	8/3/2020	6/8/2020	8/3/2020
4.3	Install Aggregate Base	8/3/2020	11/9/2020	8/3/2020	11/9/2020	8/3/2020	11/9/2020
+ 4.3.1	Place Aggregate Base	8/3/2020	9/14/2020	8/3/2020	9/14/2020	8/3/2020	9/14/2020

12.1.5 Manage Changes Between Estimate and Schedule

As changes to scope, resources, and costs come up in your estimate, and changes to relationships and dates occur in the schedule, you can continue updating your estimate and schedule as needed.

12.1.5.7 Plug Days

The Schedule Plug Days option allows you to define the duration in the schedule separate from the duration defined for your cost items on the Production tab.

For example, your 10" PVC Pipe activity may have extra days in the schedule due to the delivery date of the pipe material, but you don't want those extra days to drive the costs in your estimate, since your crews won't be working on the activity on those extra days.

NOTE All superior cost items are hard-coded to use Schedule Plug Days.

Step by Step — Schedule Plug Days

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

CBS Position Code 🗎	Description	Days (Duration driven)	Schedule Plug Days	Plug Days
6	36 Inch RCP Culvert Class III	18.66	✓	26.01
+ 6.1	Furnish RCP Materials	0.00	✓	5.00
+ 6.2	Excavate RCP Trench	4.65	✓	7.00
+ 6.3	Install RCP Pipe	4.10		4.00
+ 6.4	Backfill RCP Pipe	9.92		9.92

• This allows you to maintain your duration of 4.65 days in the estimate and 7 days in the schedule.

12.1.5.8 Update Primavera with InEight Estimate Changes

The following steps will walk you through updating the schedule with a scope change in your estimate.

Step by Step — Update Primavera with InEight Estimate Changes

- 1. In the Training Job from the Estimate tab, select Cost Breakdown Structure.
 - In this scenario, there is a scope change for your Excavation requiring you to change all of your quantities
- 2. Change the quantity in the Forecast (T/O) Quantity field in the CBS as specified below:

	Quantity Change for Co	ost Item	
CBS Code	Description	Old Quantity	New Quantity
5	Asphalt Concrete Hot Mix Type A	35,000	25,000

- As you make your changes, take note of how your duration changes in the Days (Duration driven) column for these items
- If prompted about changing Total or Unit Cost, select **Change TOTAL cost**, so that your unit costs stay intact, then click **OK**.

۲	Attention
You have changed the q Would you like the TOT	uantity for a cost item that already contains costs. AL cost to change or the UNIT cost?
Change TOTAL cost	
Change UNIT cost	•
Deactivate this confi and ALWAYS change	rmation for quantity changes FOR ALL JOBS the TOTAL cost
To re-activate this confi Confirmation for Quanti	rmation, choose Tools > Activate Unit/Total ty Changes.
	ОК

From the Estimate tab, select Schedule>Update Primaverafrom InEight Estimate to send the changed hours to Primavera.

- The Update Primavera From InEight Estimate dialog prompts you to indicate what data to update to Primavera
- 4. Make sure Resources and Expenses are checked, then select OK.

9	Update Primavera From Estimate								
Choose the data to update in the linked Primavera schedule. Data will be updated according to the Schedule options specified in Job Properties.									
WBS / Activit	ies (always updated)								
Resources									
Expenses									
Ctuals									
Tags									
Schedule Rela	ationships								
Please commit any	y changes in Primavera before clicking OK.								
	OK Cancel								

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

🙂 Waitin	g for Primavera	a Integration Server	
		•••	S
Status	2	Job Code	Description
Loading	j Job	Training Job	Updating Pri
•	III		Þ

- When the window disappears, the update is complete
- 5. Open Primavera (P6 Web Client).
- 6. Open the **Training Job** project.
- 7. On the Activities screen, compare the Planned Duration to the Days (Duration driven) in InEight Estimate for Excavate-Install-Backfill Pipe.
 - The Primavera scheduled duration should have changed from 4.65 days to 7 days to match the updated duration in InEight Estimate for Excavate-Install-Backfill Pipe
 - You will also notice a change in days for Excavation after changing the T/O Quantity in InEight Estimate

ACTIVITIES																		
Projects	Activities																	
✓ Layout:	Classic Sched	lule Layout	Filter:	AllActivitie	s			_				_						-
Activity ID	√ А	ctivity Name	Original Duration	Remaining Duration	Schedule % Complete	Start	ŀ	ruar 09	y 2020 16	23	01	Marc 08	h 202	22	29	A 05	pril 20. 12	20
1	М	obilization	10.00	10.00	0%	03-Feb-20			Mobil	izatior	1						·	
2	C	learing & Grubbing	10.00	10.00	0%	17-Feb-20		Γ.	-		Cleari	ng &	Grubi	bing				
3.1	E	kcavation	15.63	15.63	0%	02-Mar-20				۲.	-			Ex	cavat	ion		
3.2	E	mbankment	20.83	20.83	0%	23-Mar-20							G,	-				
4.1	F	urnish & Haul Base Material	45.00	45.00	0%	21-Apr-20											L,	-
4.2	Fi	negrade Subgrade	40.00	40.00	0%	23-Jun-20									1			
4.3.1	PI	ace Aggregate Base	30.00	30.00	0%	18-Aug-20												
4.3.2	В	lue Top Aggregate Base	40.00	40.00	0%	29-Sep-20												
5.1	F	urnish & Haul Hot Mix	20.83	20.83	0%	24-Nov-20												
5.2	In	stall Hot Mix Type A	20.83	20.83	0%	23-Dec-20												
6.1	F	urnish RCP Materials	5.00	5.00	0%	15-Jan-21												
6.3	In	stall RCP Pipe	4.10	4.10	0%	02-Feb-21												
6.4	B	ackfill RCP Pipe	9.92	9.92	0%	08-Feb-21												

- 8. To schedule this change in Primavera, select the **Schedule** button (or press the **F9** key) and select the **Schedule** button on the Schedule Project window.
- Your start and finish dates are different now. In InEight Estimate, from the Estimate tab, select Schedule>Update InEight Estimate from Primavera to update InEight Estimate with the new dates.

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

Exercise 12.1 — Manage Changes Between Estimate and Primavera

As changes occur during the estimating process, you can keep the estimate and schedule in sync through schedule integration. In this exercise, you will practice making changes between the estimate and schedule. Complete the following steps:

- 1. Open the Training Job and open the CBS Register.
- 2. Check the box in the Schedule Plug Days column for the Install RCP Pipe.
- 3. Change the Plug Days for Install RCP Pipe to 8 days.
- 4. Update Primavera from InEight Estimate.
- 5. Open the Training Job project in Primavera and confirm the Planned Duration (you may need to change your view to see this column) changed to 8 days.
- 6. In Primavera, change the Planned Duration for Backfill RCP Pipe to **12 days**.
- 7. Schedule the changes in Primavera (Schedule button or F9).
- 8. Update InEight Estimate from Primavera.

You should end up with the following results

Cost item 6.3 Install RCP Pipe is now showing 8 Plug days in Primavera.

Activity ID	√ Activity Name	Original Duration	Remaining Duration	Schedule % Complete	Start	Finish
1	Mobilization	10.00	10.00	0%	03-Feb-20	14-Feb-20
2	Clearing & Grubbing	10.00	10.00	0%	17-Feb-20	28-Feb-20
3.1	Excavation	15.63	15.63	0%	02-Mar-20	23-Mar-20
3.2	Embankment	20.83	20.83	0%	23-Mar-20	21-Apr-20
4.1	Furnish & Haul Base Material	45.00	45.00	0%	21-Apr-20	23-Jun-20
4.2	Finegrade Subgrade	40.00	40.00	0%	23-Jun-20	18-Aug-20
4.3.1	Place Aggregate Base	30.00	30.00	0%	18-Aug-20	29-Sep-20
4.3.2	Blue Top Aggregate Base	40.00	40.00	0%	29-Sep-20	24-Nov-20
5.1	Furnish & Haul Hot Mix	20.83	20.83	0%	24-Nov-20	23-Dec-20
5.2	Install Hot Mix Type A	20.83	20.83	0%	23-Dec-20	14-Jan-21
6.1	Furnish RCP Materials	5.00	5.00	0%	15-Jan-21	21-Jan-21
6.2	Excavate RCP Trench	7.00	7.00	0%	22-Jan-21	01-Feb-21
6.3	Install RCP Pipe	8.00	8.00	0%	02-Feb-21	11-Feb-21
6.4	Backfill RCP Pipe	9.92	9.92	0%	08-Feb-21	22-Feb-21

Cost item 6.4 Backfill RCP Pipe should have 12 plug days in InEight Estimate.

CBS Position Code	Description	Days (Duration driven)	Schedule Plug Days	Plug Days	Start	Finish
□ 6	36 Inch RCP Culvert Class III	18.66	\checkmark	46.00	1/15/2021	3/1/2021
+ 6.1	Furnish RCP Materials	0.00	\checkmark	5.00	1/15/2021	1/21/2021
+ 6.2	Excavate RCP Trench	4.65	\checkmark	7.00	1/22/2021	2/1/2021
+ 6.3	Install RCP Pipe	4.10	\checkmark	8.00	2/2/2021	2/11/2021
+ 6.4	Backfill RCP Pipe	9.92	✓	12.00	2/12/2021	3/1/2021

Congratulations, you have completed this exercise!

12.2 MICROSOFT PROJECT

12.2.1 Set Up Scheduling Options

Prior to sending information from InEight Estimate to Microsoft Project, you need to make sure the proper settings are in place.

12.2.1.1 Job Properties Schedule Tab

Microsoft Project scheduling options are configured on the Schedule tab of the Job Properties form.

- At the top of the Schedule tab, the Integrated Schedule must be set to Microsoft Project
- As a default, the Always use Plug Days when updating InEight Estimate from the schedule checkbox is not selected (on a job by job basis, this box can be checked later for jobs in which an estimator does not want updates from Microsoft Project to change the duration and therefore the cost of your cost items in InEight Estimate)

	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Equipmer
Integrated	Schedule:	[Microsoft Proje	ct -	🔲 Alwa	ays use Plug Day	s when updating Es	timate from the	schedule			
Schedule C	urrency:		U.S. Dollar	•						•		
Cost Item	Roll Up											
Auto	matically cal	culate Plug Day	s when rolling u	ip cost items for s	cheduling purp	ooses						
) L	ongest sche	duled days amo	ong all rolled up	costitems								
T	otal schedul	ed days for all i	rolled up cost it	ems								
Note	: When rolli	ng up cost item	s for scheduling	g purposes, the Pl	ug Days of the	e superior cost it	em					
will b	e recalculat	ed when a chan	ge is made to t	he scheduled days	of a subordi	nate.						
	orceimmedia	te recalculation	n of Plug Days f	or superior cost it	ems, use the '	Recalculate Plug	Days'					
To fo		lculate Plug Dav	ys' command	on the 'Tools' mer	nu in the CBS F	Register.						
To fo butto	on or the 'Ca											

12.2.2 Schedule Cost Items

Before you can integrate with Primavera, your cost items need to be marked as Scheduled in InEight Estimate. This is done on the Cost Breakdown Structure (CBS) Register. From your Saved Views dropdown list in the CBS, the Schedule Setup View displays all of your schedule-related columns. There are a couple to keep in mind when you schedule your items:

- Scheduled: This column tells you which of your items are selected to be included in your Primavera schedule
- **Roll Up Schedule**: This column lets you check a box to roll up your estimate to the selected level when it imports into Primavera

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

CBS Position Code 🗎	Description	Scheduled	Roll Up Schedule
+ 1	Mobilization	\checkmark	
+ 2	Clearing & Grubbing	\checkmark	
3	Unclassified Excavation	✓	\checkmark
+ 3.1	Excavation		
+ 3.2	Embankment		
□ 4	Aggregate Base	\checkmark	
+ 4.1	Furnish & Haul Base Material	✓	
+ 4.2	Finegrade Subgrade	✓	
■ 4.3	Install Aggregate Base	✓	

The following steps walk you through scheduling your cost items.

Step by Step — Schedule a Cost Item in InEight Estimate

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



- In the Scheduled column, you can select the checkbox for each cost item that you want to schedule
- If a cost item has subordinate cost items below it, you will only be able to check the superior cost item, which will automatically schedule the subordinate cost items along with it

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

3. Select the **Mobilization**, **Clearing & Grubbing**, and **Unclassified Excavation** cost items, then press **Tab**.

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

- 1. In the Training Job, from the Estimate tab, select Cost Breakdown Structure.
- 2. From the Saved Views drop-down list, select Schedule Setup View.
 - To schedule multiple cost items, you can highlight the row for each cost item that you want to schedule, using the Shift and Ctrl keys to select multiple rows.
- 3. Select additional cost items 4-Aggregate base, 5- Asphalt Concrete Hot Mix, and 6- 36-inch RCP Culvert Class.

TIP To schedule all cost items, highlight the JOB row

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



- On the Schedule Cost Items dialog, you can select whether or not you want to roll up the selected cost items to a specific level of the CBS for scheduling purposes
- 5. Select Schedule selected cost items and their subordinates without rolling them up, then click OK.



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

12.2.2.2 Roll Up Schedule

For cost item 3 – Unclassified Excavation, your scheduler does not need all of your estimate details and wants to roll up your cost items to a higher level when they import into the Primavera schedule.

Follow the steps below to learn how to roll up your cost items for the schedule.

Step by Step — Roll Up Schedule

- 1. In the Training Job, from the Estimate tab select Cost Breakdown Structure.
- 2. From the Saved Views drop-down list, select Schedule Setup View.
 - Review your cost items to decide which cost items need to be rolled up
- 3. Select the Roll Up Schedule checkbox on the Unclassified Excavation cost item.

CB Po	sition Code 🗎	Description	Scheduled	Roll Up Schedule
+	1	Mobilization	\checkmark	
+	2	Clearing & Grubbing	\checkmark	
	3	Unclassified Excavation	\checkmark	\checkmark
+	3.1	Excavation		
+	3.2	Embankment		
	4	Aggregate Base	\checkmark	
+	4.1	Furnish & Haul Base Material	\checkmark	
+	4.2	Finegrade Subgrade	✓	
	4.3	Install Aggregate Base	\checkmark	
+	4.3.1	Place Aggregate Base	\checkmark	
+	4.3.2	Blue Top Aggregate Base	\checkmark	

12.2.3 Update Microsoft Project from InEight Estimate

Now that you have set up your schedule to integrate with Microsoft Project in Job Properties and scheduled your cost items in the CBS, you are ready to send your project information to Microsoft Project.

When you first update Microsoft Project from InEight Estimate, Microsoft Project will create a new project automatically and load it with the following information from InEight Estimate:

Data Sent from InEight Estimate to Microsoft Project					
Data Type	InEight Estimate	Microsoft Project			
Project Data	Job Code	Project Name			
Activity Data	CBS Position Code	01 – CBS Position Code			
	Description	Description			
	Days (Duration Driven)	Duration			
Cost Data	Cost Category Total Cost	Cost Category (custom text columns)			

The following steps walk you through updating Microsoft Project from InEight Estimate to create a new schedule.

Step by Step — Update MS Project from InEight Estimate

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

⑧					ıg Job - Estimate			
File Setup Estima	te Quote I	Price E	xecution	System	Inte	grations	Actions	Μ
Cost Breakdown Structure (CBS) Breakdown Struc Re Cost Breakdown Structur	Workbook Workbook	Schedule	Cash Flow en MS Project	Indirect Cost Items	™ 8 ⊡	Price Break Structure Overhea	down (PBS)	A
Drag columns here to group	Drag columns here to group			rom Estimate	•		Find: Se	eard
CBS Position Code 📒	Description			Scheduled	20	Roll Up Schedule	WBS Element	
	JOB			✓			~	
+	Prime Bond							
+	Price % Add-On							
+	Job Financing	ing						
+	lation							
+	ation							
+	+ Indirect Cost Add-Or							
+	Job Management	& Equipme	ent					
+	General Expense							
+	Direct Cost Add-0)n						
+ 1	Mobilization			✓				
+ 2	Clearing & Grubbi	ing		\checkmark				

- Your job automatically opens in Microsoft Project
- The Work Breakdown Structure Layout displays for the project
- You can see the breakdown structure imported from InEight Estimate with durations, rolled up as specified by the Roll Up Schedule option in InEight Estimate
- Initially, the start date for your activities is the start date defined on the Job Properties >
| E | TASK | RESOURCE REPORT PROJECT \ | TEW FOR | MAT | | | Bhavna G | upta - 🗗 🗗 |
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| | 01 - CBS | | Stittent | | 3 | | linepetites | Luting |
| | Position | Bernsteller | Duration | 01-1 | | January | 1 March 1 | May 1 |
| | Code 🔻 | Description - | Duration - | Start 👻 | Finish 👻 | 12/15 1/1 | 2 2/9 3/8 4 | 5 5/3 5/31 |
| | 0 | a JOB | 45 days? | Mon 2/3/20 |) Fri 4/3/20 | | | |
| 1 | 1 | Mobilization | 10 days? | Mon 2/3/2 | Fri 2/14/20 | | | |
| 2 | 2 | Clearing & Grubbing | 10 days? | Mon 2/3/2 |) Fri 2/14/20 | | | |
| 5 | 2 | Unclassified Excavation | 1 day? | Mon 2/3/2 | Mon 2/3/20 | | | |
| 4
c | 4 | Aggregate Base | 45 days : | Mon 2/3/2 | FFI 4/3/20 | | | |
| 8 | 4.1 | Finegrade Subgrade | 45 days? | Mon 2/3/2 | Fri 3/27/20 | | | |
| 7 | 4.2 | 4 Install Aggregate Base | 40 days: | Mon 2/3/2 | Fri 3/27/20 | | 1 | |
| 8 | 431 | Place Angregate Base | 30 days? | Mon 2/3/2 | Fri 3/13/20 | | | |
| | 4.3.2 | Blue Ton Angregate Base | 40 days? | Mon 2/3/2 | Fri 3/27/20 | | | |
| 0 | 5 | Asphalt Concrete Hot Mix Type A | 29.17 days? | Mon 2/3/2 | Eri 3/13/20 | | | |
| 1 | 5.1 | Furnish & Haul Hot Mix | 29.17 days? | Mon 2/3/2 | Fri 3/13/20 | | | |
| 2 | 5.2 | Install Hot Mix Type A | 23.33 days? | Mon 2/3/2 |) Thu 3/5/20 | | | |
| 3 | 6 | ▲ 36 Inch RCP Culvert Class III | 9.92 days? | Mon 2/3/2 | Fri 2/14/20 | | | |
| 4 | 6.1 | Furnish RCP Materials | 5 days? | Mon 2/3/2 | Fri 2/7/20 | | | |
| 5 | 6.2 | Excavate RCP Trench | 4.65 days? | Mon 2/3/2 |) Fri 2/7/20 | | | |
| 6 | 6.3 | Install RCP Pipe | 4.1 days? | Mon 2/3/2 |) Fri 2/7/20 | | | |
| 7 | 6.4 | Backfill RCP Pipe | 9.92 days? | Mon 2/3/2 |) Fri 2/14/20 | | | |
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Cover Sheet tab (these will change as activity relationships are defined)

12.2.4 Update InEight Estimate from Microsoft Project

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

Update InEigh	t Estimate from Microsoft Project								
Data Type	Microsoft Project	InEight Estimate							
Activity Data	Start Dates	Start Dates							
	Finish Dates	Finish Dates							
	Hours	Hours							

Walk through the following steps to practice updating InEight Estimate from Microsoft Project. You will create a scheduling relationship in Microsoft Project and then import the updated dates and relationships into InEight Estimate.

Step by Step — Update InEight Estimate from MS Project

- 1. Open your version of the **Training Job** project in Microsoft Project.
 - In the real world, it is likely that you would have overlapping activities or your activities would be out of order, however for this example you will link all activities from finish to start
- 2. Click on the Link Tasks icon to link all activities.



- Ensure the Auto Schedule button is selected
- 3. To update InEight Estimate with this change, go back to InEight Estimate and from the Estimate tab, select **Schedule>Update InEight Estimate from Project**.

9	<u> </u>						Training	Job - E	stimate						ð ×
File	Setup E	stimate	Quote I	Price E	xecution	System	Integ	rations	Actions	More Act	ions				金田(
Cost Strue	Breakdown cture (CBS)		Workbook	Schedule	Cash Flow	Indirect Cost Items	™ %	Price Br Structu	reakdown irre (PBS)	Alternate	Scenar	io: •	Reports		
Brea	akdown Struc	Res	Workbook	💽 Ope	en MS Projec	t		Overh	lead and Pr		Altern	ates	Reports		
Cos	t Breakdown Stru	icture (Cl	BS) Register	🛛 🚰 Upo	late Estimate	from Proje	ect 💦								
Drag	columns here to gro	oup		🧬 Upo	late Project f	rom Estima	te		Find:	[Search For]]	··· Saved v	iews: Sched	ule Setup View	•
	CBS Position Code	Des	scription			Cost	Total Co (Foreca	ost st)	Currency	Scheduled	F	Roll Up Schedule	WBS Element	Schedule ID	Schedule Plug Days
	+ 1	Мо	bilization			1,909.51	\$11,	,909.51	U.S. Dollar	~				HD.0000011	
	+ 2	Cle	aring & Grubbi	ng		\$3,918.50	\$39,	184.97	U.S. Dollar	\checkmark				HD.0000012	
→	3	Un	classified Exca	vation		\$4.82	\$240,	756.89	U.S. Dollar	✓		✓		HD.0000013	\checkmark

 On the Schedule Setup View, you can see the Start and Finish dates updated from MS Project.

CBS Position Code	Description	Start	Finish	Early Start	Early Finish	Late Start	Late Finish
+ 1	Mobilization	2/3/2020	2/14/2020	2/3/2020	2/14/2020	2/3/2020	2/14/2020
+ 2	Clearing & Grubbing	2/17/2020	2/28/2020	2/17/2020	2/28/2020	2/17/2020	2/28/2020
□ 3	Unclassified Excavation	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
+ 3.1	Excavation	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
+ 3.2	Embankment	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020	3/2/2020
□ 4	Aggregate Base	3/3/2020	10/5/2020	3/3/2020	10/5/2020	3/3/2020	10/5/2020
+ 4.1	Furnish & Haul Base Material	3/3/2020	5/4/2020	3/3/2020	5/4/2020	3/3/2020	5/4/2020
+ 4.2	Finegrade Subgrade	5/5/2020	6/29/2020	5/5/2020	6/29/2020	5/5/2020	6/29/2020
■ 4.3	Install Aggregate Base	6/30/2020	10/5/2020	6/30/2020	10/5/2020	6/30/2020	10/5/2020
+ 4.3.1	Place Aggregate Base	6/30/2020	8/10/2020	6/30/2020	8/10/2020	6/30/2020	8/10/2020
+ 4.3.2	Blue Top Aggregate Base	8/11/2020	10/5/2020	8/11/2020	10/5/2020	8/11/2020	10/5/2020
□ 5	Asphalt Concrete Hot Mix Type A	10/6/2020	12/17/2020	10/6/2020	12/17/2020	10/6/2020	12/17/2020
+ 5.1	Furnish & Haul Hot Mix	10/6/2020	11/16/2020	10/6/2020	11/16/2020	10/6/2020	11/16/2020
+ 5.2	Install Hot Mix Type A	11/16/2020	12/17/2020	11/16/2020	12/17/2020	11/16/2020	12/17/2020
■ 6	36 Inch RCP Culvert Class III	12/17/2020	1/20/2021	12/17/2020	1/20/2021	12/17/2020	1/20/2021
+ 6.1	Furnish RCP Materials	12/17/2020	12/24/2020	12/17/2020	12/24/2020	12/17/2020	12/24/2020
+ 6.2	Excavate RCP Trench	12/24/2020	12/31/2020	12/24/2020	12/31/2020	12/24/2020	12/31/2020
+ 6.3	Install RCP Pipe	12/31/2020	1/6/2021	12/31/2020	1/6/2021	12/31/2020	1/6/2021
+ 6.4	Backfill RCP Pipe	1/6/2021	1/20/2021	1/6/2021	1/20/2021	1/6/2021	1/20/2021

12.2.5 Manage Changes Between Estimate and Schedule

As changes to scope, resources, and costs come up in your estimate, and changes to relationships and dates occur in the schedule, you can continue updating your estimate and schedule as needed.

12.2.5.3 Plug Days

The Schedule Plug Days option allows you to define the duration in the schedule separate from the duration defined for your cost items on the Production tab. For example, your 10" PVC Pipe activity may have extra days in the schedule due to the delivery date of the pipe material, but you don't want

those extra days to drive the costs in your estimate, since your crews won't be working on the activity on those extra days.

TIP

All superior cost items are hard-coded to use Schedule Plug Days.

Step by Step — Schedule Plug Days

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

CBS Position Code	Description	Days (Duration driven)	Schedule Plug Days	Plug Days
6	36 Inch RCP Culvert Class III	18.66	\checkmark	26.01
+ 6.1	Furnish RCP Materials	0.00	✓	5.00
+ 6.2	Excavate RCP Trench	4.65	✓	7.00
+ 6.3	Install RCP Pipe	4.10		4.00
+ 6.4	Backfill RCP Pipe	9.92		9.92

• This allows you to maintain your duration of 4.65 days in the estimate and 7 days in the schedule.

Any duration changes made in Project will import into InEight Estimate as Plug Days automatically so that they can be reviewed by the estimator before making any changes to production in InEight Estimate.

12.2.5.4 Update Microsoft Project with InEight Estimate Changes

The following steps will walk you through updating the schedule with a scope change in your estimate.

Step by Step — Update MS Project with InEight Estimate Changes

- 1. In the InEight Estimate Training Job, from the Estimate tab, select Cost Breakdown Structure.
 - In this scenario, there is a scope change for your Excavation requiring you to change all of your quantities
- 2. Change the quantity in the Forecast (T/O) Quantity field in the CBS as specified below.

	Quantity Change for Co	ost Item	
CBS Code	Description	Old Quantity	New Quantity
5	Asphalt Concrete Hot Mix Type A	35,000	25,000

- As you make your changes, take note of how your duration changes in the Days (Duration driven) column for these items.
- If prompted about changing Total or Unit Cost, select **Change TOTAL cost**, so that your unit costs stay intact

Gi Attention
You have changed the quantity for a cost item that already contains costs. Would you like the TOTAL cost to change or the UNIT cost?
 Change TOTAL cost Change UNIT cost
Deactivate this confirmation for quantity changes FOR ALL JOBS and ALWAYS change the TOTAL cost
To re-activate this confirmation, choose Tools > Activate Unit/Total Confirmation for Quantity Changes.
ОК

- From the Estimate tab, select Schedule>Update Projectfrom InEight Estimate to send the changed hours to Microsoft Project.
- 4. Go back to the **Training Job** in Microsoft Project.

- The Microsoft Project scheduled duration should have changed from 4.65 days to 7 days to match the updated duration in InEight Estimate for Excavate RCP Trench
- You can also see that the days for Asphalt Concrete Hot Mix Type A and its subordinates adjusted because you adjusted the Forecast T/O Quantity in InEight Estimate

	01 - CBS Position Code -	Description -	Duration 👻	Start 👻	Finish 👻
0	0	⊿ JOB	239.51 days?	Mon 2/3/20	Fri 1/1/21
1	1	Mobilization	10 days?	Mon 2/3/20	Fri 2/14/20
2	2	Clearing & Grubbing	10 days?	Mon 2/17/20	Fri 2/28/20
3	3	Unclassified Excavation	1 day?	Mon 3/2/20	Mon 3/2/20
4	4	⊿ Aggregate Base	155 days?	Tue 3/3/20	Mon 10/5/20
5	4.1	Furnish & Haul Base Material	45 days?	Tue 3/3/20	Mon 5/4/20
6	4.2	Finegrade Subgrade	40 days?	Tue 5/5/20	Mon 6/29/20
7	4.3	Install Aggregate Base	70 days?	Tue 6/30/20	Mon 10/5/20
8	4.3.1	Place Aggregate Base	30 days?	Tue 6/30/20	Mon 8/10/20
9	4.3.2	Blue Top Aggregate Base	40 days?	Tue 8/11/20	Mon 10/5/20
10	5	Asphalt Concrete Hot Mix Type A	37.5 days?	Tue 10/6/20	Thu 11/26/20
11	5.1	Furnish & Haul Hot Mix	20.83 days?	Tue 10/6/20	Tue 11/3/20
12	5.2	Install Hot Mix Type A	16.67 days?	Tue 11/3/20	Thu 11/26/20
13	6	▲ 36 Inch RCP Culvert Class III	26.01 days?	Thu 11/26/20	Fri 1/1/21
14	6.1	Furnish RCP Materials	5 days?	Thu 11/26/20	Thu 12/3/20
15	6.2	Excavate RCP Trench	7 days?	Thu 12/3/20	Mon 12/14/20
16	6.3	Install RCP Pipe	4.1 days?	Mon 12/14/20	Fri 12/18/20
17	6.4	Backfill RCP Pipe	9.92 days?	Fri 12/18/20	Fri 1/1/21

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

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

Lesson 12 Review

- 1. Under the Job Properties > Schedule tab, which setting can be enabled to account for plugged costs (e.g., for subcontractors)?
 - a. Resource price/unit
 - b. Expense Costs
 - c. Schedule ID
 - d. Actuals
- 2. For InEight Estimate schedule integration with Primavera, which of the following can be sent from your estimate to the schedule? (Select all that apply)
 - a. Activity data
 - b. Cash Flow graphs
 - c. Resource data
 - d. Cost data
 - e. Price data
- 3. The Schedule Plug Days option allows you to define the duration in the schedule separate from the duration defined for your cost items on the Production tab.
 - a. True
 - b. False

Lesson 12 Summary

As a result of this lesson, you can:

- Set up scheduling options
- Update Schedule from InEight Estimate
- Update InEight Estimate from Schedule
- Manage changes between estimate and schedule

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LESSON 13 – CASH FLOW

Lesson Duration: 25 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Interpret cash flow and resource utilization on the Cash Flow graph
- Select Cash Flow Options
- Change Cash Flow Display Settings

Lesson Topics

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13.1 CASH FLOW

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

You can open the Cash Flow form by selecting the **Estimate** tab from the Estimate landing page, then selecting **Cash Flow** from the Schedule section.

In order to generate a cash flow curve the estimate must be populated with schedule dates either directly from integration with Primavera, Microsoft project, or input manually.

Overview - Cash Flow Form

Section	Description
1	The graph displays the projected cash flow of your project, along with job financing expense, individual cost category costs and resource utilization.
	 The x-axis measures time The left y-axis measures amounts
	 The right y-axis measures quantities (when resource utilization is displayed) All graphs depicted on the Cash Flow form can be displayed based on Pay Quantity or Forecast (T/O) Quantity
2	 Click on the Display Settings icon to indicate what to display on the graph. You can display total costs and price or specific cost categories You can also set the display settings to report on Resource Utilization
3	Click on the Cash Flow Options icon to specify revenue timing, cost timing, and cost of money.
4	Click the Excel icon to export the numerical data represented on the graph into an Excel spreadsheet where you can run additional analysis.
5	You can filter the Cash Flow graph by date range or by a range of cost items.
6	Click and drag over the graph to zoom in on a particular section. Click the Reset Zoom button to restore the graph to its original state.



13.2 CASH FLOW OPTIONS

The Cash Flow Options are used to define the cash flow rules (revenue timing, cost timing, cost of money, and quantities) needed to calculate the finance expense and cash flow for your project.

Cash flow rules (revenue timing, cost timing, cost of money, and quantities) describe how cash flow occurs between a contractor and a client, and between contractors or owners and vendors/subcontractors. Cash flow is then calculated based on both the earning and payment terms you specify, and the job's schedule and pay item prices.

To open the Cash Flow Options, click on the **Cash Flow Options** $_{\infty}$ icon in the Tools section of the Actions tab.

TIP

You can also access Cash Flow Options from the Setup > Job Properties > Cash Flow tab.

- 1. **Revenue timing**: Revenue is the amount of money actually paid to a contractor by the client for the completion of project deliverables. This section contains options to specify when and how often payment is recieved.
- 2. **Cost Timing**: Cost is the amount of money expended to complete the scope of the project. This section contains options to specify when and how often you pay contractors, subcontractors and vendors.

NOTE To include any of your costs in your cash flow (including indirect costs), they need to be scheduled

- 3. **Cost of Money:** Represents the financing cost to fund the project. This section contains fields to specify interest rates you pay for the money you borrow, and interest rates you earn for money invested, to determine a total Finance Cost.
- 4. Quantities: Allows you to calculate cash flow based on pay quantities or forecast (T/O) quantities.
- 5. **Dates:** By default, the scheduled Early Start and Early Finish dates of each cost item (and its resource employments) as listed in the CBS Register, provide the timing of the expenses, revenue, and costs that show up on the Cash Flow graph. You have the option to base cash flow timing on Start/Finish dates or Late Start/Finish dates.

File Setup	e Estimate	Quote	Price	Execution	System	Integration	IS				Ê	1	?
Job Properties	Foundation Setup Data +	Pay Item 8 Proposal	Bid Wizard	Resource Rates -	Equipment	Resource Assemblies	Cost Item Assemblies	Standard Tables	Reports				
Cash Flow	Job Prope	erties Ø											Ŧ
Overview	Security Cov	er Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folde	er Tags	Competitors	Pricing	Schedule	-	Þ
Bills are sul At the o Every r Every Every	bmitted to the o end of the job month on this da 1 weeks 1 days	wner: ay 25	Averag Amour Retain	ge calendar day nt of each billin age is released ead revenue us	g that is withh :	n billing to coll eld by owner a At the end of t On a specific d Cost Curves as	ection: s retainage: ne job ate: the contribut	3 Ling Cost It	0 day 5.00 % • ems	s			
Cost timing Bills are rec and vendor At the o Every r Every Every	evived from subcris: end of the job month on this da weeks days	ontractors ay 25	Averaç Amour Retain subco V Apç eve	ge calendar day at of each invoi age is released ntractors and vo oly cash timing i n if their cost s	rs elapsed from ce received that to Or endors: On rules for all pro- ource is not so	n receipt of inv at is withheld t the end of the n a specific dat ocurable cost o et to "Quote"?	oice to paym y you as reta job e: ategories (no	ainage:	days 5.00 % • d equipment),				
Cost of money Average an Average an	nual interest rat	e paid to bo e earned (w	rrow money (v hen revenue ex	vhen cost excee ceeds cost):	:ds [8.00	Quan % O % ©	tities 4 Pay Quantit Forecast (T	ty 70) Quantity				
Reporting Peri Period setti	iods ing for cash flow	/: Day	•				Dates	s 5 rly Start / F	inish 👻				
									C	ОК		Cancel	

13.2.0.1 Cash Flow Options Set Up

The following steps walk you defining settings on the Cash Flow Options form.

Step by Step — Cash Flow Options Setup

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

Cash Flow	Job	Properties O											*
Overview	Security	Cover Sheet	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flow	Е. Ч	Þ

- You will see the default options already there
- You will adjust a few of those options
- 2. Change your Revenue timing to **Every month on the 10th**.

• The average calendar days from billing to collection should be set to 25 days

Overview Security Cover Sheet C	Cost Basis	Minority Setup	Fuel Cost	Job Tracking	Job Folder Tags	Competitors	Pricing	Schedule	Cash Flov
levenue timing 2	_								
Bills are submitted to the owner:	Aver	age calendar days	elapsed from	n billing to collec	tion:	25 day	/s		
O At the end of the job	Amo	unt of each billing	that is withh	eld by owner as i	retainage:	5.00 %			
Every month on this day 10	Reta	inage is released:	(پ	At the end of the	job				
O Every 1 weeks			\bigcirc	On a specific dat	e:	•			
O Every 1 days	S	pread revenue usir	ng the same O	Cost Curves as th	e contributing Cost	t Items			

- 3. For Cost timing, bills are received from subcontractors and vendors Every month on the 25th.
 - Average calendar days elapsed from receipt of invoice to payment should be set to 30 days

Bills are received from subcontractors	Average calendar days elapsed from receipt of invoice to payment: 30 day
At the end of the job Every month on this day 25 Every 1 weeks	Amount of each invoice received that is withheld by you as retainage: 5.00 % Retainage is released to subcontractors and vendors: On a specific date:
O Every 1 days	Apply cash timing rules for all procurable cost categories (non labor and equipment

4. For Cost of money, enter **10%** for the Average annual interest rate paid to borrow money (when cost exceeds revenue) and **2%** for Average annual interest rate earned (when revenue exceeds cost).

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

5. Leave all remaining options as originally defaulted.

13.3 CASH FLOW DISPLAY SETTINGS

13.3.1

13.3.2 Cost Items and Cost Categories

The Cash Flow Display Settings allow you to control what information displays on the Cash Flow graph. To open the Display Settings click on the **Actions > Display Settings** • icon in the Tools section.

Overview – Cash Flow Display Settings – Cost Items and Cost Categories

Section	Description
1	You can save your display settings for future use.
2	Select how the graph measures the timing of your cash flow. Options include: Day, Week, Month, Quarter, and Year.
3	 Under the Cost Items section, you can select: Total Cost (Forecast): The total cost of your scheduled cost items, based on when your costs are accrued (when your cost items are scheduled). This is displayed as a dashed line on the graph Total Price (current): The total revenue of your pay items, based on when the revenue is earned (when your cost items are scheduled). This is displayed as a dashed line on the graph Total Cost (Forecast) – Cash: The total cost of your scheduled cost items, reflecting the cost timing you specify in the Cash Flow Options. This is displayed as a solid line on the graph Total Price (current) – Cash: The total revenue of the pay items, reflecting the revenue timing you specify in the Cash Flow Options. This is displayed as a solid line on the graph Cash Flow: Displays the difference between your Total Cost – Cash and Total Price – Cash values, so you can see if you are making or losing money Finance Cost: Displays the Cost of Money amount calculated from the settings you specify in the Cash Flow Options
4	You can check the Estimated box for any specific cost categories you need to display.The other check boxes are used for InEight Estimate Performance

ettings: Default	Cost Categories				Resources				
Display this text		Estimated	As-Built	Planned To Date	Resource Utilization				
	Labor				Summarize resources by:	Resource	е Туре		\sim
2	Owned Equipment				Get data from:	This job's All Library	utilized re y resource	sources	
eriod Day ~	Rented Equipment				Value	Qty	Cost	AB Qty	AB Cost
Cost Items	Supplies				Labor				
Total Cost (Forecast)	Materials				Construction Equipment Rented Construction Eq Installed Material				
Total Price (current)	Subcontract				Installed Equipment				
✓ Total Cost (Forecast) - Cash	Fees				Unique				
✓ Total Price (current) - Cash	Allowance								
Cash Flow	Custom Category1								
Finance Cost	Undefined				Quantity:	Cos	t		
As-Built					None 🗸	Non	ie	\sim	
CE-Total Cost					As-Built Quantity:	As-t	Built Cost: 1e	\sim	

13.3.2.1 Cash Flow Display Set Up

The following steps walk you through setting up your Cash Flow Display Settings.

Step by Step — Cash Flow Display Settings Set Up

- 1. In the E101 Training Job, from the Estimate tab, select Cash Flow from the Schedule section.
- 2. On the Actions tab, select Display Settings . to open the Display Settings window.
- 3. From the Period drop-down list, select Week.
- 4. Under the Cost Items section, make sure the following are selected:
 - Total Cost (Forecast)
 - Total Price (Forecast)
 - Total Cost (Forecast) Cash
 - Total Price (Forecast) Cash
 - Cash Flow

• Finance Cost

Cost Items	
✓ Total Cost (Forecast)	
✓ Total Price (current)	
☑ Total Cost (Forecast) - Cash	
☐ Total Price (current) - Cash	
Cash Flow	
Finance Cost	
⊠ As-Built Total Cost	
CE-Total Cost Earned (to-date)	

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



- 6. Click **OK** to close the Display Settings window.
 - Your Total Cost (Forecast) displays as a dashed red line, indicating your accrued costs based on when your cost items are scheduled and the assigned cost curves for each cost item.
 - Your Total Price (current) displays as a dashed green line, indicating the revenue you've earned, based on the timing of your pay items
 - Your Total Cost (Forecast) Cash displays as a solid red line, indicating your costs, based on when your cost items are scheduled *and* the cost timing defined in Cash Flow Options
 - Your Total Price (current) Cash displays as a solid green line, indicating your revenue, based on the timing of your pay items *and* the revenue timing defined in Cash Flow Options
 - Your Cash Flow displays grey bars indicating when your cash flow is negative or positive



• Your Finance Cost displays as a blue line on the graph

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

				1.		<i>.</i>	~	<i>.</i>	×2.
		Thurs	day, D	ecemb	ber 27,	2018			8 VIA
	-		Febr	ruary :	2014			►	
	SU	MO	TU	WE	TH	FR	SA		
	26	27	28	29	30	31	1		
	2	3	4	5	6	7	8		
	9	10	11	12	13	14	15		otal Cost
	16	17	18	19	20	21	22		Forecast) - C
	23	24	25	26	27	28	1		
	2	3	4	5	6	7	8		
Date Ra				Clear					
Start:	2/3/2014			Ŧ	Start:				-
End:				Ŧ	End:				-

8. Click on the **End** drop-down arrow - and select an end date of your date range filter.

- Your graph now only includes your cost items that fall within the specified date range
- 9. To remove the filter, click in the **Start** field and press the **Backspace** key.
- 10. Do the same for the End field.

13.3.3 Resource Utilization

You can also use the Cash Flow graph to report on resource utilization. For example, you may want to run a report that displays a work hours curve for a particular labor trade or to see the peak usage times for a particular piece of heavy equipment.

You can run resource utilization graphs based off of any of the following:

- Resource Type
- Resource Code
- Description
- Organizational Category
- Tag 1, 2, and 3
- Quote Group
- Account Code and Cost Item Account Code
- Fuel Type

You set up your resource utilization settings from the same Display Settings window you use for setting up Cash Flow, **Display Settings** • in the Tools section of the Actions menu.

ettings: Previous	Cost Categories				Resources			
Display this text as a custom report title:		Estimated	As-Built	Planned To Date	Resource Utilization			
^	Labor				Summarize resources by:	Description		\sim
~	Owned Equipment				Get data from:	This job's utilize All Library resou	d resources urces	
eriod Week 🗸	Rented Equipment				Value	Qty Cos	t AB Qty	AB Co 1
Cost Items	Supplies				Dozer D8			
Total Cost (Forecast)	Materials				Dump Fees			
Total Price	Subcontract				Excavator 225			
Total Cost (Forecast) - Cash	Fees				Feeder Controls			
Total Price	Allowance				Finisher Flatbed Truck			<u> </u>
Cash Flow	Custom Category1				Form Materials			<u>ل</u>
Finance Cost	Undefined				Quantity:	Cost:		-
As-Built					None V	None	~	
CE-Total Cost Earned (to-date)					As-Built Quantity: None ~	As-Built Co None	ost: V	

13.3.3.2 Resource Utilization Display Set Up

The following steps walk you through setting up your Cash Flow graph to report on Resource Utilization.

Step by Step — Resource Utilization Display Setup

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

Resources	
Summarize resources by:	Description \checkmark
Get data from:	This job's utilized resources All Library resources

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

Get data from:	©1 ○/	This job's All Librar	s utilized re y resource	sources	
Value		Qty	Cost	AB Qty	AB Co
Laborer					
Lowboy Trailer					

9. From the **Quantity and Cost** drop down lists, you can select how your quantities and costs will display on the graph. In this case select the Quantity to display as a **Bar** and Cost to display as a **Line**.

Value	Qty	Cost	AB Qty	AB Co 🔨
 Labor Foreman ✓ Laborer Loader 950 				
Lowboy Trailer Manhole Precast 4 Ft				
<	L	1	-	>
Quantity: Bar ~	Cost: Line		~	

- 10. Click **OK** to close the Display Settings window.
 - The graph now displays the utilization of your Laborer resource, showing the work hours and costs used over time



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

Lesson 13 Review

- 1. Under what cash flow form can you set up your revenue and cost timing?
 - a. Cash Flow Options
 - b. Display Settings
 - c. Worksheet
 - d. Page Setup
- 2. By default, the red dashed line on the Cash Flow graph represents the:
 - a. Total Cost (Forecast)
 - b. Total Price (current)
 - c. Total Cost (Forecast) Cash
 - d. Total Price (current) Cash
- 3. In the Cash Flow Display Settings, Resource Utilization allows you to view a graphical summarization of your resources by which of the following? (Select all that apply)
 - a. Resource File Description
 - b. Resource Type
 - c. Resource Code
 - d. Description
 - e. Wage Zone
 - f. Organizational Category

Lesson 13 Summary

As a result of this lesson, you can:

- Interpret cash flow and resource utilization on the Cash Flow graph
- Select Cash Flow Options
- Change Cash Flow Display Settings



LESSON 14 – INEIGHT ESTIMATE CALCULATORS

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Use the Haul Calculator
- Use the Trench Calculator
- Use the In-Field Calculator

Lesson Topics

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14.1 HAUL CALCULATOR

The **Haul Calculator** allows you to enter the specifics of up to three haul routes (distance, travel speed, etc.). Once entered, you can either:

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

The following activity walks step by step through using the Haul Calculator to calculate the number of trucks needed for a cost item.

Step by Step — Haul Calculator – Calculate Quantity of Trucks

- 1. Open the Training Job and from the Estimate tab, select Cost Breakdown Structure.
- 2. Open cost item 4.1 Furnish & Haul Base Material.
- 3. On the Cost Item Record, click the Detail tab.
- 4. Right click on the ETDT Dump Truck row header and select Open Haul Calculator.

C <u>o</u> st	Item Summary	🍃 <u>D</u> etail :	\$11.54	₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽	00	Quote : \$0.00
Drag o	olumns here to g	roup				
F	Row Number ៉	Code	Resource	e Assembly	Desc	ription
-	- 1	LT1			Tear	nster
→ [-	- 2	ETDT			Dum	p Truck
	<u>O</u> pen				Aggr	regate Base Rock
8	<u>D</u> elete					
8<	Cu <u>t</u>					
9	Cop <u>y</u>					
Ē.	<u>P</u> aste					
+	<u>Fill Down</u>					
8	Link this field to	Excel				
집	UnLink from Ex	cel				
2.	Insert Resource	9				
12	Insert Resource	e <u>A</u> ssembly				
1	Open <u>H</u> aul Calo	culator				
20	Edit Resource F	Periods				

5. On the Haul Calculator, select the **Calculate quantity of ETDT required to complete haul in duration entered below** radio button. (ETDT is the resource code for the Dump Truck you selected.)



- 6. For the Haul Distance, type 5.
- 7. Enter an Average Payload (Ton) of 30.
- 8. For Load Time (Minutes), type 3.
- 9. Enter a Travel Speed Full of 35 Mile/Hour.

- 10. For **Dump Time (Minutes)**, type **2**.
- 11. Enter a Travel Speed Empty of 45 Mile/Hour. Notice this calculates a cycle time of 20.24.
- 12. Enter a Work Efficiency of 90 percent.

	Route 1
Quantity (Ton)	45,000.00
Haul Distance - One Way (Mile)	5.00
Average Payload (Ton)	30.00
г	
Total Loads	1,500.00
Load Time (Minutes)	3.00
Travel Speed Full (Mile/Hour)	35.00
Dump Time (Minutes)	2.00
Travel Speed Empty (Mile/Hour)	45.00
Cycle Time (Minutes)	20.24
Work Efficiency (%)	90.00
Total Hauler Hours	562.17
Hours Per Shift	8.00

• The calculator shows a result of 1.56 concurrent haulers

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

- 13. Click OK.
- 14. Your cost item now shows a quantity of 1.56. Round up the Quantity to **2**. Also, adjust the Teamster Quantity to **2** (if needed).

Row Number =		Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure
+	1	LT1		Teamster			2.00	Each
+	2	ETDT		Dump Truck			2.00	Each
+	3	MBR		Aggregate Base Rock	45,500.00	5.00	47,775.00	Ton

Step by Step — Haul Calculator – Calculate Total Duration

- 1. Open the Training Job and from the Estimate tab, select Cost Breakdown Structure.
- 2. Open cost item 4.1 Furnish & Haul Base Material.
- 3. On the Cost Item Record, click the **Detail** tab.
- 4. Change your Teamster and Dump Truck quantities back to **2 each**.
- 5. Right click on the ETDT Dump Truck row header and select Open Haul Calculator.
- 6. On the Haul Calculator, select the **Calculate total duration of haul using quantity of ETDT** entered below radio button.
 - With the previous information you entered still there, the calculator calculates a total duration of 281.08 hours

Calculate quantity of ETDT required to	complete haul in du	ration entered belov	v		
Calculate total duration of haul using q	uantity of ETDT ent	ered below			
	Route 1	Route 2	Route 3	TOTAL	
Quantity (Ton)	45,000.00	0.00	0.00	45,000.00	Ton
Haul Distance - One Way (Mile)	5.00	0.00	0.00	5.00	Mile
Average Payload (Ton)	30.00	0.00	0.00	30.00	Ton
Total Loads	1,500.00	0.00	0.00	1,500.00	
Load Time (Minutes)	3.00	0.00	0.00	3.00	Minutes
Travel Speed Full (Mile/Hour)	35.00	0.00	0.00	35.00	Mile/Hour
Dump Time (Minutes)	2.00	0.00	0.00	2.00	Minutes
Travel Speed Empty (Mile/Hour)	45.00	0.00	0.00	45.00	Mile/Hour
Cycle Time (Minutes)	20.24	0.00	0.00	20.24	Minutes
Work Efficiency (%)	90.00	100.00	100.00	90.00	%
Total Hauler Hours	562.17	0.00	0.00	562.17	Hours
Hours Per Shift	8.00	8.00	8.00	8.00	
Results					
Quantity of resource ETDT	0.00	0.00	0.00	2.00	Concurrent Haulers
Total duration (Hours)	281.08	0.00	0.00	281.08	Hours

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

14.2 TRENCH CALCULATOR

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

With this information, the Trench Calculator can automatically calculate:

- Total excavation volume (neat-line)
- Total excavation volume (including swell/shrinkage)

- Total pipe to purchase
- Lift Volume (for up to four beddings)
- Lift Weight (for up to four beddings)

You can use these calculations to define certain cost item setup data:

- You can use the Total Excavation Volume that is calculated as the quantity of the cost item
- You can use the Total pipe to purchase calculation as the quantity of a resource (e.g., pipe) that has been employed to the cost item
- You can use the Lift Volume or Lift Weight that is calculated as the quantity of a resource employed to the cost item in either cubic yards or tons
- You can click the Toggle English / Metric button at the bottom of the dialog to switch between the English and Metric systems for entering data
- TIP You can access the Trench Calculator from the Actions tab of a Cost Item Record
- NOTE When copying cost items in a job or from job to job, the Trench Calculator variable data is included with the data being copied. When a cost item is copied to the clipboard, Trench Calculator variable data is also included.

14.2.1 Trench Calculator – Trench Tab

The following steps walk through using the Trench Calculator to take-off excavation volume.

Step by Step — Trench Calculator – Trench

- 1. Open the **Training Job** and from the Estimate tab, select **Cost Breakdown Structure**.
- 2. Create a new cost item from the bottom row of your CBS and call it **24**" **Pipe**.
- 3. Add the following three subordinates and update their Units of Measure:
 - Excavate Trench: CY
 - Install Pipe: LF
 - Backfill Trench: CY
- 4. Open the Excavate Trench Cost Item Record. Add the following resources:

- LL2 Laborer 1
- LO2 Operator Class 2 1
- EX245 Excavator 245 1
- 5. Adjust the Production to: **100 CY/Hour**.

Cos	st Item Summar	у	<mark>⊉</mark> <u>D</u> etail :	\$1.74	₩ Plu <u>a</u> : \$0.00	Quote : \$0.00	Allocation	Production				×
Drag	; columns Firede	[Se	earch For]		Saved views	Previous View	•		Days:	0.00	0.00	*
	Row	r	Code	Resource	e Assembly	Description	Quantity		Shifts:	0.00	0.00	
	Number —					Labora	(Less Waste)		Hours:	0.01	0.00	
	т _	1	102			Caporer			Man-Hours:	0.02	0.00	
	+	3	EX245			Excavator 245			Equip-Hours:	0.01	0.00	
÷			1						CY/Day:	800.00	0.00	
									CY/Shift:	800.00	0.00	
									CY/Hour:	100.00 ┥	0.00	
									CY/Man-Hr:	50.00	0.00	*
								▲				•
4							Þ	🍖 ·· 📑 ··	🔄 •• 🔊 ••		· · ·	Ζ.

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

Training Job - Estimate	: 	-			
System Integratio	ns Actions	1			
ue (Delta) Resource Fields	🛓 Edit Resource Periods	Trench Calculator			
ue (Delta) Cost Item Fields 🛛 🔚 Insert Subordinate 🛛 👬 Shift / Rate Calo					
	🔏 Break Cost Allocation Link				
	Тоо	ls			
rd ©		Trench Calculator			
t (T/O) Qty: Unit of Meas	sure: Unit Cost:	Total Cost: Currenc			
	-				
1.00 Each	\$1.74	\$1.74 U.S. Do			

- 7. For Trench Length, type 1000.00 feet.
- 8. For Trench Width (at the bottom) type 4.00 feet.
- 9. Enter a Trench Depth of 10.00 feet.
- 10. Enter a Hinge Elevation of 5.00 feet.

- 11. Enter a **Backslope** of **45** degrees.
- 12. Define the Material Swell/Shrinkage Factor (fraction expressed as a decimal) at .10.
 - You can select either a "neat-line" total volume or include swell/shrinkage
- 13. Select the "Total excavated volume (including swell/shrinkage)" checkbox.

	Trench	Pipe	Beddings		
	Variables				
		Tren	ch length:	1000.	00 feet
	Trench	width (at bottom):	4.	00 feet
		Tre	nch depth:	10.	00 feet
		Hinge	elevation:	5.	00 feet
		E	Backslope:	45.	00 degrees
	Materi	al swell/	shrinkage factor:	0.	10 (decimal)
	Results				
\mathbf{X}	Tota	l excava	tion volume (neat-line):	2,407.41	CY
	Us quant	e this vo ity on th	olume as the his cost item		
	Tot (includi	al excava ng swell	ated volume /shrinkage):	2,648.15	CY
	Us quant	e this vo ity on th	olume as the iis cost item		
	Trada	F !!!	(14-1-1-		017 D D

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

14.2.2 Trench Calculator – Pipe Tab

You can also use the Trench Calculator to take off how much piping and bedding you need for the trench.

Step by Step — Trench Calculator – Pipe

- 1. On the CBS Register, adjust the Forecast T/O Quantity for the Install Pipe cost item to 1000 LF.
 - Assume this quantity is based off manual take-off calculations you already did
- 2. Open the Install Pipe Cost Item Record.
- 3. Add the Resource Assembly of CPIPE Pipe Crew and adjust the production to 300 LF / Day.
- 4. On the Cost Item Record's Actions tab, select Trench Calculator.
- 5. Select Load Configuration from Library.
- 6. Select Trench Example (with your initials).

A	ctions								
Drag	g columns here to group			Find: [Sea	arch For]	5	Saved views:	Standard View	•
	Name	Comments	Pipe Diameter	UM	Pipe Type	Pipe Class	Agency	Last Changed	Last Chan
\rightarrow	New Trench Configuration (bla		0.00	inches					
	24" PVC Sewer at 10' Deep (1)		26.00	inches				7/29/2009 2:13:19 PM	wmfarr
	Trench Example PB		0.00	inches				2/15/2019 11:59:52 AM	Paul.Benni

- 7. Click OK.
- 8. On the Trench Calculator, select the Pipe tab.
- 9. Enter the following for the size and position of the pipe:
 - Pipe exterior diameter: 26.00 inches
 - Pipe center elevation (from bottom): 19.00 inches
 - Waste factor: 10%
- 10. Click on the resource icon to pull up the Resource Rate Register.
- 11. Select the Installed Material tab.
- 12. Select MPP24 Pipe 24" PVC SDR35, then click OK.
 - The Pipe variables you entered should match the following image:

	Trench Pipe Beddings
	Variables
	Pipe exterior diameter: 26.00 inches
	Waste factor: 10.00 %
	Results Total pipe to purchase: 1,100.00 LF Use Total Pipe To Purchase as the quantity on this resource (on this cost item): MPP24 \$

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

14.2.3 Trench Calculator – Beddings Tab

The following steps walk you using the Trench Calculator to calculate bedding take-offs.

Step by Step — Trench Calculator – Beddings

- 1. Back on the CBS Register, adjust the Forecast T/O Quantity for **Backfill Trench** to **2300** CY, based on manual calculations.
- 2. Open the Backfill Trench Cost Item Record.

- 3. Add the following resources:
 - LL2 Laborer 3
 - LO2 Operator Class 2 1
 - RPC Plate Compactor 1
 - EL950 Loader 950 1
- 4. Adjust the Production to **160** CY/Day.
- 5. From the Cost Item Record's Actions tab, select Trench Calculator.
- 6. Select Load Configuration from Library
- 7. Select Trench Example (with your initials), then click OK.
- 8. On the Trench Calculator, select the **Beddings** tab.
- 9. On the Beddings tab, you can define up to four beddings to backfill the trench
 - The variables you enter will determine how much bedding you need
- 10. Enter the following variables for each bedding:

	Bedding Lift 1	Bedding Lift 2	Bedding Lift 3
Elevation (from trench floor)	6.00	38.00	76.00
Additional material needed	5.00	5.00	5.00
Conversion factor	1.60	1.70	1.60

- Under Results, you can match each of the Bedding Lifts with a material resource, by selecting the **resource** icon and selecting the resource you want to employ from the Material tab
- 11. Selecting the resource from the Tons selection field, select the following materials for each bedding:

	Resource Code	Resource Description
Bedding Lift 1	MASAND	Sand
Bedding Lift 2	MAFA	Fine Aggregate
Bedding Lift 3	MACA1-1/2	Coarse Aggregate
Trenc	h Calculator	
---	---	
	Trench Pipe Beddings	
	● Bedding Lift 1 ○ Bedding Lift 2 ○ Bedding Lift 3 ○ Bedding Lift 4	
	Variables	
	Elevation (from trench floor): 6.00 inches	
	Additional material needed to 5.00 %	
	Conversion factor (TON per CY): 1.60	
	Results	
	Lift Volume: 77.78 CY	
大学学校が生まれた	Use Lift Volume as the quantity on this resource (on this cost item):	
And the second states	Lift Weight: 124.44 Tons	
the part to the part to	Use Lift Weight as the quantity on MASAND	
	this resource (on this cost item):	
No. of the second se		

12. Click OK.

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

Row Number ≒ ▼	Code	Resource Assembly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure
+ 1	LL2		Laborer			3.00	Each
+ 2	LO2		Operator Class 2			1.00	Each
+ 3	RPC		Plate Compactor			1.00	Each
+ 4	EL950		Loader 950			1.00	Each
+ 5	MASAND		Sand	124.44	0.00	124.44	Ton
+ 6	MAFA		Fine Aggregate	593.66	0.00	593.66	Ton
+ 7	MACA1		Coarse Aggregate	3,327.59	0.00	3,327.59	Ton

Exercise 14.1 — Trench Calculator

In this exercise, you will practice using the Trench Calculator to take-off piping and bedding materials. Complete the following steps:

- 1. In the Training Job, create a new cost item called Underground Pipe.
- 2. Give the cost item a quantity and unit of measure of **1640 Linear Feet**.
- 3. Open the new cost item and open the **Trench Calculator**.
- 4. On the **Trench tab**, enter the variables for the trench:

Trench length	1000 feet
Trench width (at bottom)	4 feet
Trench depth	10 feet
Hinge elevation	5 feet
Backslope	45 degrees
Material swell/shrinkage factor	0.10 (decimal)

- Do NOT check the box to bring in volume shrinkage.
- 5. Select the MPR36 material resource from the drop-down Results list.
- 6. On the **Beddings** tab, enter bedding variables.

Bedding lift 1	
Elevation (from trench floor)	6 inches
Additional material needed to compensate for compaction	5.00%
Conversions factor (Ton per CY)	1.3

Bed	ding	lift 1

Bedding material resource (Tons)

MASAND

Bedding lift 2	
Elevation (from trench floor)	38 inches
Additional material needed to compensate for compaction	5.00%
Conversions factor (Ton per CY)	1.1
Bedding material resource (Tons)	MAFA

Bedding lift 3	
Elevation (from trench floor)	76 inches
Additional material needed to compensate for compaction	5.00%
Conversions factor (Ton per CY)	1.1
Bedding material resource (Tons)	MACA1-1/2

7. Select **OK** and confirm that the pipe material and bedding materials populated the cost item.

You should end up with the following results

Cost	Breakdown	Structur	e (CBS)	Register	Cost	Item Record 🛛									
CBS C	Code:	Optional	Code:	Descriptio	n:			Foreca	ast (T/O) Qty:	Unit of Measure	e:	Unit Cost:	Total Cost:	Currency:	
											~				
											~				
2	!6			Undergrou	ind Pipe				1,640.00	LF	•	\$34.59	\$56,734.45	U.S. Dollar	
PI As:	signment:	PI Line N	umber:	PI Descript	ion:					Cost Segment:		Pay Quantity:	Cost Source:	Alternate:	
	~									Job Overhead	•	1,640.00	Detail +	BASE	
Cost	Item Summar	y 🌬	etail : \$	34.59 🗳	Plug : \$0.0	0 Quote : \$0.00	Allocation				Pro	duction			×
Drag	columns here t	to group				Find: [Search For]	··· Saved	views: Previou	s View	-				Qty Driven Hourly	
	Row Number ៉	Code	F	Resource Asse	embly	Description	Quantity (Less Waste)	Waste % Add-on	Quantity	Unit of Measure		Durati	on Driven Resources	Resources	
	+	1 MPR3	6			Pipe RCP 36 In	1,000.00	0.00	1,000.00	Linear Feet		D	ays: 0.00	0.00	
	+	2 MASA	ND			Sand	101.11	0.00	101.11	Ton		Sh	ifts: 0.00	0.00	
→ :	+	3 MAFA	1			Fine Aggregate	384.13	0.00	384.13	Ton		Но	ours: 0.00	• 0.00	
*		1 Piece				Course Aggregate	2,155.15	0.00	2,133.13	1011		Man-Ho	ours: 0.00	0.00	
												Equip-Ho	ours: 0.00	0.00	
											_	LF/	Day: 0.00	0.00	
											4 20		<u></u> 18 21	±	* >?
4										F.					_

Congratulations, you have completed this exercise!

14.3 IN-FIELD CALCULATOR

You can use the In-field Calculator to do simple mathematical calculations in any numeric field on records, registers, and tree lists. You use this calculator much like an Excel workbook field, by inserting the cursor in the field where you want to perform a calculation, then pressing the "=" key, followed by a valid arithmetic expression. To display the calculated result, you press the tab key. The resulting value is stored without the arithmetic expression used to calculate the value.

The following steps walk through using the In-field Calculator to calculate the area of how much sandblasting is needed for painting the steel bridge structure specified in the Training Job.

NOTE

The resulting field value is stored without the arithmetic expression used to calculate the value.

Step by Step — In-Field Calculator

- 1. Open the Training Job and from the Estimate tab, select Cost Breakdown Structure.
- 2. Scroll to find cost item **13.3 Sandblast**.
- 3. Click in the Forecast (T/O) Quantity field.

		12,1,0,0	Sub Mai	21,000,00	aquarencee
		13	Paint Existing Steel Bridge Structure	1.00	Lump Sum
	+	13.1	Setup Equipment	1.00	Lump Sum
	+	13.2	Wash-Remove-Dispose of Water	25.000.00	Square Feet
ı	+	13.3	Sandblast	2500	Square Feet
	+	13.4	Apply Primer	25,000.00	Square Feet
	+	13.5	Paint Top Coat	25,000.00	Square Feet

4. Press the = key, then type **10*250**.

	13	Paint Existing Steel Bridge Structure	1.00	Lump Sum
+	13.1	Setup Equipment	1.00	Lump Sum
+	13.2	Wash-Remove-Dispose of Water	25,000.00	Square Feet
+	13.3	Sandblast	=10*250	Square Feet
+	13.4	Apply Primer	25,000.00	Square Feet

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

Lesson 14 Review

- 1. The Haul calculator allows you to:
 - a. Calculate the number of trucks required to complete the haul in a set amount of time
 - b. Calculate how long it will take to complete the haul with a set number of trucks
 - c. Neither
 - d. Both

2. The Trench Calculator allows you to quickly calculate ______ values.

- a. Trench
- b. Pipe
- c. Bedding
- d. All of the above
- 3. For the in-field calculator, what symbol needs to be at the beginning of the math equation for it to calculate?
 - a. +
 - b. –
 - c. =
 - d. (

Lesson 14 Summary

As a result of this lesson, you can:

- Use the Haul Calculator
- Use the Trench Calculator
- Use the In-Field Calculator