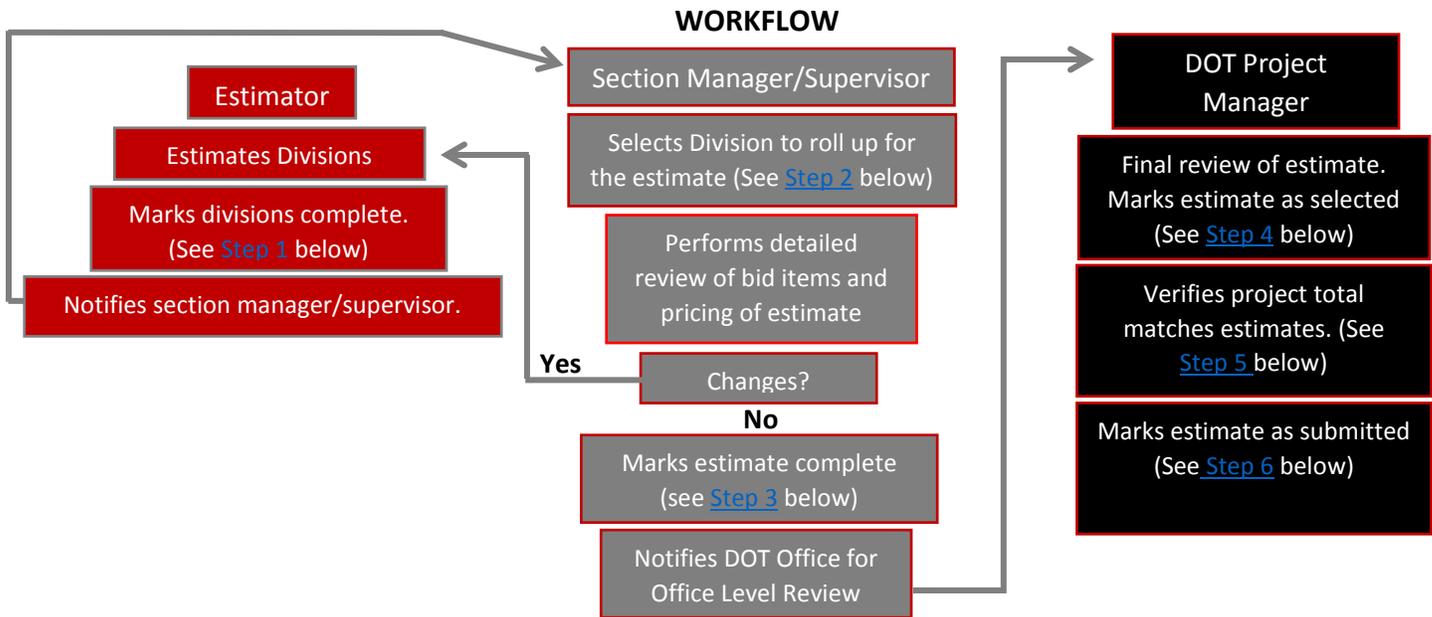


Estimate Selection and Completion

iPDWeb Cost Estimating Manual
Chapter 8
Estimate Workflows
Originally Issued: 08-16-19
Revised: xx-xx-xx

Completed and Selected Definition/Requirement:

- Marked Complete** – **Division:** No more items to be added or modifications to prices made.
- **Estimate:** Estimate has been verified and is ready to be added to project total
- Selected**
- **Division:** Each division selected will have total price included into the estimate
 - **Estimate:** Will be included in project total. It is unusual to have multiple estimates selected outside of OLE.



Step 1: Completing Divisions

Once the division is finished it must be marked complete. **Right click** on the division and select **Mark Complete**. This will lock the estimate so no changes can be made to the bid items in the division and places a red checkmark in a red circle in front of the division name.

BEST PRACTICE: Do not leave divisions selected that are not complete.

Step 2: Selecting Division to Roll Up for the Estimate

Once the estimate divisions are complete, the designer/estimator needs to **contact the Section Manager/Supervisor**, as shown in the workflow. The Section Manager/Supervisor is responsible for reviewing the bid items and pricing of the estimate checking for any errors. They will also select the division to be rolled up for the estimate. Any required changes should be passed back to the estimator to make adjustments. In order for a division to be included into the total project cost it must be selected. Right click each completed division and choose **Select**. This will change the color of the checkmark to green. A division must be selected for percent based items to calculate correctly. In a situation like this you may need to select a division before it is marked complete.

Step 3: Marking Estimates Complete

| Event | Name | Note | Complete | Selected | Submitted | Complete Date | Estimate Amount |
|-------|--------------------------------------|------|-------------------------------------|--------------------------|--------------------------|---------------|-----------------|
| Annu. | 2018 Annual Estimate | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12/20/2018 | \$10,861,394.14 |
| Annu. | 2019 Annual Estimate | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12/23/2019 | \$12,913,587.99 |
| B01 | 04/2018-Layout | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 04/20/2018 | \$10,924,532.95 |
| B03 | 6/2019 Final Design | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | \$11,605,475.84 |

After the estimate has been reviewed it can be marked complete. To do this, **click on the office estimate in the tree, then check the box** for completed event.

Version Duplicate Items
B03-6/2019-Final Design in Project IM-NHS-029-3(193)54--03-78

| Comparing Item | | | | Duplicate Item | | | |
|----------------------|--------------------------------|----------|------------|----------------|---------------------|-----------|------------|
| Item Number | Item Description | Quantity | Unit Price | Item Number | Item Description | Quantity | Unit Price |
| Roadway Items | | | | | | | |
| 2102-2710070 | EXCAVATION, CL 10, RDWY+BORROW | 60.00 | \$11.45 | PCT-010-010 | EARTHWORK (010-010) | 92,554.01 | \$0.02 |

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Clicking on the mark complete box causes a duplicate items analysis to run. This analysis checks for any possible unintentional duplicates of bid items in the estimate. In the example shown above, the direct bid item is also included in the earthwork percentage item and is being doubled. In this scenario the estimate needs to be **unchecked as complete** and the Section Manger needs to contact the estimator to make the required changes before the estimate can be reviewed again and marked complete.

Step 4: Selecting Estimates to Roll Up to the Project

| Event | Name | Note | Complete | Selected | Submitted | Complete Date | Estimate Amount |
|-------|--------------------------------------|------|-------------------------------------|--------------------------|--------------------------|---------------|-----------------|
| Annu. | 2018 Annual Estimate | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 05/31/2019 | \$10,861,394.14 |
| Annu. | 2019 Annual Estimate | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12/20/2018 | \$12,913,587.99 |
| B01 | 04/2018-Layout | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12/23/2019 | \$10,924,532.95 |
| B03 | 6/2019 Final Design | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 04/20/2018 | \$11,605,475.84 |

Once the estimate is marked complete the Section Manager/Supervisor needs to contact the Iowa DOT office managing the project for final review of the estimate. Once the review is finished the Iowa DOT office staff will select the estimate adding it to the project total. To do this, click on the box in the select column or **Right click** on the event estimate and then choose **Select**. A green circle will be placed before the estimate showing that it has been selected.

Current office already has one or more selected version.
If you want to select this version too, click YES.
If you want to select this version only and unselect other versions, click NO.

Yes No Cancel

Typically only one event will be selected per office to apply to the project costs. Multiple events can be selected in one office when required, however a warning pop up screen will appear when more than one event is selected.

| Event | Name | Note | Complete | Selected | Submitted | Complete Date | Estimate Amount |
|-------|--------------------------------------|------|-------------------------------------|-------------------------------------|--------------------------|---------------|-----------------|
| Annu. | 2018 Annual Estimate | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12/20/2018 | \$10,861,394.14 |
| Annu. | 2019 Annual Estimate | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12/23/2019 | \$12,913,587.99 |
| B01 | 04/2018-Layout | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 04/20/2018 | \$10,924,532.95 |
| B03 | 6/2019 Final Design | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 05/31/2019 | \$11,605,475.84 |

Click on the Office in the tree viewer to return to the table showing all events. Verify that the new estimate is marked complete and selected.



Note: All events marked as selected will be totaled up in the project costs.

Step 5: Verify Project Total Matches The Sum of the Estimates

| Office Type | Event | Submitted Date | Submitted By | Estimate Total |
|--------------------------------|-----------------------------------------|----------------|--------------|-----------------|
| Office Of Bridges & Structures | B03 6/2019 Final Design | | | \$11,605,475.84 |

Project Total: \$11,605,475.84

Complete a QC check by clicking on the project number in tree view and select the Project Review tab. Verify that the Estimate Total matches the estimate totals for the divisions. If the estimate total is not correct then go back and verify that the correct divisions and events have been marked complete and are selected.

Step 6: Marks Estimate as Submitted

| Event | Name | Note | Complete | Selected | Submitted | Complete Date | Estimate Amount |
|-------|--------------------------------------|------|-------------------------------------|-------------------------------------|--------------------------|---------------|-----------------|
| Annu. | 2018 Annual Estimate | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12/20/2018 | \$10,861,394.14 |
| Annu. | 2019 Annual Estimate | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 12/23/2019 | \$12,913,587.99 |
| B01 | 04/2018-Layout | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 04/20/2018 | \$10,924,532.95 |
| B03 | 6/2019 Final Design | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 05/31/2019 | \$11,605,475.84 |

To finish the process the estimate must be submitted. This is accomplished by selecting the estimate in the tree view and then clicking on the box in the submitted column. The estimate is now finished.

Chronology of Changes to iPDWeb Manual Section:

8D-1 Estimate Selection and Completion

DATE 08-16-2019

New.

DATE Revised

Description