



# ProjectVIEW<sup>ERP</sup>

Cost Monitoring Solution

## Tendering & Budgeting

This section describes the functionality of the Tendering and Budgeting module.

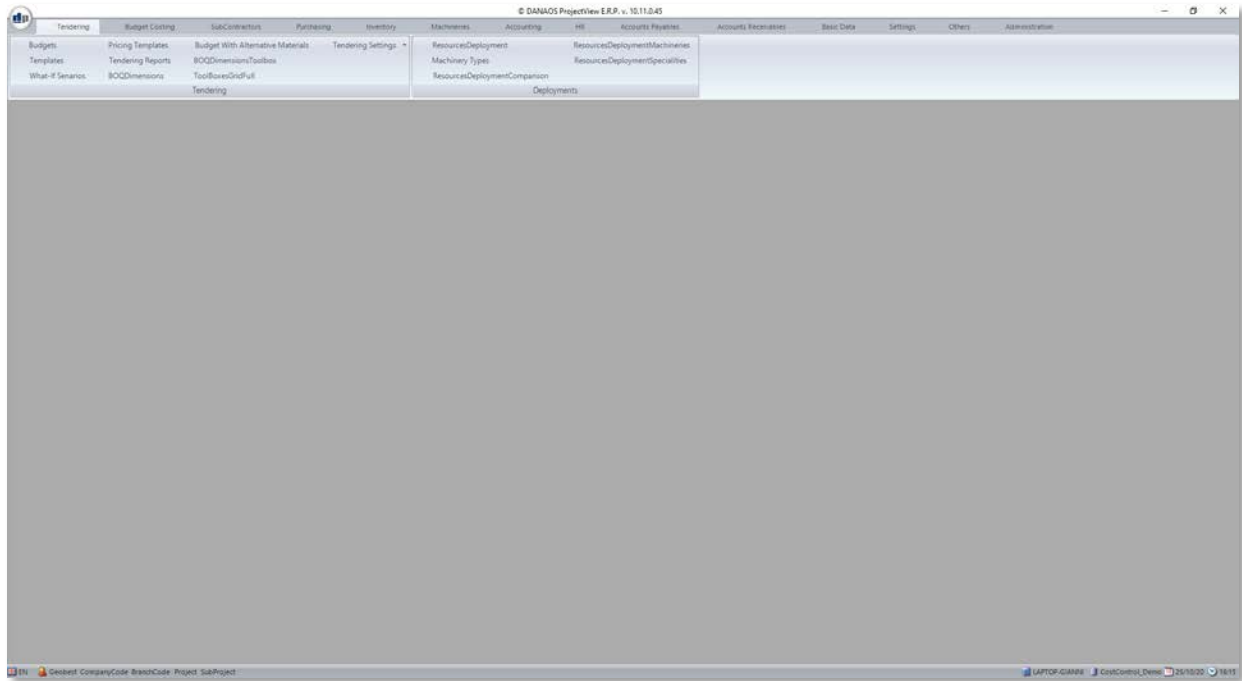
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1 Budgets and BOQs

Choosing the “*Tendering*” menu displays the following submenu:



The submenu “*Tendering*” displays a grid view with all available project budgets. For the list’s functionality and buttons, please refer to section “*Grid Views*”.

Clicking on the “*Add record*” button opens an empty form covering the entire screen. The same form is displayed when the “*Edit record*” button is clicked or when a record is double-clicked.

## 1.1 Add a budget – Edit Budget

When a new budget is created or edited, the following form is displayed. Having finished adding or editing data, the “Save” button must be clicked to save the budget.

In this screen, some fields may be filled by data from a list (already registered in system tables). Examples of such fields are *Country*, *City*, *Type of company* etc. To fill these fields, click on the “Browse” button and select the desired value. The User can also type a value for the field but attention must be paid to fill the field with the exact value as the one stored in the system table.

Some fields are mandatory in order to save the budget. These are: **Company**, **Branch**, **Project Code**, **Budget Code** and **Budget Number**.

The field “Budget Number” can be filled with the following values:

- ✓ 0 – Tendering Budget (also called BOQ Budget)
- ✓ 1 – Cost Budget
- ✓ P – Primavera Budget

Assigning a “Commitment No” (6) will allow this budget to retrieve prices for materials, services etc. from that Supplier Commitment.

To display the entire list of entries in the budget the user has to click on “Budget Analysis” (7).

## 1.2 Locking a budget

After a budget has been filled-in and the tender process has been completed, it is useful for the budget to be locked in order for no further changes to be allowed. This is accomplished by changing the “Budget Type Flag” to “Locked”.

## 1.3 Allowing budget updates

The budget can be updated from the Purchasing/Procurement Department during the Requisition stage. To allow such an update, the “Allow Update from Requisition” checkbox must be checked. This is to avoid the accidental update of the budget from an external department. This functionality is controlled by the “Allow Update From Requisition” checkbox.

The budget can also receive updated prices from its associated commitment (see Updating Prices and Templates in a Budget). This functionality is controlled by the “Allow Update From Commitment” checkbox.

## 2 Import BOQ/Budget from Excel

ProjectVIEW gives users the ability to import a budget in an Excel file format. The files must be formatted using the ProjectVIEW guidelines (See. “BOQ import into ProjectVIEW” manual).

To import the budget, the User must be in the New/Edit Budget screen. After filling in all necessary fields (in case of a new budget – See. Add a budget – Edit Budget) and saving, the user must do the following:

1. Insert the excel file path is set either manually or by clicking on “Browse” and then selecting the excel file
2. Click on “Import Excel Budget with Annotations”.

The following four messages will appear requesting additional information. These messages have been created in order for the system to be able to process a large variety of formats in the excel file:

<p><b>“Importing an excel will delete any existing data. Make sure you have used annotations correctly. Proceed?”</b></p>	<p><b>The message appears as a failsafe. If “Yes” is clicked, all previous data in the budget will be overwritten by the data in the excel file.</b></p>
<p><b>“Is Column B used for Package Code?”</b></p>	<p>Click yes if the column in the message contains the Package Code.</p>
<p><b>“Is Column C used for Cost Package Item?”</b></p>	<p>Click yes if the column in the message contains the Cost Package Item.</p>
<p><b>“Are columns C and D used both for Description”</b></p>	<p>Click yes <b>ONLY</b> if <b>BOTH</b> columns C and D contain the description.</p>
<p><b>“Is Quantity Column before Unit Column?”</b></p>	<p>Click yes if the Quantity Column is to the left of the Unit Column.</p>
<p><b>“Perform Check in Excel file?”</b></p>	<p>Click yes to check the excel file for irregularities.</p>

### 3 Import and merge Updated BOQ

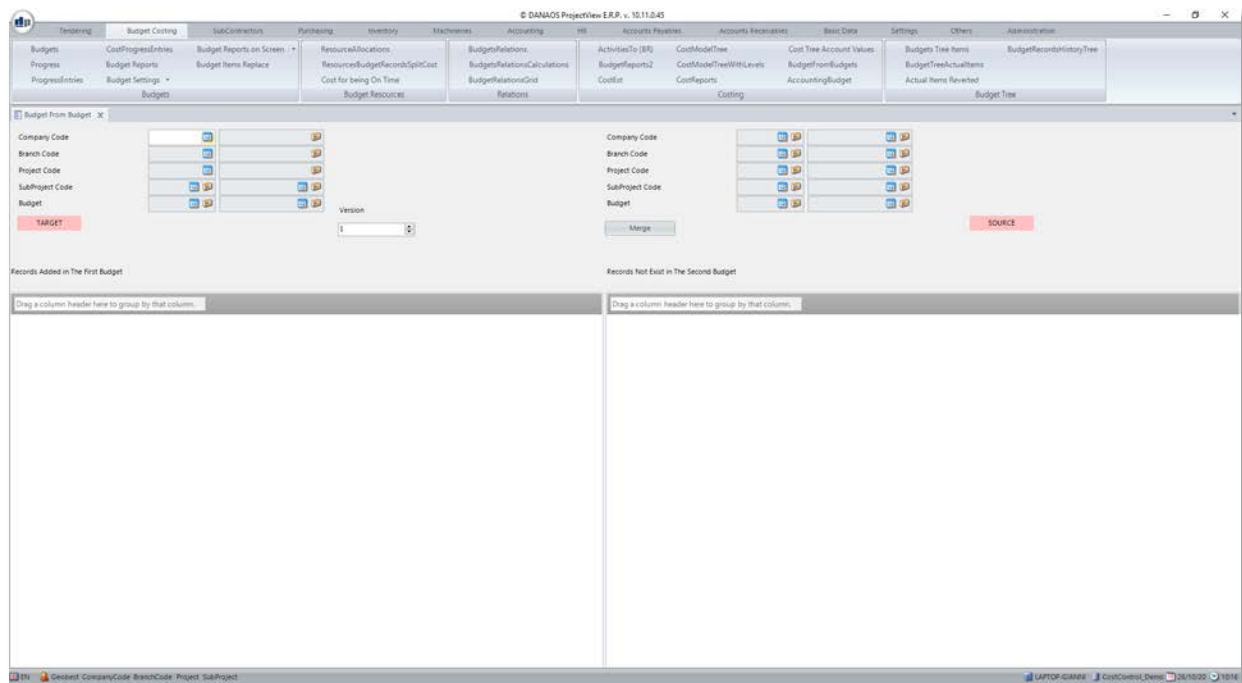
ProjectVIEW includes a tool which enables the comparison and merge of two versions of a budget. This is particularly useful when an updated version of a BOQ which has already been imported and filled with information, resources, prices etc. is received.

To access the tool, please navigate to:

*“Budget Costing” > “Costing” > “Budget from Budget”*

In order for this functionality to be used, there have to be two versions of the same budget in the system. Please follow the steps described in the manual “BOQ import into ProjectVIEW” as well as those in the previous chapter to upload the two versions of the budget. Having done so, there should be two budgets in the same project. We will be calling the original one *“Target”* and the updated one *“Source”*.

Choosing *“Budget from Budget”*, will display the following screen:



Normally, *Target* will have been edited multiple times since its original import and therefore will contain a multitude of information. *Source* on the other hand will not. Therefore, after the comparison and merger of the two budgets, *Target* will be updated while *Source* will remain as it was and therefore can be deleted after this operation if no longer necessary.

Specifically, the actions performed during the merger are:

- ✓ Rows present in *Source* are added to *Target*.
- ✓ Rows present in *Target* but not *Source* are removed from *Target*.

The steps necessary to compare and merge two budgets are as follows:

1. Select the “old” version of the budget using the left-side controls.
2. Select the “new” version of the budget using the right-side controls.
3. Select a version for the operation. This allows the user to maintain a track of which BOQ lines have been changed in each version. Each BOQ line’s version is visible in the Budget Records screen (See. Next chapter) in the column “Budget Version”.
4. Click on the “Merge” button. Please use caution since this action **cannot** be undone.
5. The system then proceeds with the comparison and merger of the BOQs. Please be aware that this can take some time depending on the size of the BOQs being compared. After the completion of this process, the two grids are populated with BOQ lines. Specifically:
  - The left grid displays all the BOQ lines which were added from the updated BOQ to the old BOQ.
  - The right grid displays all the BOQ lines which were removed from the old BOQ because they were not present in the updated BOQ.

### 3.1 Versioning

When the aforementioned process takes place, the user has the option to add a version number to the added lines. This version number will appear in the appropriate column in the budget analysis, making it possible to filter the budget by version.

To do this, the user simply has to add a version number in the field “*Version*” **before** clicking on the “*Merge*” button.

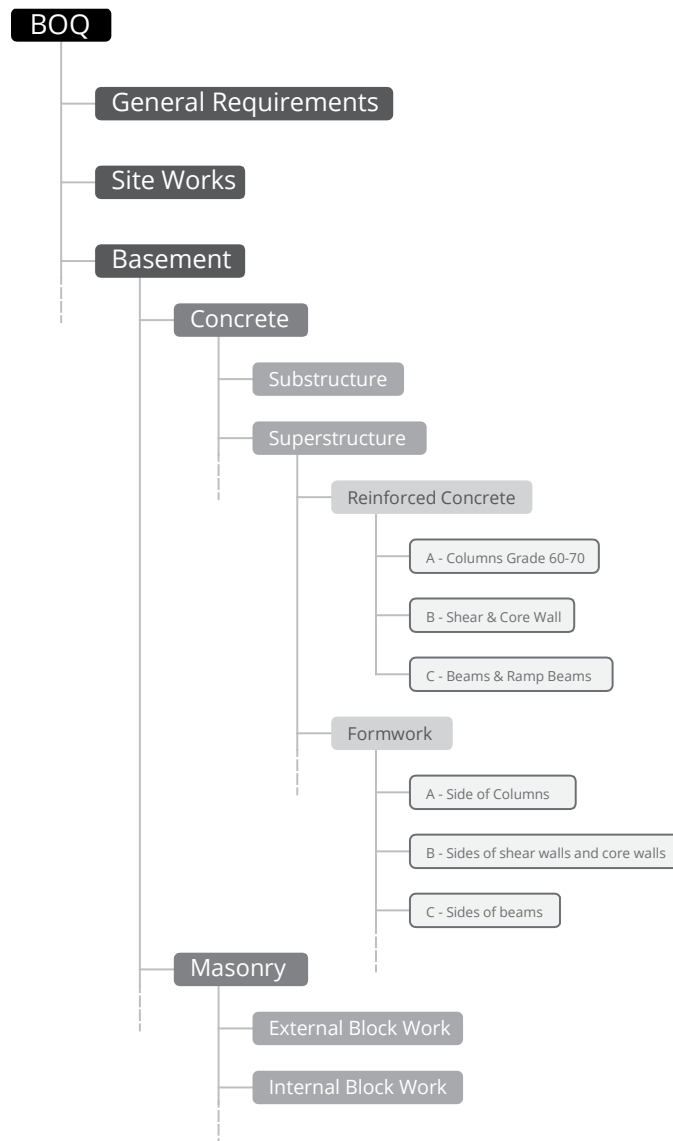
#### Note

- ✓ Please be aware that a number of rows might be deleted after the completion of this operation. This is done in order for Target to contain the same lines as Source.

## 4 Budget Record Analysis

When the button “*Refactored Budget Analysis*” is pressed (See. Add a budget – Edit Budget) a new Grid View appears in which all Budget Records are displayed. Budget Records comprise the detailed, multi-level breakdown analysis of a Budget in Cost Accounts.

Every Budget is built using a tree structure. This structure is represented with the field “Cost Code”. To better understand how this structure is organized, please See. Manual – “BOQ import into ProjectVIEW”.



Having the records organized in a tree structure means that to add a second level cost account, the first level cost account has to be filled in first. As soon as the record is saved, the system automatically fills the first two columns (Cost Code and Cost Description).

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Tendering Budget Control SubContractors Purchasing Inventory Machineryes Accounting HR Accounts Receivables Basic Calls Settings Others Administration

Budgets Pricing Templates Budget With Alternative Materials Tendering Settings... ResourceDeployment ResourceDeploymentMachineryes  
 Templates Tendering Reports BOQDimensionsToolbox Machinery Types ResourceDeploymentSpecialities  
 What-if Scenarios BOQDimensions ToolboxGridFull Tendering ResourceDeploymentComposon Deployments

Budget Records: BOQ Budget For Cinema A

Budget Amount: 1,701,910.30  
Version No:

BOQ Item	BOQ Item Description	Qty	Templates	Package Description	Level No	Item Unit Code	Unit Rate	BOQ Amount	Total Amount	Material	Labour	Plant	SubContract
Grid Add Prompt	BOQ Budget for Cinema A	0			1		0.00	1,701,910.30	83,375,126.80	83,375,663.88	4,462.92	0.00	0.00
D1	Bit 1 - Ash	0			2		0.00	1,701,910.30	83,375,126.80	83,375,663.88	4,462.92	0.00	0.00
D1.01	Section B - Site Works Note: Unless stated otherwise...	0		Earthworks	3		0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.01.01	Additional Items Any items that may not be covered...	0			4		0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.01.A	Demolition of existing 200 mm CMU wall including...	498		Earthworks	4	m2	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.01.B	Demolition of existing foundation 1400 Wx 1500 m...	4		Earthworks	4	m	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.01.C	Demolition of temporary gypsum wall	271		Earthworks	4	m2	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.01.D	Removal of 160 mm thick existing grade slab to PUF	386		Earthworks	4	m2	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.01.E	Removal of existing MEP equipment and services	1		Earthworks	4	item	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.01.F	Reinstatement of 160 mm thick existing grade slab...	120		Earthworks	4	m2	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.02	Section C - Concrete Works Reinforced poured conc...	0	03.00.00	Concrete	3		0.00	1,699,315.30	1,989,616.16	1,986,460.18	3,191.92	0.00	0.00
D1.02.01	To Cinema	0	03.00.00	Concrete	4		0.00	1,699,315.30	1,986,562.14	1,984,302.22	2,249.92	0.00	0.00
D1.02.01.A	100 mm thick concrete floating slab	245	03.00.00	Concrete	5	m3	629.85	154,313.25	314,668.78	313,505.00	1,289.78	0.00	0.00
D1.02.01.B	A393 mesh to floating slab	2453	03.00.00	Concrete	5	m2	629.85	1,545,022.05	627,417.64	627,180.00	237.64	0.00	0.00
D1.02.01.C	10 mm resilient layer	2453	03.00.00	Concrete	5	m2	0.00	0.00	941,126.50	940,740.00	386.50	0.00	0.00
D1.02.01.D	150 mm light weight concrete fill	9	03.00.00	Concrete	5	m3	0.00	0.00	3,133.25	2,822.32	316.93	0.00	0.00
D1.02.02	To Ramps	0	03.00.00	Concrete	4		0.00	0.00	629.85	313.38	316.00	0.00	0.00
D1.02.02.E	Extruded polystyrene filling below ramps	1	03.00.00	Concrete	5	item	0.00	0.00	629.85	313.38	316.00	0.00	0.00
D1.02.03	To Levelling deck slab	0	03.00.00	Concrete	4		0.00	0.00	65,227.06	64,611.06	616.00	0.00	0.00
D1.02.03.F	50 mm thick reinforced slab concrete (C30 grade) incl...	9	03.00.00	Concrete	5	m2	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.02.03.G	A-192 mesh to levelling slab	207	03.00.00	Concrete	5	m2	0.00	0.00	65,227.06	64,611.06	616.00	0.00	0.00
D1.02.04	To PUF Rein Slab	0	03.00.00	Concrete	4		0.00	0.00	17,249.23	16,933.32	316.00	0.00	0.00
D1.02.04.H	160 mm RC slab including reinforcement bar	54	03.00.00	Concrete	5	m3	0.00	0.00	17,249.23	16,933.32	316.00	0.00	0.00
D1.02.05	Additional Items Any items that may not be covered...	0	03.00.00	Concrete	4		0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.03	Section D - Masonry Works Brickworks as selected...	0			3		0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.03.01	Additional Items Any items that may not be covered...	0			4		0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.03.A	200 mm CMU wall	43			4	m2	0.00	0.00	0.00	0.00	0.00	0.00	0.00
D1.04	Section E - Metal Supply, Reinforce and erect structu...	0	081300		3		0.00	0.00	81,401,431.70	81,401,431.70	0.00	0.00	0.00
D1.04.01	Structural Beams	0	081300		4		0.00	0.00	44,430,373.80	44,430,373.60	0.00	0.00	0.00
D1.04.01.A	S81 - PFC 150x75x18	4809	081300		5	kg	0.00	0.00	4,453,614.90	4,453,614.90	0.00	0.00	0.00
D1.04.01.B	S82 - PFC 150x90x24	4668	081300		5	kg	0.00	0.00	4,323,034.80	4,323,034.80	0.00	0.00	0.00
D1.04.01.C	S83-C88 - UB 205x139x30	6561	081300		5	kg	0.00	0.00	6,041,324.50	6,041,324.40	0.00	0.00	0.00
D1.04.01.D	S84 - UB 254x146x51	2899	081300		5	kg	0.00	0.00	2,875,502.30	2,875,502.90	0.00	0.00	0.00
D1.04.01.E	S85-C98 - UB 305x127x37	9813	081300		5	kg	0.00	0.00	9,087,819.30	9,087,819.30	0.00	0.00	0.00
D1.04.01.F	S86-C98 - UB 356x174x45	2345	081300		5	kg	0.00	0.00	2,171,704.30	2,171,704.30	0.00	0.00	0.00

**Note**

- ✓ As with any other Grid View, the Budget Analysis has a large number of columns (fields) available. The user can customize his experience as explained in Grid view functionality.
- ✓ If the user wants to assign the same value to multiple sub-levels of a budget line, he can simply add the value in the top level and then double-click on that value. This will result in the copying of the value to all the sub-levels of that particular level. The value of each sub-level can of course be changed individually after this procedure.

## 4.1 Adding Costs

There are six main Cost Categories in this analysis:

1. General Expenses
2. Materials
3. Labor
4. Plant
5. SubContractor
6. Prov Sums

The user can fill these cost amounts either by providing a single value (e.g lump sum) or by providing a “Resource Analysis” by pressing the “Browse” button inside each cost category cell. A new form will be appear displaying the following fields:

Cost Category	Fields displayed
Materials & Prov Sums	<ul style="list-style-type: none"> <li>✓ Item Code</li> <li>✓ Quantity</li> <li>✓ Unit Price</li> </ul>
Labor	<ul style="list-style-type: none"> <li>✓ Employee Code OR</li> <li>✓ Specialty Code</li> <li>✓ Hours or Days</li> <li>✓ Cost of Hours or Days</li> </ul>
Plant	<ul style="list-style-type: none"> <li>✓ Machinery Code OR</li> <li>✓ Machinery Type Code</li> <li>✓ Hours or Km</li> <li>✓ Cost of Hours or Km</li> </ul>
SubContractor	<ul style="list-style-type: none"> <li>✓ Supplier Code OR</li> <li>✓ Supplier Description</li> <li>✓ Quantity</li> <li>✓ Cost</li> </ul>

Having filled-in the resource analysis form, the user has to **save** in order to return the calculated summarized amounts to the previous “Budget Analysis” form.

### Note

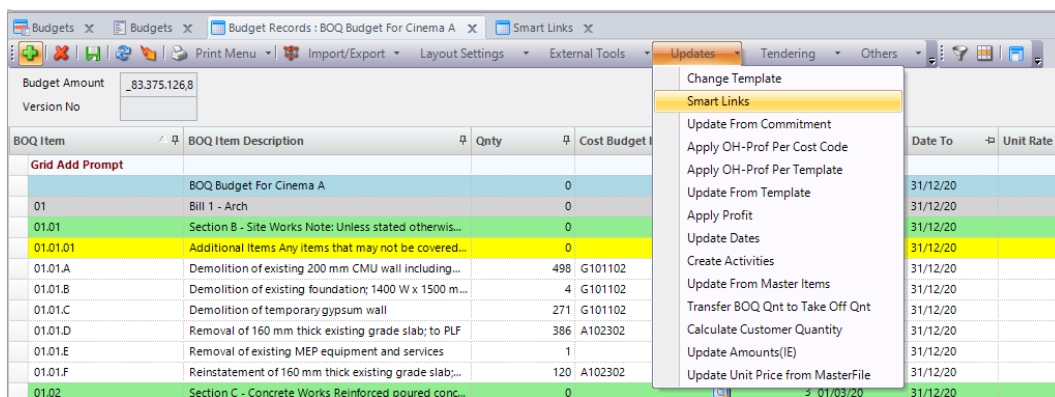
- ✓ Instead of using the quantity field in the “Resource Analysis” form, the “Qty For One Unit” can be used. With this, the user only inputs the quantity of resources needed for a single unit in the budget (that is, a single unit in the BOQ line). ProjectVIEW will then calculate the total amount of the resources using the quantity in the budget and the “Qty For One Unit” for every single resource in that unit.
- ✓ Costs must be entered only in the lowest sub-levels in the Budget. To calculate the subtotal for every upper level, the “Recalculate” button can be clicked (See. Calculating subtotals for upper Budget levels).
- ✓ The user must not forget to **save** before exiting the “Budget Analysis” Grid View.

## 4.2 Adding Cost Codes

To take advantage of the full functionality of the system, cost codes should be added to each line. This section will not go into detail regarding cost codes since this is not the Tendering department’s responsibility.

To add a cost code, the column “Cost Budget Item” should be filled. This can be done manually or using Smart Links.

To use Smart Links, the user has to click on the “Smart Links” button in the “Updates” menu.



The system will ask for confirmation. If given, the cost codes will be assigned to the appropriate budget lines. For more information, See. Smart Links below.

### 4.3 Using Templates/Price Sheets

Templates (or Price Sheets) are collections of resources (materials, labor etc) that can be used repeatedly for multiple projects or/and multiple budget lines. They include quantities, prices etc.

Templates are assigned by filling in the appropriate field. They can either be assigned by providing a value manually or by pressing the “Browse” button inside the “Templates” field.

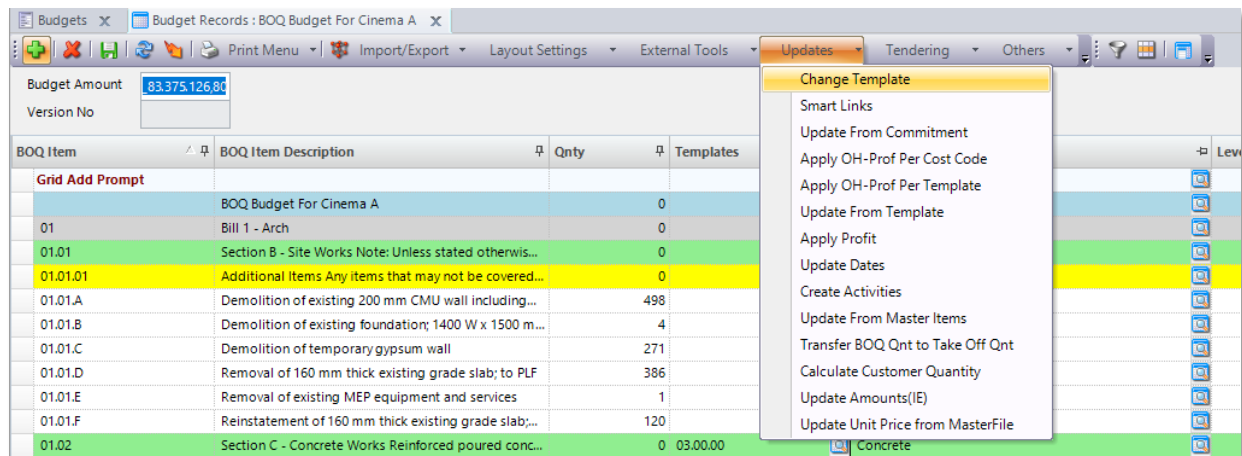
After selecting a template and returning to the Budget Analysis screen, the user has to double-click on the template value. This will copy all the resources inside the template to the respective Cost Categories (material resources to Materials etc).

#### Note

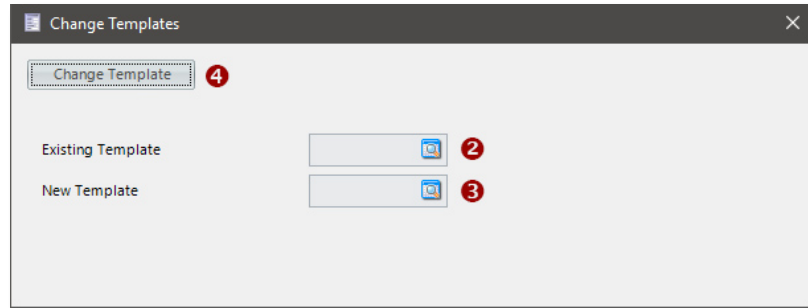
To create new templates, please See. Updating Prices and Templates in a Budget

### 4.4 Replacing a template within a budget

If a user wants to replace a template within a budget, the “Change Template” button in the “Updates” menu has to be clicked.



This will display the following dialog box:



By selecting an “Existing Template” (2) and a “New Template” (3) and clicking on “Change Template” (4), all instances of the existing template selected will be replaced with the “New Template”. This can be used either to replace a template with another or to **re-apply** an existing template.

#### 4.5 Assigning Item Codes

The user can assign an item Item Code to a budget line to allow ProjectVIEW to match that particular item to an item already stored in the company database. This can be very useful for other ProjectVIEW modules such as “Purchasing”.

#### 4.6 Assigning Divisions, Package Codes and Cost Budget Items

The user can assign Divisions or/and Package Codes to any budget line. Simply fill in the values in columns “Divisions”, “Package Codes” or “Cost Budget Item” with the appropriate values.

The user can fill Divisions, Package Codes and Cost Budget Items either by providing a value manually or by pressing the “Browse” button inside the appropriate cell. A list of values will appear allowing the user to select the correct one.

## 4.7 Applying Overheads, Risk, Profit & Discount

The screenshot shows the ProjectVIEW ERP interface with a budget table. The table has the following columns: BOQ Item, BOQ Item Description, Qty, Overhead %, Risk %, and Profit %. The data is as follows:

BOQ Item	BOQ Item Description	Qty	Overhead %	Risk %	Profit %
01	B01 1 - Arch	0	0.00 %	0.00 %	0.00 %
01.01	Section B - Site Works Note: Unless stated otherwise...	0	10.00 %	0.00 %	15.00 %
01.01.01	Additional Items Any items that may not be covered...	0	10.00 %	0.00 %	15.00 %
01.01.A	Demolition of existing 200 mm CMU wall including...	490	10.00 %	0.00 %	15.00 %
01.01.B	Demolition of existing foundation 1400 W x 1500 mm...	4	10.00 %	0.00 %	15.00 %
01.01.C	Demolition of temporary gypsum wall	271	10.00 %	0.00 %	15.00 %
01.01.D	Removal of 160 mm thick existing grade slab to R/F	386	10.00 %	0.00 %	15.00 %
01.01.E	Removal of existing MEP equipment and services	1	10.00 %	0.00 %	15.00 %
01.01.F	Restatement of 160 mm thick existing grade slab...	120	10.00 %	0.00 %	15.00 %
01.02	Section C - Concrete Works Reinforced poured conc...	0	2.00 %	0.00 %	20.00 %
01.02.01	To Crende	0	2.00 %	0.00 %	20.00 %
01.02.01.A	100 mm thick concrete floating slab	243	2.00 %	0.00 %	20.00 %
01.02.01.B	A393 mesh to floating slab	2433	2.00 %	0.00 %	20.00 %
01.02.01.C	10 mm resilient layer	2433	2.00 %	0.00 %	20.00 %
01.02.01.D	150 mm light weight concrete fill	9	2.00 %	0.00 %	20.00 %
01.02.02	To Ramps	0	2.00 %	0.00 %	20.00 %
01.02.02.E	Extruded polystyrene filling below ramps	1	2.00 %	0.00 %	20.00 %
01.02.03	To Levisee deck slab	0	2.00 %	0.00 %	20.00 %
01.02.03.F	50 mm thick reinforced slab concrete (C30 grade) incl...	0	2.00 %	0.00 %	20.00 %
01.02.03.G	A-192 mesh to levisee deck	307	2.00 %	0.00 %	20.00 %
01.02.04	To R/F floor slab	0	2.00 %	0.00 %	20.00 %
01.02.04.H	160 mm RC slab including reinforcement bar	54	2.00 %	0.00 %	20.00 %
01.02.05	Additional Items Any items that may not be covered...	0	2.00 %	0.00 %	20.00 %
01.03	Section D - Masonry Works Blockwork, as selected...	0	0.00 %	0.00 %	0.00 %
01.03.01	Additional Items Any items that may not be covered...	0	0.00 %	0.00 %	0.00 %
01.03.A	200 mm CMU wall	401	0.00 %	0.00 %	0.00 %
01.04	Section E - Metal Supply, fabricate and erect structu...	0	0.00 %	0.00 %	0.00 %
01.04.01	Structural Beams	0	0.00 %	0.00 %	0.00 %
01.04.01.A	S81 - PFC 150x75x18	4039	0.00 %	0.00 %	0.00 %
01.04.01.B	S82 - PFC 150x60x24	4669	0.00 %	0.00 %	0.00 %
01.04.01.C	S83-C/S81 - UB 200x133x20	4546	0.00 %	0.00 %	0.00 %
01.04.01.D	S84 - UB 254x146x31	2558	0.00 %	0.00 %	0.00 %
01.04.01.E	S85-C/S85 - UB 305x127x37	9813	0.00 %	0.00 %	0.00 %
01.04.01.F	S86-C/S86 - UB 356x171x45	2345	0.00 %	0.00 %	0.00 %
01.04.01.G	S87-C/S87 - UB 406x170x54	3287	0.00 %	0.00 %	0.00 %

After a budget has been fully analyzed and the final cost has been calculated, the User has the ability to insert the following as a percentage:

1. Overhead
2. Risk
3. Profit
4. Discount

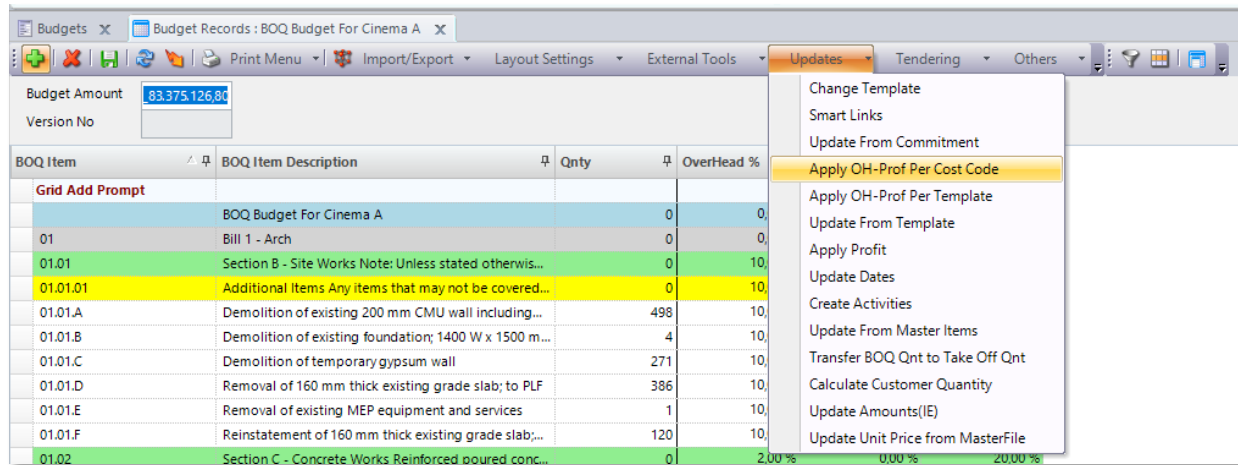
In order for these four values to take effect, the user must first fill them in, subsequently make sure that the check box is ticked and press “Tend.”.

The final step in the procedure is to click on “Apply Dis” or “Apply Profit” to calculate the. The first one applies the discount while the second one applies the profit. The system will then calculate the unit price based on the above.

## 4.8 Applying Overheads, Risk, Profit & Discount per Template/ Cost Budget Item

If Templates or Cost Budget Items have been assigned to budget lines, it is possible to apply the same Overhead, Risk, Profit and Discount for all budget lines assigned to the same Template or Cost Budget Item.

To do so, click on the button “Apply OH-Prof Per Template” or the button “Apply OH-Prof Per Cost Budget Item” in the “Updates” menu.

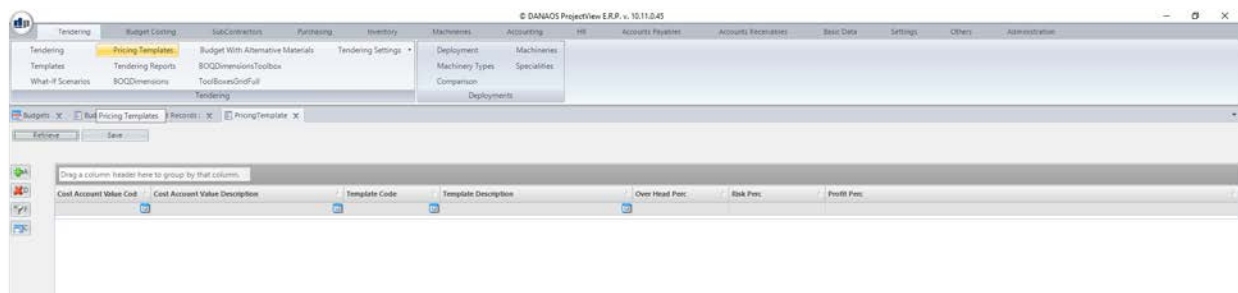


### Note

In order for the aforementioned procedure to produce results, Pricing Templates have to be created in the system. In order to do so, the user must follow the following procedure. Please note that the registered Pricing Templates are available across projects and budgets.

1. Click on “Tendering”
2. Click on “Pricing Templates”

The “Pricing Template” form displays all the pricing templates stored in the system.



To view the Pricing Templates stored in the system, the user must first retrieve them. If any change is made, the user must save so the new/changed entries are stored in the system.

When adding a new Pricing Template the user can:

1. Choose which Cost Budget Item will be affected by this Pricing Template.
2. Choose which Template will be affected by this Pricing Template.
3. Set an Overhead, Risk and Profit percentage.

After the changes/new entries have been saved, the user can return to the “Budget Record Analysis” Grid View and apply these values using the buttons “Apply OH-Prof Per Template” or the button “Apply OH-Prof Per Cost Budget Item”.

If no Pricing Templates exist in the system, pressing the aforementioned buttons will incur no change to the items in the budget.

#### 4.9 Calculating subtotals for upper Budget levels

All the Costs, Overheads, Risks, Profits and Discounts are applied in the sub-levels of a budget. They can however be summarized in a bottom – up direction thus creating a subtotal for every level. This is achieved by clicking on the “Recalculate” button at any time:

Recalculate:



#### 4.10 Adding additional items to a budget

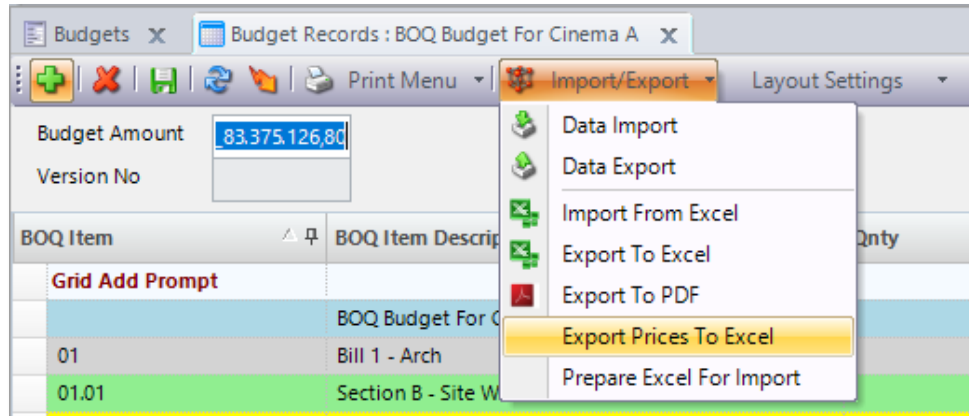
Additional items i.e. items that were not in the original BOQ sent by the customer but were later added by the users of ProjectVIEW can be inserted at any stage in a budget.

There are two ways for flagging an item as “additional”:

1. By clicking on the checkbox in the “Company Analysis” column of an existing item
2. By adding/editing an existing item’s “Cost Description”. If two “\*\*” are inserted at the start of an item’s “Cost Description”. By doing so, ProjectVIEW will automatically check the respective “Company Analysis” check box.

## 4.11 Export to Excel

Once the budget is complete, it can be exported to an excel file. There are two ways to do that which can be found in the “Import/Export” menu:



1. By pressing the “Excel Export” button, the entire budget will be exported as a **NEW** excel file. After pressing this button, a new dialog will appear requesting a save location for the new file.
2. By pressing the “Export Prices To Excel” button, the system will update the **ORIGINAL** excel file from which this budget was generated (See Manual – “BOQ import into ProjectVIEW”) with the prices. This file can then be used for submitting the company’s proposal as part of the tendering process. After pressing this button, two dialogs will appear:
  - a. The first one requests the original excel file. Please note that this file will not be altered.
  - b. The second requests a save location for the updated file.

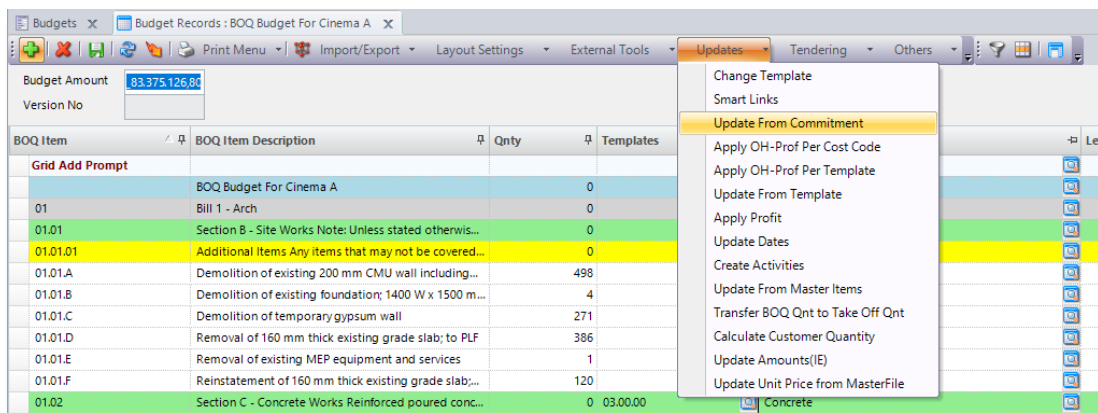
## 5 Updating Prices and Templates in a Budget

A budget can receive an update to its prices:

- ✓ by changing the prices in the associated commitment (see and Adding/Editing a commitment)
- ✓ by changing the prices in the templates used in the budget
- ✓ by changing the prices in the Master Items
- ✓ by changing the prices in the Master File

If changes are made to the prices in the associated commitment or if the associated commitment is replaced entirely (by changing the Commitment No. in the Budget Form) the changes are not immediately reflected in the budget. The same applies to changes made to the templates used within a budget.

To apply the price changes in the budget, a user must click on one of the following buttons:



- ✓ Pressing the “Update from Commitment” button will update the prices in the entire budget to match the ones in the commitment associated with the budget.
- ✓ Pressing the “Update from Template” button will update the prices in the budget rows, which have a template associated with them to match the ones in the said templates.
- ✓ Pressing the “Update from Master Items” button will update the prices in the budget rows, which have according to the Master Items.
- ✓ Pressing the “Update Unit Price from Master File” button will update the prices in the budget rows, which have according to the Master File.

## 6 Creating & Editing Templates/Price Sheets

As mentioned earlier (See. Using Templates/Price Sheets), templates are collections of resources that can be used throughout projects. In order to facilitate the creation and edit of templates they are organized in the same way a budget and its lines are.

In order to access the list of templates, please navigate to:

*“Tendering” > “Templates”*

The grid will display all available templates.

Template Code	Description	Item Unit Code	Quantity	General Expenses	Material	Labor	Plant	SubContractors	Tools	Unit Price
024000	Demolition and Structure Moving	sm	1.00							
026100	Disposal	m3	1.00							
030000	Concrete	m3	1.00		0.00	0.00				
034000	Precast Concrete	m3	1.00							
036000	Grouting for cavities	m3	1.00							
036001	Lean concrete for cavities	m3	1.00							
038113	Finishing and drying	m	1.00							
030000	Screens	m2	1.00							
040100	Glass Block Masonry	m2	1.00							
044000	Stone Wall Cladding	m2	1.00		0.00					
048100	Block Masonry	m2	1.00		0.00					
074243	Aluminum composite wall cladding	m2	1.00							
075100	Roof water Proofing	m2	0.00							
076000	Stainless steel cladding	m2	1.00							
081000	Interior Doors	no	1.00							
081400	Wood Doors	no	1.00							
087000	Hardware	no	0.00							
088000	Glazing	m2	0.00							
088200	Mimpr	no	0.00							
090400	Cement plastering	m2	1.00							
092000	Dry wall partition	m2	1.00							
09301.001	Porcelain/Ceramic floor tiles	m2	1.00							
09301.002	Porcelain / Ceramic tile Skirting	sm	1.00							
09301.003	Ceramic/Porcelain wall tiles	m2	1.00							
095000	False ceiling	m2	1.00		0.00					
095100	Acoustic gypsum board ceiling	m2	1.00							
095123	Mineral fiber acoustic ceiling tiles	m2	1.00							
095133	Aluminum ceiling tiles	m2	1.00							
095333	Pvc false ceiling	m2	1.00							
095426	Wood cladding ceiling	m2	1.00							
095443	Stretched ceiling	m2	1.00							
095616	Marble cladding ceiling	m2	1.00							
096340.001	Granite and Marble floor tiles	m2	1.00							
096340.002	Threshold	sm	1.00							
096340.003	Marble/Ceramic Threshold	sm	1.00							

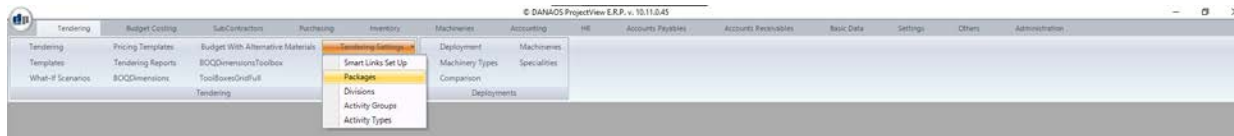
Every line of this grid is a template. Creating and editing templates is the same as creating and editing a normal BOQ line. The only difference is that the only editable fields are the Cost Categories.

To add a new template, simply add a new line to this budget. By editing the Cost Categories (See. Adding Costs) resources can be added to each template

After saving this template, it will be available for all projects and budgets.

## 7 Creating Packages & Divisions

Choosing the *“Tendering Settings”* inside the *“Tendering”* menu displays the following submenu:



From here, the user can choose to add/edit either Packages or Divisions which can then be used in budgets.

Creating a new Package or Division is done by clicking on the *“+”* button on the toolbar and then filling in the details in the first line of the grid.

Editing is done by directly clicking inside the grid and typing the changes.

When an entry is created or edited the *“Save”* button must be clicked to save the changes.

## 8 Tendering Reports

To view all available reports, the user has to navigate to:

*“Tendering” > “Tendering” > “Tendering Reports”*

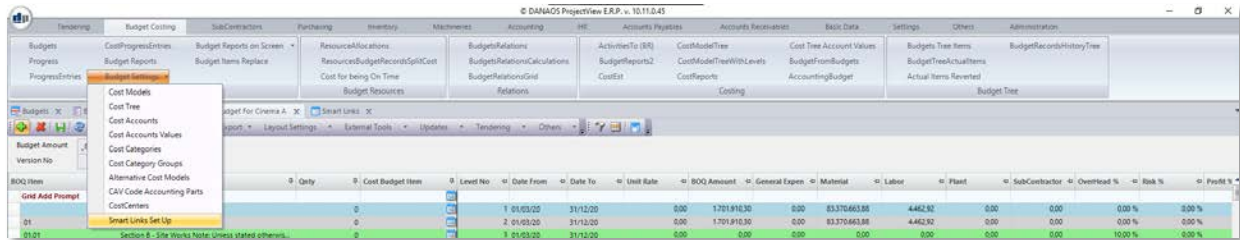
This will display the following form:

After providing the appropriate parameters the user can select a report and click on the *“Print Preview”* button to view it.

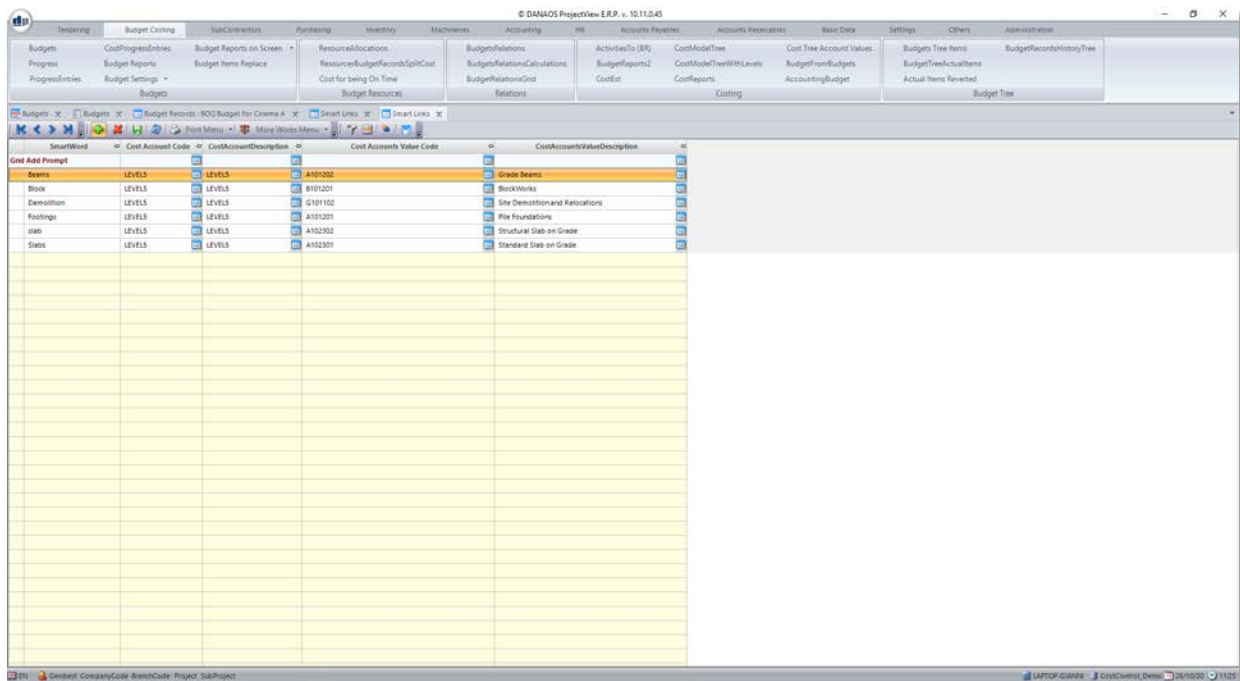
## 9 Smart Link setup

ProjectVIEW ERP uses an additional functionality to easily update a budget with cost codes. To setup Smart Links, the user has to navigate to:

*“Budget Costing” > “Budgets” > “Budget Settings” > “Smart Links Setup”*



The following grid will be displayed:



When selected within a budget, Smart Links will search the entire budget for a *“SmartWord”* and assign a *“Cost Account Code”* when successful.

Therefore, to setup Smart Links, the user must simply add new entries with a *“SmartWord”* and a *“Cost Account Code”* in the grid above.



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