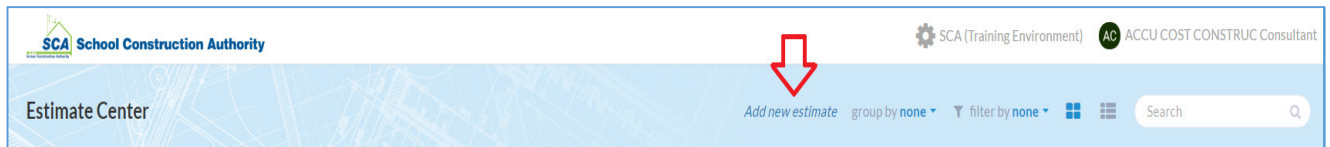


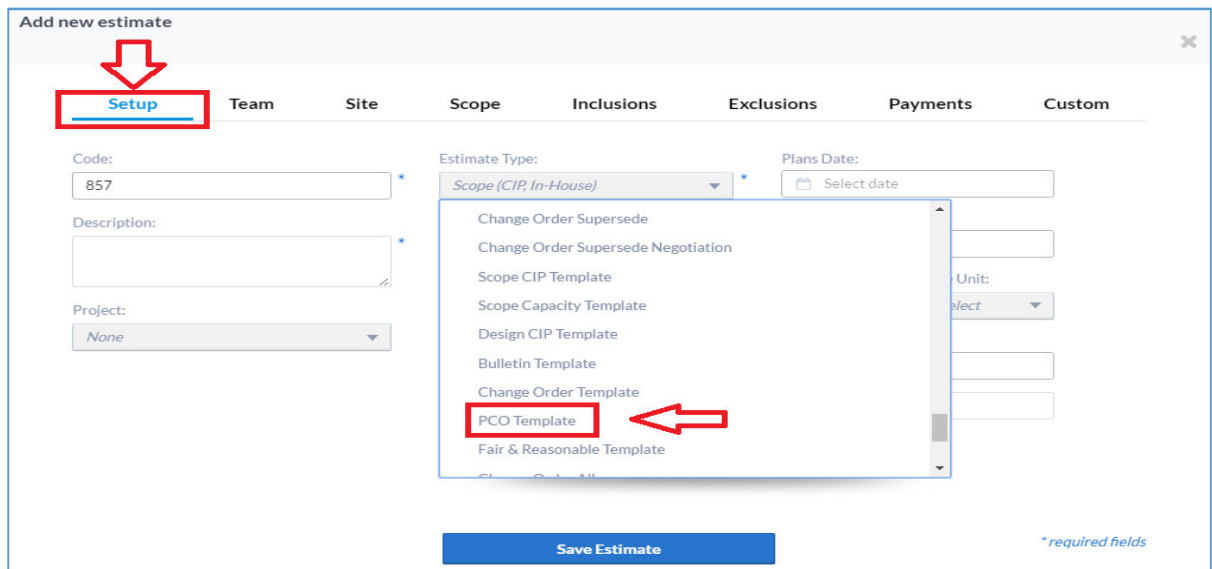
Creating an Template Estimate

1. Click on the Estimate Center  icon.

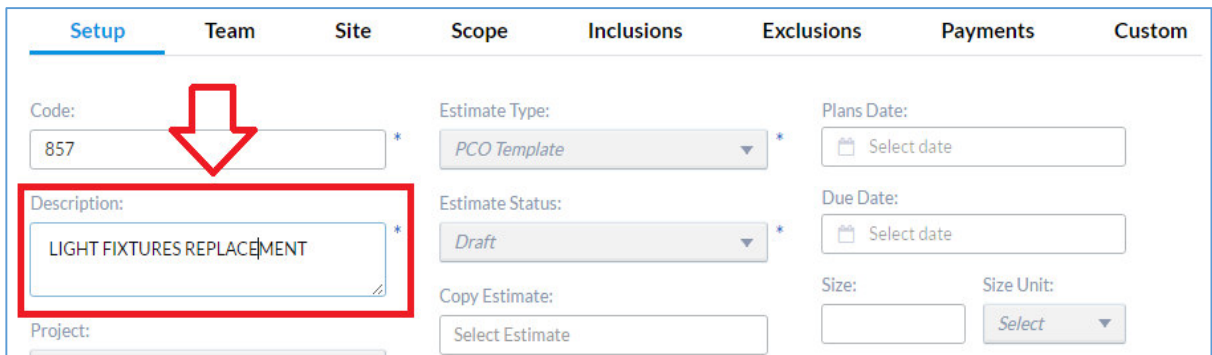
1.1. Find the **Add new estimate** link located in the blue header section.



1.2 In the Add new estimate popup within the **Setup** Tab, click on the **Estimate Type** drop down and select **PCO Template**.



1.3 Enter a description for the Template in the **Description** field.





Cost Estimating System: How to create an Estimate Template (for GC / Subs)

1.4 Select the **Estimate Labor Source** from the drop down.

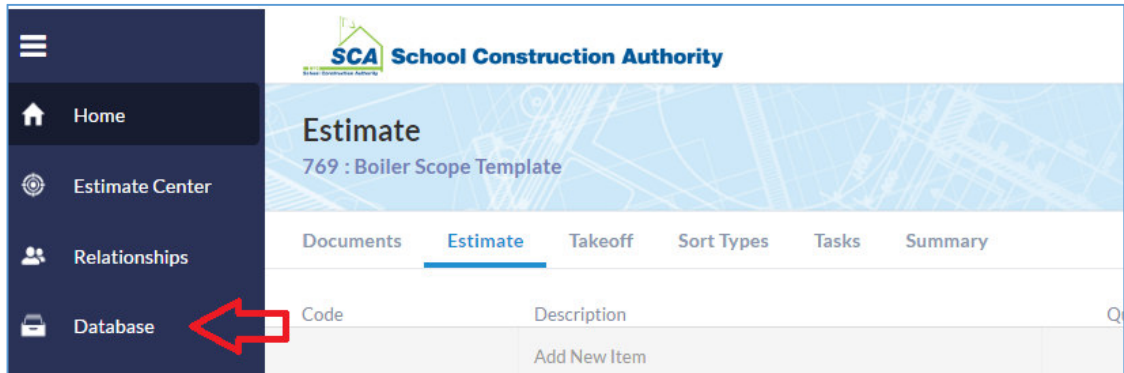
The screenshot shows the 'Setup' tab of a cost estimating system. The form includes fields for Code (857), Description (LIGHT FIXTURES REPLACEMENT), Project (None), Estimate Type (PCO Template), Estimate Status (Draft), Copy Estimate (Select Estimate), Estimate Labor Source (2017 PLA Wage Rates), Plans Date, Due Date, Size, Size Unit, Relationship (Company), and Contact. A red box highlights the 'Estimate Labor Source' dropdown menu, which is open to show options: '2017 PLA Wage Rates' (selected), '2017 Schedule A Wage Rates', and 'Select Labor Source'. A red arrow points to the selected option. A 'Save Estimate' button is at the bottom, and a '* required fields' note is in the bottom right.

1.5 Click on the **Save Estimate** button.

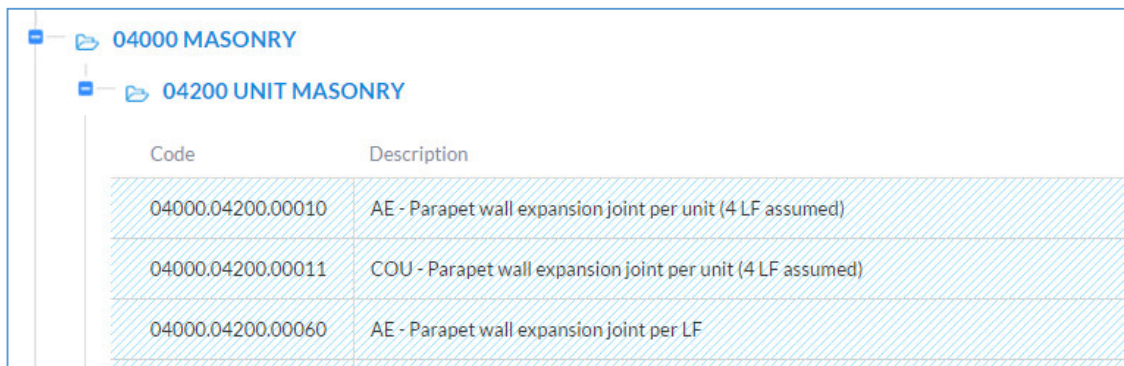
This screenshot shows the same 'Setup' form as above, but with the 'Estimate Labor Source' dropdown set to 'Select Labor Source'. A red arrow points down to the 'Save Estimate' button, which is highlighted with a red box. The '* required fields' note is still present in the bottom right.


Adding database line items to the Estimate Template

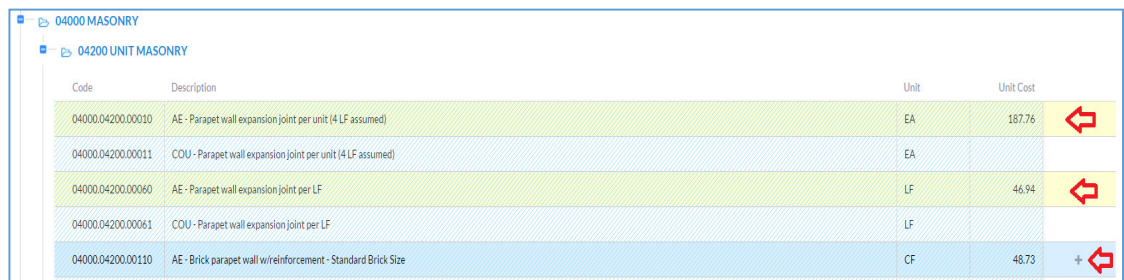
2.1 Add line items to the Template by clicking on the Database  icon.



2.2 Select a Division, then a Sub Division by clicking on the folder  icon.

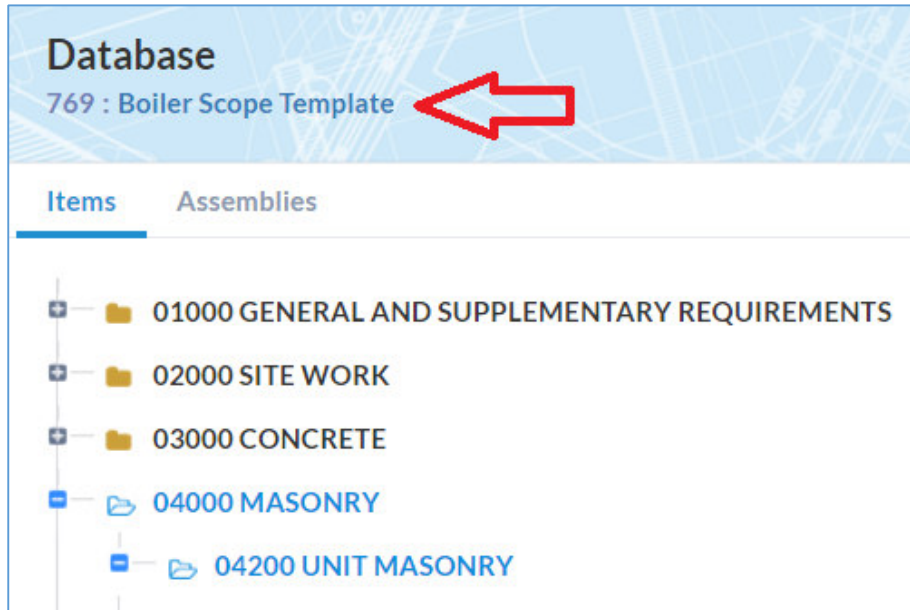


2.3 Click on the plus  sign to highlight the line items that will be added to the Estimate.



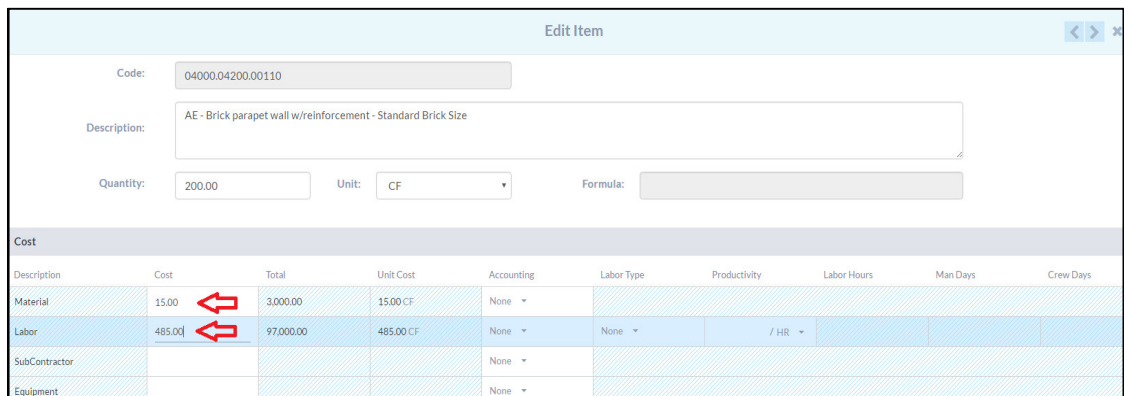
Cost Estimating System: How to create an Template Estimate (for GC / Subs)

- 2.4 Once finished highlighting the line items, click on the Estimate link located in the blue header to take you back to Estimate.



- 2.5 The line items are now part of the Estimate. Enter in Quantity. If the Unit Cost (Material, Labor & Equipment) needs to be modified, click on the pencil icon located on right hand side of row (visible when mouse hovers over line item row).

- 2.6 An Edit Estimate screen will appear. Click on the Material, Labor and/or Equipment Cost field and update cost.




The 'Edit Item' screen displays the following details:

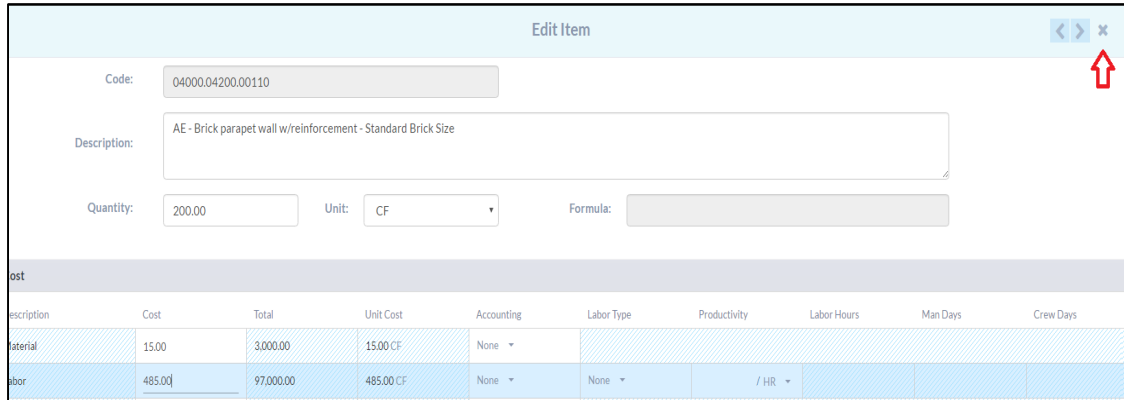
- Code: 04000.04200.00110
- Description: AE - Brick parapet wall w/reinforcement - Standard Brick Size
- Quantity: 200.00
- Unit: CF
- Formula: (empty)

Below the form is a 'Cost' table with the following data:

Description	Cost	Total	Unit Cost	Accounting	Labor Type	Productivity	Labor Hours	Man Days	Crew Days
Material	15.00	3,000.00	15.00 CF	None					
Labor	485.00	97,000.00	485.00 CF	None	None	/ HR			
SubContractor				None					
Equipment				None					

Cost Estimating System: How to create an Template Estimate (for GC / Subs)

2.7 When finished with updating cost, click on the  to leave this screen and take you back to the Estimate.



Description	Cost	Total	Unit Cost	Accounting	Labor Type	Productivity	Labor Hours	Man Days	Crew Days
Material	15.00	3,000.00	15.00 CF	None					
Labor	485.00	97,000.00	485.00 CF	None	None	/ HR			

2.8 The line item will now reflect the new Unit Cost.

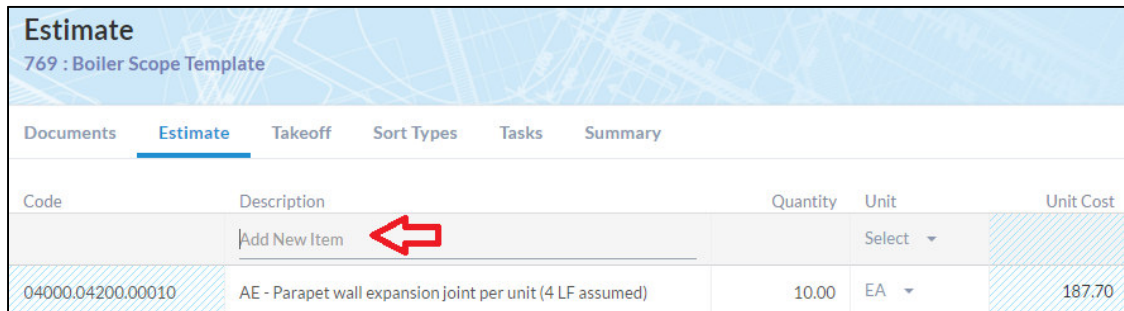


Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW
	Add New Item		Select			None	None
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA	187.70	1,877.00	ACCU CO...	None
04000.04200.00060	AE - Parapet wall expansion joint per LF	115.00	LF	46.94	5,397.55	ACCU CO...	None
04000.04200.00110	AE - Brick parapet wall w/reinforcement - Standard Brick Size	200.00	CF	500.00	100,000.00	ACCU CO...	None

2.9 Repeat steps 2.1 thru 2.8 to add additional line items via the Database screen.

Adding line items that exist in Database from Estimate Tab

3.1 Find the **Add New Item** field and start typing some keyword.



Code	Description	Quantity	Unit	Unit Cost
	Add New Item		Select	
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA	187.70


Cost Estimating System: How to create an Template Estimate (for GC / Subs)

3.2 A drop down will appear with any item containing the keywords. If the item that you are looking for appears, click on the line.

Estimate
769 : Boiler Scope Template


Documents Estimate Takeoff Sort Types Tasks Summary

Code	Description	Quantity	Unit	Unit Cost	Total
	chill		Select ▾		
04000.04200.00010					1,877.00
04000.04200.00060	AE - 10" Steam/chilled water piping	4	LF	152.27	5,397.55
04000.04200.00110	AE - 8" Steam/chilled water piping	10	LF	128.84	100,000.00
	AE - Active chilled beams		LS		
	AE - Chilled water piping		LF	37.85	

3.3 Enter in a **Quantity** and hit Enter key or the save icon .

Estimate
769 : Boiler Scope Template


Documents Estimate Takeoff Sort Types Tasks Summary

Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW	
01010	AE - 10" Steam/chilled water piping	15.00	LF ▾	152.33	2,284.95	None	None ▾	
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA ▾	187.70	1,877.00	ACCU CO... ▾	None ▾	
04000.04200.00060	AE - Parapet wall expansion joint per LF	115.00	LF ▾	46.94	5,397.55	ACCU CO... ▾	None ▾	

3.4 The line is added to the template. Repeat steps 2.5 thru 2.8 to make changes to the Unit Cost.

Estimate
769 : Boiler Scope Template

Documents Estimate Takeoff Sort Types Tasks Summary

Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW	
	Add New Item		Select ▾			None	None ▾	
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA ▾	187.70	1,877.00	ACCU CO... ▾	None ▾	
04000.04200.00060	AE - Parapet wall expansion joint per LF	115.00	LF ▾	46.94	5,397.55	ACCU CO... ▾	None ▾	
04000.04200.00110	AE - Brick parapet wall w/reinforcement - Standard Brick Size	200.00	CF ▾	500.00	100,000.00	ACCU CO... ▾	None ▾	
15400.15410.01010	AE - 10" Steam/chilled water piping	15.00	LF ▾	152.33	2,284.94	ACCU CO... ▾	None ▾	


3.5 Repeat steps 3.1 thru 3.4 to add additional line items from the Database.

Cost Estimating System: How to create an Template Estimate (for GC / Subs)

Adding line items that do not exist in Database from Estimate Tab

4.1 Find the **Add New Item** field and start typing the description of the new line item.

Estimate								
769 : Boiler Scope Template								
Documents <u>Estimate</u> Takeoff Sort Types Tasks Summary								
Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW	
	new line item #1		Select			None	None	
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA	187.70	1,877.00	ACCU CO...	None	
04000.04200.00060	AE - Parapet wall expansion joint per LF	115.00	LF	46.94	5,397.55	ACCU CO...	None	

4.2 Enter in a **Quantity** and hit Enter key or the save icon .

Estimate								
769 : Boiler Scope Template								
Documents <u>Estimate</u> Takeoff Sort Types Tasks Summary								
Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW	
	new line item #1	50.00	Select			None	None	
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA	187.70	1,877.00	ACCU CO...	None	
04000.04200.00060	AE - Parapet wall expansion joint per LF	115.00	LF	46.94	5,397.55	ACCU CO...	None	

4.3 The line is added to the Estimate with a code of **00000.00000.00000**.

Estimate								
769 : Boiler Scope Template								
Documents <u>Estimate</u> Takeoff Sort Types Tasks Summary								
Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW	
	Add New Item		Select			None	None	
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA	187.70	1,877.00	ACCU CO...	None	
04000.04200.00060	AE - Parapet wall expansion joint per LF	115.00	LF	46.94	5,397.55	ACCU CO...	None	
04000.04200.00110	AE - Brick parapet wall w/reinforcement - Standard Brick Size	200.00	CF	500.00	100,000.00	ACCU CO...	None	
15400.15410.01010	AE - 10" Steam/chilled water piping	15.00	LF	152.33	2,284.94	ACCU CO...	None	
00000.00000.00000	new line item #1	50.00	Select			ACCU CO...	None	



Cost Estimating System: How to create an Template Estimate (for GC / Subs)

4.4 Click on the code drop down, select the Division & Sub Division this item belongs to.

Code	Description	Quantity	Unit
	Add New Item		Select ▾
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA ▾
04000.04200.00060	AE - Parapet wall expansion joint per LF	115.00	LF ▾
04000.04200.00110	AE - Brick parapet wall w/reinforcement - Standard Brick Size	200.00	CF ▾
15400.15410.01010	AE - 10" Steam/chilled water piping	15.00	LF ▾
00000.00000.00000 ▾	new line item #1	50.00	Select ▾

- ▶ 01000 GENERAL AND SUPPLEMENTARY REQUIREMENTS
- ▶ 02000 SITE WORK
- ▶ 03000 CONCRETE
- ▼ 04000 MASONRY ←
- 04200 UNIT MASONRY ←
- 04250 TERRA COTTA ←
- 04270 GLASS UNIT MASONRY

4.5 Repeat steps 2.5 thru 2.8 to make changes to the Unit Cost.

Edit Item < > ✕

Code:

Description:

Quantity: Unit: Formula:

▼ Cost

Description	Cost	Total	Unit Cost	Accounting	Factor	Waste %	Rounding	Mat Quantity	Part Number
Material	<input type="text" value=""/>			None ▾	/ Select ▾		Select ▾		
Labor	200.00	10000.00	200.00	None ▾					

4.6 Repeat steps 4.1 thru 4.5 to add additional new line items to the Estimate.


Merging a pre-existing PCO Estimate to a Template Estimate

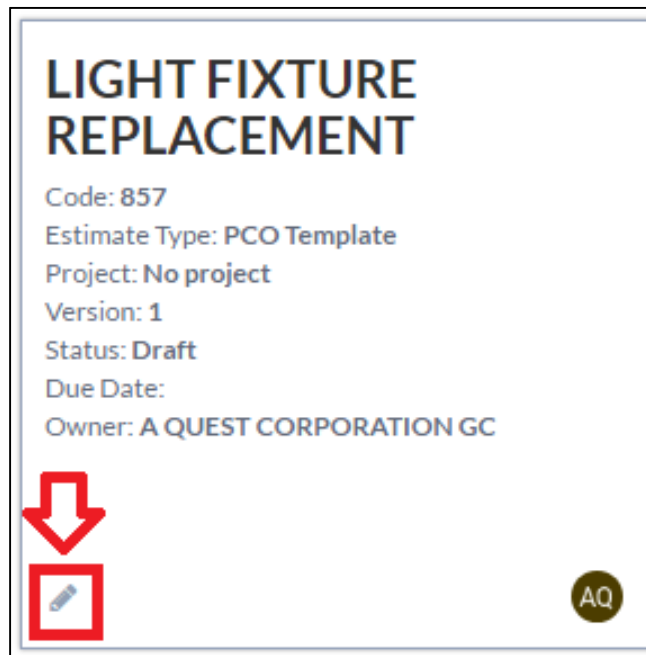
5. Click on the **Estimate Center**  icon.



- 5.1. Type in the Estimate Description of the Template Estimate in the Search field located in the upper-right hand corner of screen to find the Estimate.



Note: Search can be used with the Project Number, LLW, NOD Number, Estimate Description, Contract Number, etc. or use the Filter by Estimate Type = PCO Template


- 5.2 Click on the pencil icon  located inside the PCO Template Estimate Tile of the Estimate.



LIGHT FIXTURE REPLACEMENT

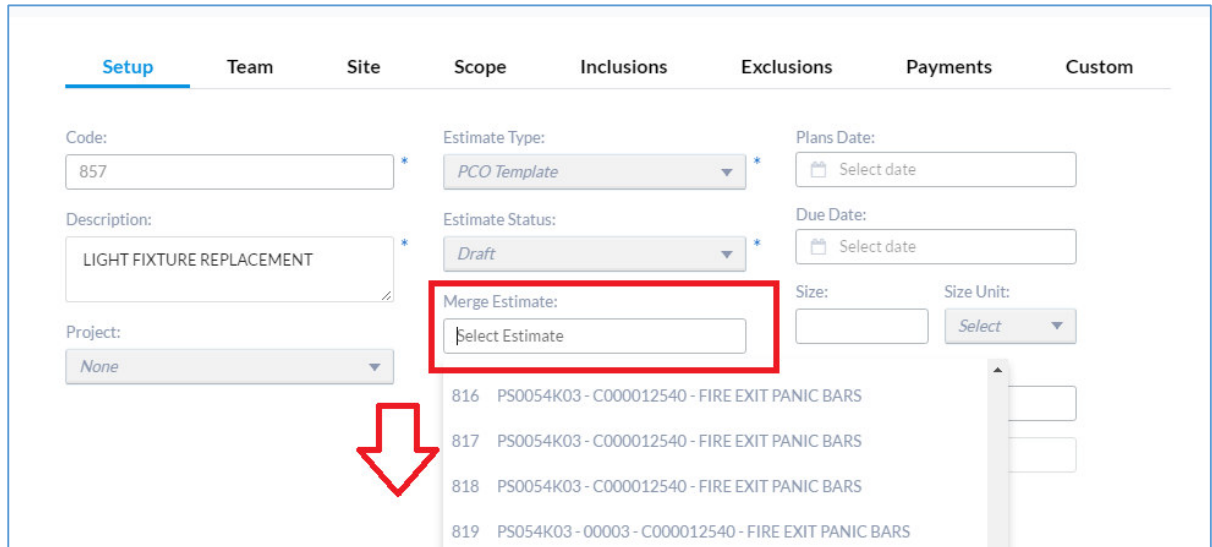
Code: 857
Estimate Type: PCO Template
Project: No project
Version: 1
Status: Draft
Due Date:
Owner: A QUEST CORPORATION GC



Cost Estimating System: How to create an Template Estimate (for GC / Subs)

- 5.3 In the **Edit estimate** popup, find the **Merge Estimate** field located in the middle column and double-click.



The screenshot shows the 'Edit estimate' popup with the following fields and values:

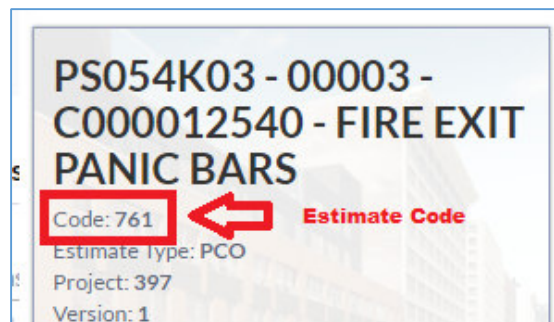
- Code: 857
- Estimate Type: PCO Template
- Plans Date: Select date
- Description: LIGHT FIXTURE REPLACEMENT
- Estimate Status: Draft
- Due Date: Select date
- Project: None
- Merge Estimate: Select Estimate (highlighted with a red box)
- Size: [Empty]
- Size Unit: Select

Below the Merge Estimate field, a list of estimates is visible:

816	PS0054K03 - C000012540 - FIRE EXIT PANIC BARS
817	PS0054K03 - C000012540 - FIRE EXIT PANIC BARS
818	PS0054K03 - C000012540 - FIRE EXIT PANIC BARS
819	PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS

- 5.4 Select the PCO Estimate that you want to copy from.

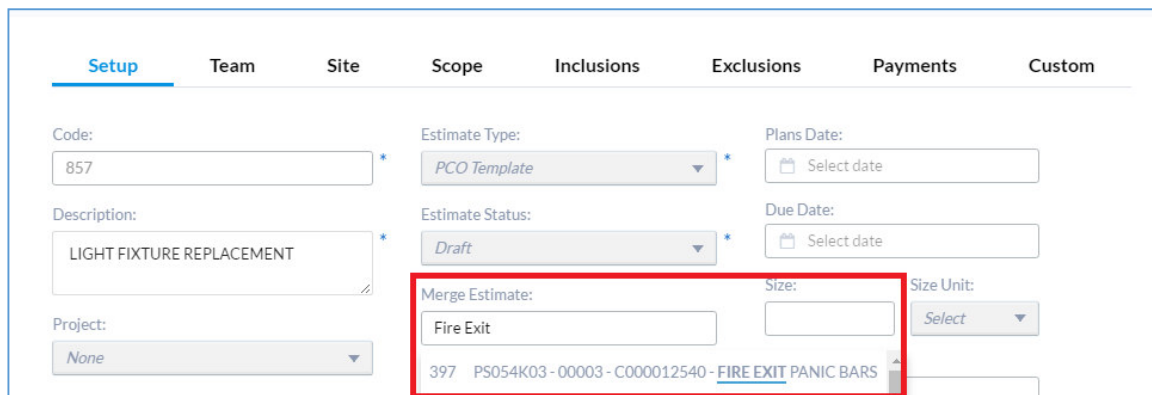
Note: Typing in keywords or the Estimate Code in the Merge Estimate field will help find the Template Estimate easier.



The close-up shows the following details for the selected estimate:

- Code: 761 (highlighted with a red box)
- Estimate Type: PCO
- Project: 397
- Version: 1

The text 'PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS' is also visible above the code field.



The screenshot shows the 'Edit estimate' popup with the following fields and values:

- Code: 857
- Estimate Type: PCO Template
- Plans Date: Select date
- Description: LIGHT FIXTURE REPLACEMENT
- Estimate Status: Draft
- Due Date: Select date
- Project: None
- Merge Estimate: Fire Exit (highlighted with a red box)
- Size: [Empty]
- Size Unit: Select

Below the Merge Estimate field, the list of estimates is updated to show the selected estimate:

397	PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS
-----	--



Cost Estimating System: How to create an Template Estimate (for GC / Subs)

5.5 Once the PCO Estimate is selected inside the Merge Estimate field, click on the **Save Estimate** button.

Code: 857 * Estimate Type: PCO Template * Plans Date: Select date

Description: LIGHT FIXTURE REPLACEMENT * Estimate Status: Draft * Due Date: Select date

Project: None Merge Estimate: 397 PS054K03 - 00003 - C000012540

Estimate Labor Source: 2017 PLA Wage Rates Relationship: Company

Update Estimate: None Contact

Save Estimate * required fields

5.6 All the line items from the PCO Estimate will be copied into the Template Estimate.

Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW
	Add New Item		Select			None	None
15500.15555.00010	AE - Fin Tube Boilers (Steam) 100 gallon	50.00	EA	79.36	3,968.00	None	None
15500.15580.00010	AE - Duplex boiler feed unit to 6696 MBH	1.00	EA	25,249.84	25,249.84	None	None
05000.05500.00010	AE - Steel access platform and ladder assembly @ boilers	2.00	EA	3,329.12	6,658.23	None	None
16000.16470.00860	AE - Break-glass station Boiler Panel Shutdown	40.00	EA	477.38	19,095.20	None	None