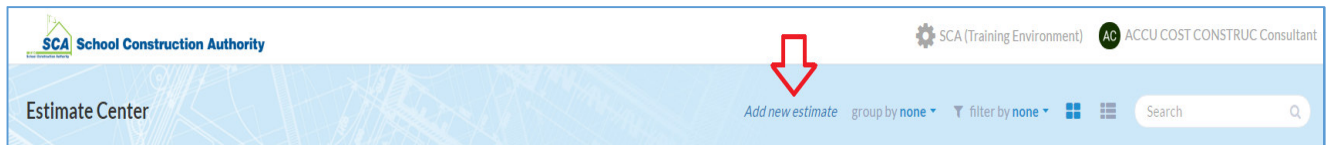


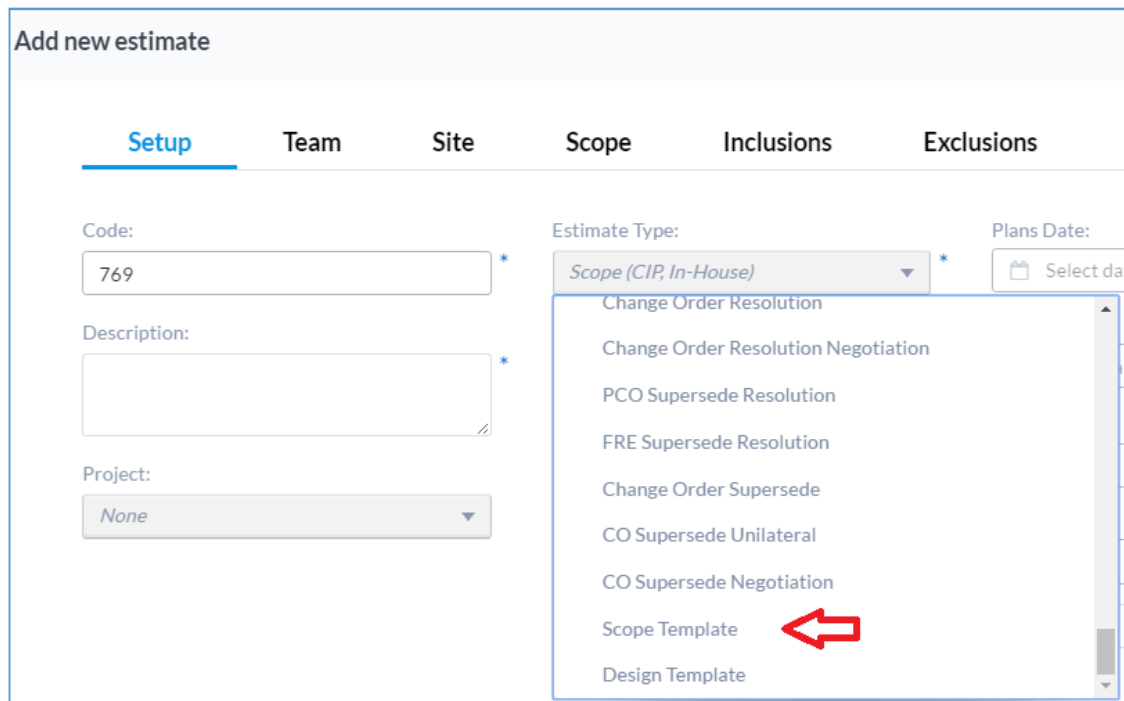
Creating an Template Estimate

1. Click on the Estimate Center  icon.

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



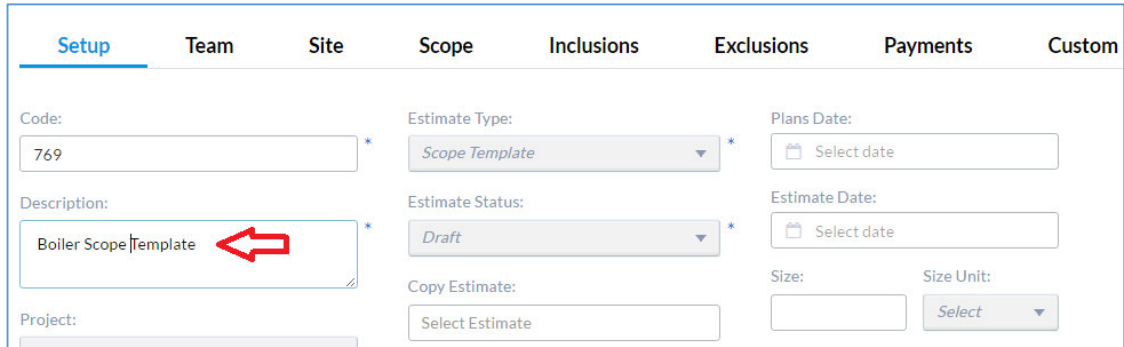
1.2 In the Add new estimate popup, click on the **Estimate Type** drop down and select **Scope Template**.



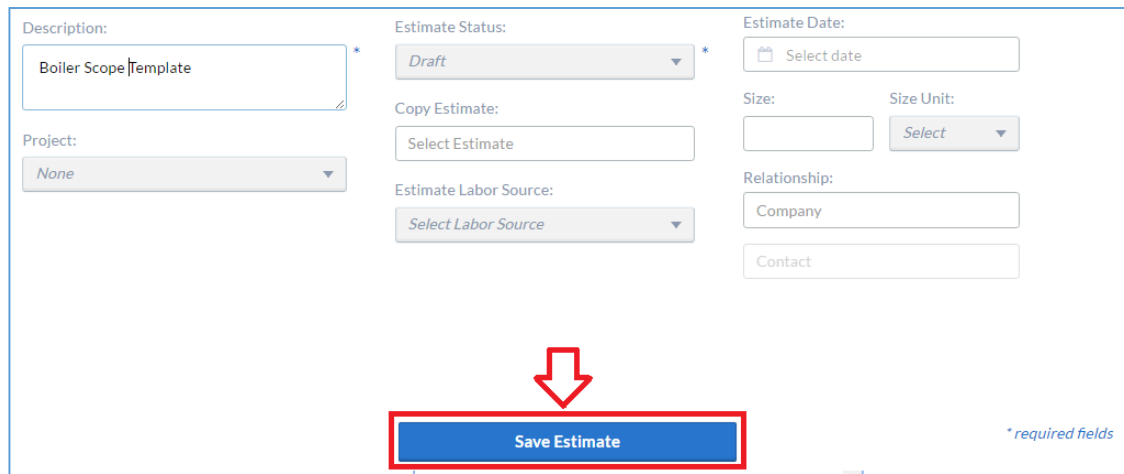
The screenshot shows the 'Add new estimate' popup form. The 'Setup' tab is selected. The form has several fields: 'Code' (769), 'Description', 'Project' (None), 'Estimate Type' (Scope (CIP, In-House)), and 'Plans Date' (Select date). The 'Estimate Type' dropdown menu is open, showing a list of options: Change Order Resolution, Change Order Resolution Negotiation, PCO Supersede Resolution, FRE Supersede Resolution, Change Order Supersede, CO Supersede Unilateral, CO Supersede Negotiation, Scope Template, and Design Template. A red arrow points to 'Scope Template'.

Note: If user wants to create a Design Template, then select Design Template.

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

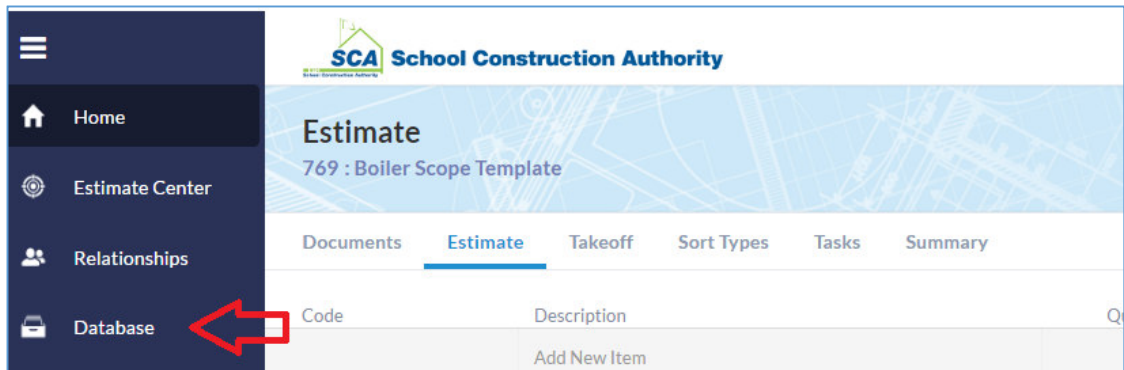


1.4 Click on the **Save Estimate** button.



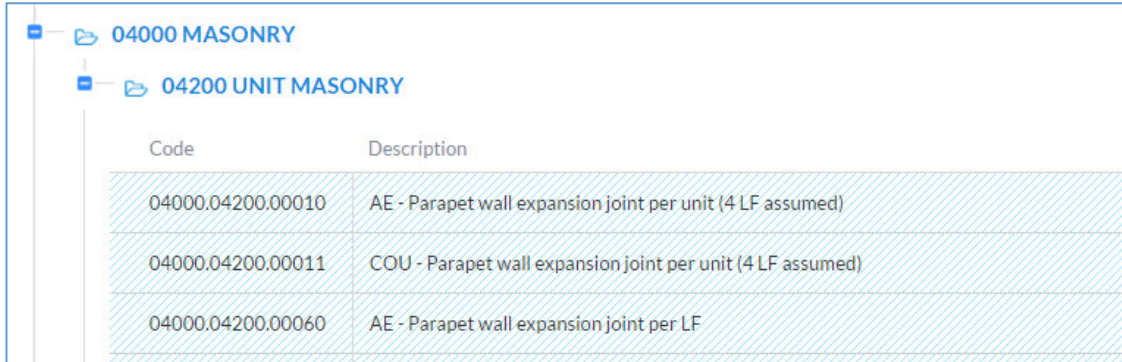
Adding database line items to the Estimate Template

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




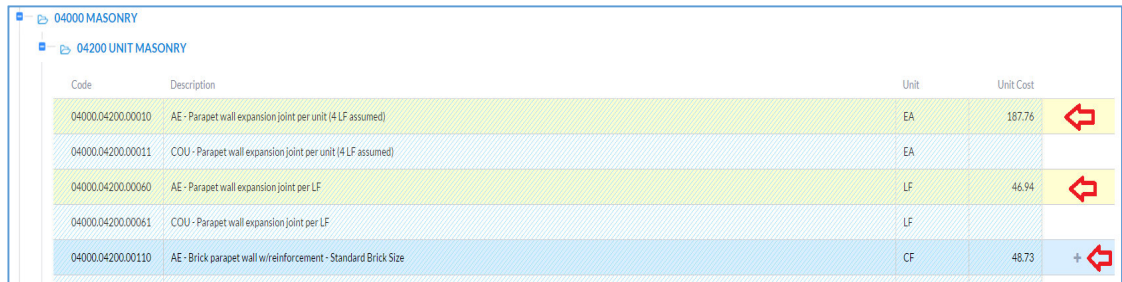
Cost Estimating System: How to create an Template Estimate

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



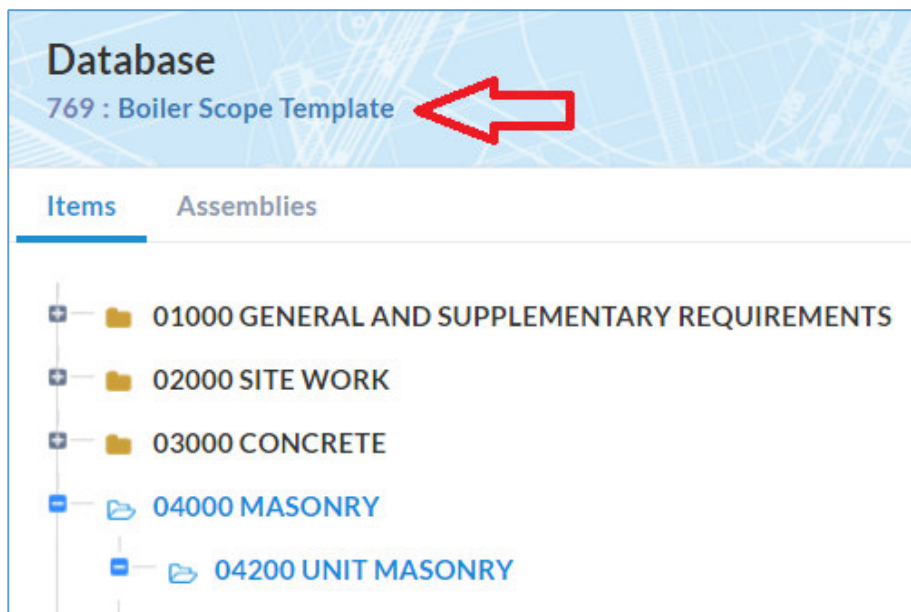
Code	Description
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)
04000.04200.00011	COU - Parapet wall expansion joint per unit (4 LF assumed)
04000.04200.00060	AE - Parapet wall expansion joint per LF

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



Code	Description	Unit	Unit Cost
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	EA	187.76
04000.04200.00011	COU - Parapet wall expansion joint per unit (4 LF assumed)	EA	
04000.04200.00060	AE - Parapet wall expansion joint per LF	LF	46.94
04000.04200.00061	COU - Parapet wall expansion joint per LF	LF	
04000.04200.00110	AE - Brick parapet wall w/reinforcement - Standard Brick Size	CF	48.73

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




Database
769 : Boiler Scope Template

Items Assemblies

- 01000 GENERAL AND SUPPLEMENTARY REQUIREMENTS
- 02000 SITE WORK
- 03000 CONCRETE
- 04000 MASONRY
 - 04200 UNIT MASONRY

Cost Estimating System: How to create an Template 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  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.


Edit Item
< > x

Code:

Description:

Quantity: Unit: Formula:

Cost									
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					

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

Edit Item
< > x

Code:

Description:

Quantity: Unit: Formula:

Cost									
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			



Cost Estimating System: How to create an Template Estimate

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

Estimate								Total 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	

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.

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				
04000.04200.00010	AE - Parapet wall expansion joint per unit (4 LF assumed)	10.00	EA	187.70	1,877.00		

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	Assigned	LLW
	chill		Select				
04000.04200.00010		10	EA	187.70	1,877.00		
04000.04200.00060	15400.15410.01010 AE - 10" Steam/ <u>chilled</u> water piping	4	LF	152.27	5,397.55		
04000.04200.00110	15400.15410.00210 AE - 8" Steam/ <u>chilled</u> water piping	10	LF	128.84	100,000.00		
	15500.15932.00010 AE - Active <u>chilled</u> beams		LS				
	15400.15410.00160 AE - <u>Chilled</u> water piping		LF	37.85			

Cost Estimating System: How to create an Template Estimate

3.3 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		
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 <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		


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


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		

Cost Estimating System: How to create an Template Estimate

4.2 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	
	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 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	
00000.00000.00000	new line item #1	50.00	Select			ACCU CO...	None	

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

<ul style="list-style-type: none"> ▶ 01000 GENERAL AND SUPPLEMENTARY REQUIREMENTS ▶ 02000 SITE WORK ▶ 03000 CONCRETE ▼ 04000 MASONRY <ul style="list-style-type: none"> 04200 UNIT MASONRY 04250 TERRA COTTA 04270 GLASS UNIT MASONRY



Cost Estimating System: How to create an Template Estimate

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.