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# AASHTOWare Project Estimation™ Quick Reference Guide for OrDOT 5 | Cost Estimate Features

This document is a quick reference guide for Cost Estimate Features. Additional Estimation Quick Reference Guides and Computer Based Training files are available from OrDOT.

## Background

- A **concept** in AASHTOWare Project Estimation is the starting point in the cost estimation life cycle. Multiple cost estimates can be associated with a single concept. A concept can be transitioned to a project, which will move all associated cost estimates from the concept to the project.
- A **project** in AASHTOWare Project Preconstruction is a group of work items associated with transportation related construction.
- A **cost estimate** includes all of the settings, pricing information, and estimated costs of a planned improvement. A cost estimate can be associated with a concept, project, or proposal, depending on the stage of estimation in progress when the estimate is initiated.
- The cost estimate-related features included in this quick reference guide are:
  - Typical Sections
  - Contingency Assignment Profiles
  - Variables
  - Adhoc Prices
  - Non-construction Costs
  - Detail Items
  - Renumbering Cost Estimate Items
  - Snapshots

## Copy a Typical Section to a Conceptual Cost Estimate

**Note:** A typical section represents a standard design for a cross section of a roadway or bridge, including the detail items that might be needed to complete construction of that section. A lead estimator or other user may have prepared Typical Section Profiles that you can copy to and use in your cost estimate.

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. On the **General** tab, ensure there is a value in the **Typical Section Bid History Profile** field. If blank, search for and select a bid history profile to add.
3. Click the **Typical Sections** quick link at the top of the Cost Estimate Summary component.
4. Click the component **Actions** button, then select the **Copy Typical Section Profiles...** action.
5. Search for and select the typical section profile(s) to associate to your cost estimate.
6. Click the **Copy to Cost Estimate** button.
7. Optionally, in the **Qty** field, adjust the quantity of the typical section. (Note: changing the Qty field will trigger the
8. Click the **Save** button.

## Transition Typical Section Items to Detail Item(s)

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. From the *Cost Estimate Summary* screen, click the **Typical Sections** quick link.
3. Click the component **Actions** button, then select the **Transition Typical Sections to Detail Items...** task.

4. Search for and select the typical section to transition to detail items.
5. Click the **Add to Cost Estimate** button.
6. Click the **Cost Estimate** quick link.
7. Click the **Cost Estimate Items** tab or the **Item Pricing Worksheet** quick link.
8. Enter quantity and other information for the new items as needed.
  - **Note:** If quantities and price tasks were set in the typical section, they will already be applied to the estimate items.
9. Click the **Save** button.

### Add a Contingency Assignment Profile to a Cost Estimate

1. From the *Cost Estimate Summary* screen, click the **Contingency Assignment** quick link.
2. Click the **Action** button next to the **Add** button.
3. Click the **Select Contingency Assignment Profile...** button.
4. From the modal window, select a **Profile Name**, then click the **Add to Cost Estimate** button.
5. To view the contingency assignment profile, click the **Profile Name** link.
6. View each tab and adjust if desired: General, Phase Ranges, Risk Factors, and Items. (Note: contingency will not be applied to the cost estimate's total cost until a factor percent is added to a phase range.)
7. To return to the *Cost Estimate Summary* screen, click the **Cost Estimate** quick link.

### Add a Variable to a Cost Estimate

**Note:** Users can add variables to a cost estimate that can later be used in formulas. Examples of variables include the number of miles of pavement or the acreage of a work site area.

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. From the *Cost Estimate Summary* screen, click the **Variable** tab.
3. Click the **New** button.
4. In the **Variable Name** field, enter a name for the variable.
5. In the **Variable Description** field, enter brief text describing the variable.
6. In the **Value** field, optionally enter a value for the variable.
7. Click the **Save** button.

### Add an Adhoc Price to a Cost Estimate

**Note:** An **ad hoc price** is a price entered on the fly as needed, typically at earlier phases of the cost estimate when the design is relatively unknown.

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. From the *Cost Estimate Summary* screen, click the **Adhoc Pricing** tab.
3. Click the **New** button, if needed.
4. In the **Name** field, enter a name for the ad hoc price utilized in the cost estimate.
5. In the **Description** field, enter a description for the ad hoc price.
6. In the **Cost** field, enter a total cost for the ad hoc price.
7. Click the **Active** check box if the price should be applied to the cost estimate total amount.
8. Click the **Save** button.

### Add a Non-Construction Cost to a Cost Estimate

**Note:** Examples of Non-Construction costs include preliminary engineering, construction engineering, incidental construction, and right-of-way costs. A non-construction cost can be set as a dollar amount or as a percent of the total estimate.

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. From the *Cost Estimate Summary* screen, click the **Adhoc Pricing** tab.
3. Click the **New** button, if needed.
4. In the **Non-Construction Cost Name** field, enter a name.
5. In the **Non-Construction Cost Description** field, enter a description.
6. In the **Percent of Total Estimate** field, enter a value representing the percentage of the total estimate to be associated with the non-construction cost, OR, in the **Non Construction Cost Amount** field, enter the dollar amount of the associated non-construction cost.
7. Click the **Active** check box if you wish to include these costs in the cost estimate.
8. Fill in additional fields as desired.
9. Click the **Save** button.

### Add a Detail Item to a Cost Estimate – Via the Cost Estimate Items Tab

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. From the *Cost Estimate Summary* screen, click the **Cost Estimate Items** tab.
3. Click the **New** button.

4. In the **Item** field, search for and select the item to add to the cost estimate.
5. In the **Supplemental Description** field, enter an additional description for the item, if appropriate.
6. In the **Quantity** field, enter a quantity for the cost estimate item.
7. In the **Cost Estimate Category ID** field, search for and select the category for the item, if appropriate.
8. Enter values in the remaining fields, if appropriate.
  - **Note:** For more information regarding pricing items, refer to OrDOT training files **6 | Pricing with Historical Bid Data** and **7 | Pricing with Reference Prices**.
9. Click the **Save** button.

### Add a Detail Item to a Cost Estimate – Via the Item Pricing Worksheet

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. From the *Cost Estimate Summary* screen, click the **Item Pricing Worksheet** quick link.
3. Click the **New** button.
4. In the **Item** field, search for and select the item to add to the cost estimate.
5. In the **Cat ID** field, search for and select a category, if desired.
6. In the **Quantity** field, enter a quantity for the cost estimate item.
7. In the **Supp Descr** field, enter an additional description for the item, if appropriate.
8. Enter values in the remaining fields, if appropriate.
  - **Note:** For more information regarding pricing items, refer to OrDOT training files **6 | Pricing with Historical Bid Data** and **7 | Pricing with Reference Prices**.
9. Click the **Save** button.

### Renumber All Cost Estimate Items

**Note:** A custom process has been built to allow users to renumber all cost estimate items by category, then item id, then supplemental description. This process can be used up until project items are build after PS&E submittal.

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. From the *Cost Estimate Summary* screen, click the component **Actions** button.
3. Click the **Renumber Cost Estimate Items** task.
4. Click **Execute**.

### Snapshots of a Cost Estimate

**Note:** A snapshot enables you to save a read-only copy of a cost estimate at any point in time to allow for later review. Each cost estimate can have multiple snapshots, each taken at different stages of the estimation process, providing an audit trail for the evolution of the cost estimate over time. The system can automatically create snapshots as a result of system events and agency option settings, and you can manually create a snapshot at any time.

1. Navigate to the desired cost estimate. (**Estimation** component > **Cost Estimates** link > Search for and open a **Cost Estimate**)
2. From the *Cost Estimate Summary* screen, click the component **Actions** button.
  - To view all snapshots of a cost estimate, click **Snapshots** under the Views section.
  - To take a snapshot of a cost estimate, click **Create Snapshot** under the Tasks section.
  - To overwrite the current cost estimate with a iteration of a cost estimate, click **Import Snapshot...** under the Tasks section.

### Next Steps

- For more information regarding pricing items, refer to OrDOT training files **6 | Pricing with Historical Bid Data** and **7 | Pricing with Reference Prices**.

### Key to Actions buttons



System Actions button  
(At the top of the screen)



Component Actions button (On the heading)



Row Actions button  
(On the row)