


Grouping an Estimate by Trade Specialty

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

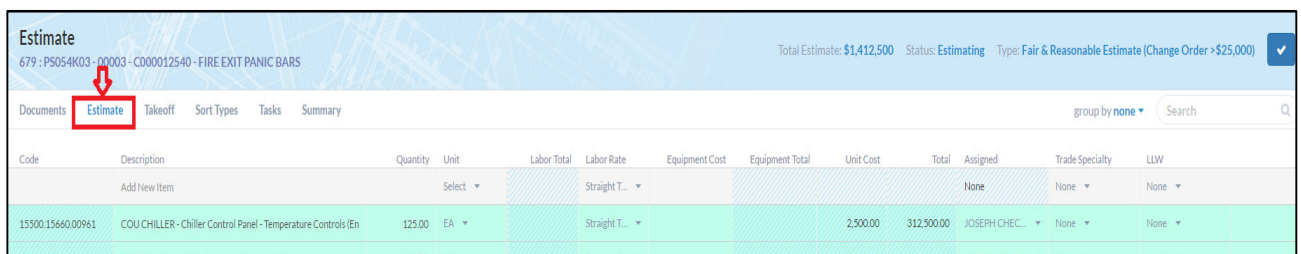
1.1. Type in the Design Number in the Search field  located in the upper-right hand corner of screen to find the Estimate.

Note: Search can be used with the Project Number, LLW, NOD Number, Estimate Description, Contract Number, etc.

1.2 From the Estimate Center, locate the Estimate and click anywhere inside the Estimate Tile.



1.3 Click on the **Estimate** tab.



Code	Description	Quantity	Unit	Labor Total	Labor Rate	Equipment Cost	Equipment Total	Unit Cost	Total	Assigned	Trade Specialty	LLW
15500.15660.00961	COU CHILLER - Chiller Control Panel - Temperature Controls (En	125.00	EA					2,500.00	312,500.00	JOSEPH CHEC...	None	None

Cost Estimating System: How to group an Estimate by Trade Specialty


1.4 In the Estimate, click on the **Group by** drop down.



The screenshot shows the 'Estimate' interface for '679 : PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS'. The 'group by none' dropdown menu is highlighted with a red box, and a red arrow points to it. The table below shows the estimate items:

Code	Description	Quantity	Unit	Labor Total	Labor Rate	Equipment Cost	Equipment Total	Unit Cost	Total	Assigned	Trade Specialty
	Add New Item		Select		Straight T...				None	None	None
15500.15660.00961	COU CHILLER - Chiller Control Panel - Temperature Controls (En	125.00	EA		Straight T...			2,500.00	312,500.00	JOSEPH CHEC...	Asbestos SubC...
15500.15660.00061	COU CHILLER - Chiller Outdoor Packaged Modular Outdoor (En)	150.00	EA		Straight T...			4,000.00	600,000.00	JOSEPH CHEC...	Electrical SubC...
15500.15650.01011	COU CHILLER - Chiller Chiller Shell And Tube Type Evaporator (E	100.00	EA		Straight T...			5,000.00	500,000.00	JOSEPH CHEC...	Plumbing SubC...

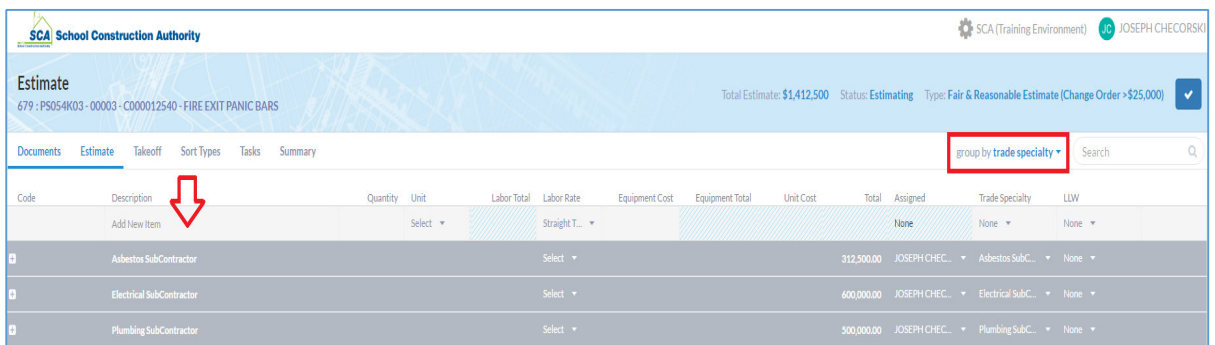
1.5 Select **Trade Specialty** in the group by drop down list.



The screenshot shows the 'Estimate' interface with the 'group by none' dropdown menu open. The 'Trade Specialty' option is selected and highlighted with a red box and a red arrow. The table below shows the estimate items:

Code	Description	Quantity	Unit	Labor Total	Labor Rate	Equipment Cost	Equipment Total	Unit Cost	Total	Assigned	Trade Specialty
	Add New Item		Select		Straight T...				None	None	None
15500.15660.00961	COU CHILLER - Chiller Control Panel - Temperature Controls (En	125.00	EA		Straight T...			2,500.00	312,500.00	JOSEPH CHEC...	Asb
15500.15660.00061	COU CHILLER - Chiller Outdoor Packaged Modular Outdoor (En)	150.00	EA		Straight T...			4,000.00	600,000.00	JOSEPH CHEC...	Elec
15500.15650.01011	COU CHILLER - Chiller Chiller Shell And Tube Type Evaporator (E	100.00	EA		Straight T...			5,000.00	500,000.00	JOSEPH CHEC...	Plu

1.6 The Estimate will grouped by Trade Specialty.




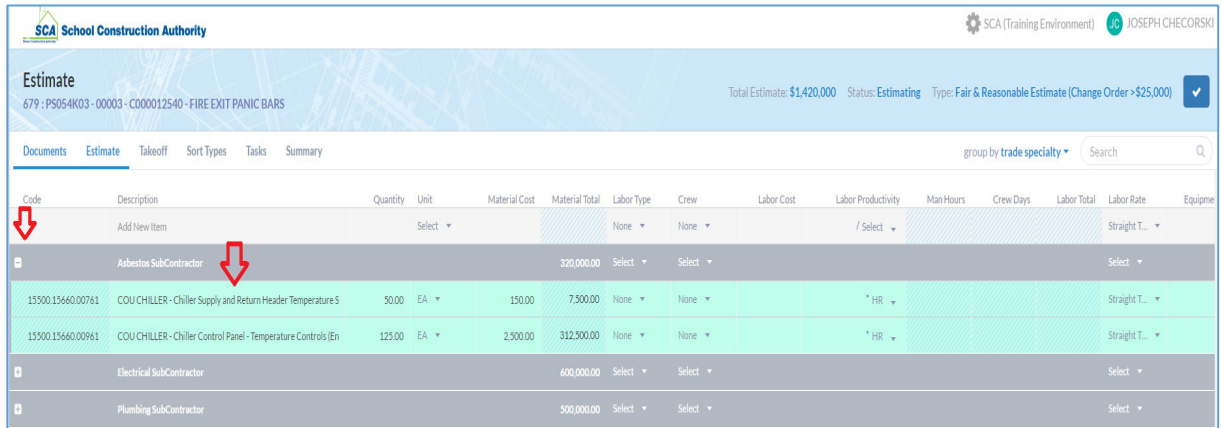
The screenshot shows the 'Estimate' interface with the estimate grouped by Trade Specialty. The 'group by trade specialty' dropdown menu is highlighted with a red box. The table below shows the estimate items grouped by Trade Specialty:

Code	Description	Quantity	Unit	Labor Total	Labor Rate	Equipment Cost	Equipment Total	Unit Cost	Total	Assigned	Trade Specialty	LLW
	Add New Item		Select		Straight T...				None	None	None	None
	Asbestos SubContractor				Select				312,500.00	JOSEPH CHEC...	Asbestos SubC...	None
	Electrical SubContractor				Select				600,000.00	JOSEPH CHEC...	Electrical SubC...	None
	Plumbing SubContractor				Select				500,000.00	JOSEPH CHEC...	Plumbing SubC...	None



Cost Estimating System: How to group an Estimate by Trade Specialty

- 1.7 Click on the  next to the code column to expand and see the line items contained in that Trade Specialty.



SCA School Construction Authority

Estimate
679 : P5054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS

Total Estimate: \$1,420,000 Status: Estimating Type: Fair & Reasonable Estimate (Change Order >\$25,000)

Documents Estimate Takeoff Sort Types Tasks Summary

group by trade specialty Search

Code	Description	Quantity	Unit	Material Cost	Material Total	Labor Type	Crew	Labor Cost	Labor Productivity	Man Hours	Crew Days	Labor Total	Labor Rate	Equipme
	Add New Item		Select			None	None		/ Select				Straight T...	
	Asbestos SubContractor				320,000.00	Select	Select						Select	
15500.15660.00761	COU CHILLER - Chiller Supply and Return Header Temperature S	30.00	EA	150.00	7,500.00	None	None		* HR				Straight T...	
15500.15660.00961	COU CHILLER - Chiller Control Panel - Temperature Controls (En	125.00	EA	2,300.00	312,500.00	None	None		* HR				Straight T...	
	Electrical SubContractor				600,000.00	Select	Select						Select	
	Plumbing SubContractor				300,000.00	Select	Select						Select	

Note: The **Group by** will remain on until you select **None** to turn off.