Cost Estimating System
Prime Consultant & Sub Consultant FAQs

- Will the Prime Consultants have access to all Estimates?
  - No, they will see only those estimates in which they have been assigned as Team Members.

- Is there any restrictions on file types to upload?
  - No, you can upload any file type (i.e. .doc, .xls, .zip, .dwg, etc.). However, it is recommended to not upload CADD Files [convert them to .PDF].

- Can we upload multiple files at the same time?
  - No, currently the User has to upload one file at a time.

- How much memory is allocated to each User for uploading?
  - 20 GB have been allocated per User [not per project].

- Can files that have been uploaded documents be revised?
  - No, the Prime Consultant cannot change information in the uploaded document; however, they can delete the document and/or upload a revised file.

- Is the Prime Consultant still required to submit documents physically?
  - Submitting documents is part of SCA Policy & Procedures, which will continue to occur (unless directed by the Design Project Manager otherwise).

- Does every User in CES require their own Login credentials?
  - Yes, every User who is going to use CES will need to have their own Login credentials.

- How does a User get Login credentials?
  - In order to get Login credentials, Users must take the available training classes at the SCA (or via WebEx) and then a CES request form will be provided with instructions on how to get User ID and Password.

- What is the SCA Database?
  - The SCA Database contains pre-defined line items within the CSI Divisions 01 thru 16, which will be available for everyone to use in their Estimates.

- How often will the SCA Database be updated?
  - The SCA Database will be updated at least twice per year.

- Does the Users have the ability to change the Unit Cost provided by the SCA in the estimate.
  - Yes, the Users can adjust the Unit Cost in any Estimate.
    [This change will only take effect in the Estimate, not the SCA Database].

- What does the Code represent for each line item in an Estimate?
  - The Code is a 15-digit number (ex. **15400.15410.00110**) in which the first 5-digits represents the CSI Division (01-16), the next 5-digits is CSI Sub Division in which the line item resides and the last 5-digits is SCA numbering convention which starts at 10 and increments in +50 for each additional line item in the Database.

- What if a line item is needed within an Estimate that is not found in the SCA Database?
  - The User has the ability to add new line items that are not part of the SCA Database within the Estimate. This line item will contain a Code of **00000.00000.00000.** The User will then need to associate the line item to a specific CSI Division and Sub Division. These new line items are added to the Estimate only (not to SCA Database).

    [**Note**: Users will not be able to submit Estimate until all new line items have a Code associated to them].

- Is there a way to see what changes a Prime Consultant has made to the Unit Cost after the changes have been applied?
  - Yes, there is an Audit Trail feature in the application. In the 'Estimate' tab when a User hovers over a line item, there are icons displayed on the right most column. Click on the Pencil icon that will open an 'Edit Item' Page. Locate 'Audit Trail' and click on the arrow. This will display all changes that have occurred for that specific line item.

- Does the Prime Consultant have the ability to invite additional Team members to review the Estimate?
  - Yes, Prime Consultant can invite additional Team members via the Pencil Icon in the Estimate Tile to review the Estimate. A popup screen (Edit Estimate) will appear, click on the 'Team' Tab, find the Field labeled "Invite Team Member" and add each person that you need to invite to review.

    [**Note**: Team members will not appear in the list unless they have access to the CES application].

- Can the Prime Consultant assigns multiple Sub Consultants to work on an Estimate?
  - Yes, the Prime Consultant can assign multiple Sub Consultants to work on an Estimate. Each Sub Consultant should get a line item assigned to them in the Estimate via the 'Assigned' column.

    [**Note**: Prime Consultant can invite Sub Consultants to an Estimate via the Pencil Icon in the Estimate Tile. A popup screen (Edit Estimate) will appear, click on the 'Team' Tab, find the Field labeled "Sub Consultant" and add each Sub Consultant that you need to work on the Estimate].

- Can multiple Users work on the same Estimate at the same time?
  - Yes, multiple Users can work on the same Estimate at the same time. As long as they have been assigned a line item, they will have access to their portion of the Estimate.

    [**Note:** The Prime Consultant cannot submit the Estimate to the SCA until all Users have processed their portion back to the Prime].

- If the Prime Consultant needs to work on a portion or the entire Estimate, how can this be achieved?
  - When the Prime Consultant adds a line item, the line item will be automatically assigned to that User. So all the Prime Consultant needs to do is work on the line items within the Estimate. If no Sub Consultants are needed, then the Prime Consultant can submit directly to SCA once completed.

- Is there a way to sort the Estimate by CSI Division?
  - Yes, within the Estimate there is a 'Group By' option. Select Division from the drop down and the Estimate will group all line items via CSI Divisions.

- Is there a way to sort the Estimate by User (Sub Consultant, etc.)?
  - Yes, within the Estimate there is a 'Group By' option. Select Assigned from the drop down and the Estimate will group all line item via Assigned.

- Is there a way to sort the Estimate by LLW?
  - Yes, within the Estimate there is a 'Group By' option. Select LLW from the drop down and the Estimate will group all line item via LLW.

- Sometimes an additional LLW is need in an Estimate, how can this be added?
  - Additional LLW numbers can be added in "Sort Types" Tab in the Estimate. Click on Plus [+] symbol next to LLW and select Add New Value.

    [**Note**: Enter the LLW Description (Parapets, Roofs, etc.) in the Description field and enter the LLW Number (012345, etc.) in the Code Field].

- Where are Markups applied in the Estimate?
  - Markup are applied in the 'Summary' Tab of the Estimate. The Direct & Indirect Costs are prepopulated based on the Estimate Type.

    [**Note:** User has to ability to adjust Markups (Ex. Escalation 4% (default) to 6%) or add additional Markups if needed (Select + Add New Markup)].

- How PLA is calculated?
    - PLA is calculated on the Labor total provided in Base Cost of the Summary Tab in the Estimate.

      [**Note**: The User needs to enter the pre-defined % (based on the Estimate Type/Estimate Total) in the percentage column and the system will automatically calculate the Markup.]

- Sometime an Estimate needs to include SCA Additional Recommendations, where is this incorporated.
    - User can add SCA Additional Recommendations in the "Sort Types" tab on the Estimate page, click on Plus [+] symbol next to LLW and select Add New Value.

      [**Note**: Enter the SCA Additional Recommendations in the Description field and enter SCAARI in the Code Field].

- Sometime an Estimate needs an additional Allowance Markup, where is this incorporated.
    - User can add an additional Allowance markup in the "Summary" tab on the Estimate page, under the Indirect Cost section.

      [**Note**: Click on + Add New Markup, enter Allowance in the Description field, select Lump Sum in the Markup Type field and enter value in the Amount field].

- Is there the ability to copy from a pre-existing or completed Estimate?
    - Yes, Users can copy from any Estimate that is in application to the new Estimate using the "Merge" feature.

      [**Note**: Users will need to click on the Pencil Icon in the Estimate Tile. A popup screen (Edit Estimate) will appear, click on the 'Setup' Tab, find the Field labeled "Merge" and enter the Estimate Code or Estimate Description that you want to copy from].

- While using the 'Merge' feature, will it override the line items already incorporated in the new Estimate?
    - While merging, already existing line items in the Estimate are not going to be overridden. Merge will add the <u>entire Estimate</u> that has been selected.

      [**Note**: Users will have to manually delete the line items that are not needed or have been repeated in the Estimate].

- Do Users have the ability to create Templates that can be used with the 'Merge' feature in an Estimate?
  - Yes, Users have the ability to create their own Templates in the CES application, which can be specifically accessed solely by that User.

    [**Note**: In the Estimate Center, click on Add New Estimate. In the 'Setup' Tab, find 'Estimate Type' and scroll down until you see the Scope or Design Template in drop down. Once selected, click on the Save Estimate Button].

- How is an Estimate with a "new version" created and how many times can a new version be created?
  - When the SCA (Design Project Manager) resubmits an Estimate back to Prime Consultant for revision changes, a new version of the Estimate is automatically created by the application (which is an exact copy of the original). The previous version gets a "Closed" status and there is no limit to the number of versions an Estimate can have until the SCA (DPM) finally concurs.

- When will "Estimate Shells" be created in the CES Application and how will Users get notified?
  - When projects are entered in SCA's Project Tracking System (PTS), an Estimate Shell will be created in the CES Application and an email notification will be sent to the Prime Consultant informing them that an Estimate was created. For CIP Scope Estimate, the Estimate Phase will be "Draft". For CIP Design, the Estimate Phase will be "50%". For CAPACITY Scope, the Estimate Phase will be "Pre-Schematic" Phase.

- Is there a field to enter the Gross Area, Construction Duration, etc. for Capacity Estimates?
  - Yes, User can add the Gross Area, Construction Duration, etc. in the Custom Tab, under the Design Estimate section. Users will need to click on the Pencil Icon in the Scheme Estimate Tile. A popup screen (Edit Estimate) will appear, click on the 'Custom' Tab, the 'Design Estimate' section contains those fields.

    [**Note**: *Users do not need to enter a value for Cost per SF. The Cost per SF will be automatically calculated in the Project Comparison Report once the Gross Area has been entered.]

- Is there any way to include the "Basis of Estimate" for CAP Pre- Schematic & Schematic Estimate (Schemes 1, 2, 3, etc.) in the Report?
  - Yes, the User has the ability to include the "Basis of Estimate" in Pre-Schematic & Schematic Schemes Estimates via the Scope Tab.

    [**Note**: Users will need to click on the Pencil Icon in the Scheme Estimate Tile. A popup screen (Edit Estimate) will appear, click on the 'Scope' Tab, find the

Description Field and enter comments. These comments will appear on the Basis of Estimate page of the Project Comparison Report.

- How can a User run the Project Comparison Report for the Pre-Schematic & Schematic Scheme Estimates?
  - The Prime Consultant is required to attach the "Project Comparison" Report in the Scheme Estimates, select the appropriate Schemes (1, 2, 3) and Basis of Estimate will on the 2nd page.

- How can a User attach the Project Comparison Report to the Pre-Schematic & Schematic Scheme Estimates?
  - Once the report has run and been saved, click on the Documents Tab in the Scheme Estimate and select Add New File. Repeat for all Schemes.

- Do Users need to access the SCA Citrix portal to use the CES Application?
  - No, the CES Application is web based and can be accessed via your own web browsers.

- Which Web Browsers work with the CES Application?
  - **Google Chrome** is the recommended browser for the CES Application; however, Microsoft Internet Explorer, Mozilla Firefox and Apple Safari are all supported browsers for the CES Application. Each required a specific version. Click on the provided link to see the Browser Support Matrix.

- Is there a way to Export an Estimate from the CES Application?
  - Yes, an Estimate can be exported to Excel from the Reports screen. After selecting the Report (Scope Estimate, Design Estimate, etc.), click on the Excel option located on the top right corner of the screen. A copy of the Estimate will download into Excel.

- What about Import?
  - No, there is no Import feature available.

- Will Bulletins be part of CES application?
  - Currently, Scope & Design Estimates will be processed in the CES application. Bulletins, which are part of the Construction phase, will be incorporated in a future release sometime in 2018.

- How do Users get support in regards to the CES Application?
  - Users can contact the SCA Helpdesk at **(718) 472-8871** for support. If the Helpdesk cannot resolve issue, they will ask the User to submit a Support Ticket.

- Is there documentation available?
  - Yes, documentation on the CES Application can be found at the SCA Website.