Cost Model Phases Summary

Phases are used to create subtotals for a project. Think of them as one level higher than Pay Items in a Work Breakdown hierarchy. Phases are project specific, but you can store common ones in a library to import.

Create Phases for Cost Model

a.

1. Open Cost Model for a Project, select the Phases Tab on the Ribbon Menu. Phases can be entered manually using the Add New row or imported from the Phase Library using the Import Phases button.

| PI. | - 8 | | | | | | | | | | | | | |
|---------------|------------------|----------------|-----------------|----------------|-------------|-------|--------------|-------------|--------------|------|----------|--------|-------------|----------|
| Но | me | Quotes | Phas | es | Soft Costs | Opera | itions | Libraries | Reports | Lay | youts Ad | min | PrjIx Admin | Арр |
| Assi Pha | ign Im ses Ph | port S ases | et Phase | Clear Phase | | | | | | | | | | |
| Prji | Ix | Cost M | es Iodel 241 | 578 Un | derground D | emo 🛛 | | | | | | | | |
| | Origi | ial Cont | tract Price | e Est | imated Marg | in | Targe | t Price | Target | Fee | Target | Markup | Estimat | ed Tota |
| ⇒ | | \$1 | 1,253,260.0 | 00 | 12.9 | 8 % | \$1,417, | 792.73 | \$327,18 | 2.94 | 30.0 | 00 % | \$1 | ,090,609 |
| Pha | ses | | | | | | | | | | | | | |
| | Descrip | tion | | | | | | | Phase Sort V | ≞ N | lotes | Pric | e Total | |
| * | | | | | | (| Click here t | to add a ne | ew row | | | | | |
| \rightarrow | Mobiliz | ation | | | | | | | | 9 | | | \$1 | 0.00 |
| | Sewer | | | | | | | | | 10 | | | \$1 | 0.00 |
| | SWPP | installati | on Only | | | | | | | 10 | | | \$1 | 0.00 |

2. If you want to setup common Phases in the library, click on Import Phases and use the Add New row to enter library phases, then check the boxes for the ones you want to import.



| | <mark>₽l.</mark> - | | | lard Phases | ⊞ – □ × | |
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| Contract Pric | ∎- | Default | Phases | | | |
| \$523,750. | _ | | | | | |
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| | ок | Cancel | Delete | | | |
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| | | alog | Defau | | | |
| | | | Phase Description | Default Sort Order 🛛 🖮 | | |
| llation Only | | | # <u></u>]C | | | |
| | * | | Click here to add a new rov | v | | |
| | - | | Mobilization | 9 | | |
| | | | SWPP Installation Only | 10 | | |
| | | | Removals | 15 | | |
| | | | Grading | 20 | | |
| | | | Sewer | 30 | | |
| | | | Water | 40 | | |
| | | | Storm Drain | 50 | | |
| | | | Dry Utilities | 60 | | |
| | | | Paving | 70 | | |
| | | | Landscaping | 80 | | |
| | | | Misc | 100 | | |
| | | | Offsite | 110 | | |
| | | | Onsite | 111 | | |
| | | | Sales Tax | 200 | | |
| | | | Alternate | 300 | | |

3. Once Phases are setup, you can assign them in the Cost Model, if you setup Phases prior to Pay Items, you can set the default Phase for data entry by selecting the Set Phase button, then entering new pay items.

| RL 🛛 | | 98 🗹 🖓 | | | | | | | | |
|---------------------|--------------|-------------|---------|--------|--------|----------------------|--------|-----------|-------------|----|
| Hom | ie | Quotes | Pha | ases | So | ft Costs | 0 | perations | Libraries | Re |
| Assig Phase | I n ⊮s | Import Ph | ases | Set Pl | hase | ab Clear Phase | | | | |
| | | | 4505 | | | | | | | |
| PrjIx | | Cost Mod | lel 24 | 1581 | Test F | Project | 8 | | | |
| | Origi | inal Contra | ict Pri | ice I | Estima | ated Ma | rgin | Ta | rget Price | |
| \rightarrow | | \$5 | 23,750 | 0.00 | | -135 | 5.51 % | \$1 | ,603,500.55 | |
| | | | | | | | | | | |
| a. ^{Phase} | es | | | | | | | | | |

4. Assigning Phases

a. Return to Cost Model by selecting the Home tab, if the column Sub-Total Phase is not showing, use the column chooser to add it to the layout. Select the Pay Items you want, right click on one of the selected pay items and navigate to Assign>Assign Phases

| | Pay Item N | lo. | Sub-Total | Pha | ise | | Pay Item Id |
|---|------------|-------------|------------------|-----|---------|----------------------|----------------|
| * | | | | | | | |
| | | 1 | | | | | 102260 |
| | | | | | | | 102260 |
| | | ינ <u>ט</u> | Сору | | | | 102260 |
| | | G | Paste | | | | 102260 |
| | | 8 | Delete | | | | |
| | | E= | Copy WBS | | | | |
| | | ÷ | Add Cost Item | | | | |
| | | ¥ | Import Cost Item | | | | |
| | | 2 | Lock/Unlock | | | | |
| | | Ŷ | Add OH Item | | | | 10226 |
| | | Ξ. | Selected Total | | | | 10226 |
| | | € | Send to Library | | | | 10226 |
| | | | Pay Item Tasks | | | | 10226 |
| | | | Accian | | | | 10220 |
| | | 17 | Assign | | | Assign Cost Accounts | |
| | | 18 | | | Ûe | Assign | Lib Cost Items |
| | | 19 | | | • | Assign | Phases |
| | | 20 | | | •• | Assign | Trades |

- b. A dialog box showing Phases will appear, select the Phase you wish to assign to those Pay Items and click OK.
 - i. Tips
 - 1. Phases can be added on the fly.
 - 2. Grouping by the Phase column provides a great way to summarize cost model by phases within the grid.