Deltek ProPricer

ProPricer Help

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Access Rights

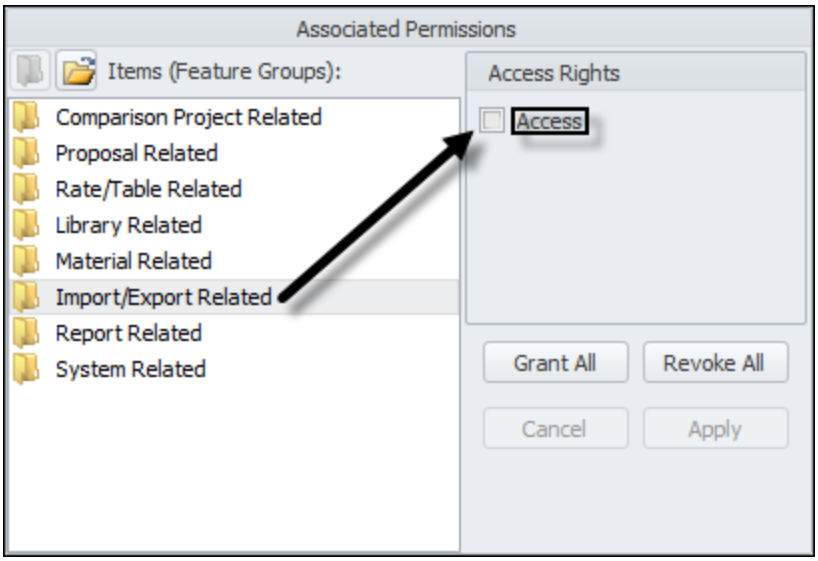
The Associated Permissions section is where you grant the Access Rights the role will have. It is subdivided into Items (Feature Groups) and Access Rights. There are eight top-level folders in the Items (Feature Groups):

- Comparison Project Related
- Proposal Related
- Rate Related
- Library Related
- Material Related
- Import/Export Related
- Report Related
- System Related

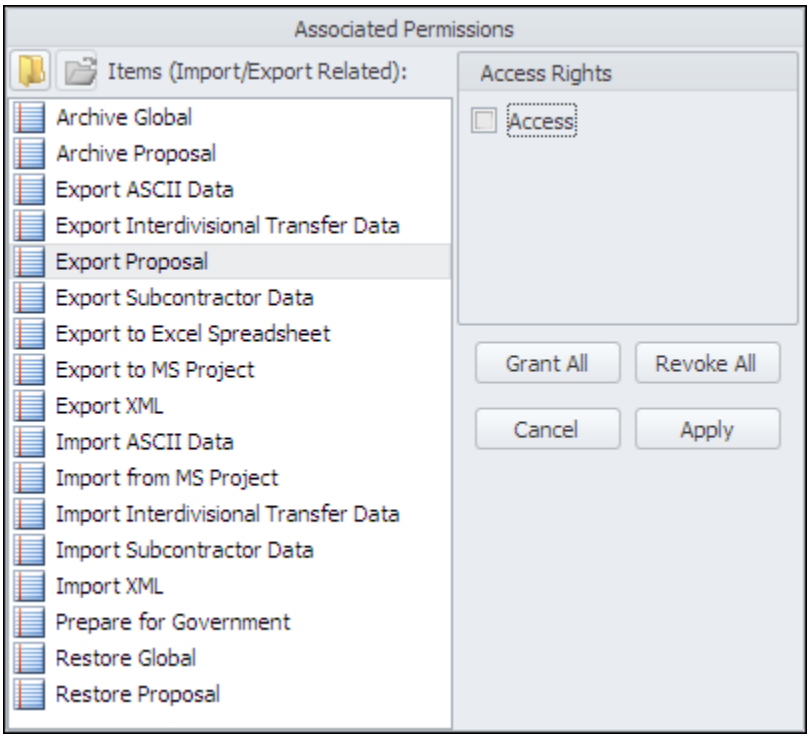
Each item in the Items (Feature Groups) can have up to five Access Rights available: **Access**, **Edit**, **Add**, **Delete**, and **Print**. **Access** has the highest priority and regulates the remaining rights. Access Rights can be granted/revoked at the top-most folder level or at the individual item level. Selecting or clearing the checkboxes at the folder level will act as the default settings for all the items within the folder. However, you can open the folder and grant/revoke access to the individual items.

Example

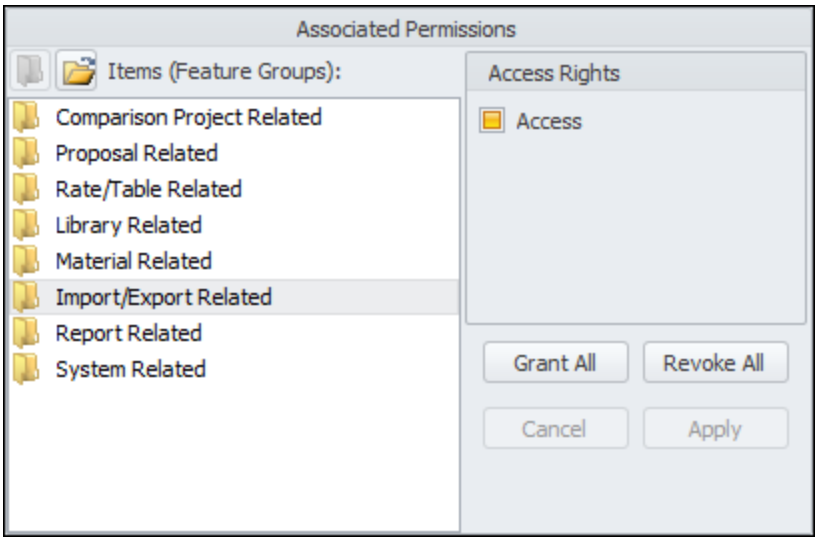
We cleared the **Access** checkbox of the **Import/Export Related** folder.



The **Access** checkbox of all the items within the folder will also be clear.

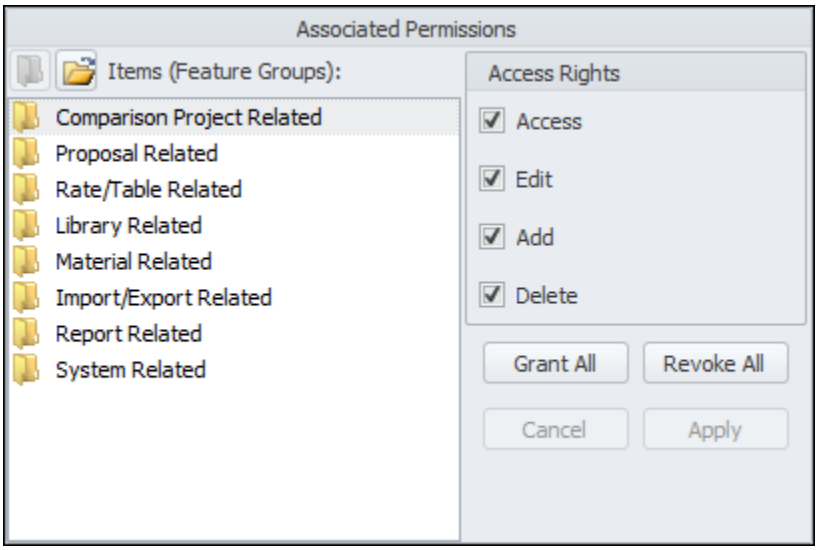


If we select the **Access** checkbox of the **Export Proposal** option, the **Access** checkbox at the **Import/Export Related** folder level will show partial access (not completely selected, nor completely clear).

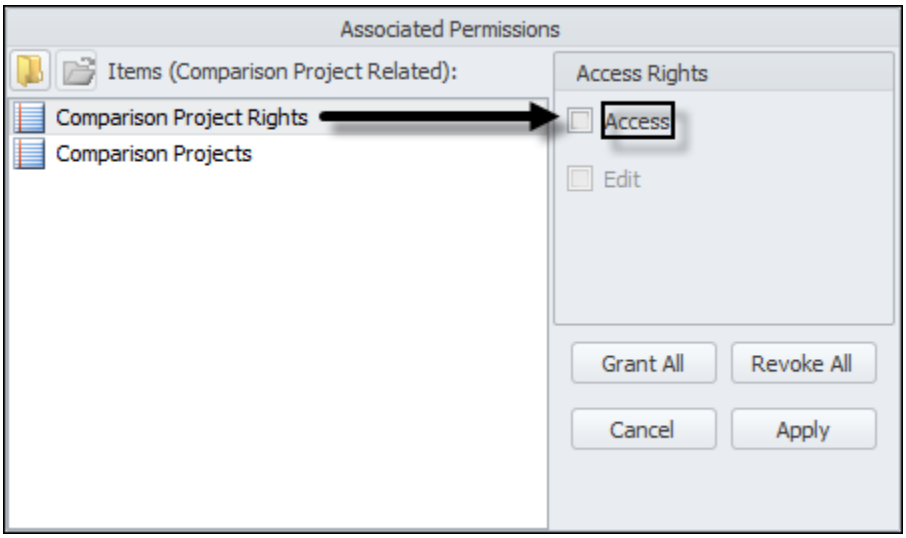

Associated Permissions
Items (Feature Groups):
Comparison Project Related
Proposal Related
Rate/Table Related
Library Related
Material Related
Import/Export Related
Report Related
System Related
Access Rights
Access
Grant All
Revoke All
Cancel
Apply

Comparison Project Related Access Rights

The **Comparison Project Related** folder in the **Associated Permissions** section of Role Information allows you to grant/revoke Access Rights to the Comparison Projects and Comparison Project Rights.



To revoke access to a specific item, open the folder and clear the **Access** checkbox of the item. In the following example, the user will not be able to access the **Rights** page in the **Program** folder of **Comparison Project Properties**.



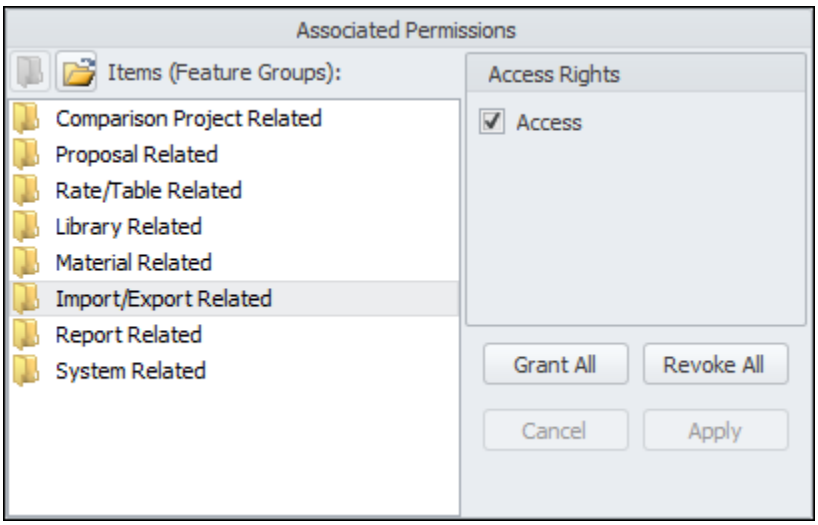
Grant/Revoke

Access Rights are granted to the individual roles that are then assigned to the users.

1. Click the **Setup** ribbon, and then click **Role Information** in the **Security** group.
2. In the **Roles** grid, select the role for which you want to grant/revoke Access Rights.
3. In the **Associated Permissions** section:
    3.1. Select the entire folder and click **Grant All**/**Revoke All** to select/clear all the checkboxes of the elements within the folder.
    3.2. Open the folders and grant/revoke the Access Rights to the individual elements within the folder. You must select the **Access** checkbox to enable the subsequent checkboxes.
4. Click **Apply**.

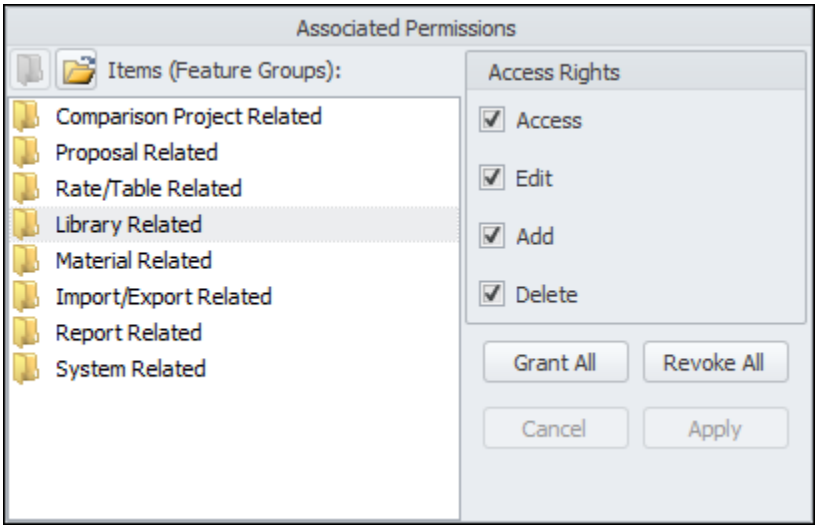
Import/Export Related

The Import/Export Related folder in the Associated Permissions section of Role Information allows you to grant/revoke Access Rights to the various import and export processes, as well as archive/restore.



Library Related

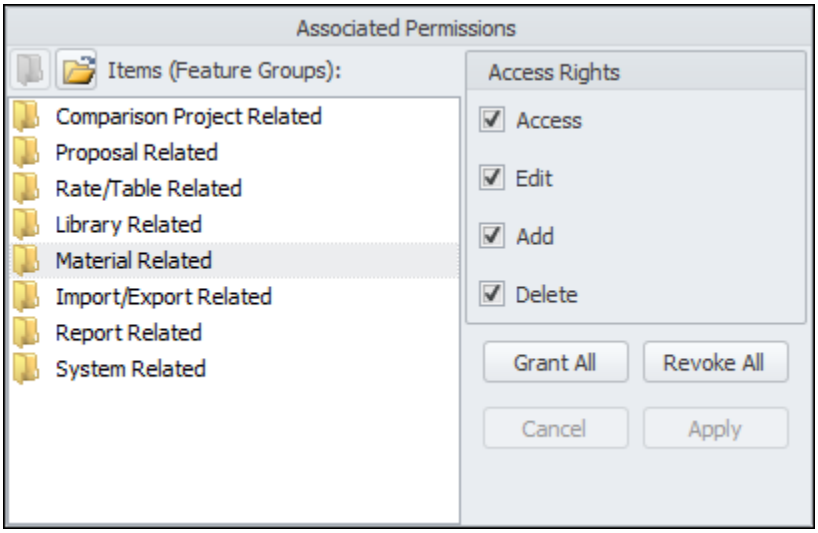
The Library Related folder in the Associated Permissions section of Role Information allows you to grant/revoke Access Rights to the various libraries.



Note: Within the subfolders, the (New Item Name) option allows you to set the default settings of any new item created. For example, if you want to revoke the right of a user assigned this role to be able to delete any new item created, clear the ***Delete*** *checkbox.*

Material Related

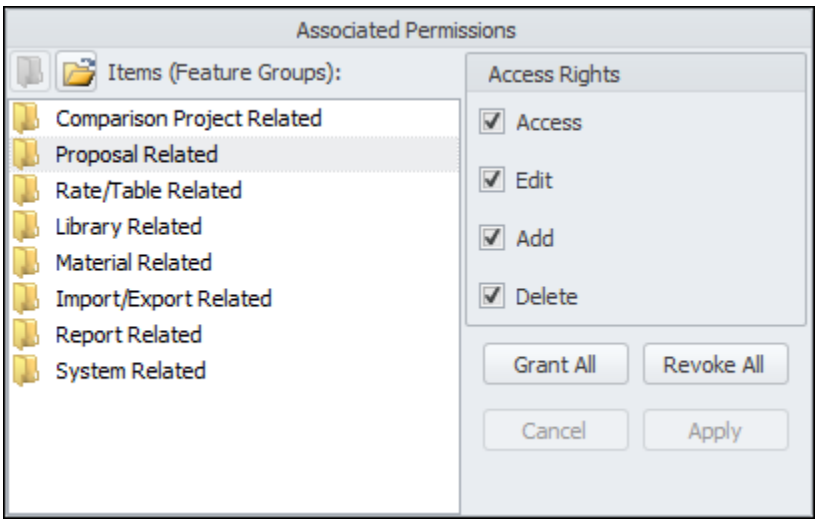
The Material Related folder in the Associated Permissions section of Role Information allows you to grant/revoke Access Rights to the various libraries.



*Note: Within the subfolders, the **(New Item Name)** option allows you to set the default settings of any new item created. For example, if you want to revoke the right of a user assigned this role to be able to delete any new item created, clear the **Delete** checkbox.*

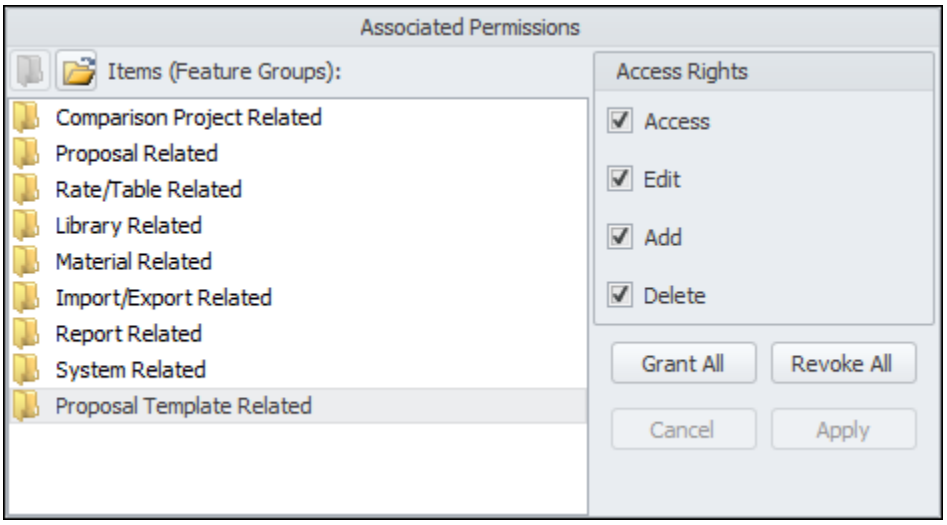
Proposal Related

The Proposal Related folder in the Associated Permissions section allows you to grant/revoke Access Rights to things in proposals, such as individual Proposal Properties pages, various task input options, What-Ifs, Task Selections, Resource Selections, Proposal Selections, Overrides, etc.



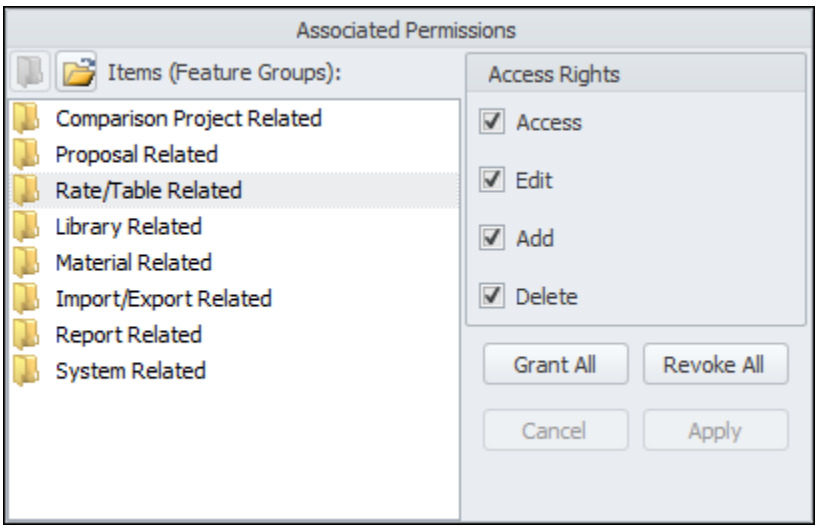
Proposal Template Related Access Rights

The Proposal Template Related folder in the Associated Permissions section allows you to grant/revoke Access Rights to things in proposal templates, such as individual Proposal Properties pages.



Rate/Table Related

The Rate/Table Related folder in the Associated Permissions section of Role Information allows you to determine if a user can create a rate table, modify a rate table, delete a rate table, as well as Algorithms.



There are two subfolders for each rate table.

- The **Indirect Rate Tables** folder, for example, is where you determine if a user can create a new table, delete an existing one, or change any of the properties of a table.
- The **Indirect Rate Maintenance** folder is where you determine if a user can open an Indirect Rate Table, define rates for an indirect pool in a table, modify existing rates, etc. A user must have access to the table in both folders to be able to open it.

*Note: The **(New...Rate Tables)** option allows you to set the default settings of any new table created. For example, if you want to revoke the right of a user assigned this role to be able to delete any new table created, clear the **Delete** checkbox.*

Report Related

The Report Related folder in the Associated Permissions section of Role Information allows you to grant/revoke Access Rights to all reports or just specific ones. It contains a Reports subfolder that lists all the reports in ProPricer.

Access Rights for reports encompass both system and user reports. Different rights can be set for each role. The following explains how the Access Rights work for system and user reports.

Access

This right applies to both system and user reports. It determines if a user can run a report.

Edit

This right applies to user reports. It determines if a user can edit a custom report.

Add

This right applies to both system and user reports. It determines if a user can:

- Modify a system report. You cannot save the changes you make to a system report. You must use the **Save As** feature, which is equivalent to adding a new report.
- Create a custom report.
- Import a custom report.

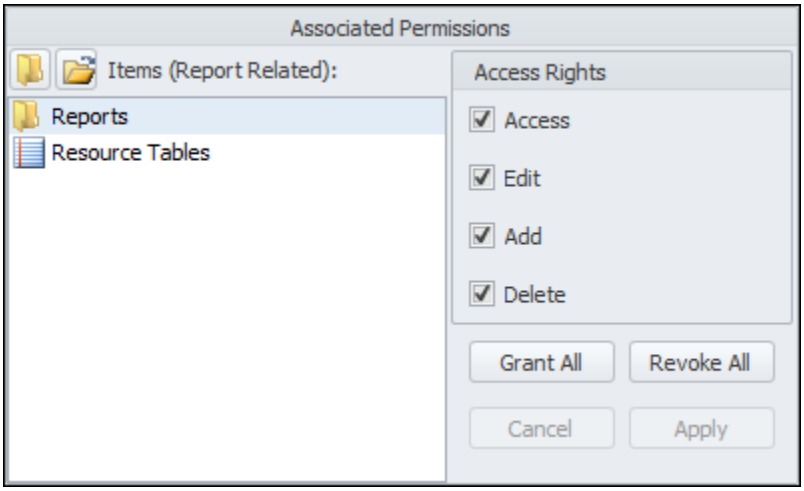
Delete

This right applies to user reports. It determines if a user can delete a custom report.

Folder Level

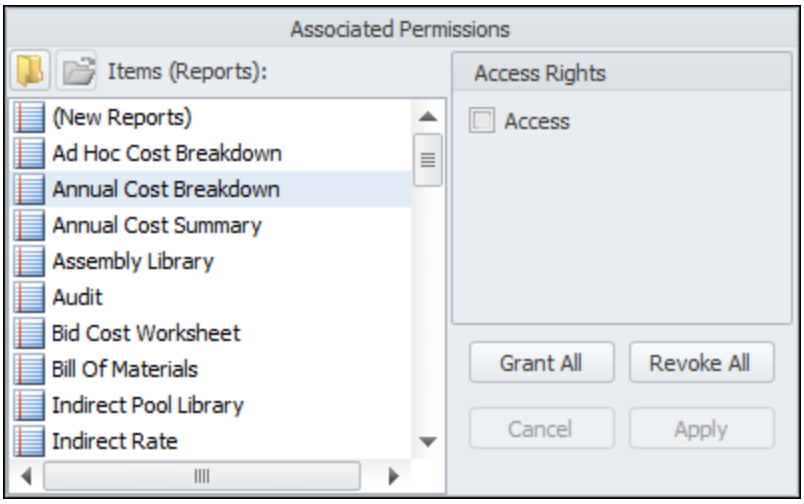
The Access Rights at this level are the default settings for all the reports listed within the folder. For example, clearing the **Access** checkbox here will clear the same checkbox for all the reports within the folder.

- **Add** is not a default setting since it is not available at the report level. It is only available at the folder level.
- **Access** is available for all reports (system and custom).
- **Edit** and **Delete** are only available for custom reports.

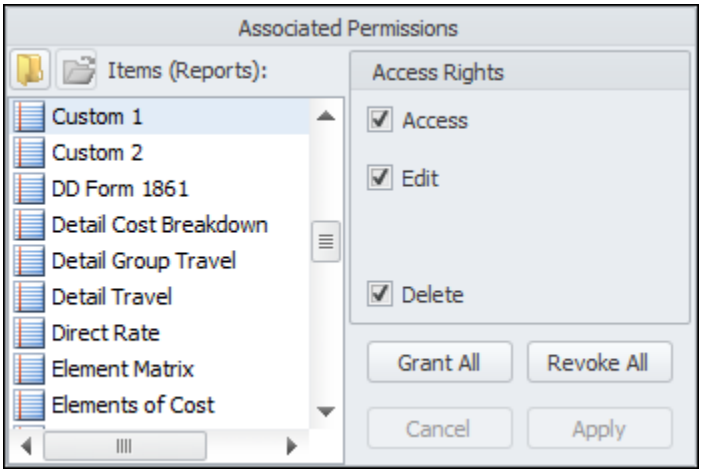


Report Level

As previously mentioned, the Access Rights change for system and user reports. In the following example, Annual Cost Breakdown is a system report, therefore, **Access** is the only right available.



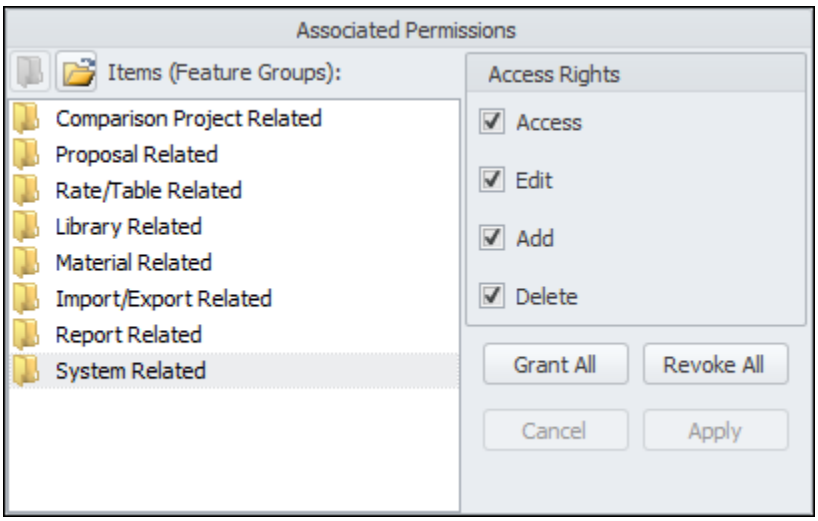
Custom reports have **Access**, **Edit**, and **Delete**.



*Note: Within the subfolder, the **(New Reports)** option allows you to set the default settings of any new report created. For example, if you want to revoke the right of a user assigned this role to be able to delete any new report created, clear the **Delete** checkbox.*

System Related

The System Related folder in the Associated Permissions section of Role Information allows you to determine if a user can do things such as create users and roles, grant Access Rights to the roles, enter company information, set system options, and set report defaults.



Access Tags

Quickly control which items in ProPricer are visible to a common group of users by creating and assigning access tags. For example, an access tag called *East Coast Office* could be created so employees at a specific location only see certain proposals and rate tables.

Access tags work with all reports in the Report List, as well as most Navigation Pane items. In the Navigation Pane, you can assign tags to:

- Proposals
- Tables
- Folders
- Items in libraries
- Products
- Parts and assemblies
- Vendors

To get started, set up your system's access tags. All of them will be available when you assign tags to items and to users. If an item has several access tags assigned to it, a user only needs one matching tag to view it.

Assign Access Tags to an Item

Users can work with a tagged item if they share the same access tag. To learn more, see Assign Access Tags to a User.

Assign Access Tags in the Navigation Pane

1. In the Navigation Pane, right-click an item, and then click **Assign Access Tags**.
2. In the **Assign Access Tags** dialog box, click to assign all available access tags. Or select individual available tags, and then click .
   - Hold **Shift** to select multiple available tags consecutively.
   - Hold **Ctrl** to select multiple available tags separately.
3. Click **OK**.

Assign Access Tags in Libraries

1. In the Navigation Pane, double-click a library to open it.
2. Do one of the following:
   - Right-click an item in the library, and then click **Assign Access Tags**.
   - In the **Access Tags** column, click .
3. In the **Assign Access Tags** dialog box, click to assign all available access tags. Or select individual available tags, and then click .
   - Hold **Shift** to select multiple available tags consecutively.
   - Hold **Ctrl** to select multiple available tags separately.

4. Click **OK**.

Assign Access Tags to a User

1. On the **Setup** ribbon, click **User Information**.
2. Do one of the following:
   - Right-click a user, and then click **Assign Allowed Access Tags**.
   - In the **Access Tags** column, click .
3. In the **Assign Access Tags** dialog box, click to assign all available access tags. Or select individual available tags, and then click .
   - Hold **Shift** to select multiple available tags consecutively.
   - Hold **Ctrl** to select multiple available tags separately.
4. Click **OK**.

Copy an Access Tag

1. On the **Setup** ribbon, click **Access Tags**.
2. Right-click an access tag, and then click **Copy**.
3. Enter a name for the new access tag.
4. (Optional) Enter a description of the new access tag.
5. Click **OK**.

Create an Access Tag

1. On the **Setup** ribbon, click **Access Tags**.
2. Enter a name for the access tag.
3. (Optional) Enter a description of the access tag.
4. Press **Ctrl**+**S** or move to another row to save your work.

Delete an Access Tag

1. On the **Setup** ribbon, click **Access Tags**.
2. Right-click an access tag, and then click **Delete**.
3. Confirm the deletion when asked.

Accounting Calendars

Accounting calendars allow you to define the standard number of hours an employee will work per month. They are used to compare hours and equivalent heads, to calculate man-months in some reports, and to create work schedules. Accounting calendars are stored in the Libraries section of the Navigation Pane.

Every new proposal will use the default calendar entered on the Calendar page of the System Options. If there is no default calendar specified, or if you want to replace the default with a different one, you can assign a calendar directly to a proposal. Proposal-specific calendars are entered on the Calendar page of the Proposal Properties.

In the Resource Library, you can assign an accounting calendar to each resource individually. When you first add a resource to task, the selected calendar will be used automatically.

In a proposal, you can override a resource's assigned accounting calendar after adding the resource to a task.

Accounting Calendar Library

ProPricer uses accounting calendars to compare hours and equivalent heads, as well as calculate man-months used in some reports.

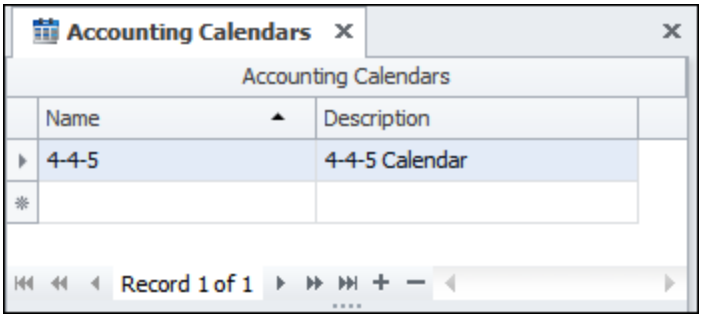
If you plan to have a Work Schedule Table in a proposal, you will first need at least one accounting calendar in the library.

The Accounting Calendar Library is divided into two grids: Accounting Calendars and Hours.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Accounting Calendars

This grid shows all calendars in the system. It is where you create, copy, rename, and delete calendars.



Name

Enter a name for the calendar.

Description

Enter a description for the calendar.

Access Tags

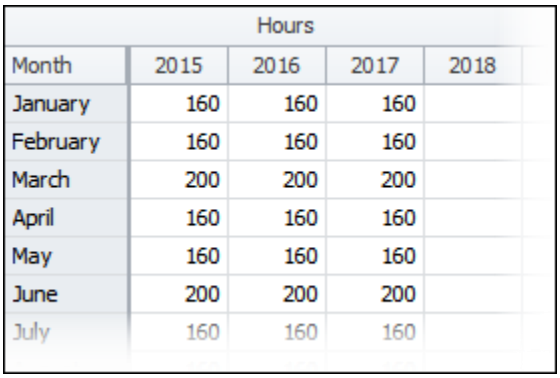
Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Hours

Here you define the number of hours a full-time employee will work per month. The range of years in any calendar comes from the System Options.

ProPricer works with a monthly time frame, so the month is the only calendar unit available. You do not have to enter hours for every month in a calendar. You can enter hours for just the months and years you need. The number of hours per month cannot be less than 0 nor more than 744.

If you use an accounting calendar in a Work Schedule Table, any monthly hours in the calendar will appear in the table as well. Overriding the monthly hours in a Work Schedule Table has no effect on the hours in the Accounting Calendar Library.



Hours				
Month	2015	2016	2017	2018
January	160	160	160	
February	160	160	160	
March	200	200	200	
April	160	160	160	
May	160	160	160	
June	200	200	200	
July	160	160	160	

Copy an Accounting Calendar

1. Click the **Libraries** button in the Navigation Pane, and then double-click **Accounting Calendars**.

2. Right-click the accounting calendar you want to copy, and then click **Copy** on the shortcut menu.

3. Enter a name for the new calendar and click **OK**. ProPricer will copy the calendar and create the new one with the same description and distribution of monthly hours.

Create an Accounting Calendar

1. Click the **Libraries** button in the Navigation Pane, and then double-click **Accounting Calendars**.
2. Enter a name and description for the new calendar.
3. In the **Hours** grid, enter the monthly accounting hours.
4. Press **Ctrl**+**S** or move to another row to save your work.

Delete an Accounting Calendar

1. Click the **Libraries** button in the Navigation Pane, and then double-click **Accounting Calendars**.

2. Right-click the calendar you want to delete, and then click **Delete** on the shortcut menu.

3. Confirm the deletion when asked.

*Note: You can only delete calendars that are not used anywhere in the system. If the calendar is used, ProPricer will display the **Item Usage Info** box instead.*

Enter Accounting Calendar Hours

1. Click the **Libraries** button in the Navigation Pane, and then double-click **Accounting Calendars**.
2. In the **Hours** grid, enter the monthly values in the respective months.
3. Press **Ctrl**+**S** or move to another row to save your work.

Note: You can add and remove hours from a range of years simultaneously by right-clicking the grid and using the Fill function.

Note: In a Work Schedule Table, you can override the monthly hours provided by an accounting calendar.

Fill Years with Hours in an Accounting Calendar

Fill Subsequent Years with Existing Hours

1. Right-click the column that has the hours you want to use.
2. Click **Fill** on the shortcut menu.
3. Enter the start year.
4. Use the spin button or type the end year.
5. Click **OK**.

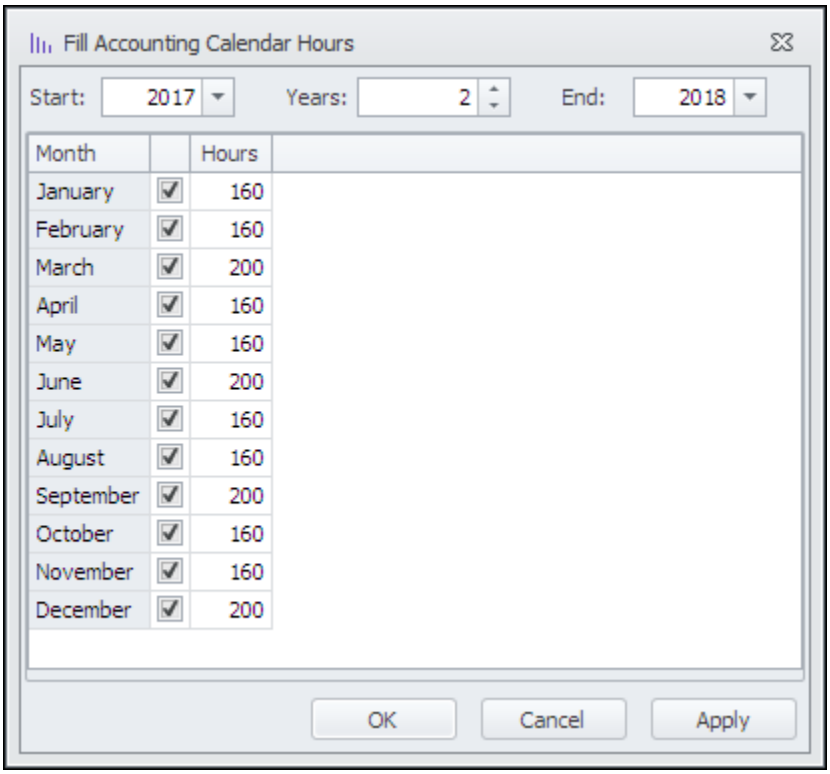
Note: If the start year is the column you selected to copy and you make changes to any of the hours, you will overwrite the respective hours in the start year.

Fill Years with New Hours

1. Right-click a column that does not have existing hours.
2. Click **Fill** on the shortcut menu.
3. Enter the start year.
4. Use the spin button or type the end year.
5. Enter the hours you want to use.
6. Click **OK**.

Fill Accounting Calendar Hours Dialog Box

The **Fill Accounting Calendar Hours** dialog box opens when you click **Fill** on the shortcut menu of a year in the **Hours** grid. It allows you to fill subsequent years with existing hours or fill years with new hours. You can also select the hours you want to include in the Fill process.



Start

This field shows the year you selected for the Fill process. If you enter a subsequent year, ProPricer will begin to fill the hours entered as of that date. If you enter a previous year, ProPricer will overwrite any existing hours as of that date.

Years

Type a number or use the spin button to select the number of years you want to include in the Fill process. The default number is 2, which will fill the start year and

the following year with the hours entered. Entering 1 will only fill the start year with the hours entered.

End

If you used the spin button in the Years field, this field will show the last year that will be included in the Fill process. You can also type a year instead.

Month

This column shows the names of each month. The checkboxes to the right of the months allow you to select the hours you want to include in the Fill process. Select the respective checkboxes of the months you want to include, or clear the checkboxes to exclude the months.

Hours

This column may or may not show hours, depending on the column you selected. If you selected a blank column, enter the hours you want to use. If you selected a column that has hours, you can use the same hours or modify them to fit your needs.

Accounting Calendars - Priorities

ProPricer needs to know the number of hours an employee will work per month to calculate equivalent heads in tasks or man-months in some reports. This number can be obtained from an accounting calendar, a Work Schedule Table, or the proposal's default accounting hours per month.

The accounting calendar and the accounting hours per month can be set on the Calendar page of the System Options. ProPricer will automatically enter this information on the Calendar page of the Proposal Properties for every new proposal you create. If they are not specified in the System Options, these fields will be blank in the Proposal Properties, and you will need to enter this information. You can also change the system defaults.

Since accounting calendars and accounting hours per month can be specified in different places, ProPricer will check the following conditions to determine which one to use.

Resource Calendar

If an accounting calendar is assigned to a resource at the global level in the Resource Library or a Direct Rate Table, ProPricer will use that calendar.

When the calendar in a Direct Rate Table overrides the one in the Resource Library, the override has priority. Similarly, when a resource's calendar has been overridden in a task, then the task-level calendar has priority over the Direct Rate Table and Resource Library.

You can override a resource's accounting calendar by selecting a different one for it in a task. Using a Work Schedule Table in a proposal can also change a resource's accounting hours and lead to accounting calendar overrides in tasks.

Proposal Calendar

If an accounting calendar is not assigned to a resource at the global level, ProPricer will use the proposal-level calendar on the Calendar page of the Proposal Properties.

Proposal Hours

If an accounting calendar is not assigned to a resource or proposal, or if a month has zero hours in the calendar, ProPricer will use the value entered in the **Default Acct Hours/Month** field on the Calendar page of the Proposal Properties.

Assign an Accounting Calendar to a Resource

ProPricer will use the accounting calendar specified for a proposal to provide the monthly working hours for your resources. If you have a resource that does not follow the same calendar as a proposal, you can specify a different calendar for the resource at the global level in the Resource Library or a Direct Rate Table. Whenever the resource is added to a task, the accounting calendar you assigned will be used by default.

Note: In a proposal, you can override a resource's default accounting calendar at the task level.

Note: In a Work Schedule Table, you can override the monthly hours provided by an accounting calendar.

Assign to a resource in the Resource Library

1. In the Navigation Pane, click the **Libraries** button, and then double-click **Resources**.
2. In the **Accounting Calendar** column, select a calendar from the Accounting Calendar Library.
3. Press **Ctrl**+**S** or move to another row to save your work.

Assign to a resource in a Direct Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button, and then double-click a Direct Rate Table.

2. In the **Resources** grid, find the appropriate resource and go to the **Accounting Calendar** column. Then select a calendar from the Accounting Calendar Library.

3. Press **Ctrl**+**S** or move to another row to save your work.

Override the Default Accounting Calendar of a Resource

If you want to assign a different accounting calendar to a resource without modifying the Resource Library, Direct Rate Table, or Proposal Properties, you can override a resource's accounting calendar in a task. This includes any resource added to a task directly (in Resource View or in the Resources tab of Task View), and any resource added to a task through an activity (in Activity View or in the Activities tab of Task View).

Note: In a Work Schedule Table, you can override the monthly hours provided by an accounting calendar.

1. Open a proposal in Task View, Resource View, or Activity View to find the resource that needs a task-specific accounting calendar.
2. In the grid where the resource's hours are entered, edit the **Accounting Calendar** column. The name of the overriding accounting calendar will appear blue text.
3. Press **Ctrl**+**S** or move to another row to save your work.

Set the Accounting Calendar

Accounting calendars define the standard number of hours an employee will work per month.

You can set the calendar at the system level and at the proposal level. The one entered at the system level will be the default calendar for every new proposal you create.

Note: In a Work Schedule Table, you can override the monthly hours provided by an accounting calendar.

Set the System Default

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **Calendar** page.
3. Enter the name of the calendar you want to use in the **Accounting Calendar** field.
4. Click **OK**.

Set the Accounting Calendar of a Proposal, or Change the Default Calendar

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Calendar** page in the **Proposal** folder.
3. Enter the name of the calendar you want to use in the **Accounting Calendar** field.
4. Click **OK**.

Set the Accounting Hours per Month

ProPricer will initially use the accounting calendar specified for the resource or proposal. If, however, the accounting calendar does not have values entered for all months in the system period, or there is no calendar specified for a proposal or resource, ProPricer will use the default accounting hours per month.

You can set the accounting hours per month at the system level and at the proposal level. The hours entered at the system level will be the default value for every new proposal you create.

Note: In a Work Schedule Table, you can override the monthly hours provided by an accounting calendar.

Set the System Default

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **Calendar** page.
3. In the **Accounting Hours/Month** field, enter a number from 1 to 744 (31 days times 24 hours).
4. Click **OK**.

Set the Accounting Hours per Month of a Proposal, or Change the Default Value

1. In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. In the **Proposal** folder, click the **Calendar** page.

3. In the **Default Accounting Hours/Month** field, enter a number from 1 to 744 (31 days times 24 hours).

4. Click **OK**.

Set the Accounting Hours per Month Decimal Precision

Accounting Hours/Month Decimal Precision tells ProPricer to use that number to round the accounting hours in calendars, Work Schedule Tables, and on reports.

1. On the **Setup** ribbon, click **System Options**.
2. Click the **Calendar** page.
3. In the **Accounting Hours/Month Decimal Precision** field, enter a number between 0 and 6.
4. Click **OK**.

Activities

Activities allow you to add resources to a task with reference information. You could use activities to:

- Separate the input data of multiple employees working on the same task.
- Create subsets in a task that has more than one BOE.

The **Activities** tab must be enabled. It is not a default tab in Task View. You also have the option of specifying that only resources with resource type *Labor* can be added to the tasks.

Enable the Activities Tab

The **Activities** tab allows you to use activities to assign resources to tasks. Activities can be used to identify subtasks of a task and/or review the input of the different users.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. Click the **Proposal Input** page in the **Proposal** folder.
3. Select the **Enable Activities** checkbox.
4. *(Optional)* Select the **Limit to Labor Resources Only** checkbox to only be able to assign resources with resource type *Labor* to the task.
5. Click **OK**.

Use an Activity to Add Resources to a Task

1. Select the task, and then click the **Activities** tab.
2. In the **Activity Input** grid:
    2.1. Enter an ID and descriptive text for the activity.
    2.2. Enter the start/end dates of the activity.
3. In the **Resource Input** grid:
    3.1. Enter the resource you want to add to the task.
    3.2. *(Optional)* Enter values in the resource fields if any exist.
    3.3. *(Optional)* Override the accounting calendar, indirect pool, rate band, currency, profit/fee, or scheduled rate of the resource.
    3.4. Distribute the appropriate number of resource hours/units/cost.
4. Press **Ctrl**+**S** or move to another row to save your work.

Algorithms

The Algorithm provides the formula that calculates indirect expenses and subtotals through a collection of logical and mathematical expressions.

In the formula, each Algorithm element (such as Overhead, G&A, and Profit) should be defined by an expression that calculates a summable value. In other words, ProPricer must be able to add the value to a subtotal. For this reason, an Algorithm should not contain any elements that generate a rate or percent value.

After creating and setting up an Algorithm, you must publish it to your database. Once published, you can assign it to Indirect Rate Tables and Work Schedule Tables. The Algorithm will provide the indirect expenses that appear in Indirect Rate Tables, and the rate modifiers in Work Schedule Tables.

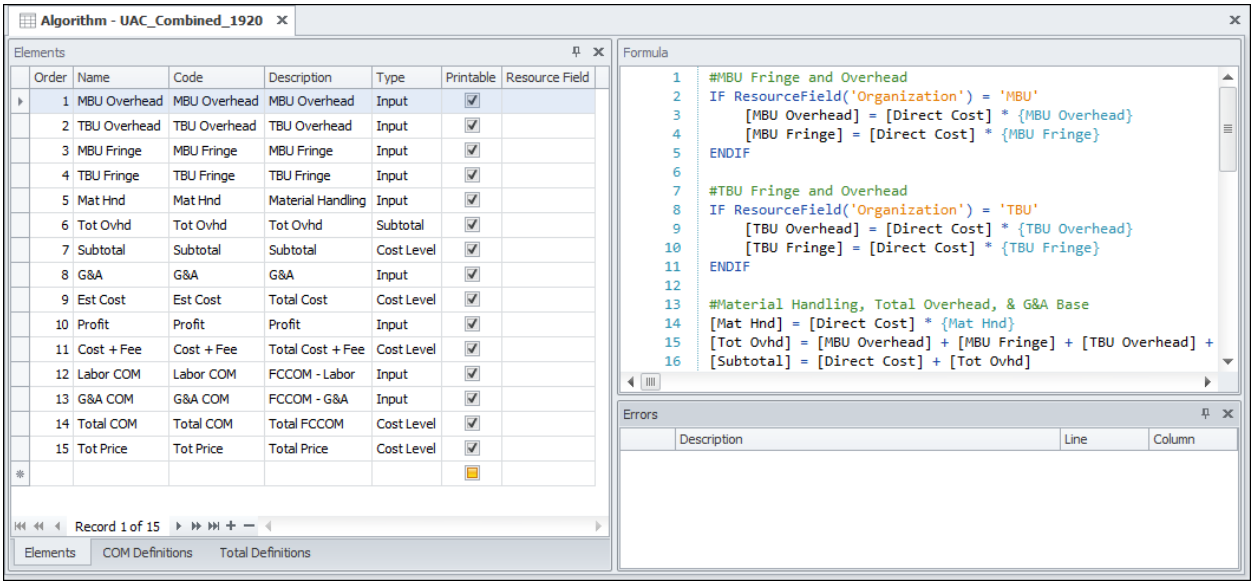
If your organization has a single Algorithm for all proposals, ProPricer automatically assigns the Algorithm to new Indirect Rate Tables and Work Schedule Tables. If your organization has multiple Algorithms, you must select the correct one when you create a new table.

Algorithm Maintenance

While editing an Algorithm, there is an Edit ribbon and your Workspace is divided into three sections.

The section on the left side of your Workspace has tabs labeled Elements, COM Definitions, and Total Definitions. Click a tab to view or change the corresponding information.

The right side of your Workspace has the Formula section and the Errors section.



When you finish editing an Algorithm, you should save it, test it, and publish it. Then you can assign it to Indirect Rate Tables and Work Schedule Tables.

You can also copy an Algorithm, delete an Algorithm from your database, or set an Algorithm as current.

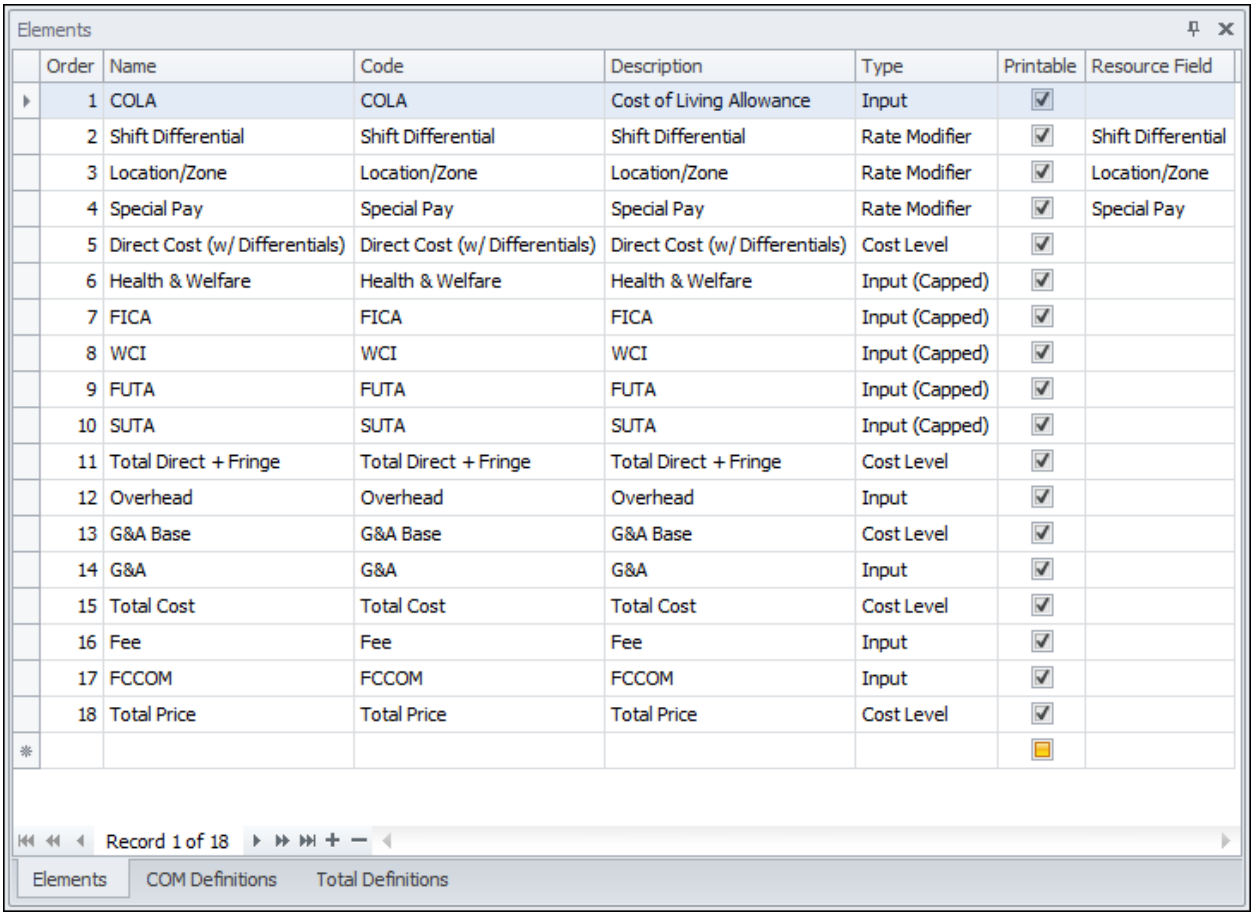
Algorithm Elements, COM Definitions, and Total Definitions

Algorithm Elements

The Algorithm elements are the indirect expenses and subtotals that comprise your pricing model. Before the Algorithm formula (or pricing formula) can be created, the elements must be set up in this grid.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

In the formula, each Algorithm element should be defined by an expression that calculates a summable value. In other words, ProPricer must be able to add the value to a subtotal. For this reason, an Algorithm should not contain any elements that generate a rate or percent value.


Elements

Order	Name	Code	Description	Type	Printable	Resource Field
1	COLA	COLA	Cost of Living Allowance	Input	☑	
2	Shift Differential	Shift Differential	Shift Differential	Rate Modifier	☑	Shift Differential
3	Location/Zone	Location/Zone	Location/Zone	Rate Modifier	☑	Location/Zone
4	Special Pay	Special Pay	Special Pay	Rate Modifier	☑	Special Pay
5	Direct Cost (w/ Differentials)	Direct Cost (w/ Differentials)	Direct Cost (w/ Differentials)	Cost Level	☑	
6	Health & Welfare	Health & Welfare	Health & Welfare	Input (Capped)	☑	
7	FICA	FICA	FICA	Input (Capped)	☑	
8	WCI	WCI	WCI	Input (Capped)	☑	
9	FUTA	FUTA	FUTA	Input (Capped)	☑	
10	SUTA	SUTA	SUTA	Input (Capped)	☑	
11	Total Direct + Fringe	Total Direct + Fringe	Total Direct + Fringe	Cost Level	☑	
12	Overhead	Overhead	Overhead	Input	☑	
13	G&A Base	G&A Base	G&A Base	Cost Level	☑	
14	G&A	G&A	G&A	Input	☑	
15	Total Cost	Total Cost	Total Cost	Cost Level	☑	
16	Fee	Fee	Fee	Input	☑	
17	FCCOM	FCCOM	FCCOM	Input	☑	
18	Total Price	Total Price	Total Price	Cost Level	☑	
*					☐	

Record 1 of 18

Elements | COM Definitions | Total Definitions

Order

The elements appear in this order on reports. A number automatically appears when an element is added to the grid.

Name

The name identifies the element in the ProPricer user interface and in reports.

Code

The code represents the element in the Algorithm formula.

Description

The description helps to identify the element in reports.

Type

The type determines the element's function or purpose.

- *Input* elements are indirect expenses. The indirect rates of these elements are entered in an Indirect Rate Table.
- *Input (Capped)* elements are indirect expenses with a maximum annual cost per equivalent head. The indirect rates and annual caps of these elements are entered in an Indirect Rate Table.
- *Composite* elements are not cost levels, and they cannot be defined with rates. They are best used as placeholders for other elements.
- *Cost Level* elements are totals of other elements. They provide data in the Cost Analysis section of reports, and they can be selected in the Cost Level report option.
- *Subtotal* elements are totals of other elements. They provide data in the Cost Analysis section of reports.
- *Rate Modifier* elements account for shift differentials, such as overtime rates, that affect direct rates.
  - A resource field must be selected for this type of element.
  - A rate modifier can be assigned to an accounting calendar in a Work Schedule Table.

Printable

Select the checkbox if you want the element to appear in the Cost Analysis section of reports.

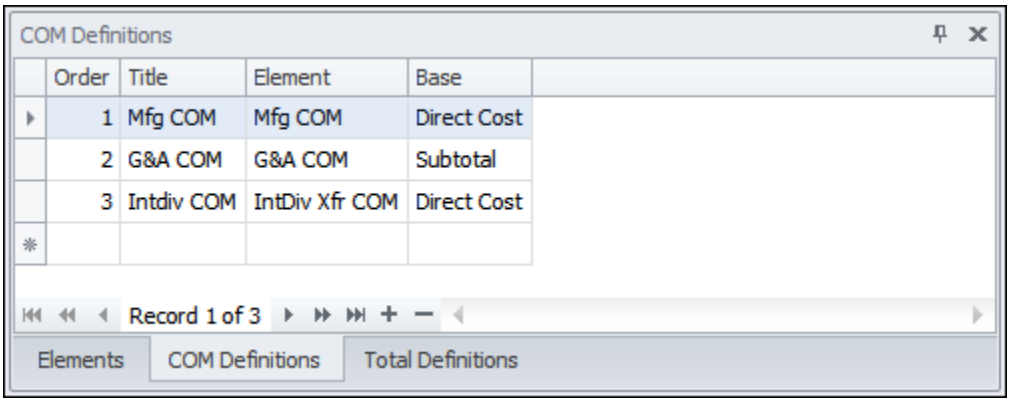
Resource Field

This column is only enabled for rate modifiers, which must be linked to a resource field. In a Work Schedule Table, when a rate modifier is added to an accounting calendar, the resource field provides the available rate modifier values.

The resource fields you can select in this column come from the global Resource Field Library.

COM Definitions

The Cost of Money Definitions relate to DD Form 1861 and DD Form 1547. In those reports, ProPricer calculates the Facilities Capital Cost of Money with the defined COM categories. If you have no need for DD Form 1861 or DD Form 1547, then you can leave the COM Definitions grid blank.



Order

The defined COM categories appear in this order in DD Form 1861.

Title

The title, or name, identifies the COM category in DD Form 1861.

Element

The selected Algorithm element is the indirect expense associated with the defined COM category. ProPricer uses the element's indirect rate, or factor, for COM calculations in DD Form 1861 and DD Form 1547.

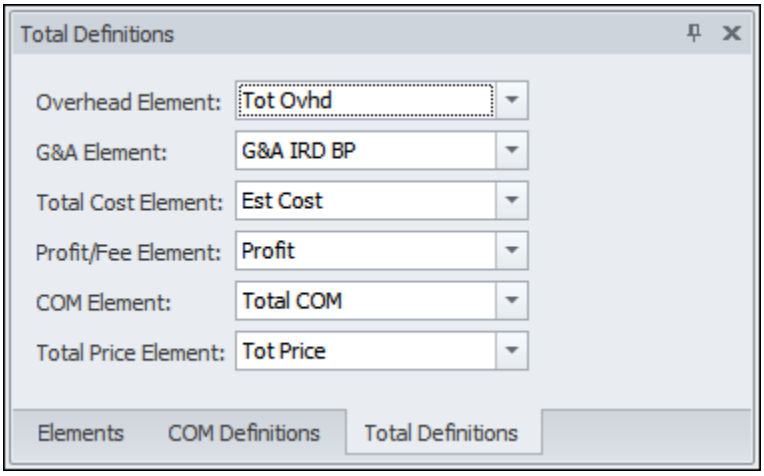
Base

ProPricer multiplies the selected base by the Algorithm element's indirect rate, or factor, to produce the COM amount. The sum of the individual COM amounts is the Facilities Capital Cost of Money total.

Total Definitions

Here you identify which Algorithm element ProPricer should use for the different totals.

Total Price Element is the only required field.



Algorithm Formula

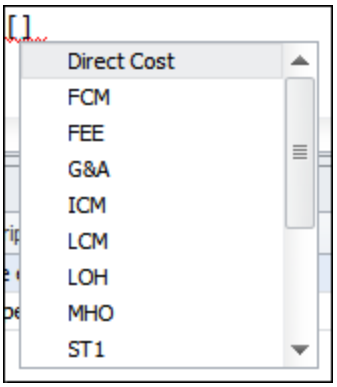
The Algorithm formula should contain expressions that tell ProPricer how to calculate each indirect expense in a proposal.

While editing the formula, you can use standard mathematical equations or logical statements.

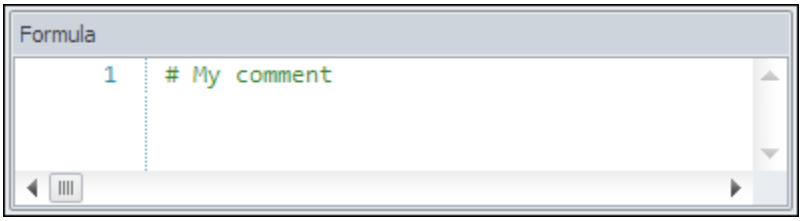
The following functions are available in the Algorithm formula editor:

- And
- Base
- If
- Log
- Ln
- Not
- Or
- Power
- Round
- RoundDown
- RoundUp
- Year

ProPricer will assist you as you type in the editor. For example, when you type [, a menu lists the information that can follow an opening bracket without causing an error.



If you want to add a comment, type # at the beginning of the line. The text will turn green.



When you finish editing the formula, save your changes in the Algorithm file by clicking **Save** or **Save As** on the ribbon. To use the updated Algorithm in ProPricer, click **Publish**.

Example: Editing a Formula

In this example, the formula has expressions that use codes for the Algorithm elements.

Order	Name	Code	Description	Type	Printable
1	Labor Ovhd	LOH	Labor Overhead	Input	☑
2	Mat Hnd OH	MHO	Material Handling OH	Input	☑
3	Tot Ovhd	TOH	Total Overhead	Cost Level	☑
4	Subtotal	ST1	Subtotal	Cost Level	☑
5	G&A IRD BP	G&A	G&A, IR&D / B&P	Input	☑
6	Tot Indrct	TIN	Total Indirect	Cost Level	☑
7	Est Cost	ST2	Estimated Cost	Cost Level	☑
8	Profit	FEE	Profit	Input	☑
9	Cst + Fee	ST3	Total Cost + Fee	Cost Level	☑
10	Mfg COM	LCM	Mfg Cost of Money	Input	☑
11	G&A COM	FCM	G&A Cost of Money	Input	☑
12	IntDiv Xfr COM	ICM	Interdivisional Transfer FCCOM	Input	☑
13	Total COM	TCM	Total COM	Cost Level	☑
14	Tot Price	ST4	Total Price	Cost Level	☑
					☐

Record 1 of 14

Line 1 of the formula states that Labor Overhead (LOH) equals Direct Cost multiplied by the Labor Overhead rate.

Formula

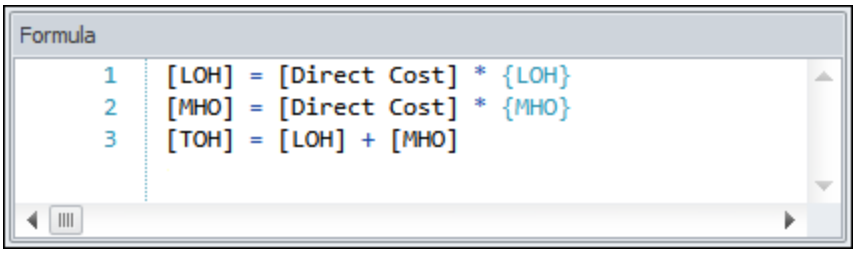
```
1  [LOH] = [Direct Cost] * {LOH}
```

Line 2 states that Material Handling Overhead (MHO) equals Direct Cost multiplied by the Material Handling Overhead rate.

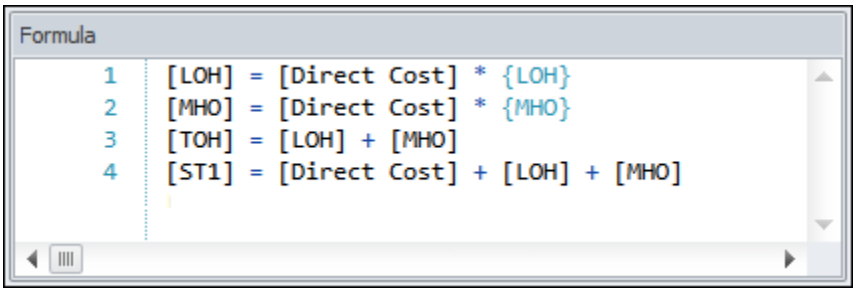
Formula

```
1  [LOH] = [Direct Cost] * {LOH}
2  [MHO] = [Direct Cost] * {MHO}
```

Line 3 states that Total Overhead (TOH) equals Labor Overhead plus Material Handling Overhead.

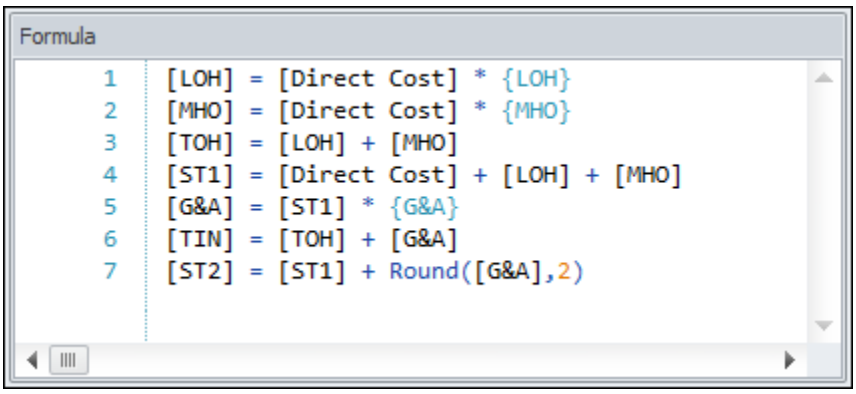


Line 4 states that Subtotal (ST1) equals Direct Cost plus Labor Overhead and Material Handling Overhead.



Example: Rounding in a Formula

In this example, line 7 rounds G&A to two decimal places in the Estimated Cost (ST2) calculation. *Round* precedes the G&A element code, and it is followed by *2* to indicate the number of decimal places.

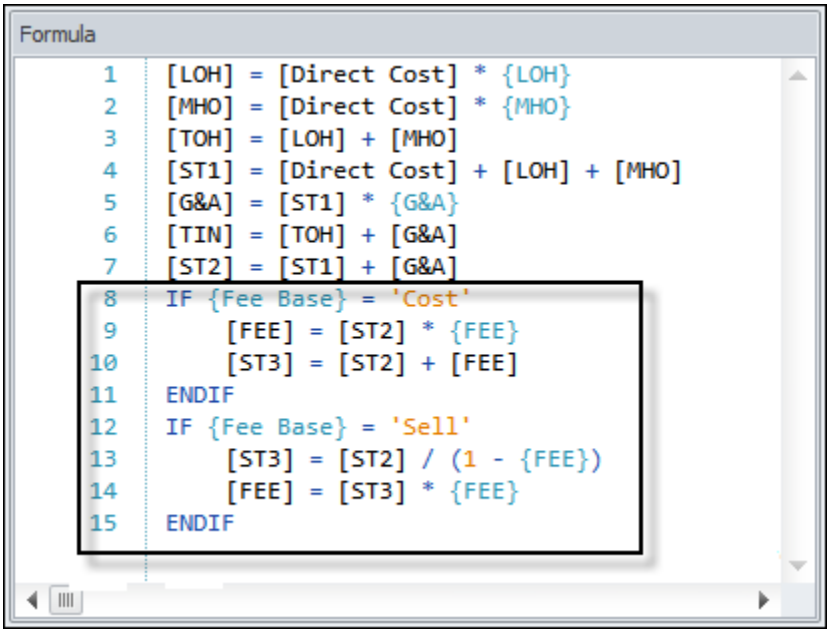


You can use *RoundUp* or *RoundDown* instead of the *Round* function. They ensure that ProPricer always rounds up or down, respectively.

Example: IF Statements in a Formula

When a formula has *IF* statements, you can see how they work by testing the formula and changing the parameters.

In this example, lines 8 to 15 define the Profit/Fee calculation, which depends on the Fee Base of the proposal. The Fee Base could be Cost or Sell, so *IF* statements are used to cover both scenarios.



IF statements can also be based on resource fields, summary fields, and proposal user fields you have created. This is helpful when the calculation of some costs depends on certain resource, task, or proposal information. When a specific value is entered in a resource field, summary field, or proposal user field, the formula will calculate accordingly.

Here is an example with a resource field in lines 2 to 4 of another formula. If the resource field *Location* contains the value *International*, then a cost of living allowance (COLA) will be calculated for the resource. Line 5 adds the allowance to the resource's direct cost.

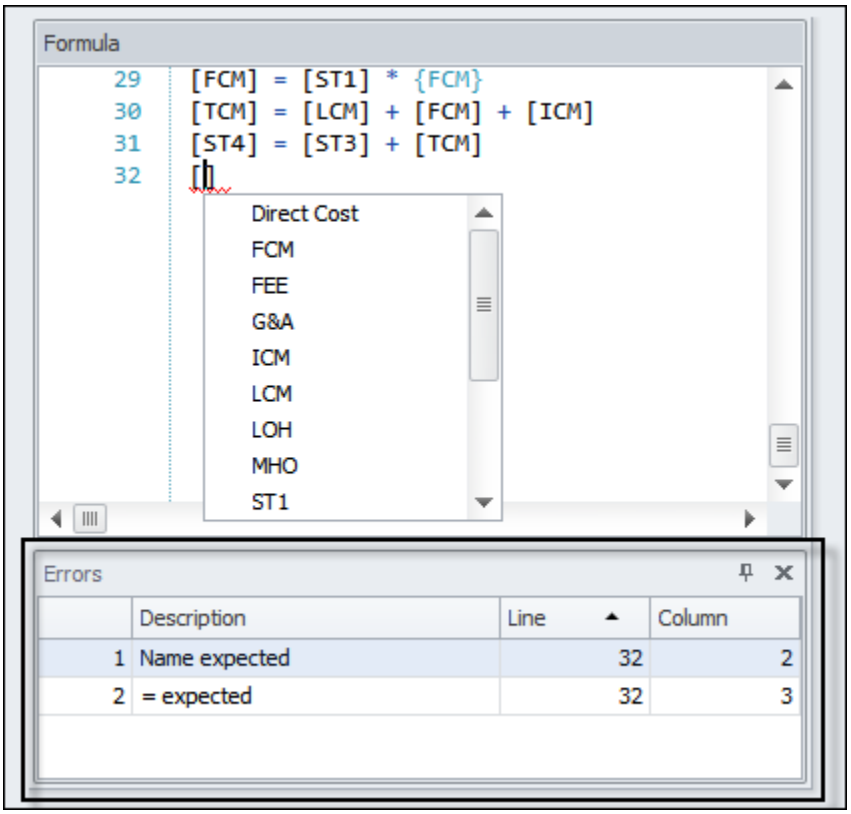
Formula

```
1  #Direct Cost (Including Shift Differentials)
2  IF ResourceField('Location')='International'
3      [COLA] = [Direct Cost] * {COLA}
4  ENDIF
5  [Direct Cost (w/ Differentials)] = [Direct Cost] + [COLA]
```

*Note: To use a summary field or proposal user field in IF statements, follow the same syntax as you would with a resource field. Just type **SummaryField** or **ProposalField** instead of **ResourceField** before specifying the field name.*

Algorithm Formula Errors

The **Errors** section immediately informs you of any problems in the Algorithm formula, and it tells you where to find them.



Description

The description briefly explains the error.

Line

The line number indicates where the error is. In the formula, the numbers are listed on the left.

Column

The column number indicates where the error is. Unlike line numbers, columns numbers are not shown in the formula.

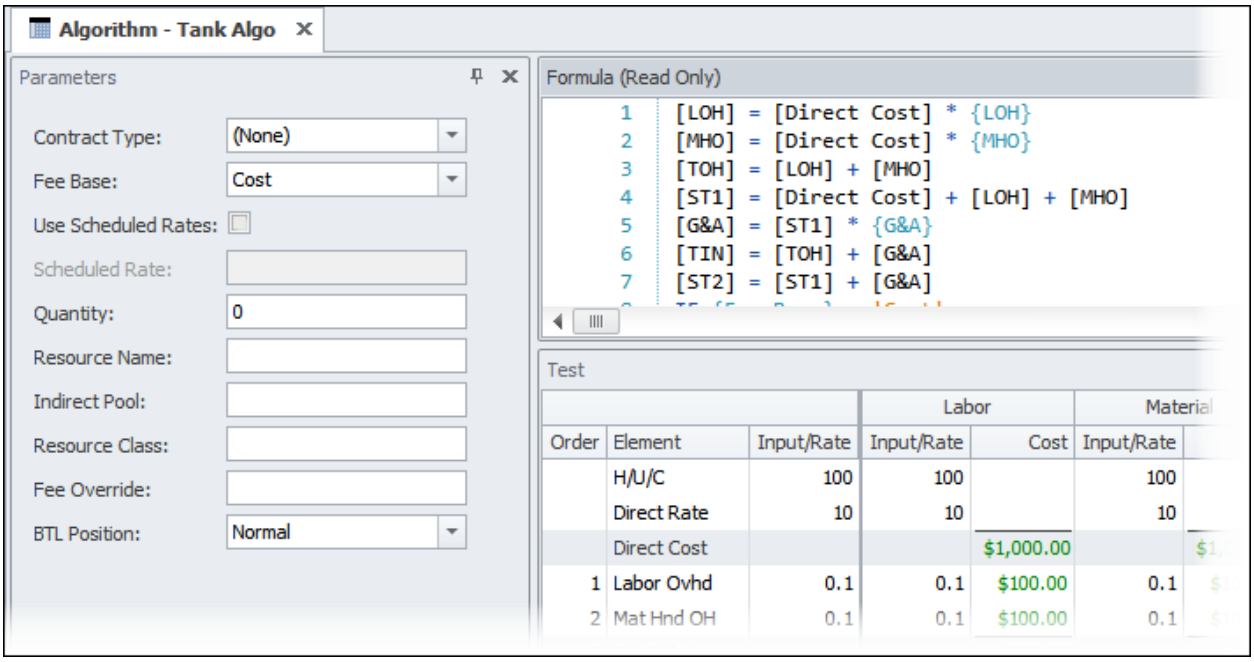
Algorithm Testing

While testing an Algorithm, there is a Test ribbon and your Workspace is divided into three sections.

In the Parameters section, you can try different parameter values and see how they affect the formula's calculations.

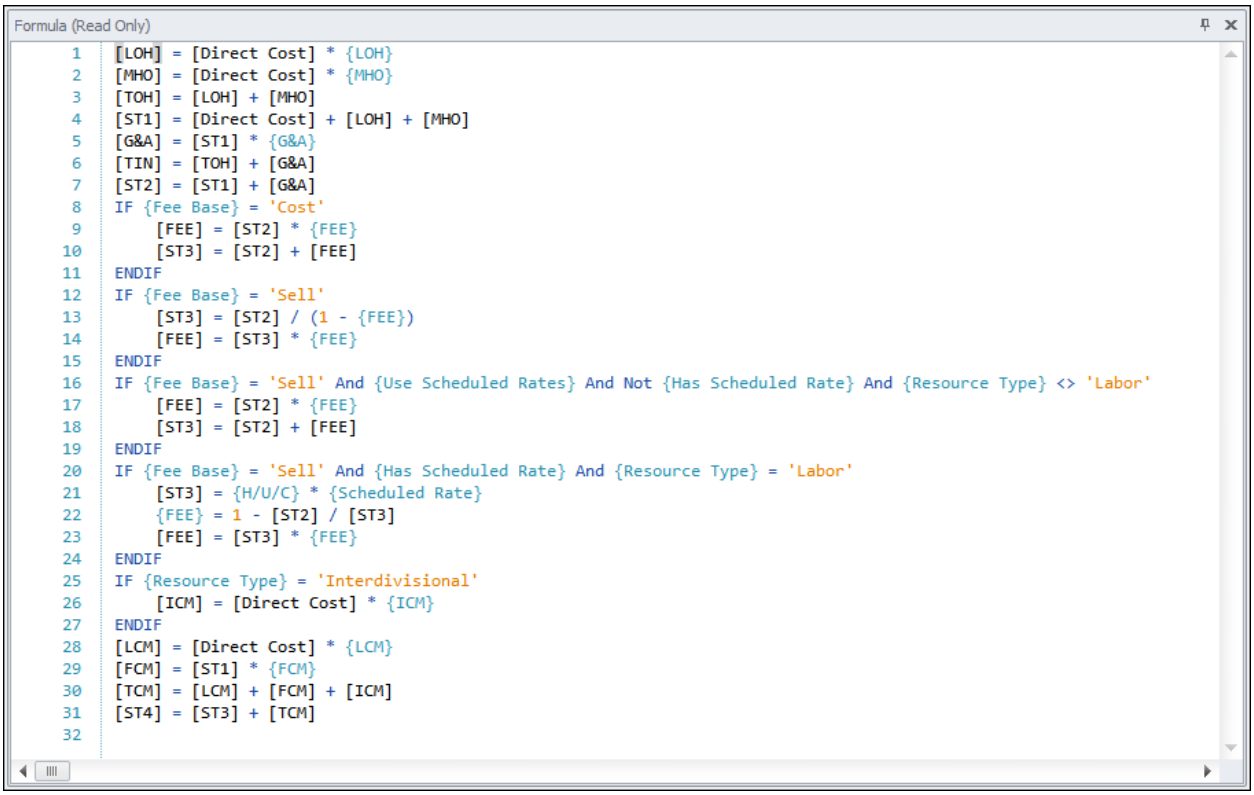
The Formula (Read Only) section shows the Algorithm formula so you can refer to it during testing. If you need to change the formula, click **Edit** on the ribbon.

The Test section shows how the formula works with example data.



Algorithm Formula (Read Only)

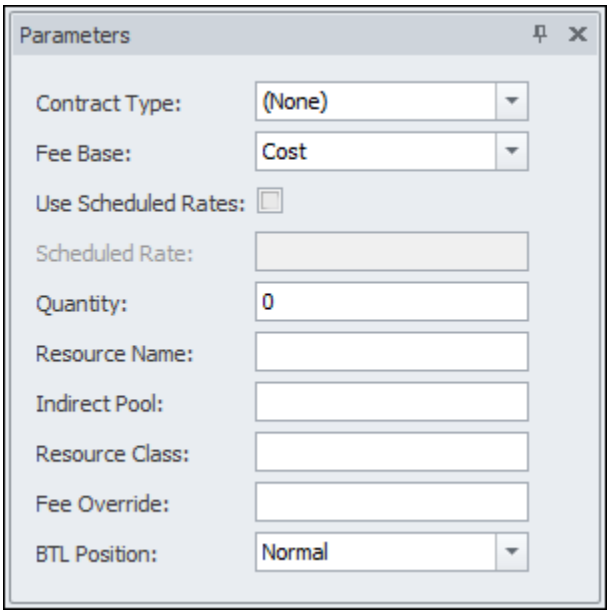
The Formula (Read Only) section shows the entire Algorithm formula. To change the formula, stop testing and click **Edit** on the ribbon.



Algorithm Test Parameters

When your Algorithm formula has *IF* statements for the contract type, scheduled rates, indirect pool, etc., you can change the related parameter and immediately see its effect in the **Test** section.

Note: IF statements let you use resource and proposal user fields in the Algorithm formula.



Our Algorithm has two *IF* statements to calculate the profit/fee. There is one for **Fee Base** *Cost* and another for **Fee Base** *Sell*.

```
IF {Fee Base} = 'Cost'
    [FEE] = [ST2] * {FEE}
    [ST3] = [ST2] + [FEE]
ENDIF
IF {Fee Base} = 'Sell'
    [ST3] = [ST2] / (1 - {FEE})
    [FEE] = [ST3] * {FEE}
ENDIF
```

This is what the **Test** section shows with the **Fee Base** set to *Cost*.

Test

			Labor		Material		Subcontractor		Other		Travel		Interdivisional	
Order	Element	Input/Rate	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost
	H/U/C	100	100		100		100		100		100		100	
	Direct Rate	10	10		10		10		10		10		10	
	Direct Cost			$1,000.00		$1,000.00		$1,000.00		$1,000.00		$1,000.00		$1,000.00
1	Labor Ovhd	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
2	Mat Hnd OH	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
3	Tot Ovhd			$200.00		$200.00		$200.00		$200.00		$200.00		$200.00
4	Subtotal			$1,200.00		$1,200.00		$1,200.00		$1,200.00		$1,200.00		$1,200.00
5	G&A IRD BP	0.1	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00
6	Tot Indrct			$320.00		$320.00		$320.00		$320.00		$320.00		$320.00
7	Est Cost			$1,320.00		$1,320.00		$1,320.00		$1,320.00		$1,320.00		$1,320.00
8	Profit	0.1	0.1	$132.00	0.1	$132.00	0.1	$132.00	0.1	$132.00	0.1	$132.00	0.1	$132.00
9	Cst + Fee			$1,452.00		$1,452.00		$1,452.00		$1,452.00		$1,452.00		$1,452.00
10	Mfg COM	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
11	G&A COM	0.1	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00
12	IntDiv Xfr COM	0.1	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$100.00
13	Total COM			$220.00		$220.00		$220.00		$220.00		$220.00		$320.00
14	Tot Price			$1,672.00		$1,672.00		$1,672.00		$1,672.00		$1,672.00		$1,772.00

We changed the **Fee Base** to *Sell* and immediately saw the impact on the total price.

Test

			Labor		Material		Subcontractor		Other		Travel		Interdivisional	
Order	Element	Input/Rate	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost
	H/U/C	100	100		100		100		100		100		100	
	Direct Rate	10	10		10		10		10		10		10	
	Direct Cost			$1,000.00		$1,000.00		$1,000.00		$1,000.00		$1,000.00		$1,000.00
1	Labor Ovhd	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
2	Mat Hnd OH	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
3	Tot Ovhd			$200.00		$200.00		$200.00		$200.00		$200.00		$200.00
4	Subtotal			$1,200.00		$1,200.00		$1,200.00		$1,200.00		$1,200.00		$1,200.00
5	G&A IRD BP	0.1	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00
6	Tot Indrct			$320.00		$320.00		$320.00		$320.00		$320.00		$320.00
7	Est Cost			$1,320.00		$1,320.00		$1,320.00		$1,320.00		$1,320.00		$1,320.00
8	Profit	0.1	0.1	$146.67	0.1	$146.67	0.1	$146.67	0.1	$146.67	0.1	$146.67	0.1	$146.67
9	Cst + Fee			$1,466.67		$1,466.67		$1,466.67		$1,466.67		$1,466.67		$1,466.67
10	Mfg COM	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
11	G&A COM	0.1	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00
12	IntDiv Xfr COM	0.1	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$100.00
13	Total COM			$220.00		$220.00		$220.00		$220.00		$220.00		$320.00
14	Tot Price			$1,686.67		$1,686.67		$1,686.67		$1,686.67		$1,686.67		$1,786.67

Algorithm Test Results

The Test section uses practice data to demonstrate how the Algorithm formula works. Shaded rows are for cost levels and subtotals, which are calculated automatically and appear in green text.

Test

			Labor		Material		Subcontractor		Other		Travel		Interdivisional	
Order	Element	Input/Rate	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost
	H/U/C	100	100		100		100		100		100		100	
	Direct Rate	10	10		10		10		10		10		10	
	Direct Cost			$1,000.00		$1,000.00		$1,000.00		$1,000.00		$1,000.00		$1,000.00
1	Labor Ovhd	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
2	Mat Hnd OH	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
3	Tot Ovhd			$200.00		$200.00		$200.00		$200.00		$200.00		$200.00
4	Subtotal			$1,200.00		$1,200.00		$1,200.00		$1,200.00		$1,200.00		$1,200.00
5	G&A IRD BP	0.1	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00
6	Tot Indrct			$320.00		$320.00		$320.00		$320.00		$320.00		$320.00
7	Est Cost			$1,320.00		$1,320.00		$1,320.00		$1,320.00		$1,320.00		$1,320.00
8	Profit	0.1	0.1	$132.00	0.1	$132.00	0.1	$132.00	0.1	$132.00	0.1	$132.00	0.1	$132.00
9	Cst + Fee			$1,452.00		$1,452.00		$1,452.00		$1,452.00		$1,452.00		$1,452.00
10	Mfg COM	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
11	G&A COM	0.1	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00
12	IntDiv Xfr COM	0.1	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$100.00
13	Total COM			$220.00		$220.00		$220.00		$220.00		$220.00		$320.00
14	Tot Price			$1,672.00		$1,672.00		$1,672.00		$1,672.00		$1,672.00		$1,772.00

If you change any hours/units/cost amounts or indirect rates in the grid, or if you change the parameters, the test results update immediately. All input/rate changes appear in blue text.

In the following example, we changed the overhead rate for labor to *1.4* and immediately saw the change in the total price.

Test

			Labor		Material		Subcontractor		Other		Travel		Interdivisional	
Order	Element	Input/Rate	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost	Input/Rate	Cost
	H/U/C	100	100		100		100		100		100		100	
	Direct Rate	10	10		10		10		10		10		10	
	Direct Cost			$1,000.00		$1,000.00		$1,000.00		$1,000.00		$1,000.00		$1,000.00
1	Labor Ovhd	0.1	1.4	$1,400.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
2	Mat Hnd OH	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
3	Tot Ovhd			$1,500.00		$200.00		$200.00		$200.00		$200.00		$200.00
4	Subtotal			$2,500.00		$1,200.00		$1,200.00		$1,200.00		$1,200.00		$1,200.00
5	G&A IRD BP	0.1	0.1	$250.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00
6	Tot Indrct			$1,750.00		$320.00		$320.00		$320.00		$320.00		$320.00
7	Est Cost			$2,750.00		$1,320.00		$1,320.00		$1,320.00		$1,320.00		$1,320.00
8	Profit	0.1	0.1	$305.56	0.1	$146.67	0.1	$146.67	0.1	$146.67	0.1	$146.67	0.1	$146.67
9	Cst + Fee			$3,055.56		$1,466.67		$1,466.67		$1,466.67		$1,466.67		$1,466.67
10	Mfg COM	0.1	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00	0.1	$100.00
11	G&A COM	0.1	0.1	$250.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00	0.1	$120.00
12	IntDiv Xfr COM	0.1	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$0.00	0.1	$100.00
13	Total COM			$350.00		$220.00		$220.00		$220.00		$220.00		$320.00
14	Tot Price			$3,405.56		$1,686.67		$1,686.67		$1,686.67		$1,686.67		$1,786.67

*Note: For a better understanding of the calculations, right-click the grid and select **View** > **Show Columns** > **Bases**.*

Create or Open an Algorithm File

To start an Algorithm from scratch, create a new file. If you have an existing Algorithm file that is complete or needs changes, open it in ProPricer.

After creating or opening an Algorithm file, you can edit it and test the formula. When the Algorithm is ready to be used, publish the file to your database.

Create a New Algorithm File

1. Do one of the following:
   - In the Main Menu, click **New Algorithm**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Algorithms** folder, then click **New Algorithm**.
2. On the **Edit** ribbon, click **Save** or **Save As**.
3. In the file explorer, enter a name for the Algorithm file (for example, *Algorithm.ppax*) and save it.

Open an Existing Algorithm File

1. In the Navigation Pane, click the **Rates/Tables** button, right-click the **Algorithms** folder, then click **Open from file**.
2. In the **Open Algorithm** dialog box, select the .bin or .ppax file.
3. Click **Open**.

Use and Manage Published Algorithms

You must publish an Algorithm file to add it to your database and use it in ProPricer. Published Algorithms appear in the **Algorithms** folder of the Navigation Pane.

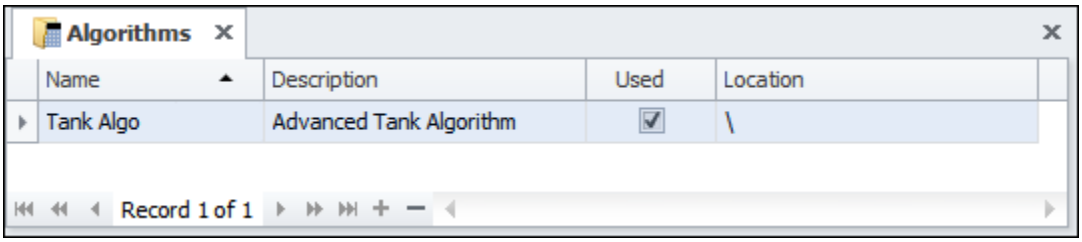
If you edit a published Algorithm, make sure you publish it again to update your database. This will apply your changes throughout ProPricer wherever the Algorithm is used.

Publish an Algorithm

1. Create or open an Algorithm file.
2. On the **Edit** ribbon, click **Publish**.
3. In the **Publish Algorithm** dialog box, click **OK**.

Algorithm List

The Algorithm List shows all the Algorithms that have been published to your database. It is also a convenient place to copy and delete Algorithms.



Name

The name of the Algorithm.

Description

The description of the Algorithm.

Used

This column indicates if the Algorithm is assigned to an Indirect Rate Table.

Location

The folder in which the Algorithm is stored. If there is no folder name after the backslash, it is stored in the root **Algorithms** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Algorithm Properties

The **Algorithm Properties** dialog box is where you define the Algorithm.

Name

Enter a name for the Algorithm.

Description

Enter a description for the Algorithm.

OK

Save the changes and closes the dialog box.

Cancel

Ignore the changes and closes the dialog box.

Apply

Save the changes without closing the dialog box.

Assign an Algorithm to a Work Schedule Table

To use a Work Schedule Table in a proposal, its Algorithm must match the Algorithm assigned to the proposal's Indirect Rate Table.

If you need to change the Algorithm assigned to an existing Work Schedule Table, ensure that the new Algorithm is equivalent. This means that the new Algorithm must have the same elements as the one being replaced.

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand the **Work Schedule Tables** folder.
2. Right-click the appropriate Work Schedule Table, and then click **Properties** in the shortcut menu.
3. In the **Algorithm** field, select an Algorithm.
4. Click **OK**.

Assign an Algorithm to an Indirect Rate Table

If you need to change the Algorithm assigned to an existing table, ensure that the new Algorithm is equivalent. This means that the new Algorithm must have the same elements as the one being replaced.

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand the **Indirect Rates** folder.
2. Right-click the appropriate Indirect Rate Table, and then click **Properties** in the shortcut menu.
3. In the **Algorithm** field, select an Algorithm.
4. Click **OK**.

Copy an Algorithm

1. In the Navigation Pane, expand the **Algorithms** folder.
2. Right-click an Algorithm, and then click **Copy**.
3. Select a save location for the copy. Leave this field blank to save it in the root folder, which is the **Algorithms** folder.
4. Enter a name and description for the copy.
5. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the Algorithm in your Workspace.
6. Click **OK**.

Delete an Algorithm

1. In the Navigation Pane, expand the **Algorithms** folder.
2. Right-click an Algorithm, and then click **Delete**.
3. Click **Yes** to confirm the deletion.

*Note: You can only delete an Algorithm that is not used anywhere in the system. If the Algorithm is used, ProPricer will display the **Item Usage Info** dialog box instead.*

Set an Algorithm as Current

Setting an Algorithm as current makes it the default Algorithm for every new Indirect Rate Table you create. ProPricer will automatically assign it in the Indirect Rate Table Properties.

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand the **Algorithms** folder.

2. Right-click the appropriate Algorithm, and then click **Current**. In the **Algorithms** folder, the name of the current Algorithm will appear in bold letters and its icon will have a star.

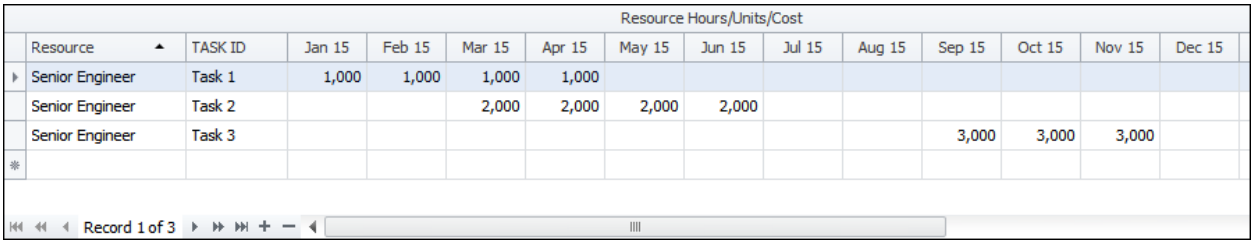
Allocations

Allocation Methods

Month-to-Month

Month-to-Month allocation spreads resources and equipment/ODC expenses in proportion to the total of the base level values for a specific month: allocation value of a specific month * (base level value of that month in the task / (base level value in Task 1 + base level value in Task 2 + base level value in Task 3)).

For example, our proposal has three tasks with the following resource assignments.

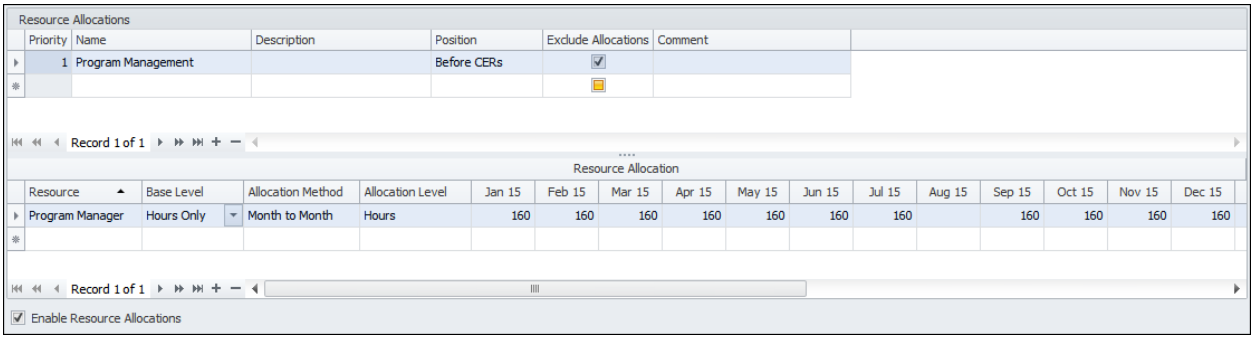


Resource Hours/Units/Cost

Resource	TASK ID	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Senior Engineer	Task 1	1,000	1,000	1,000	1,000								
Senior Engineer	Task 2			2,000	2,000	2,000	2,000						
Senior Engineer	Task 3									3,000	3,000	3,000	

Record 1 of 3

This is the resource allocation we will use.



Resource Allocations

Priority	Name	Description	Position	Exclude Allocations	Comment
1	Program Management		Before CERs	☑	

Record 1 of 1

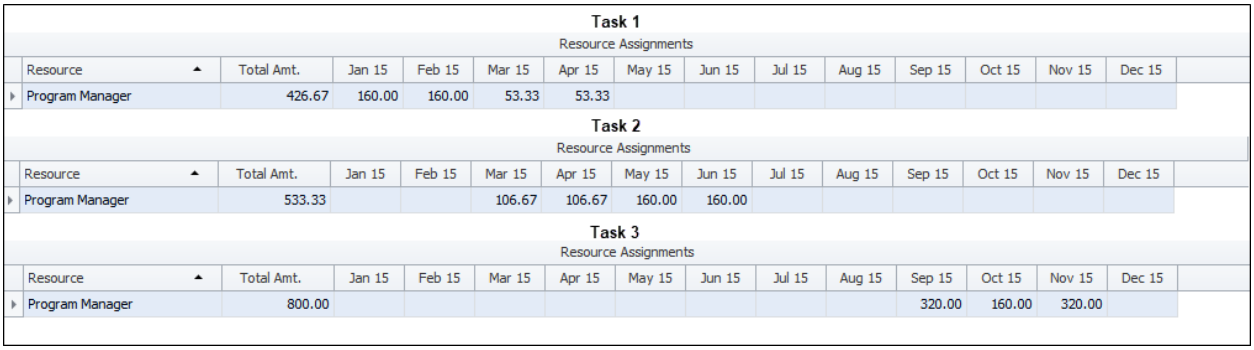
Resource Allocation

Resource	Base Level	Allocation Method	Allocation Level	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Program Manager	Hours Only	Month to Month	Hours	160	160	160	160	160	160	160		160	160	160	160

Record 1 of 1

☑ Enable Resource Allocations

The following screenshot shows the **Allocations** tab of all three tasks.



Task 1

Resource Assignments

Resource	Total Amt.	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Program Manager	426.67	160.00	160.00	53.33	53.33								

Task 2

Resource Assignments

Resource	Total Amt.	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Program Manager	533.33			106.67	106.67	160.00	160.00						

Task 3

Resource Assignments

Resource	Total Amt.	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Program Manager	800.00									320.00	160.00	320.00	

January 15 shows 160 allocated hours: 160 hours * (1,000 / (1,000 + 0 + 0)) = 160.

The 160 hours of March 15 will be allocated over Task 1 and Task 2 since they both have base level values. March 15 of Task 1 shows 55.33 allocated hours: 160 hours * (1,000 / (1,000 + 2,000 + 0)) = 53.33. March 15 of Task 2 shows 106.67 allocated hours: 160 hours * (2,000 / (1,000 + 2,000 + 0)) = 106.67.

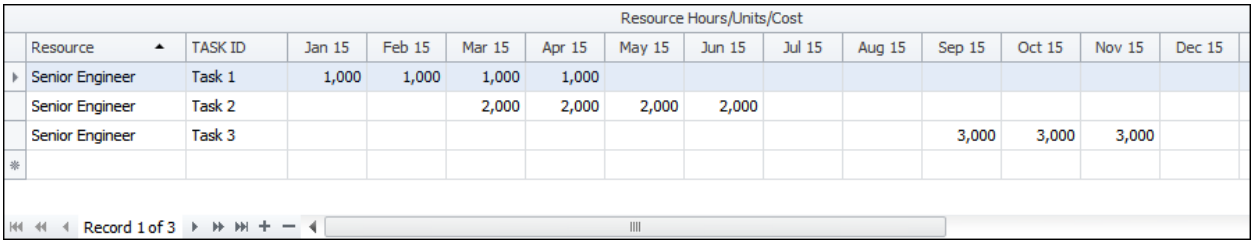
There are 160 hours to be allocated in July 15, but none of the tasks have base values. These 160 hours will be allocated to the next month with base values: September 15 in Task 3. This month shows 320 hours, which is the sum of its allocation of 160 hours and the 160 hours from July 15.

There are 160 hours to be allocated in December 15, but none of the tasks have base values. Since there are no base values past December 15, these 160 hours were allocated to November 15. This month shows 320 hours, which is the sum of its allocation of 160 hours and the 160 hours from December 15.

Month-to-Total

Month-to-Total allocation spreads resources and equipment/ODC expenses based on the total allocation multiplied by the ratio of total task to total base and the ratio of a single month to the total task.

Our proposal has three tasks with the following resource assignments.

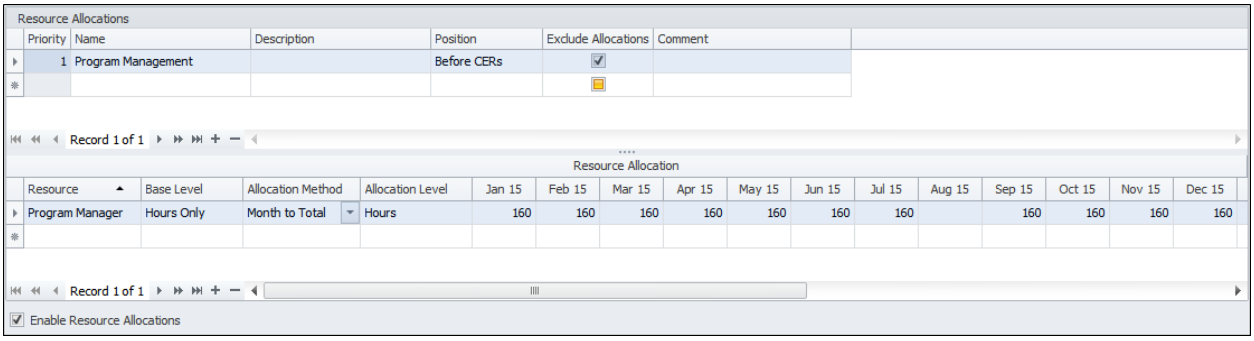


Resource Hours/Units/Cost

Resource	TASK ID	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Senior Engineer	Task 1	1,000	1,000	1,000	1,000								
Senior Engineer	Task 2			2,000	2,000	2,000	2,000						
Senior Engineer	Task 3									3,000	3,000	3,000	

Record 1 of 3

This is the resource allocation we will use:



Resource Allocations

Priority	Name	Description	Position	Exclude Allocations	Comment
1	Program Management		Before CERs	☑	

Record 1 of 1

Resource Allocation

Resource	Base Level	Allocation Method	Allocation Level	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Program Manager	Hours Only	Month to Total	Hours	160	160	160	160	160	160	160		160	160	160	160

Record 1 of 1

☑ Enable Resource Allocations

We need to calculate the percentage of total task to total base and month to total task:

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	Percent of total task to total base	Percent of month to total task
Task 1	1,000	1,000	1,000	1,000									4,000	19.048%	25%
Task 2			2,000	2,000	2,000	2,000							8,000	38.095%	25%
Task 3									3,000	3,000	3,000		9,000	42.857%	33%
													21,000		

Hours to be allocated

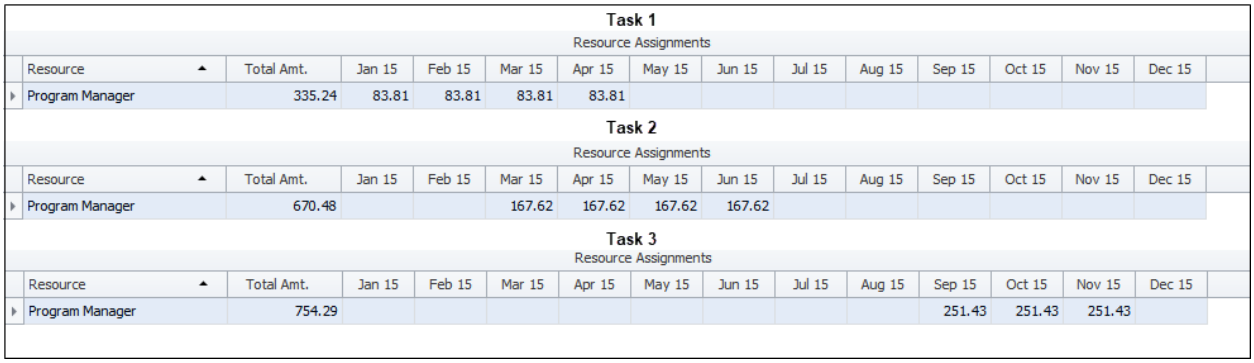
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
160	160	160	160	160	160	160		160	160	160	160	1,760

To calculate the monthly allocations, we multiply total allocation by the percent of total task to total base and by the percent of month to total task.

- Task 1 = 1,760 * 19.048% = 335.244 * 25% = 83.81

- Task 2 = 1,760 * 38.095% = 670.472 * 25% = 167.62
- Task 3 = 1,760 * 42.857% = 754.283 * 33.33% = 251.43

The following screenshot shows the **Allocations** tab of all three tasks.



Task 1

Resource Assignments

Resource	Total Amt.	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Program Manager	335.24	83.81	83.81	83.81	83.81								

Task 2

Resource Assignments

Resource	Total Amt.	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Program Manager	670.48			167.62	167.62	167.62	167.62						

Task 3

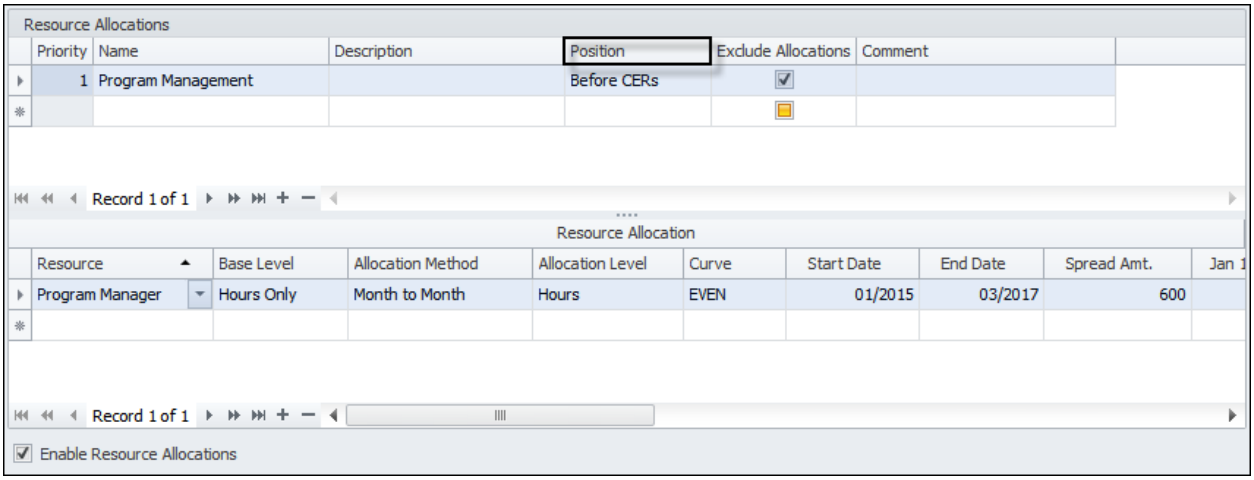
Resource Assignments

Resource	Total Amt.	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15	Dec 15
Program Manager	754.29									251.43	251.43	251.43	

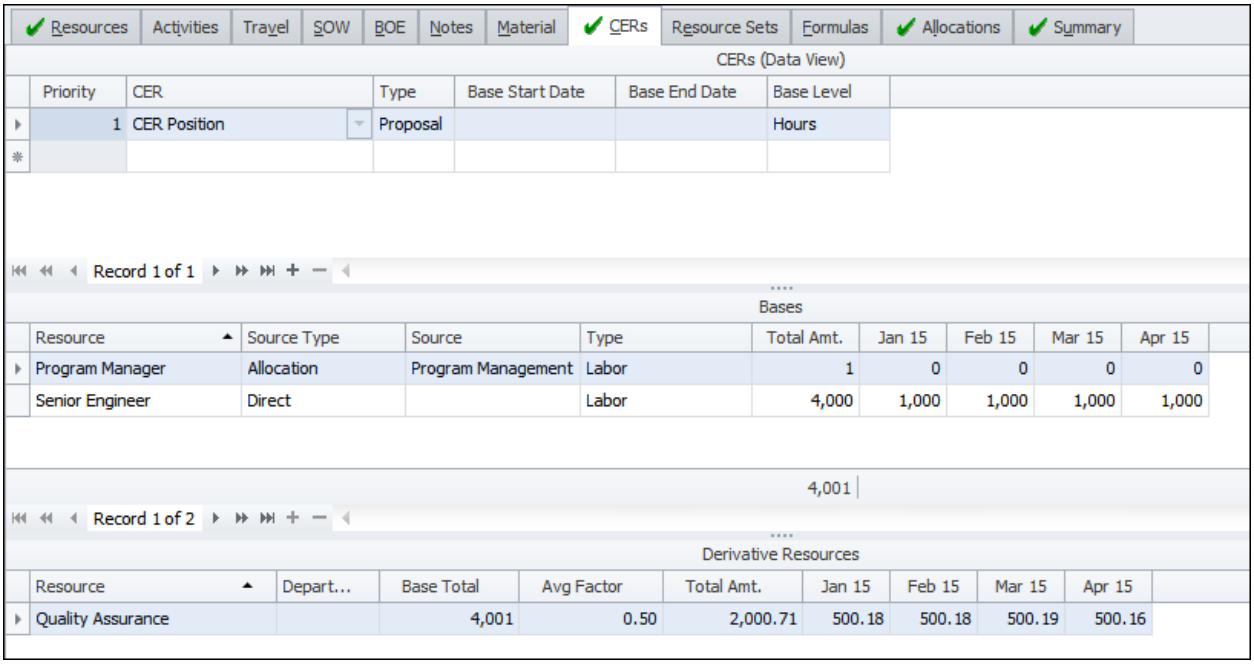
Allocation Position

The **Position** determines if the allocated resource or equipment/ODC expense group is included in or excluded from the calculation of the derivative resource of a CER.

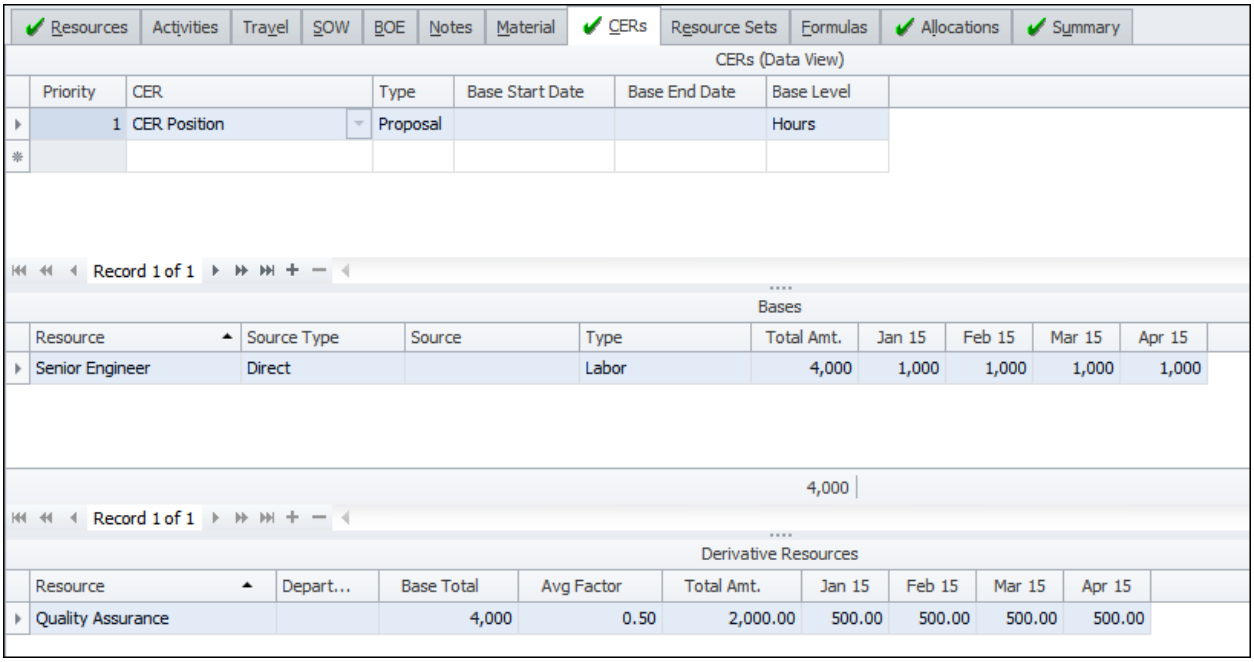
For example, our CER adds a *Quality Assurance* resource for every resource whose resource type is *Labor*. Our resource allocation adds a *Program Manager* resource.



The following example shows the **CERs** tab, using *Before CERs* as the **Position**. *Program Manager* was added as a base resource and is used in the calculations of the derivative resource.



We changed the **Position** to *After CERs*. Now *Program Manager* is excluded from the calculations of the derivative resource.



Equipment/ODC Allocations

This feature lets you create a group of below the line (BTL) expenses and allocate them throughout the proposal. The expenses you group here come from the Equipment/ODC Expense Library.

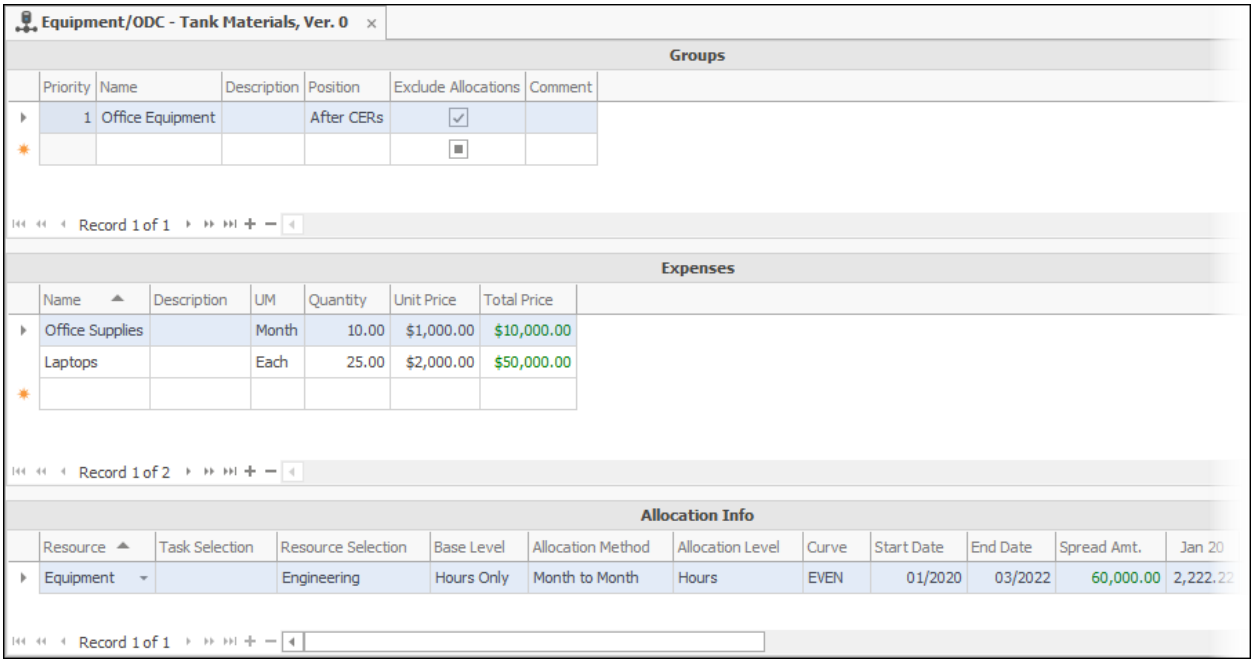
Allocating equipment and other direct costs is similar to allocating resources in ProPricer, and all allocation data in a proposal appears in the Allocations tab.

If an allocation should only apply to specific tasks or resources, use a task or resource selection. For example, a resource selection can allocate the expenses for your labor resources only.

To quickly print the details of the expense groups, run the Equipment/ODC Report.

The Equipment/ODC Allocations feature is divided into three grids: Groups, Expenses, and Allocation Info.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Groups

Priority

This field is for information only. It indicates the order in which equipment/ODC allocations are added to the proposal.

Name

Enter a name for the group of expenses. To copy an existing group, right-click it, then select **Copy**.

Description

Enter a description of the group.

Position

Enter *Before CERs* to include the allocated expenses in the calculation of the derivative resource. Enter *After CERs* to exclude the allocated expenses from the calculation of the derivative resource. See *Allocation Position* to learn more.

Exclude Allocations

Select this checkbox if you want previous allocations to be excluded from the current allocation.

Comment

Enter any applicable comment.

Expenses

Name

Select an expense from the Equipment/ODC Expense Library. Expenses must exist in the library before you can select them in a proposal.

Description

This column shows the default description from the library. You can change it in the proposal without affecting the information in the library.

UM

This column shows the default unit of measurement from the library. You can change it in the proposal without affecting the information in the library.

Quantity

Enter a quantity for the expense.

Unit Price

This column shows the default unit price from the library. You can change it in the proposal without affecting the information in the library.

Total Price

ProPricer calculates the total price automatically. The expense's total price equals the quantity multiplied by the unit price. In the **Allocation Info** grid, the total price of all expenses is the spread amount.

Allocation Info

Resource

Select a resource to associate with the expense group so it can be allocated in the proposal. The rate type of the resource, which is set in the Direct Rate Table, must be *Cost*.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter values in the fields as needed.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table for the resource. You can change it. This column is hidden by default.

Profit/Fee

Override the profit/fee rate of the resource. This column is hidden by default.

Task Selection

Enter a task selection if you want to apply the allocation to specific tasks.

Resource Selection

Enter a resource selection if you want to apply the allocation to specific resources.

Base Level

Enter the cost level that the allocation is based on. For example, it could be based on total overhead instead of hours.

Allocation Method

Specify whether the allocation will be based on month-to-month or month-to-total values. This changes how ProPricer calculates the allocated amounts in months/quarters/years. See *Month-to-Month* and *Month-to-Total* to learn more.

Allocation Level

Enter the type of cost that the allocation is applied as. For example, it can be applied as a direct cost or an overhead cost.

Curve

Enter a curve to distribute the spread amount.

Spread Method

Enter the spread method that defines how the curve will be applied over the spread period.

Start Date

Enter the date you want the allocation to start.

End Date

Enter the date you want the allocation to stop.

Spread Amount

ProPricer automatically calculates the spread amount by adding the total price of all expenses in the group. It cannot be edited.

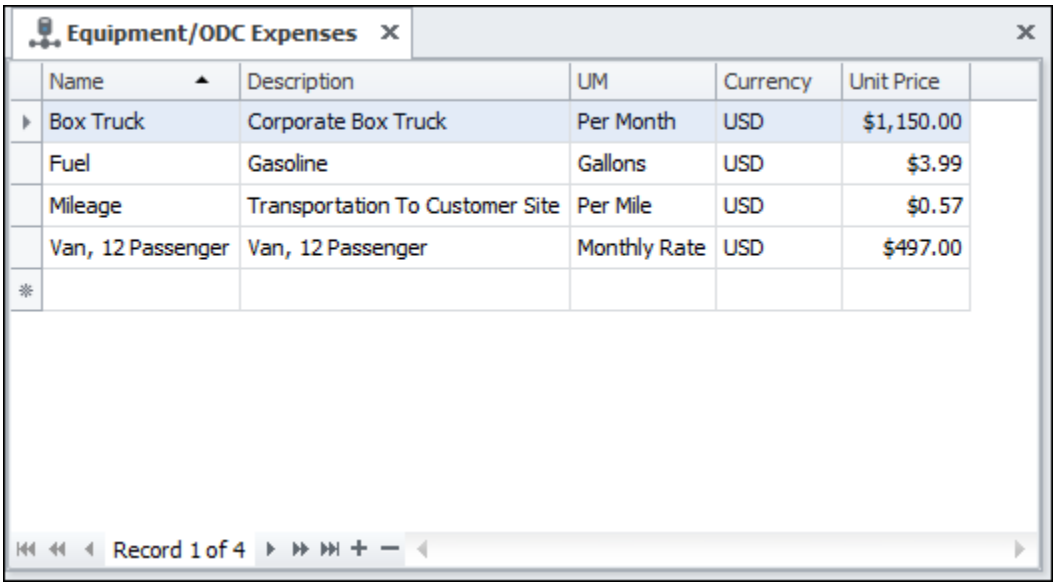
Distribution

Each column represents a month/quarter/year in the spread period and shows how much of the spread amount is distributed during that time.

Equipment/ODC Expense Library

This library stores the equipment and other direct cost expenses that can be grouped and allocated in proposals. Before setting up equipment/ODC allocations in proposals, create the expenses in this library first.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the expense.

Description

Enter a description of the expense.

UM

Enter the unit of measurement (EA for each, SF for square feet, etc.) of the expense. This is a text field for reporting purposes only.

Currency

Select a currency for the unit price of the expense.

The default currency is set in the System Options, and it is selected automatically when you create a new expense. If you select a different one, the text will change color to indicate an override of the default currency.

Unit Price

Enter the price for a single unit.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Resource Allocations

Resource allocations allow you to proportionally assign resources to your tasks based on a month-to-month or month-to-total basis.

You can also use allocations to assign a resource as an indirect cost if it is not normally represented as a rate. The rate is incorporated as an indirect cost and allocated across your resources.

You can specify the time spread of allocated resources, as well as the base for the allocation. For the month-to-month allocation method, if the base task does not have any resource assignments in a month where the allocated resources are to be spread, then the allocated resources will be summarized to the next month where there are resource assignments in the base task.

Allocating resources is similar to allocating equipment and other direct costs in ProPricer, and all allocation data in a proposal appears in the Allocations tab. Unlike equipment/ODC allocations, the resource allocation setup is in the Proposal Properties.

Archive

The Archive feature allows you to compress proposals, proposal templates, and global data in a .zip file. This makes it easier to transfer a proposal or template from one place to another, save computer space, or keep a copy of your work for future reference.

A global archive can include a single table or the entire database. A proposal archive can include only the global items related to the elements used in the proposal, or it can include the entire table or library related to the elements used in the proposal.

If you regularly archive many proposals at once, use Auto-Archiving to save time. With this feature, you can create jobs that automatically archive groups of related proposals while you are away.

Archive a Proposal

Archive a Proposal

1. On the **External Data** ribbon, in the **Archive** group, Click **Proposal**.
2. Enter the location of the folder where you want to save the .zip file.
3. Click the **Add** button to select the proposals to archive, or click the **Remove** button to remove a proposal from the list.
4. Set the remaining archive options.
5. Click **Process**.

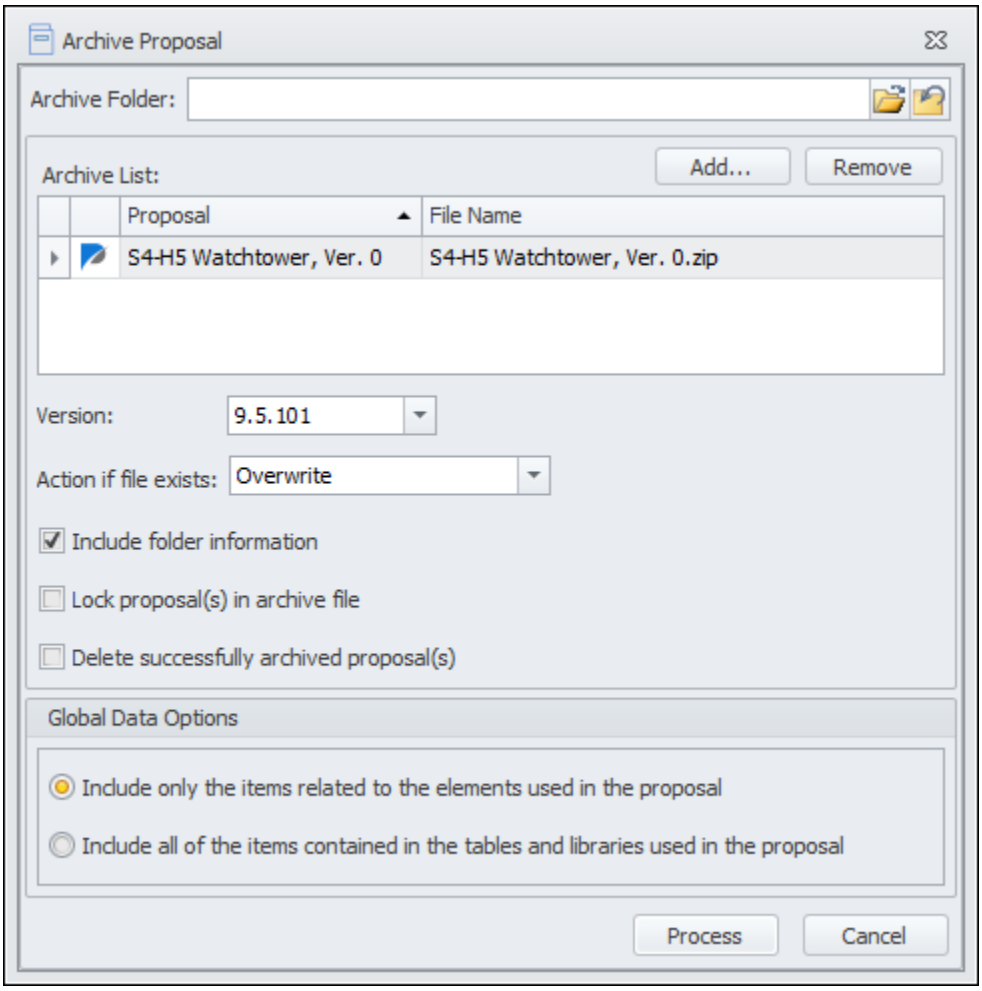
Note: You can also archive proposals automatically using ProPricer with Microsoft Windows Task Scheduler.

Archive a Proposal Template

1. On the **External Data** ribbon, in the **Archive** group, Click **Proposal Template**.
2. Enter the location of the folder where you want to save the .zip file.
3. Click the **Add** button to select the templates to archive, or click the **Remove** button to remove a templates from the list.
4. Set the remaining archive options.
5. Click **Process**.

Archive Proposal or Template Dialog Box

The archive process and options are the same for proposals and proposal templates.



Archive Folder

Enter the path of the folder where the archived data will be saved. This field may show the location of the last file you archived. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Archive List

This box will automatically display the proposal or template most recently selected in the Navigation Pane. Click the **Add** button to select more items, or click the **Remove** button to remove one from the list.

*Note: When you add a proposal or template to the list, ProPricer will automatically enter its name in the **File Name** field. You can accept this name or change it.*

Action if file exists

Here you select the option you want to use if duplicate files are found.

Skip

The new archive file will not be created.

Overwrite

The new archive file will replace the existing one.

Create New Name

The new archive file will be renamed.

Version

Select the version of ProPricer that the file will be compatible with. The most recent version is selected by default.

Include folder information

Select this checkbox to include the path to a specific proposal or template.

Lock proposal(s) or proposal template(s) in archive file

Select this checkbox to have ProPricer lock proposals or templates in the .zip files.

Delete successfully archived proposal(s) or proposal template(s)

Select this checkbox to remove proposals or templates from ProPricer once they are archived.

Global Data Options

These two options allow you to select which global elements you want to include in the .zip file.

Include only the items related to the elements used in the proposal or proposal template

For example, resources from your proposal's Direct Rate Table are only included in the archive if they are in the proposal.

Include all of the items contained in the tables and libraries used in the proposal or proposal template

For example, all resources from your proposal's Direct Rate Table are included in the archive, even those that are not in the proposal.

Process

Click this button to start the archive.

Cancel

Click this button to close the dialog box without archiving the data.

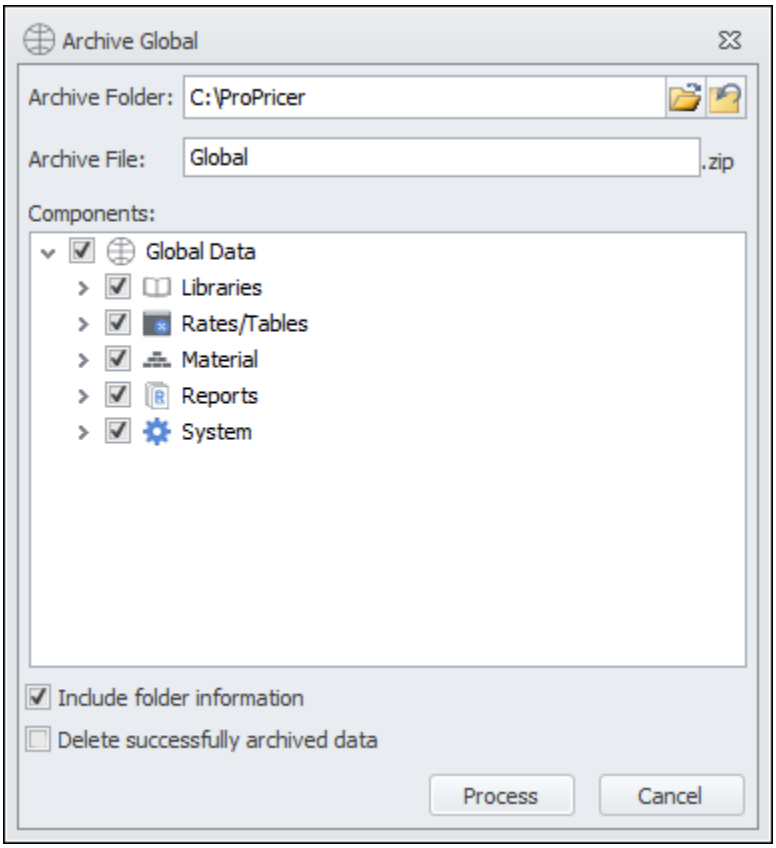
Archive Global Data

With the Archive Global Data feature, you can save anything from a single rate table to all global items in your ProPricer database.

1. Click the **External Data** ribbon.
2. Click **Global Data** in the **Archive** group. The **Archive Global** dialog box will open.
3. Enter the location of the folder where the .zip file will be saved.
4. Enter a name for the file.
5. Select the items to archive.
6. *(Optional)* You can archive the folders where the items are stored by selecting **Include folder information**. The checkbox is selected by default.
7. *(Optional)* You can automatically erase the selected global data items from your database after archiving by selecting **Delete successfully archived data**. The checkbox is cleared by default.
8. Click **Process**.

Archive Global Dialog Box

The **Archive Global** dialog box is where you select the global data you want to archive.



Archive Folder

Enter the path of the folder where the archived data will be saved. This field may show the location of the last file you archived. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Archive File

Enter a name for the .zip file ProPricer is going to create. ProPricer automatically adds the .zip file name extension.

Components

This area lists all the items you can archive. The global records are organized in subfolders. A plus sign in front of a folder indicates that the folder contains

subordinate items. Click the plus sign to expand the folder. Selecting the checkbox next to a top-level folder subsequently selects the checkboxes of all the elements within it. If you only want to archive specific data, expand the respective folder, and select the checkboxes of the individual elements.

Include folder information

Select this checkbox to include the path to a specific item.

Delete successfully archived data

Select this checkbox to clear your database of the global data items after you archive them.

Process

Click this button to start the archive.

Cancel

Click this button to close the dialog box without archiving the data.

Auto-Archiving

If you need to archive proposals regularly, especially large ones, Auto-Archiving can help you save time and avoid slowdowns. With this feature, Microsoft Windows Task Scheduler starts the proposal archiving process for you at a designated recurring time, even if you are away from your computer. All you need to do in ProPricer is define archive jobs for Task Scheduler to run. Once the jobs finish, you can track and review their details in job logs that appear in ProPricer.

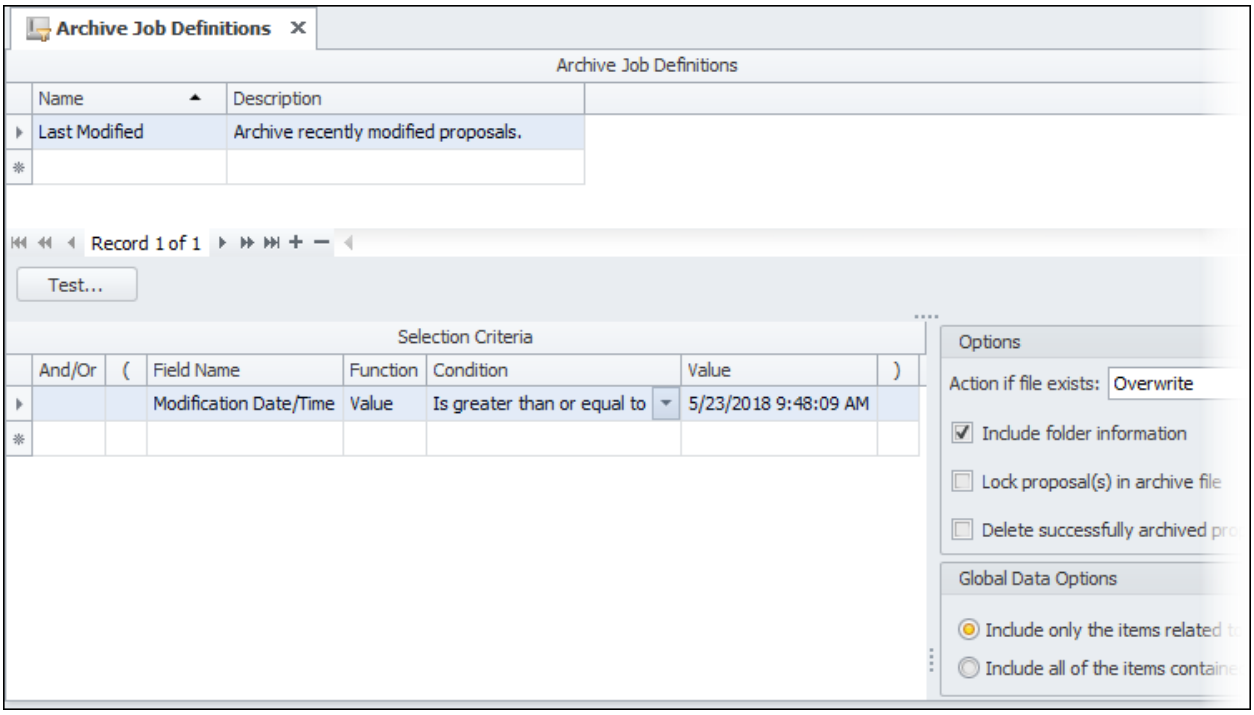
The main part of an archive job definition is the selection criteria. All proposals in a database that meet the criteria will be compressed into a .zip file when Task Scheduler begins the archiving process. Job definitions also contain data handling options to account for duplicate files, global data, etc.

To complete the initial Auto-Archiving setup, you must be familiar with Windows Task Scheduler. At least one task that can run *ProPricerArchiver.exe* with command line arguments will be required.

Archive Job Definitions Maintenance

In the Archive Job Definitions, you create and test selection queries for the proposals in your database that will be archived automatically (through Microsoft Windows Task Scheduler).

There are two grids: Archive Job Definitions and Selection Criteria. There is also an Options section and a Global Data Options section.



Archive Job Definitions

This grid shows all auto-archive jobs created. Each row in the grid represents a separate job. The **Test** button works with the job highlighted in the grid.

Name

Enter a name for the job.

Description

Enter a short description of the job.

Test

Click this button to see the **Archive Job Definition Result** dialog box, which lists the proposals that met the criteria of the query. The **Test** button becomes available after you save the selection.

Selection Criteria

Here you define the attributes of the proposals you want to include in the selection query. You can create simple queries, such as *Status Equals Submitted*, or complex queries that involve logic groups. The criteria include:

And/Or

Enter *And* or *Or*, to combine criteria. *And* means that a proposal should meet all the criteria specified to be included in the selection. *Or* means that a proposal should meet one of the specified criteria to be included in the selection. This column is disabled for the first line of the query.

(left parenthesis

Enter a left (opening) parenthesis if you want to create a complex query using logic groups. The logic group can include one criterion or combined criteria. A left parenthesis should always be followed by a right parenthesis. The right parenthesis does not necessarily have to be on the same line.

Field Name

Enter a category to use for the selection criterion. The available field names are the properties and details of proposals.

Function

When you enter the field name, the function becomes *Value* by default. You can then specify which field value to use in the criterion. For example, if you enter

Status in the **Field Name** column, then *Value* appears in the **Function** column, and you would enter *Canceled*, *In Progress*, *Loss*, etc. in the **Value** column.

For most fields, *Value* is the only function available. If the field name is related to a date/time and can serve as a point of reference, these additional functions may become available: *Days Since*, *Months Since*, *Years Since*, and *Year*. You can then set the corresponding amount of days/months/years, or the corresponding year, as the value. For example, if you enter *Days Since* in the **Function** column, you would enter the number of days in the **Value** column.

Condition

Enter the type of condition/comparison you want to apply to the field name and value. They include standard mathematical comparisons: *Equals*, *Does not equal*, *Is greater than*, *Is greater than or equal to*, *Is less than*, and *Is less than or equal to*. They also include *Contains*, *Is like*, *Is any of*, and *Is none of*.

Contains

This option allows you to find a string of contiguous characters anywhere within the field.

For example, *Proposal Name Contains Advanced* would find proposals such as *Advanced Tank* and *Advanced Tank Materials*, because *Advanced* is in both names. It would not find one named *Adv Tank*.

Is Like

This option allows you to use wildcards (* or ?) to find a string of non-contiguous characters.

For example, *Proposal Name Contains A* Tank* would find proposals such as *Advanced Tank*, *Advanced Tank Materials*, and *Adv Tank*. All proposal names start with an *A* followed by any sequence of characters, and all names end with *Tank*.

Is any of

This option allows you to select multiple values for the category entered in the **Field Name** column, thus eliminating the need to enter a separate record for each value.

Is none of

This option allows you to exclude from the selection the values listed in the **Value** column.

Value

Enter a value or select it from the drop-down list.

If you chose the *Is any of* or *Is none of* condition, clicking the lookup button will open the Edit List dialog box, which allows you to select the items you want to include or exclude from the list of criterion values.

) right parenthesis

Enter a right parenthesis, if applicable. The right (closing) parenthesis must be preceded by a left (opening) parenthesis.

Options

With these options, you can set preferences for handling the archive files.

Action if file exists

Here you select the option you want to use if duplicate files are found.

Skip

The new archive file will not be created.

Overwrite

The new archive file will replace the existing one.

Create New Name

The new archive will be renamed.

Include folder information

Select this checkbox to include the path to a specific proposal.

Lock proposal(s) in archive file

Select this checkbox to have ProPricer lock the proposal during the archive process. The .zip file will contain a locked proposal. It will not lock the proposal in the Proposals folder.

Delete successfully archived proposal(s)

Select this checkbox if you want ProPricer to remove the proposal or proposals from the list of proposals once they are archived.

Global Data Options

These two options allow you to select which global elements you want to include in the .zip files.

Include only the items related to the elements used in the proposal.

For example, resources from your proposal's Direct Rate Table are only included in the archive if they are in the proposal.

Include all of the items contained in the tables and libraries used in the proposal.

For example, all resources from your proposal's Direct Rate Table are included in the archive, even those that are not in the proposal.

Archive Job Logs

ProPricer keeps a log of every Auto-Archiving job that Microsoft Windows Task Scheduler runs. It displays information about the jobs (names, description, status, etc.), and it lists the details of each proposal in a job. If you test a job's selection criteria in the Archive Job Definitions, you can preview the proposal details that will be captured by the log.

View the Archive Job Logs

1. On the **Miscellaneous** ribbon, in the **Auto-Archiving** group, click **Archive Job Logs**.
2. In the top grid, click a job. The proposals included in the job will appear in the bottom grid.

Note: You can right-click a grid to print or export its data.

Create an Auto-Archiving Job

The process of creating an Auto-Archiving job starts in ProPricer, and it is finalized in Microsoft Windows Task Scheduler. Before you begin this process, you should know where to find *ProPricerArchiver.exe* on your computer.

In Windows Task Scheduler, you will need these *ProPricerArchiver.exe* command line parameters:

- **/ppc** - The .ppc (ProPricer Connection) file that will be used to connect. If no value is specified, use **/sn**, **/sp**, and **/cn** instead.
- **/sn** - The ProPricer server that will be used to connect. If a .ppc file is provided, this will be ignored.
- **/sp** - The ProPricer server port used to connect. If a .ppc file is provided, this will be ignored.
- **/cn** - The connection name used to connect. If a .ppc file is provided, this will be ignored.
- **/u** - The ProPricer user that will be used to connect. If Windows Authentication is used, this will be ignored.
- **/p** - The ProPricer password that will be used to connect. If Windows Authentication is used, this will be ignored.
- **/wa [Boolean]** - Uses Windows Authentication to connect to ProPricer. Beware that the current logon user will be used for this.
- **/job** - The archive job name to use.
- **/o** - The output path where to store the archives.

Enter the parameters in one of the following ways:

- /ppc:[PPC_FILE_PATH] /u:[PP_USER] /p:[PP_PASSWORD] /job:[JOB_NAME] /o:[OUTPUT_PATH]

- /sn:[SERVER_NAME] /sp:[SERVER_PORT] /cn:[CONNECTION_NAME] /wa /job:[JOB_NAME] /o:[OUTPUT_PATH]

Define and Schedule a Job

1. On the **Miscellaneous** ribbon, in the **Auto-Archiving** group, click **Archive Job Definitions**.
2. In the **Archive Job Definitions** grid, enter a job name and description.
3. Go to the **Selection Criteria** grid.
4. Define the selection criteria for the query. You can use logic groups and wildcards, but a simple query can be created without them.
5. Press **Ctrl**+**S** or move to another row to save your work.
6. Click **Test** to view the results.
7. Modify the criteria, if needed.
8. Open Windows Task Scheduler.
9. Schedule a task that starts *ProPricerArchiver.exe*, and add arguments with the command line parameters listed above. See the Microsoft Windows Task Scheduler Help information to learn more.

Use a Logic Group

1. Type a left parenthesis to open the logic group.
2. Enter the first criterion (**Field Name**, **Function**, **Condition**, and **Value**).
3. Select the conjunction. *And* narrows the search. *Or* expands it.

4. Enter the second criterion.

5. Type a right parenthesis to close the logic group.

Note: You can include several criteria (clauses) in a logic group, and you can embed logic groups in larger logic groups. Just remember that the number of left parentheses must equal the number of right parentheses.

Use Wildcards

1. In the **Condition** column, enter *Is like*.

2. In the **Value** column, enter the necessary characters and wildcards (* or ?).

   - An asterisk stands for continuous characters in a string. For example, *A** means any value beginning with the letter *A*, regardless of the subsequent characters and the word length.
   - A question mark stands for one character in a string. For example, *?A* means any value that is two characters long and has the letter *A* as the second character.

Ask Dela

Ask Dela is a digital artificial intelligence assistant powered by Azure OpenAI models. It is designed to integrate seamlessly with existing infrastructure while maintaining strict data privacy and security standards.

How does Ask Dela operate in the background to deliver its capabilities?

- Azure OpenAI integration: Ask Dela leverages the power of Azure OpenAI services, utilizing cutting-edge GPT-4 models or higher to ensure high-quality responses and interactions.
- User tenant deployment: Ask Dela is deployed within the user's Azure tenant. This setup ensures all interactions and data remain within the user's own environment, enhancing security and compliance with organizational policies.
- API key and configuration: To activate Ask Dela, administrators must provide the appropriate API key and related information from their Azure OpenAI tenant. This ensures the assistant can authenticate and operate correctly within the specified tenant.
- Data privacy and security: One of the core principles of Ask Dela is maintaining the privacy and security of user data. Deltek does not have access to any of the users' questions or data. All interactions with Ask Dela are processed within the user's own environment.
- Data storage and management: Users' questions and any related data are stored in the user's database. This information is under the user's control and can be managed as needed. Users can clear this data at any point, ensuring full control over their information.

To enable Ask Dela in ProPricer, visit the Deltek Software Manager at **dsm.deltek.com** to download the ProPricer Installation Guide. In the installation guide, follow the Ask Dela Setup instructions.

Asset Tables

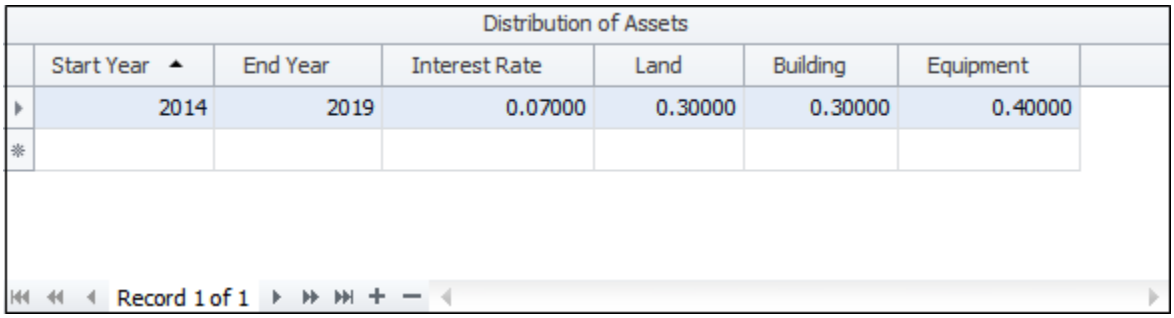
You need an Asset Table to run the Government reports DD Form 1547 and DD Form 1861. The Interest Rate and Land, Building, Equipment (LBE) factors you enter in the Asset Table are used to calculate the profit in DD Form 1547 and Facilities Capital Employed in DD Form 1861.

The table is divided into two grids: Distribution of Assets and Indirect Pool LBE Overrides.

LBE factors can be applied to every indirect pool in the Indirect Rate Table, or factors can be overridden for specific indirect pools. ProPricer will use any LBE factor overrides first.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Distribution of Assets



Start Year

Enter the year the distribution of assets will start.

End Year

Enter the year the distribution of assets will end.

Interest Rate

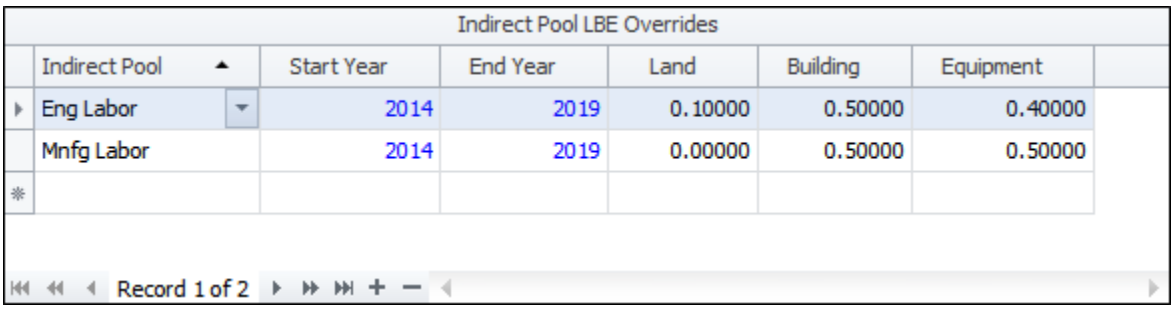
Enter the rate you want to appear in DD Form 1861 as the Treasury Rate. In DD Form 1547, this factor appears as the Interest Rate, which is used to calculate the Working Capital Profit Objective.

Land/Building/Equipment

Enter the respective distribution of the Facilities Capital Employed for DD Form 1861. The distribution is expressed in decimal factors, and the sum of the three factors must equal 1 (which is 100%).

Indirect Pool LBE Overrides

This grid allows you to specify LBE factors for a specific indirect pool.



Indirect Pool

Enter the name of the indirect pool.

Start Year

Enter the year the distribution of assets will start.

End Year

Enter the year the distribution of assets will end.

Land/Building/Equipment

Enter the respective distribution of the Facilities Capital Employed for DD Form 1861 in these columns. The distribution is expressed in decimal factors, and the sum of the three factors must equal 1 (which is 100%).

Asset Table Properties

The **Asset Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

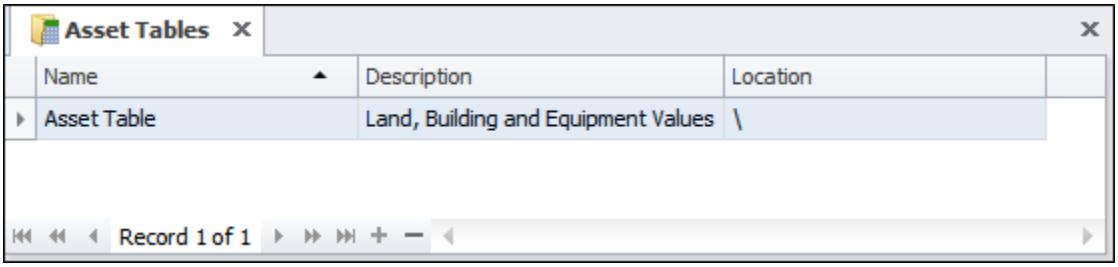
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Asset Tables List

The Asset Tables List shows all the Asset Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Asset Tables** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Assign an Asset Table to a Proposal

To ensure that the correct LBE factors are used in your proposal, you need to assign the Asset Table to the Indirect Rate Table associated with the proposal.

1. In the Navigation Pane, click the **Rates/Tables** button. Expand the **Indirect Rates** folder.
2. Right-click the appropriate Indirect Rate Table, and then click **Properties** in the shortcut menu.
3. In the **Asset Table** field, enter the name of the Asset Table.
4. Click **OK**.

Copy an Asset Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Asset Tables** folder.
    - Double-click the **Asset Tables** folder to open the list of Asset Tables.
3. Right-click the Asset Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy. Leave this field blank to store the copy in the root folder.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Create an Asset Table

1. Do one of the following:

   - In the Main Menu, click **New Asset Table**.

   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Asset Tables** folder, then click **New Asset Table**.

2. Enter a name and description for the new table.

3. Click **OK**. The Asset Table will open in the Workspace.

Delete an Asset Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Asset Tables** folder.
    - Double-click the **Asset Tables** folder to open the list of Asset Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete an Asset Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Audit Log

The Audit Log is capable of tracking any event that happens in your ProPricer system. It includes everything in the Change Log, as well as the security-related events selected on the System Logs page of the System Options. After selecting at least one event to record in the System Options, you will enable the Audit Log.

If you are concerned with or responsible for the safety of your organization's data, use the Audit Log to monitor events such as failed login attempts and changes to Access Rights. Depending on what you track, you can use the Audit Log to prove compliance with government security guidelines.

Tracking numerous events in the Audit Log might cause ProPricer to perform slowly due to extensive communication between the client and server. It is recommended that you keep the log's events to a minimum.

Note: Right-click the Audit Log grid for filtering, sorting, and grouping options.

Enable the Audit Log

1. On the **Setup** ribbon, in the **Preferences** group, click **System Options**.
2. On the **System Logs** page, select the events the log will record. At least one must be selected to enable the Audit Log.
3. Click **OK** or **Apply**.

View the Audit Log

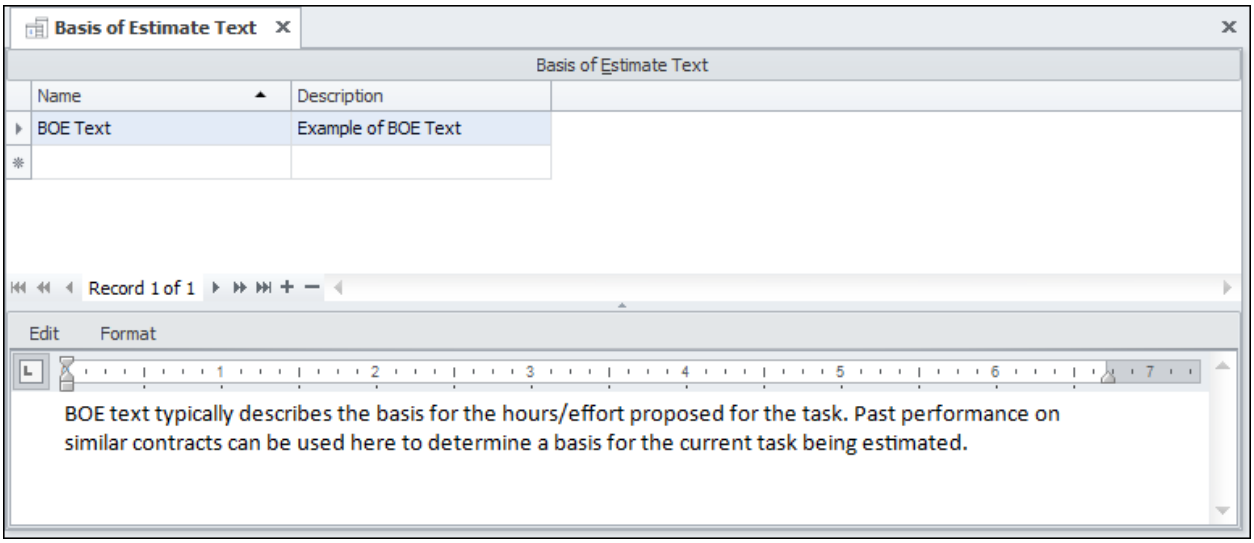
1. On the **Miscellaneous** ribbon, click **Audit Log**.
2. *(Optional)* In the **Filter** section, fill out the fields to narrow down the events that will be shown in the log.
3. Click **Find**.

Note: You must enable the Audit Log before you can view it.

BOE Text Library

The BOE Text Library is for basis of estimate text that you can later add to your tasks.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the entry.

Description

Enter a description of the entry.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Create SOW or BOE Text Library Entries

You can create SOW or BOE Text Library entries that you can then add to tasks on the **SOW/BOE** tabs.

1. In the Navigation Pane, click the **Libraries** button, and then double-click **BOE Text** or **SOW Text**.
2. Enter a unique name for the text entry in the **Name** column.
3. Enter a short description for the text entry in the **Description** column.
4. Enter the text in the Text Area.
5. Press **Ctrl**+**S** or move to another row to save your work.

CER Factors

A CER factor can be applied to the input values of a base resource of a CER to calculate the values of its derivative elements. These factors are created in the CER Factor Library, and they are defined in CER Factor Tables.

A CER Factor Table becomes associated with a CER when a factor from the CER Factor Table is assigned to the CER in a CER Table. The factor can be assigned to the CER or to a derivative element of the CER.

Assign a CER Factor to a CER

Assign to a CER

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Expand the **CER Tables** folder, and then double-click a CER Table to open it.
3. In the **Cost Estimating Relationships** grid, select the CER you want to link with a CER factor.
4. In the **CER Factor** column, enter the name of the CER factor you want to use.
5. Press **Ctrl**+**S** or move to another row to save your work.

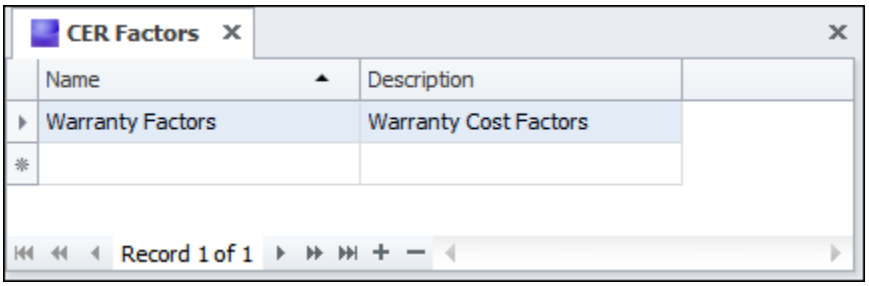
Assign to a Derivative Element of a CER

1. In the **Derivatives** grid, select the element you want to link with a CER factor.
2. In the **CER Factor** column, enter the name of the CER factor you want to use.
3. Press **Ctrl**+**S** or move to another row to save your work.

CER Factor Library

The CER Factor Library is where you create and store CER factors, which you use to link CERs to CER Factor Tables. To create this link, you assign a CER factor to a CER and include that CER factor in the CER Factor Table. You must also assign the CER Factor Table to the proposal on the Pricing page in the Proposal folder of Proposal Properties to be able to apply the factors.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the CER factor.

Description

Enter a description of the CER factor.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Copy a CER Factor within the Library

1. Right-click the CER factor you want to copy, and then click **Copy** on the shortcut menu.

2. Enter a name for the new CER factor, and then click **OK**.

Create a CER Factor

1. In the Navigation Pane, click the **Libraries** button, and then double-click **CER Factors**.
2. Enter a name for the CER factor.
3. Enter a description for the CER factor.
4. Press **Ctrl**+**S** or move to another row to save your work.

Delete a CER Factor from the Library

1. In the Navigation Pane, click the **Libraries** button.
2. Double-click **CER Factors**.
3. Right-click the CER factor you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when prompted.

*Note: You can only delete CER factors that are not used anywhere in the system. If the CER factor is used, ProPricer will display the **Item Usage Info** box instead.*

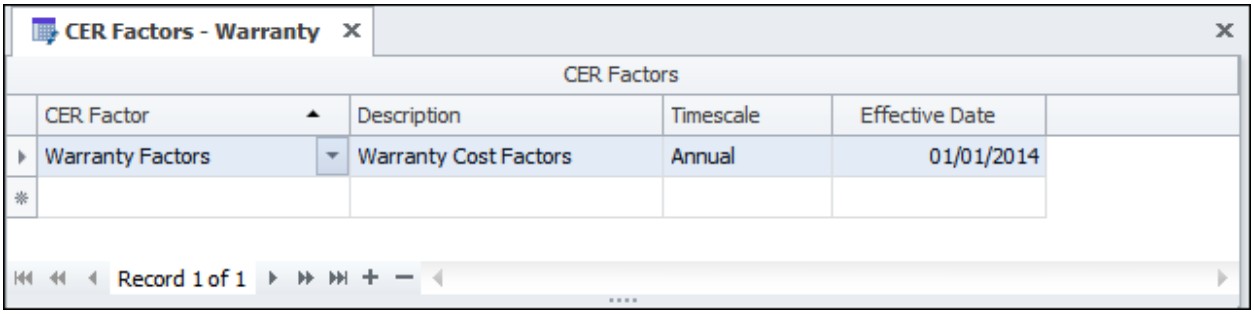
CER Factor Tables

CER Factor Tables are where you define the CER factors from the CER Factor Library. They are divided into two grids: CER Factors and Factors.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

CER Factors

In this grid, you add the CER factors from the CER Factor Library and define their timescale.



CER Factor

Enter the name of the CER factor.

Description

The description entered for the CER factor will appear here.

Timescale

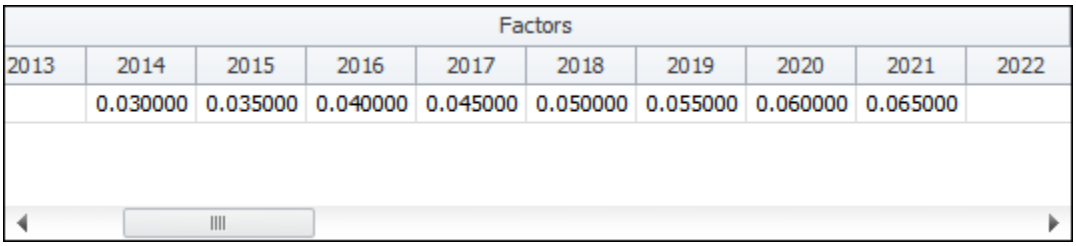
Enter the timescale: Annual, Quarterly, or Monthly.

Effective Date

Enter the date the factor will take effect. This is for information only.

Factors

Enter the factors. Depending on the timescale selected, the **Factors** grid shows yearly, quarterly, or monthly columns. When you assign a CER factor to a CER or to a derivative element of a CER, ProPricer applies these factors to the input values of the base elements to calculate the values of the derivative resources.



Factors									
2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
	0.030000	0.035000	0.040000	0.045000	0.050000	0.055000	0.060000	0.065000	

Assign a CER Factor Table to a Proposal

If you want to use a CER Factor Table with your CERs, you need to assign one to your proposal. The table should contain all the CER factors you want to assign to the CERs you will use in the proposal.

1. Click the **Proposals** button in the Navigation Pane.
2. Right-click the appropriate proposal.
3. On the shortcut menu, click **Properties**.
4. In the **Proposal** folder, click the **Pricing** page.
5. In the **CER Factor Table** field, enter the name of the CER Factor Table you want to use.
6. Click **OK** or **Apply**.

Note: To replace a proposal's CER Factor Table, the new table must contain all the CER factors assigned to the CERs used in the proposal.

CER Factor Table Properties

The **CER Factor Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

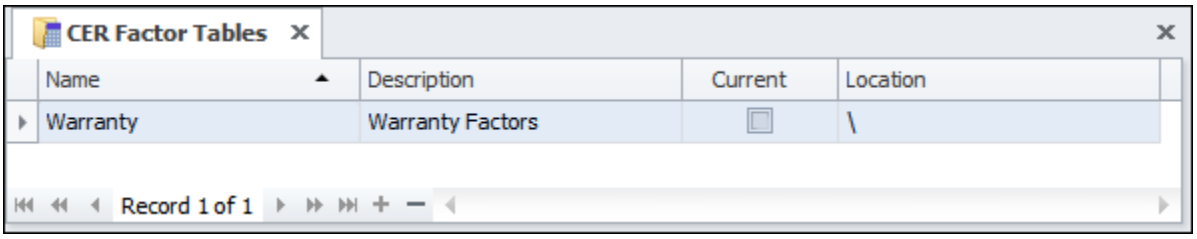
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

CER Factor Tables List

The CER Factors Tables List shows all the CER Factor Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Current

This checkbox indicates if a CER Factor Table is set as current. If selected, the table becomes the default for every new proposal you create, and it is automatically entered on the **Pricing** page in the **Proposal** folder of **Proposal Properties**.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **CER Factors** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Copy a CER Factor Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
   - Expand the **CER Factors** folder.
   - Double-click the **CER Factors** folder to open the list of CER Factor Tables.
3. Right-click the CER Factor Table you want to copy, and then click **Copy**.
4. Enter where you want to store the copy.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Copy a CER Factor to Another within a Table

After you define a CER factor, you can copy it to another CER factor in the table or to a new CER factor.

1. Right-click the CER factor you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the CER factor to which you want to copy the data.
3. Click **OK**.

ProPricer will check to see if data has been entered for the target CER factor and will:

- Copy it if there is none.
- Prompt you to replace the existing data with the new data.

Note: If the target CER factor does not exist in the CER Factor Library, ProPricer will offer you the option to add it to the library. ProPricer will create the CER factor in the library and then copy the factors for it in the table.

Create a CER Factor Table

1. Do one of the following:
   - In the Main Menu, click **New CER Factor Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **CER Factor Tables** folder, then click **New CER Factor Table**.
2. Enter a name and description for the new table.
3. Click **OK**. The CER Factor Table will open in the Workspace.

Current CER Factor Table

Setting a CER Factor Table as the current one indicates which table has the rates your company wants to use. It will be the default table for every new proposal you create and will automatically be entered on the **Pricing** page in the **Proposal** folder of **Proposal Properties**.

The name of the current table will appear in bold letters in the **CER Factors** folder in the Navigation Pane, and the icon will have a star. The table list has a **Current** checkbox as well.

You can open the table by clicking the **Current CER Factors** icon on the **Rates** ribbon. Or you can double-click the table in the Navigation Pane.

You can run the Audit Report to determine if your proposal is using the current CER Factor Table.

Notes:

- *There can only be one current CER Factor Table at a time. You can set another CER Factor Table as the new current table whenever necessary.*
- *You can switch the current CER Factor Table assigned to the proposal at any time.*
- *If there is no table set as the current one, the **CER Factor Table** field on the **Pricing** page in the **Proposal** folder of **Proposal Properties** will be blank when you create a new proposal.*
- *None of the exports distinguish if the CER Factor Table is set as current.*

- *The Archive/Restore processes do not distinguish if the CER Factor Table is set as current.*
- *Proposals that were locked with the current table are not affected by changes to the current table.*
- *You need the Associated Permission to be able to set a CER Factor Table as the current one.*

Define a CER Factor in a Table

1. In the Navigation Pane, click the **Rates/Tables** button, expand the **CER Factor Tables** folder, and then double-click the appropriate CER Factor Table.
2. In the **CER Factor** column, enter the name of the CER factor. ProPricer will retrieve the description and timescale of the CER factor from the library and enter them in the respective columns.
3. Enter the factors in the **Factors** grid.
4. Press **Ctrl**+**S** or move to another row to save your work.

Delete a CER Factor from a Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Expand the **CER Factor Tables** folder and then double-click the appropriate CER Factor Table.
3. Right-click the CER factor you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when prompted.

*Note: You can only delete CER factors that are not used anywhere in the system. If the CER factor is used, ProPricer will display the **Item Usage Info** box instead.*

Delete a CER Factor Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **CER Factors** folder.
    - Double-click the **CER Factors** folder to open the list of CER Factor Tables.
3. Right-click the table you want to delete, and then click **Delete**.
4. Click **Yes** when prompted to confirm the deletion.

*Note: You can only delete a CER Factor Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Fill Years with CER Factors in a Table

Fill Subsequent Years with Existing Factors

1. Right-click the column that has the factor you want to use.
2. Click **Fill** on the shortcut menu.
3. Enter the start year.
4. Specify how many years to fill with the factor by doing one of the following:
   - In the **Years** field, type the number of years, or click the spin button until the number appears.
   - In the **End** field, type the last year to fill, or click the down arrow to select the year from a menu.
5. Click **OK**.

Note: If the start year is the column you selected to copy and you make changes to the factor, you will overwrite the factor in the start year.

Fill Years with New Factors

1. Right-click a column that does not have an existing factor.
2. Click **Fill** on the shortcut menu.
3. Enter the start year.
4. Specify how many years to fill with the factor by doing one of the following:
   - In the **Years** field, type the number of years, or click the spin button until the number appears.

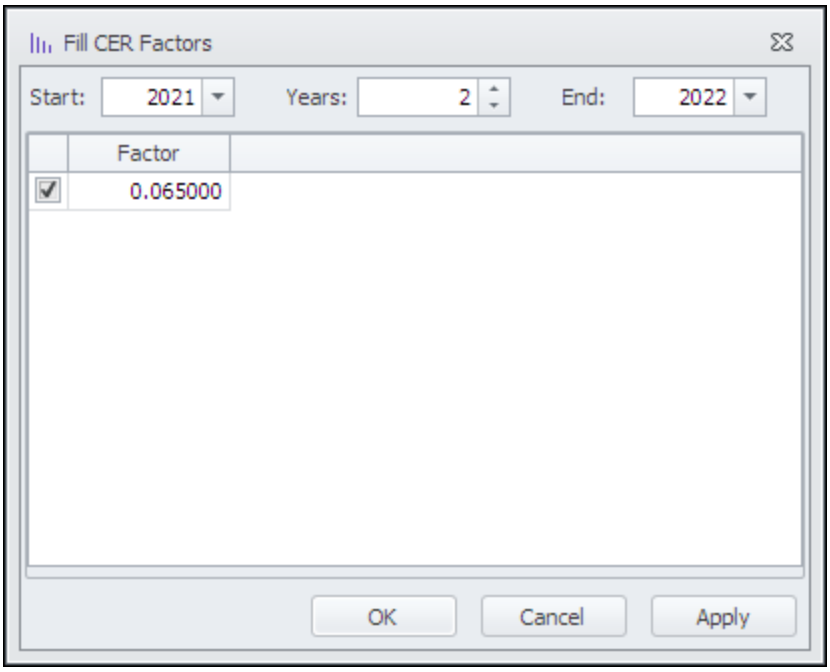
- In the **End** field, type the last year to fill, or click the down arrow to select the year from a menu.

5. Enter the factor you want to use.

6. Click **OK**.

Fill CER Factors Dialog Box

The **Fill CER Factors** dialog box opens when you click **Fill** on the shortcut menu of a year in the **Factors** grid. It allows you to fill subsequent years with existing factors or fill years with new factors.



Start

This field shows the year you selected for the Fill process. If you enter a subsequent year, ProPricer will fill the columns with the factor entered as of that date. If you enter a previous year, ProPricer will overwrite any existing factors as of that date.

Years

Type a number or use the spin button to select the number of years you want to include in the Fill process. The default number is **2**, which will fill the start year and the following year with the factor entered. Entering **1** will only fill the start year with the factor entered.

End

If you used the spin button in the **Years** field, this field will show the last year that will be included in the Fill process. You can also type a year instead.

Factor

This column may or may not show a factor, depending on the column you selected. If you selected a blank column, enter the factor you want to use. If you selected a column that has a factor, you can use the same factor or modify it to fit your needs.

Set a CER Factor Table as Current

Setting a CER Factor Table as current makes it the default CER Factor Table for every new proposal you create. ProPricer will automatically assign it in the Pricing page of the Proposal Properties.

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand the **CER Factors** folder.

2. Right-click the appropriate table, and then click **Current**. In the **CER Factors** folder, the name of the current CER Factor Table will appear in bold letters and its icon will have a star.

CER Factors - Priorities

ProPricer offers you three ways to enter the factors that calculate the derivative elements of a CER. You can:

- Assign a CER factor to a CER.
- Assign a CER factor to the derivative element or elements of a CER.
- Enter factor values for each separate derivative of a CER.

ProPricer follows the criteria below to find the appropriate factor to apply:

Derivatives Level

The first place ProPricer looks for factor values is at the derivatives level. If there is a CER factor assigned to a derivative element of a CER, the values entered for this CER factor in the table are used to calculate the input values of the derivative. If the table does not contain a value for a certain month, the factor value specified for the derivative is used.

CER Level

If there is no CER factor associated with a derivative element of a CER, ProPricer uses the CER factor assigned to the CER to calculate the input values of the derivative. If the table does not contain a value for a certain month, the factor value specified for the derivative element is used.

Factors Level

If there is no CER factor assigned to a derivative or the CER, the factor value specified for the derivative is used.

CERs

There may be times when you want to group resources together to accomplish certain tasks. These resources have a unique technical relationship, commonly referred to as a CER (Cost Estimating Relationship). A CER can consist of multiple base resources combined with multiple derivative resources.

CERs spread the effort of a derivative resource based on the overall effort of the base resource in the task. CERs can be based on a specific resource, resource type, or class. If the base category is *Resource Type* and the base element is *Labor*, for example, then the input values of the derivative resources would be based on all the hours already spread for every resource with type *Labor* in the task.

After adding a CER to the CER Library, you can set its base and derivative information in a CER Table. Then the CER will be available in all proposals using that CER Table. If a proposal needs a unique CER that should not be shared through a CER Table, you can define a Proposal CER in the Proposal Properties.

There are two display modes for CERs in tasks: Data and Structure. While in Structure mode, you can change the start and end dates of base resources, as well as the spread curve, spread method, and dates of derivative resources. This can be helpful if you need to offset the costs of derivatives to a period that differs from the base resource.

Regular and summary tasks can both use CERs, but a CER will work differently depending on the type of task it is in. To learn more, see the *CERs and Summary Tasks* help topic.

Base Level and Calculation Order also play an important role in CERs. Base Level determines whether the input values of the derivative resources will be based on hours, equivalent heads, direct cost, or an indirect expense. Calculation Order determines whether base resources and derivative resources stemming from other CERs will be included in the calculation of the input values of the derivative elements.

Base Levels

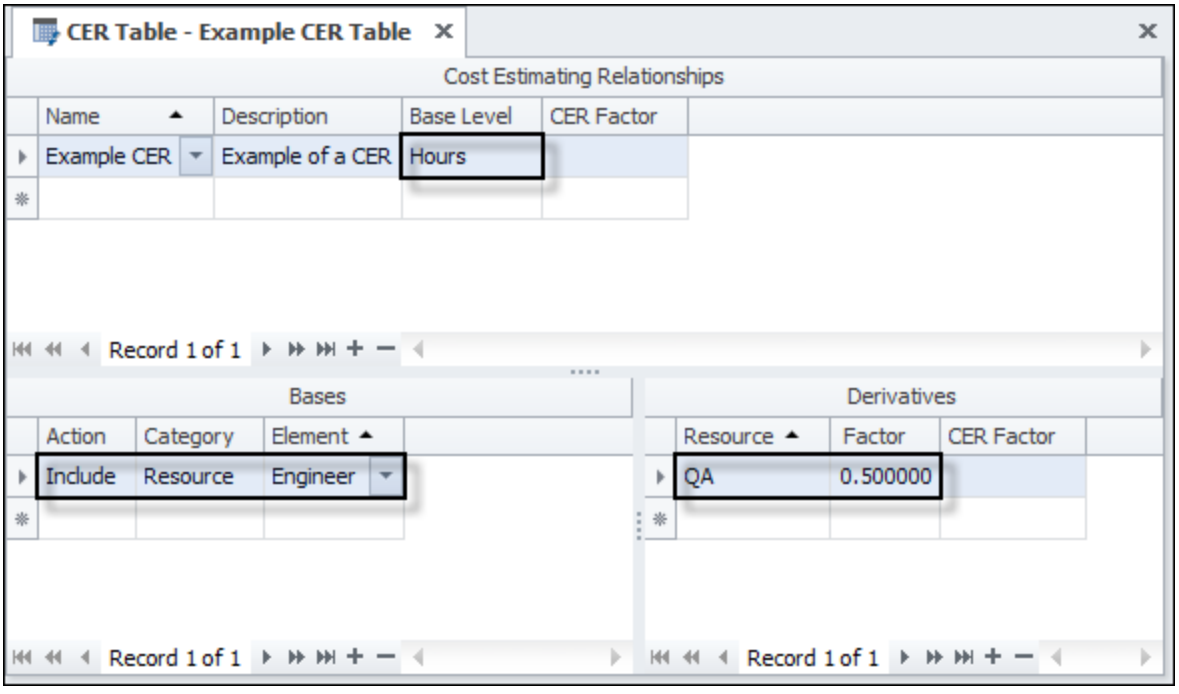
The base level of a CER greatly affects the calculation of the derivative resource's input values in tasks. That calculation can be based on the hours, the equivalent heads, the direct cost, or an indirect cost of the base resource.

The examples in this topic show each base level being used in a CER. In all examples, the rate type of the derivative resource *QA* has been set to *Hours* (in the proposal's Direct Rate Table), so every base level generates a different amount of hours for *QA* in the same task.

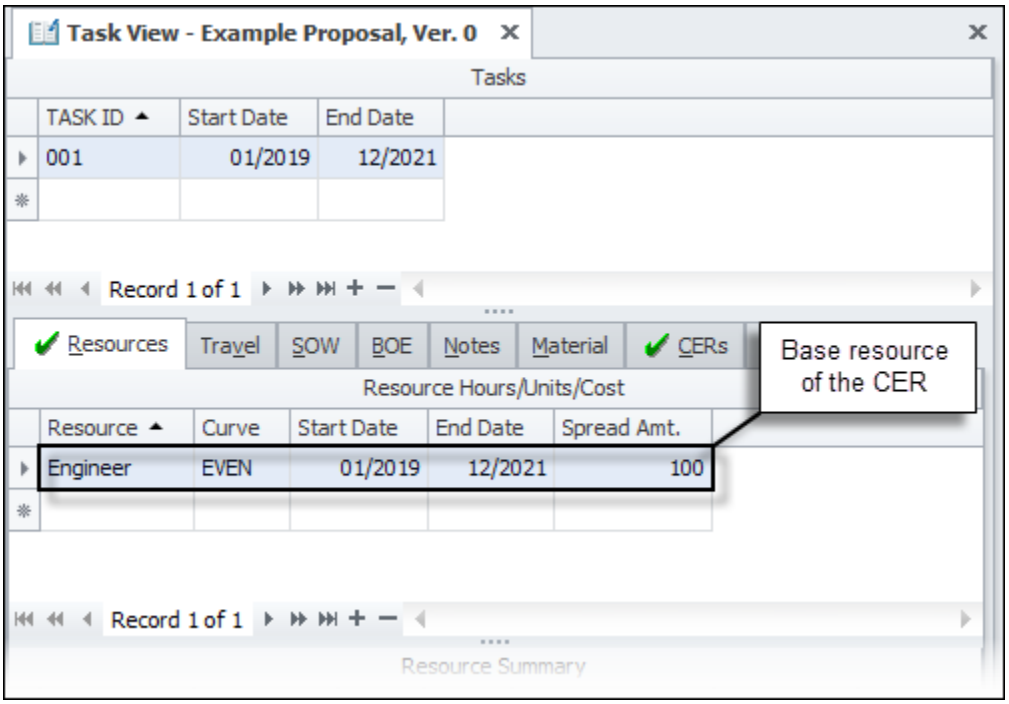
Note: You can limit a CER by setting a base amount cap in your CER Table, but this is not required.

Example 1: Base Level is *Hours*

In this example, the base level of the CER is *Hours*. The base resource is *Engineer*, and the derivative resource is *QA* with a factor of *0.5*.

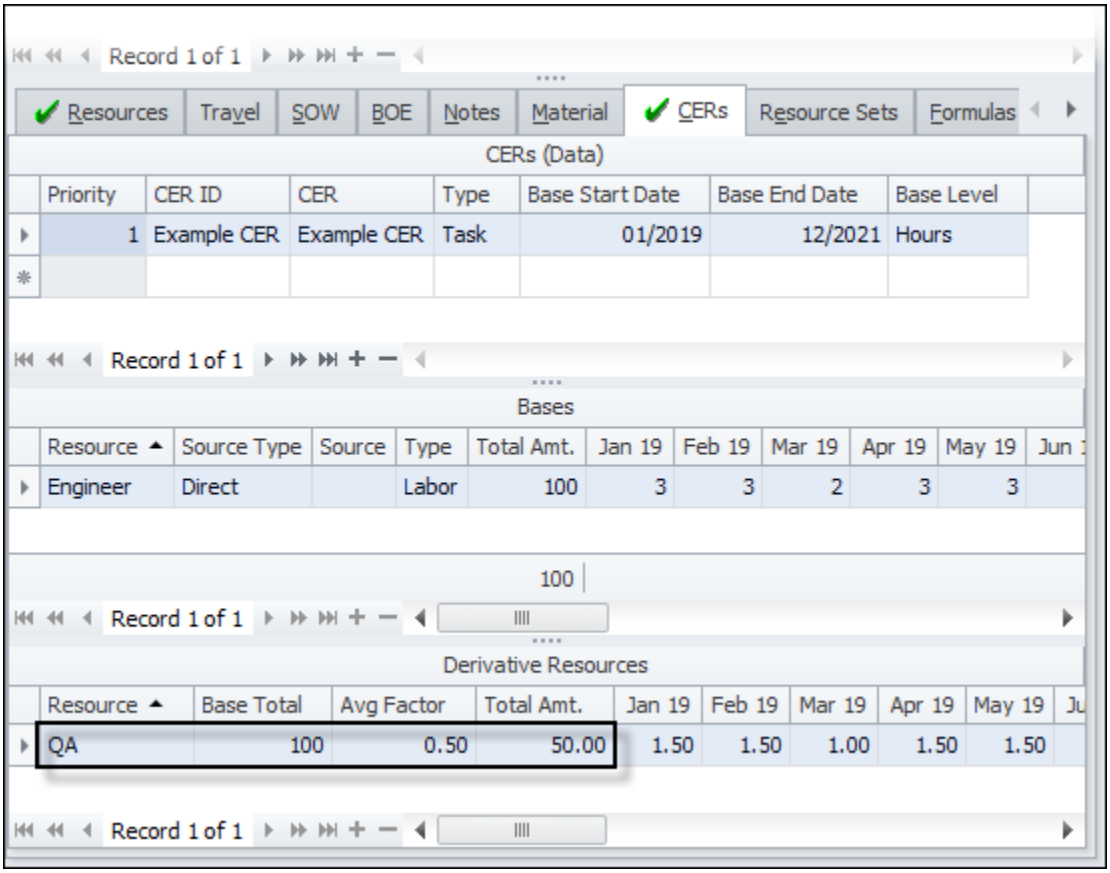


The CER has been assigned to a task where *100* hours are spread with an *EVEN* curve for the *Engineer* resource.



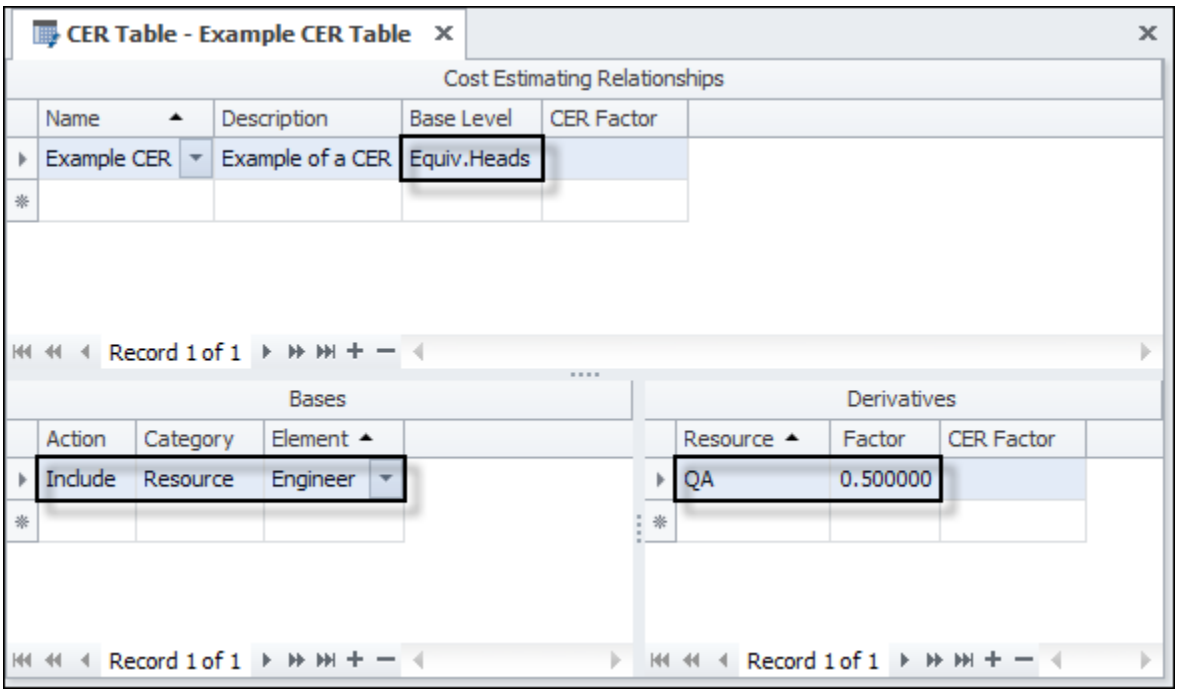
ProPricer multiplies the base resource's hours by the derivative factor, and then it spreads the calculated total amount as hours for the derivative resource.

- Calculation: *100* (base resource hours) x *0.5* (derivative resource factor) = *50* (derivative resource hours spread in the task)

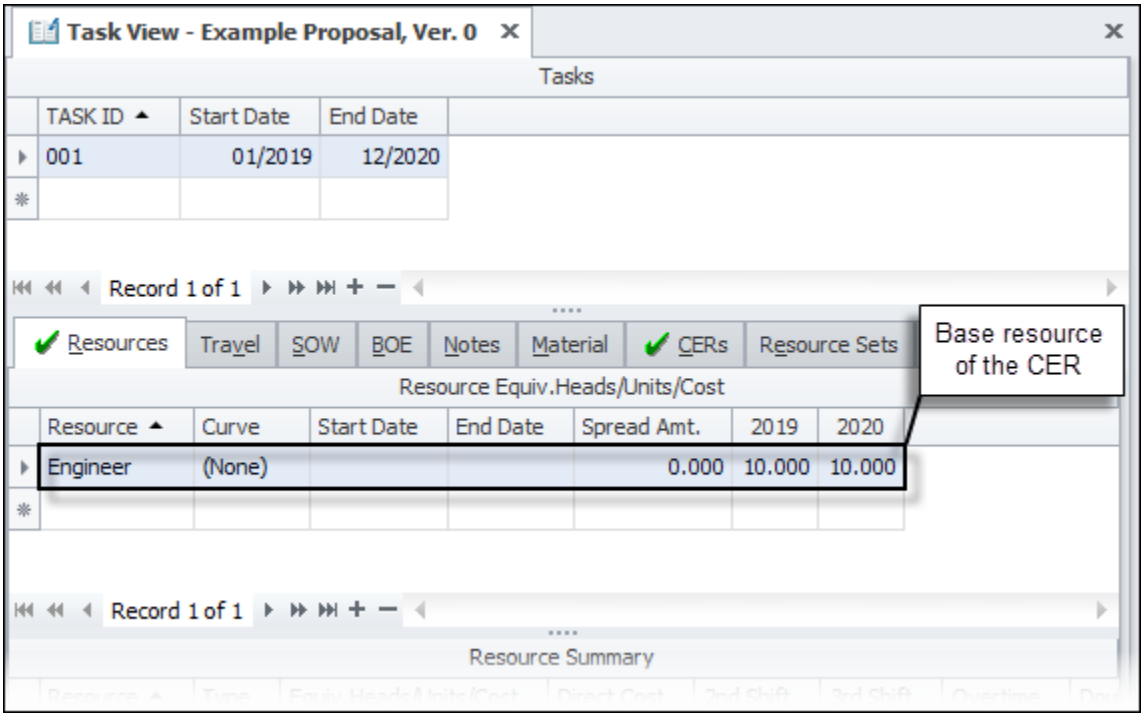


Example 2: Base Level is *Equivalent Heads*

In this example, the base level of the CER is *Equiv. Heads*. The base resource is *Engineer*, and the derivative resource is *QA* with a factor of *0.5*.

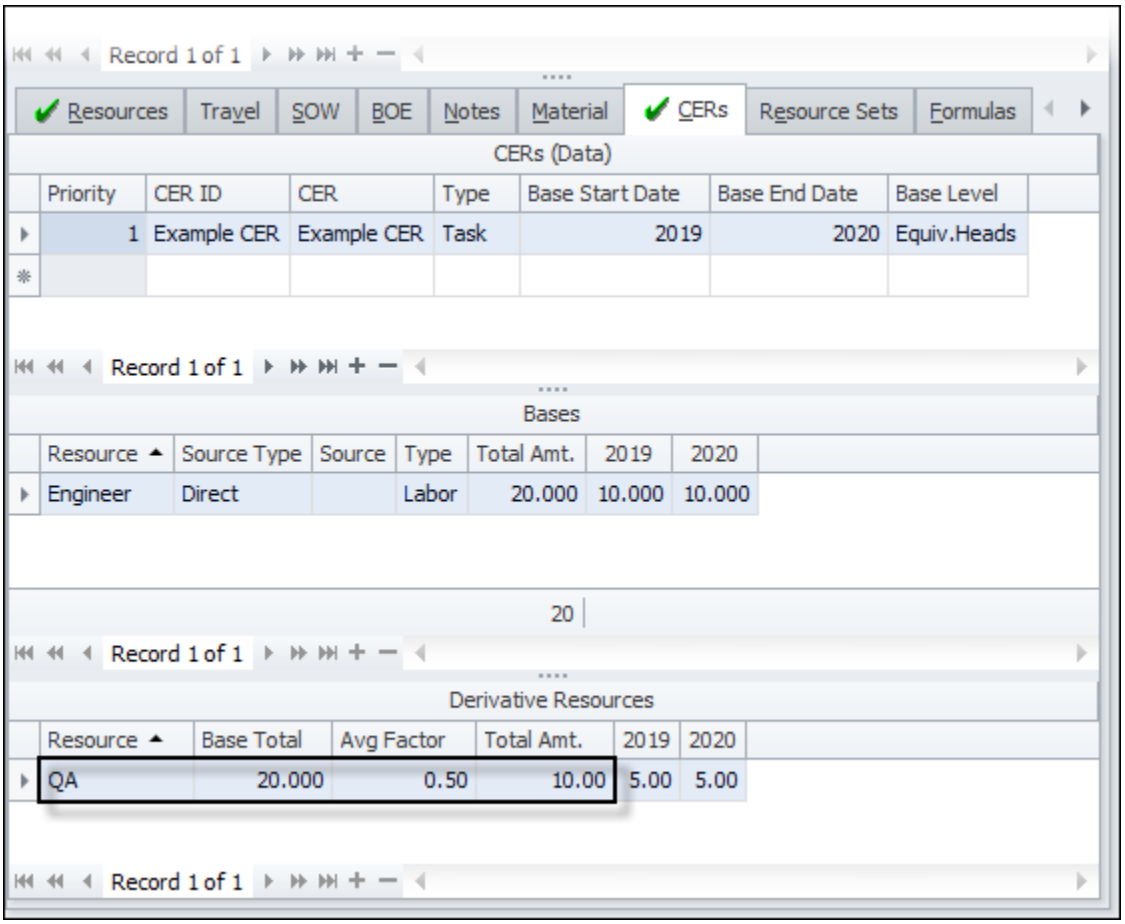


The CER has been assigned to a task with *20* equivalent heads for the *Engineer* resource (*10* heads discretely entered in both years of the task's spread period).



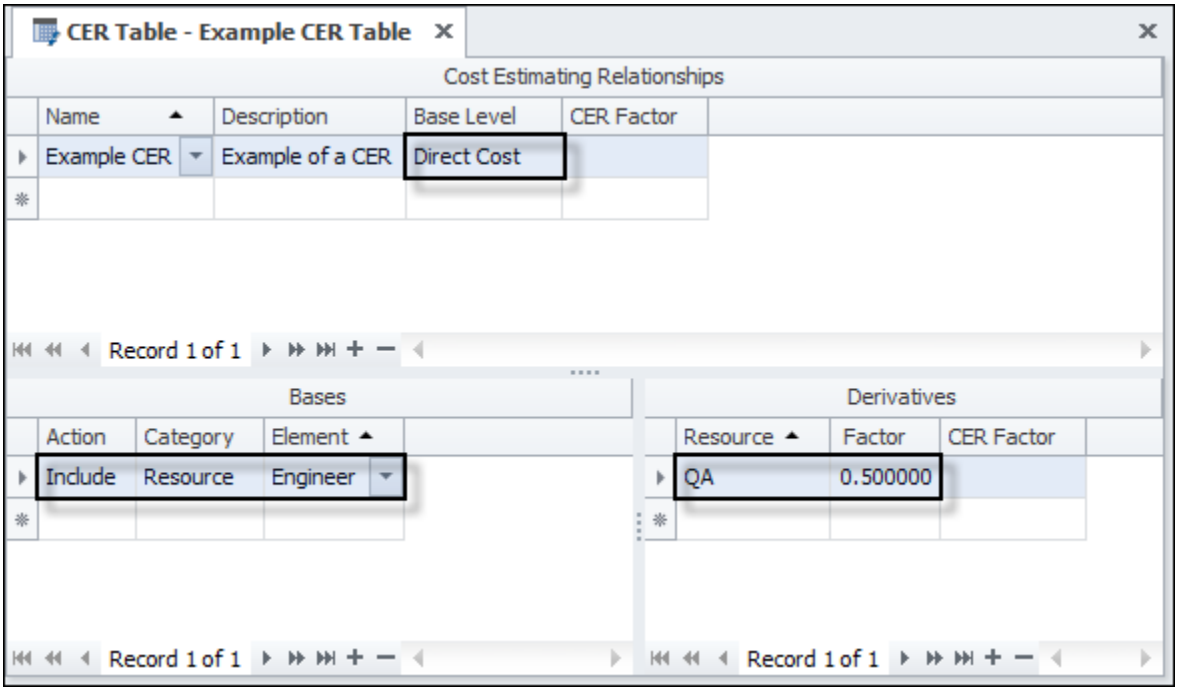
ProPricer multiplies the base resource's equivalent heads by the derivative factor, and then it spreads the calculated total amount as hours for the derivative resource.

- Calculation: *20* (base resource equivalent heads) x *0.5* (derivative resource factor) = *10* (derivative resource hours spread in the task)

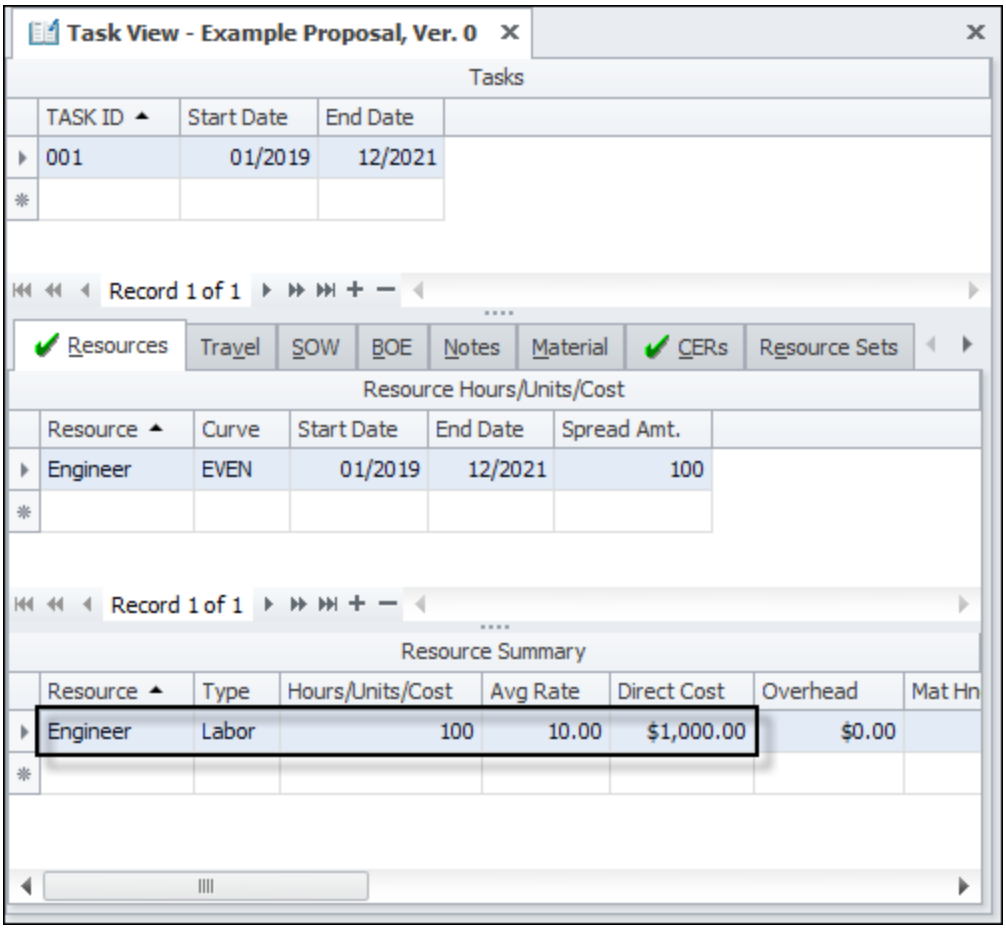


Example 3: Base Level is *Direct Cost*

In this example, the base level of the CER is *Direct Cost*. The base resource is *Engineer*, and the derivative resource is *QA* with a factor of *0.5*.

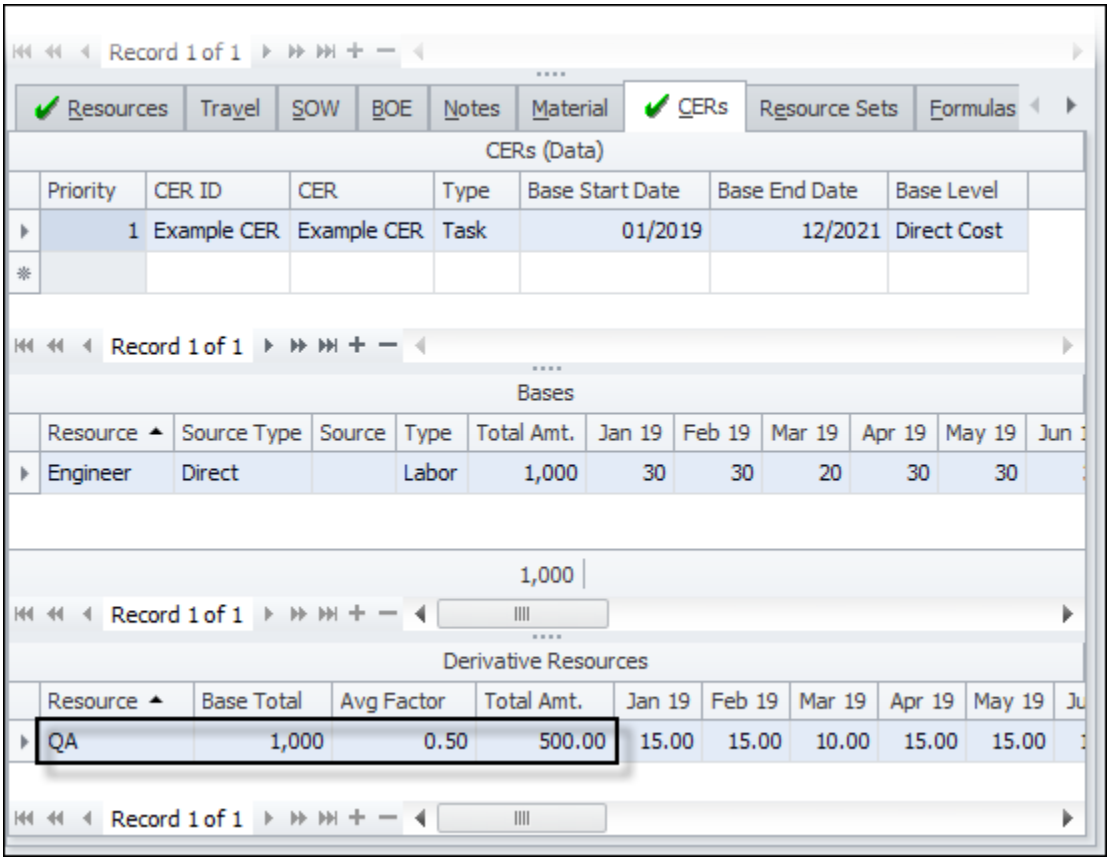


The CER has been added to a task where the direct cost of the *Engineer* resource is *$1,000.00*.



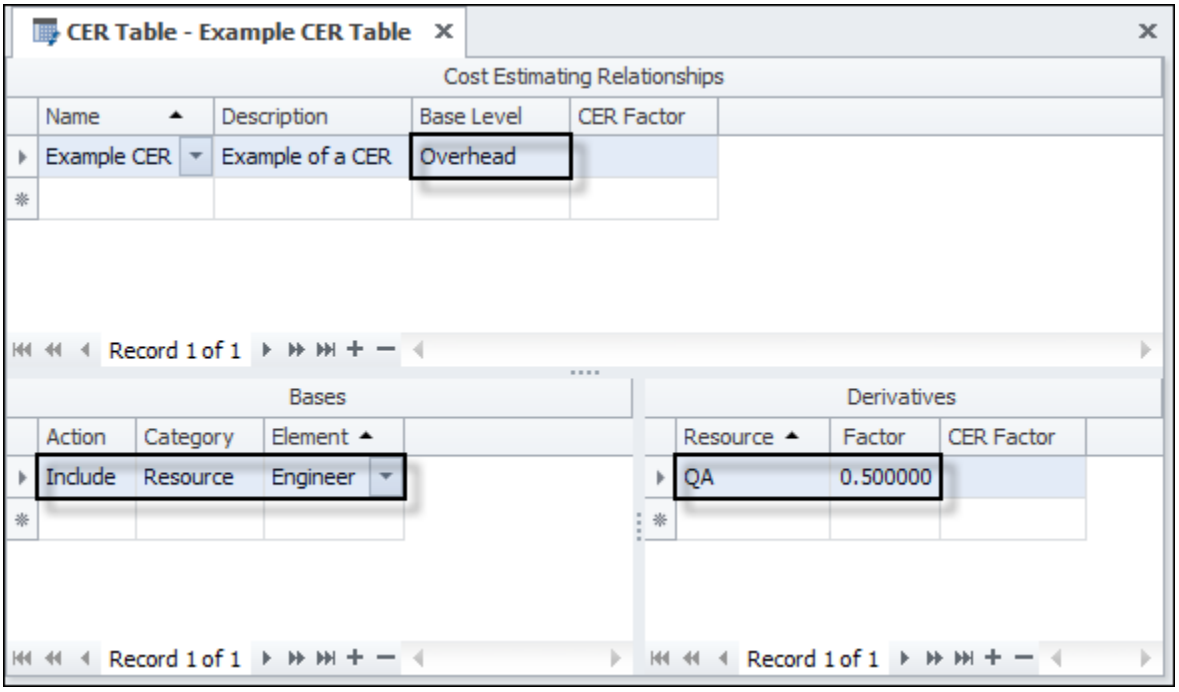
ProPricer multiplies the base resource's direct cost by the derivative factor, and then it spreads the calculated total amount as hours for the derivative resource.

- Calculation: *1,000* (base resource direct cost) x *0.5* (derivative resource factor) = *500* (derivative resource hours spread in the task)

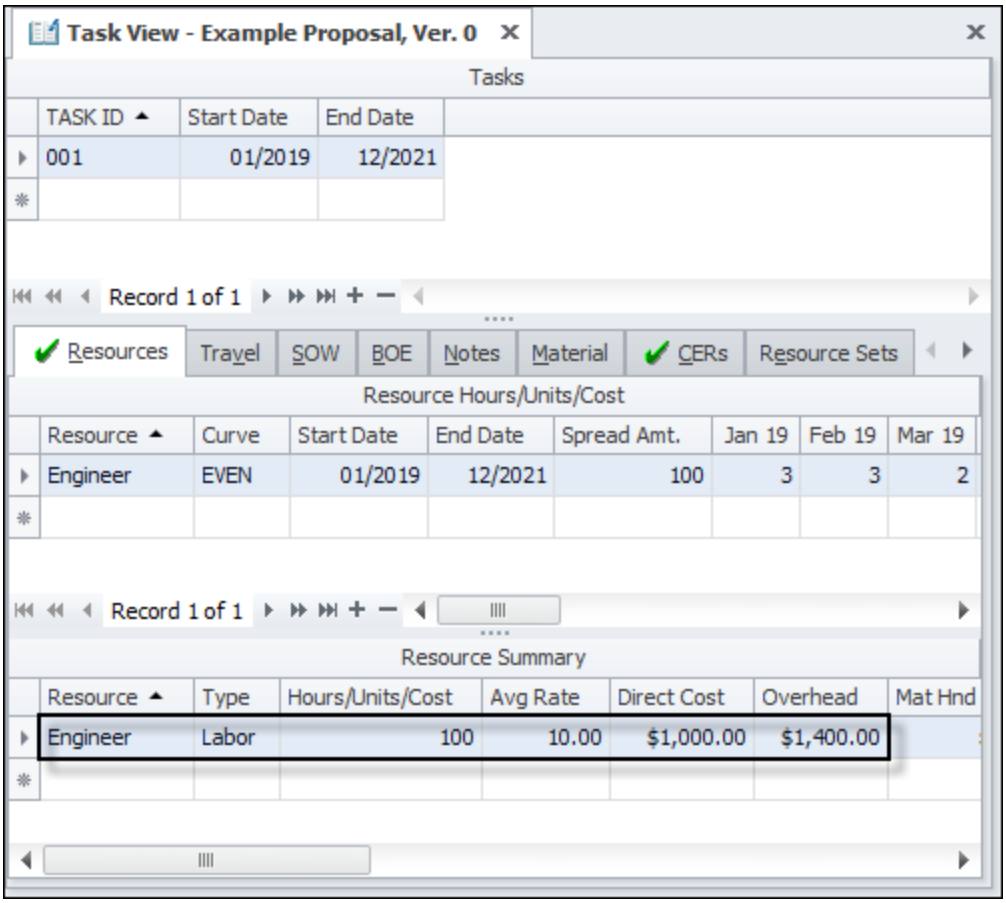


Example 4: Base Level is an Indirect Cost

In this example, the base level of the CER is the cost of an indirect expense named *Overhead*. The base resource is *Engineer*, and the derivative resource is *QA* with a factor of *0.5*.

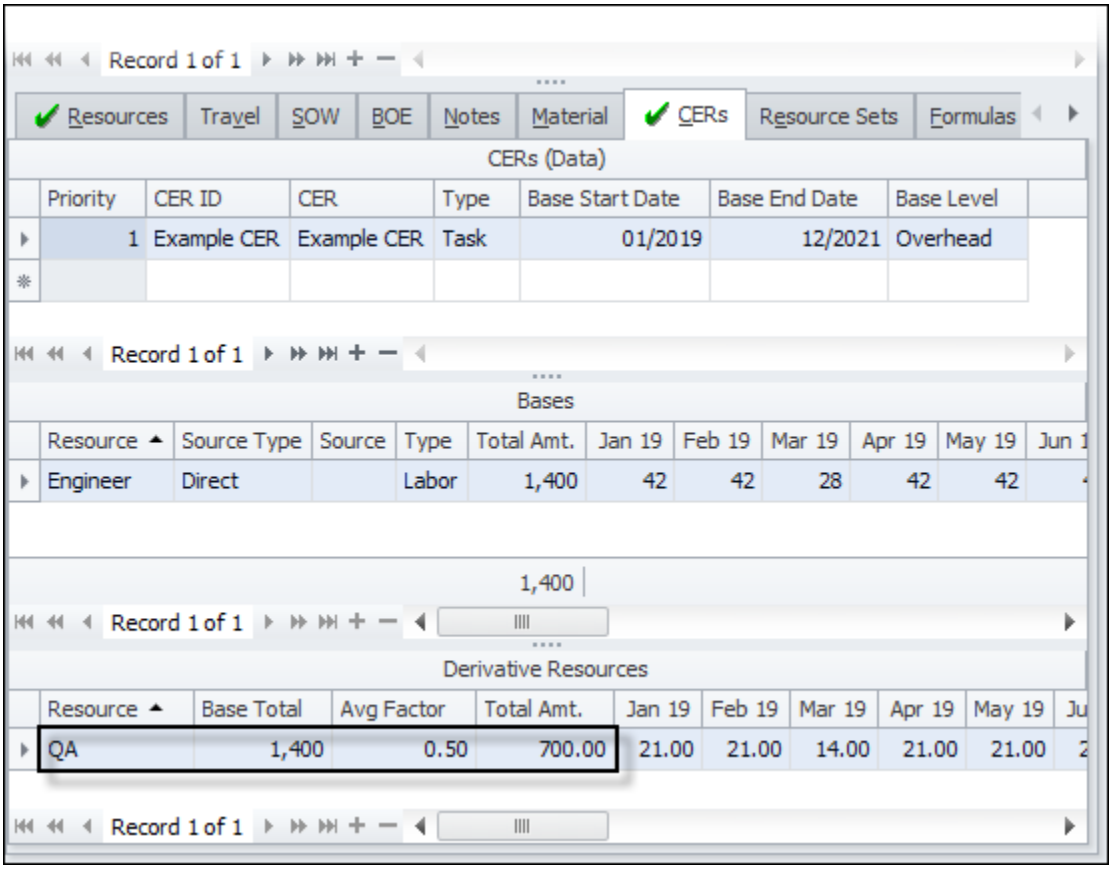


The indirect rate of the *Overhead* expense has been set to *1.4* in the proposal's Indirect Rate Table (not shown). Therefore, the *Overhead* cost for the *Engineer* resource is *$1,400.00*.



ProPricer multiplies the base resource's *Overhead* cost by the derivative factor, and then it spreads the calculated total amount as hours for the derivative resource.

- Calculation: *1,400* (base resource *Overhead* cost) x *0.5* (derivative resource factor) = *700* (derivative resource hours spread in the task)


Record 1 of 1
Resources
Travel
SOW
BOE
Notes
Material
CERs
Resource Sets
Formulas
CERs (Data)
Priority
CER ID
CER
Type
Base Start Date
Base End Date
Base Level
1
Example CER
Example CER
Task
01/2019
12/2021
Overhead
Record 1 of 1
Bases
Resource
Source Type
Source
Type
Total Amt.
Jan 19
Feb 19
Mar 19
Apr 19
May 19
Engineer
Direct
Labor
1,400
42
42
28
42
42
1,400
Record 1 of 1
Derivative Resources
Resource
Base Total
Avg Factor
Total Amt.
Jan 19
Feb 19
Mar 19
Apr 19
May 19
QA
1,400
0.50
700.00
21.00
21.00
14.00
21.00
21.00
Record 1 of 1

Calculation Order

The order of CERs plays a crucial role in the calculation of the input values of derivative resources. When calculating these values, ProPricer uses the spread amounts of resources assigned directly to a task, and it uses the spread amounts produced by higher priority CERs that include the same resources.

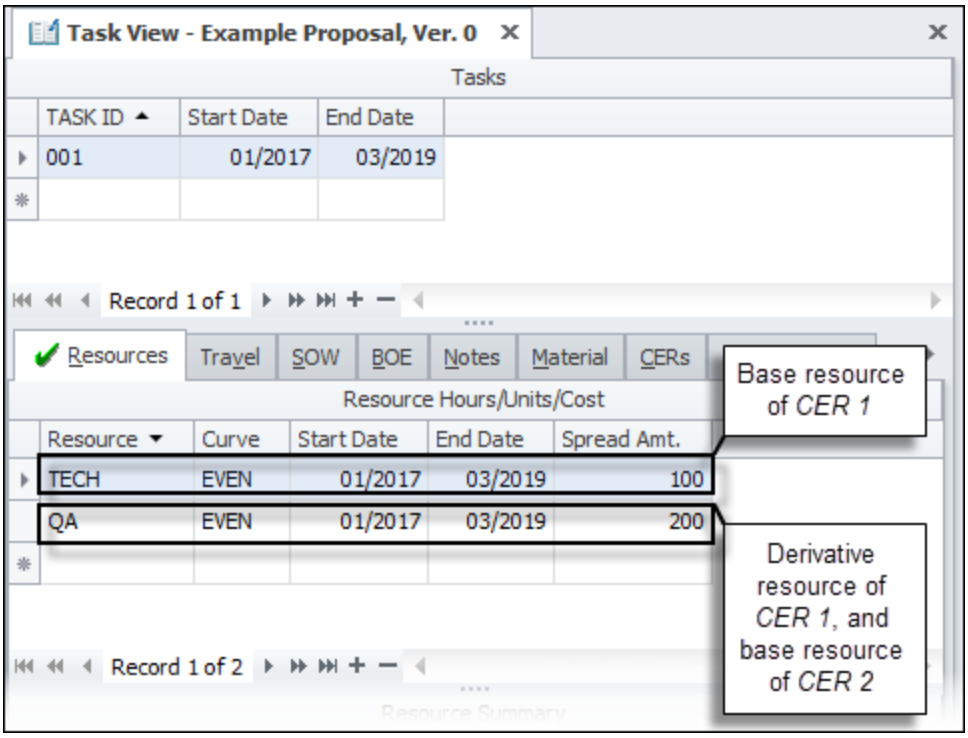
To change the calculation order of task CERs, right-click the **CERs (Data)** or **CERs (Structure)** grid, and then click **Calculation Order**. You can also change the order of proposal CERs at the system level and proposal level.

Example

We have two CERs with the following characteristics:

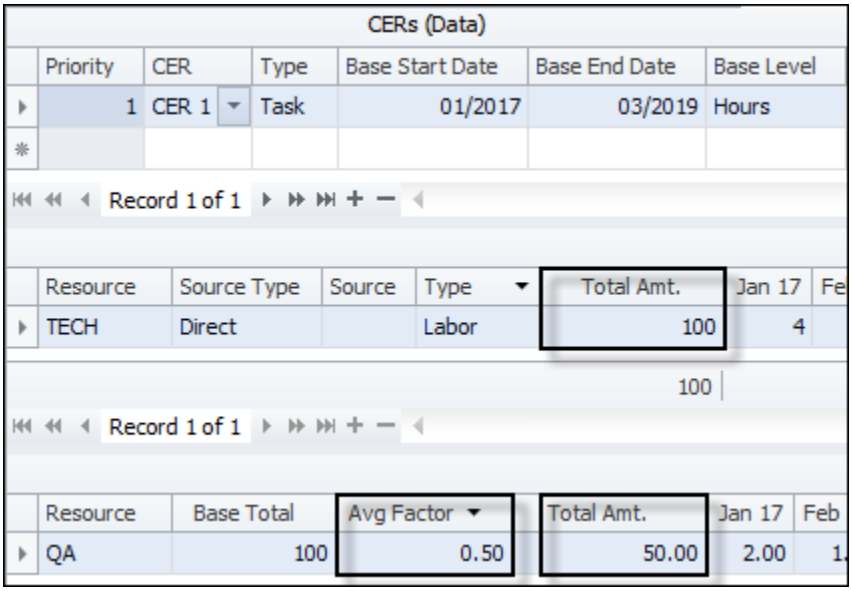
Name	CER 1	CER 2
Base Category	Resource	Resource
Base Resource	TECH	QA
Derivative Resource	QA	Program Manager
Derivative Factor	0.5	0.3

In a task, *100* hours are spread for *TECH*, and *200* hours are spread for *QA*.



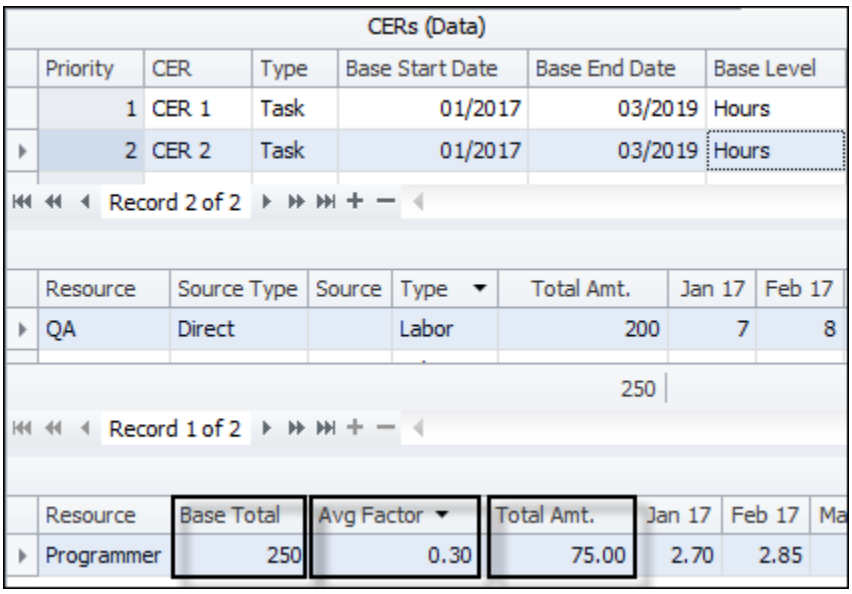
CER 1 is then added to the task on the **CERs** tab. ProPricer applies the *CER 1* derivative factor to the hours of the base resource *TECH*, and then it spreads the calculated total amount for the derivative resource *QA*.

- *CER 1* calculation: *100* (*CER 1* base resource hours) x *0.5* (*CER 1* derivative resource factor) = *50* (*CER 1* derivative resource hours spread in the task)



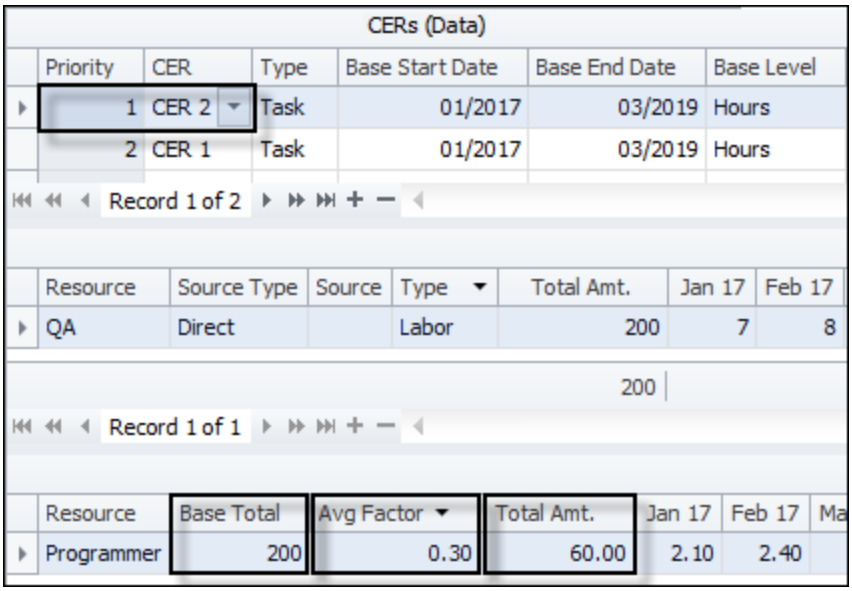
Next, *CER 2* is added to the same task. In that task, *200* hours have already been directly entered for *QA*, and an additional *50* hours have been spread for *QA* by the *CER 1* calculation. ProPricer applies the *CER 2* derivative factor to these existing *QA* hours, and then it spreads the calculated total amount for the derivative resource *Programmer*.

- *CER 2* calculation: [*200* (*CER 2* base resource hours) + *50* (*CER 1* derivative resource hours)] x *0.3* (*CER 2* derivative factor) = *75* (*CER 2* derivative resource hours spread in the task)



Changing the calculation order places *CER 2* above *CER 1* in the task. ProPricer then calculates *CER 2* with only *200* base resource hours, because the *CER 1* calculation that will generate additional *QA* hours has not been performed yet. Without those additional hours, the total amount spread for the *CER 2* derivative resource is now *60*.

- New *CER 2* calculation: *200* (*CER 2* base resource hours) x *0.3* (*CER 2* derivative resource factor) = *60* (*CER 2* derivative resource hours spread in the task)



CERs (Data)

Priority	CER	Type	Base Start Date	Base End Date	Base Level
1	CER 2	Task	01/2017	03/2019	Hours
2	CER 1	Task	01/2017	03/2019	Hours

Record 1 of 2

Resource	Source Type	Source	Type	Total Amt.	Jan 17	Feb 17
QA	Direct		Labor	200	7	8

200

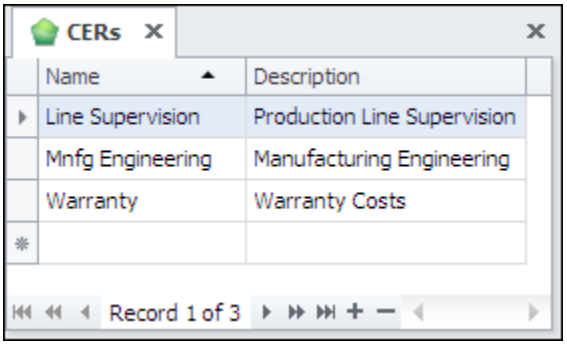
Record 1 of 1

Resource	Base Total	Avg Factor	Total Amt.	Jan 17	Feb 17	Ma
Programmer	200	0.30	60.00	2.10	2.40	

CER Library

The CER Library is where you create your Cost Estimating Relationships (CERs). Once you create a CER in the library, you can define it in a CER Table.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the CER.

Description

Enter a description for the CER.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Copy a CER in the Library

1. Right-click a CER, and then click **Copy**.

2. Enter a name for the new CER, and then click **OK**.

Create a CER in the Library

If you have tasks that require the joint effort of several resources, you can create a Cost Estimating Relationship (CER) that combines these resources and establishes the relationship among them.

1. In the Navigation Pane, click the **Libraries** button, and then double-click **CERs**.
2. Enter a name and description for the new CER.
3. Press **Ctrl**+**S** or move to another row to save your work.

Now that you have a CER in the CER Library, you can define it in a CER Table.

Delete a CER from the Library

1. In the Navigation Pane, click the **Libraries** button, and then double-click **CERs**.
2. Right-click a CER, and then click **Delete**.
3. Confirm the deletion when prompted.

*Note: You can only delete CERs that are not used anywhere in the system. If the CER is used, ProPricer will display the **Item Usage Info** box instead.*

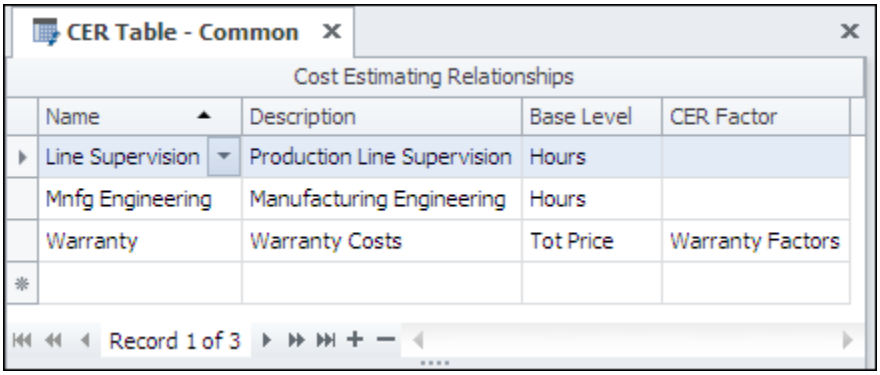
CER Tables

In a CER Table, you define and maintain the CERs from the CER Library. The table is divided into three grids: Cost Estimating Relationships, Bases, and Derivatives.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Cost Estimating Relationships

Here you define the CERs from the CER Library. After you choose a CER, you can enter the Base Level that will be used to calculate the derivative resources, and you can assign a CER factor.



Name

Enter the CER you want to define.

Description

Displays the CER description entered in the CER Library. This field cannot be edited.

Base Level

Enter the level that will be used to calculate the input values of the derivative resources. You can base the CER on hours, equivalent heads, direct cost, an indirect element, or an indirect total. The base levels are arranged in the following order:

- Hours
- Equiv. Heads
- Direct Cost
- Indirect Elements (in alphabetical order) from the Algorithm

CER Factor

Enter the name of a CER factor to assign it to the CER. Entering a CER factor provides the link between the CER and a CER Factor Table, which allows you to apply different factors to the input values of the base resource and/or derivative element.

Base Amt. Cap

If you enter a base amount cap, ProPricer will stop calculating the derivative resource input values when the base resource reaches the cap. The cap timescale determines how the cap is applied in a proposal.

For example, let's say the CER base level is *Direct Cost*, and the base amount cap is *5,000* with no cap timescale. In a proposal, the CER calculation will stop when the direct cost of the base reaches $5,000. If the cap had an annual timescale, the calculation in each year would stop when the annual direct cost reaches $5,000.

Cap Timescale

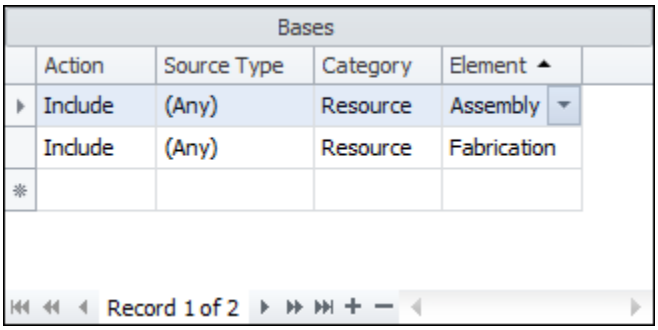
This timescale is for the base amount cap. There are two options to choose from:

- None - The cap is applied to the entire base amount. Once the cap is reached and the CER calculation stops, it will not start again.

- Annual - The cap is applied to the base amount of each year. Once the annual cap is reached and the CER calculation stops for that year, it will start again the following year.

Bases

A CER can be based on one or more resources, resource types, or resource classes. The values of the derivative resources are calculated as a percentage of the base resources' hours/units/cost.



Action

Include a resource, resource type, or resource class in the CER definition, or exclude it from the definition.

Source Type

A resource's source type indicates how it was added to a task. Select a source type to include or exclude resources of that type. The options are:

- **(Any)** - Any source type. This is the default option.
- **Activity** - Resources added by activities on the Activities tab of Task View.
- **Allocation** - Resources added by resource allocations on the Allocations tab of Task View, and by equipment/ODC allocations.
- **CER** - Resources added by other CERs on the CERs tab of Task View.

- **Direct** - Resources added directly to tasks on the Resources tab of Task View.
- **Formula** - Resources added by formulas on the Formulas tab of Task View.
- **Material** - Resources added by parts and assemblies on the Material tab of Task View.
- **Resource Set** - Resources added by resource sets on the Resource Sets tab of Task View.
- **Travel** - Resources added by trips on the Travel tab of Task View.

Category

There are three options to choose from:

- Resource - The values of the derivative resources are calculated using the resource you enter in the **Element** column.
- Resource Type - The values of the derivative resources are calculated using all the resources of the specific type you enter in the **Element** column.
- Resource Class - The values of the derivative resources are calculated using all the resources of the specific class you enter in the **Element** column.

Element

Enter the resource, resource class, or resource type.

Resource Fields

These columns only appear if there are resource fields defined in the Resource Field Library.

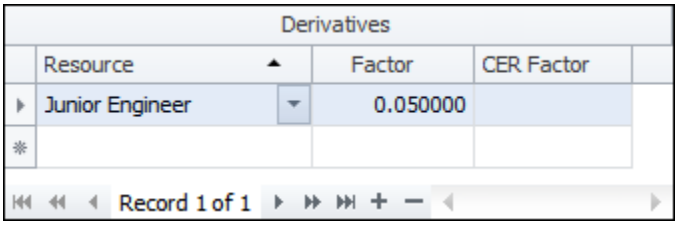
Entering a value in a resource field tells ProPricer to use resources with that resource field value. You can enter a partial value with the asterisk * wildcard to summarize multiple values containing the same string of characters (for example, *AAA** to account for all values that start with *AAA*, such as *AAA123* and *AAAXYZ*).

(Any) appears as a possible resource field value. **(Any)** means that the values calculated for the derivative elements of the CER will be based on the values of all resources from the selected category, regardless of the entries in their resource fields.

Resources with empty resource fields are included as well. If a resource field is empty, the values of the derivative elements are calculated based on the values of the resources that have no entries in that field.

Derivatives

Derivatives are defined by resource, resource fields, factor, and CER factor.



Resource

Enter the derivative resource.

Resource Fields

These columns only appear if there are resource fields defined in the Resource Field Library. Entering a resource field value tells ProPricer to spread hours/units/cost for the derivative resource with the resource field value entered.

The lookup button in every cell allows you to select the desired resource field value. **(Match)** will also appear as a possible resource field value. **(Match)** means that the values will be the same as those in the **Bases** grid.

Use the shortcut menu to hide the unnecessary fields and display only those that are applicable to the selected resource.

Factor

Enter the multiplier that will be used to calculate the derivatives. ProPricer multiplies the hours/units/cost (depending on the Base Level) of the base resources by this value to determine the input values of the derivative resources. The default factor for each derivative is zero.

CER Factor

Enter the name of a CER factor to assign it to the derivative resource.

Assign a CER Table to a Proposal

After you assign a CER Table to a proposal, you can add any of the CERs in the table to your tasks. Until a CER Table is assigned, the **CERs** input tab and the **Proposal CERs** page of **Proposal Properties** are both inactive.

1. In the Navigation Pane, click the **Proposals** button.
2. Right-click the appropriate proposal, and then click **Properties**.
3. In the **Proposal** folder, click the **Pricing** page.
4. In the **CER Table** field, enter the name of the CER Table.
5. Click **OK** or **Apply**.

Note: To replace a proposal's CER Table, the new table must contain all the CER elements used in the proposal.

CER Table Properties

The **CER Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

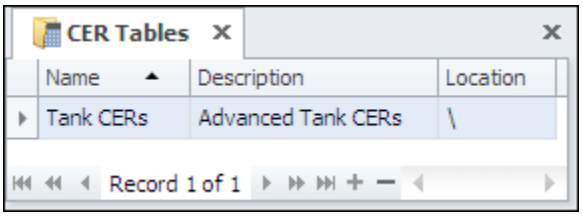
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

CER Tables List

The CER Tables List shows all the existing CER Tables. It is also a convenient place to copy and delete tables.



Name

Displays the name of the table.

Description

Displays the description of the table.

Location

Displays the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **CER Tables** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Copy a CER Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following to view all existing CER Tables:
   - Expand the **CER Tables** folder.
   - Double-click the **CER Tables** folder to open the CER Tables List.
3. Right-click a CER Table, and then click **Copy**.
4. In the **Location** field, click the ellipsis (...) button to choose the folder where the new CER Table will be saved. Otherwise, leave the default location unchanged to save the table in the root folder.
5. Enter a name and description for the new table.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Copy the Data of One CER to Another within a Table

After you define a CER in a CER Table, you can copy its data to another CER in the table, to a CER from the library, or to a new CER.

1. Open the CER Table.
2. In the **Cost Estimating Relationships** grid, right-click a CER, and then click **Copy**.
3. In the **Copy** dialog box, enter the name of the target CER to which the data will be copied.
4. Click **OK**.

Notes:

- *If you copy data to a CER that is already defined in the table, ProPricer will prompt you to replace the existing data with the copied data.*
- *If the target CER is new and does not exist in the CER Library, ProPricer will prompt you to add it to the library.*

Create a CER Table

1. Do one of the following:
   - In the Main Menu, click **New CER Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **CER Tables** folder, then click **New CER Table**.
2. Enter a name and description for the new table.
3. Click **OK**. The CER Table will open in the Workspace.

Define a CER in a Table

After you create a CER in the CER Library, you can define it in a CER Table. A single CER in the library can be defined differently in each of your CER Tables.

1. In the Navigation Pane, click the **Rates/Tables** button, expand the **CER Tables** folder, and then double-click a table to open it.
2. In the **Name** column, enter a CER from the CER Library.
3. In the **Base Level** column, enter the base that will be used to calculate the input values of the derivative resources.
4. *(Optional)* In the **CER Factor** column, enter a CER factor from the CER Factor Library if the factor changes periodically. It will apply to all derivatives of the CER.
5. Go to the **Bases** grid.
6. In the **Action** column, specify whether the base will be included in the CER definition or excluded from it. The default entry is **Include**.
7. In the **Category** column, enter the category for the base element.
8. In the **Element** column, enter a specific resource, resource class, or resource type.
9. In the **Source Type** column, you can choose to include or exclude resources added to the proposal by a specific source. To leave the source type unspecified, enter **(Any)**.
10. *(Optional)* Enter values in any resource fields that may appear.
11. Go to the **Derivatives** grid.
12. In the **Resource** column, enter the derivative element.

13. *(Optional)* Enter values in the resource fields. If the category of the derivative is **Resource**, then **(Match)** appears in the list of resource field values. **(Match)** means that the values will be the same as those in the **Bases** grid.

14. In the **Factor** column, enter a constant factor for the derivative element.

15. *(Optional)* In the **CER Factor** column, enter a CER factor from the CER Factor Library if the factor changes periodically. The CER factor of a derivative takes priority over the CER factor selected in step 4.

16. Press **Ctrl**+**S** or move to another row to save your work.

Delete a CER Table

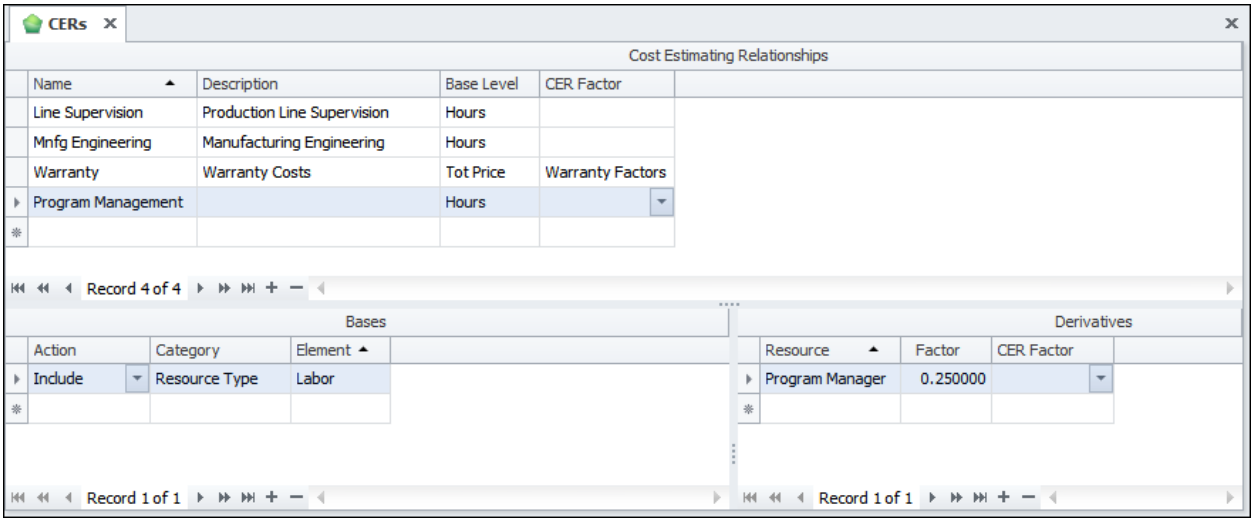
1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following to view all existing CER Tables:
    - Expand the **CER Tables** folder.
    - Double-click the **CER Tables** folder to open the CER Tables List.
3. Right-click a CER Table, and then click **Delete**.
4. Click **Yes** when prompted to confirm the deletion.

*Note: You can only delete a CER Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

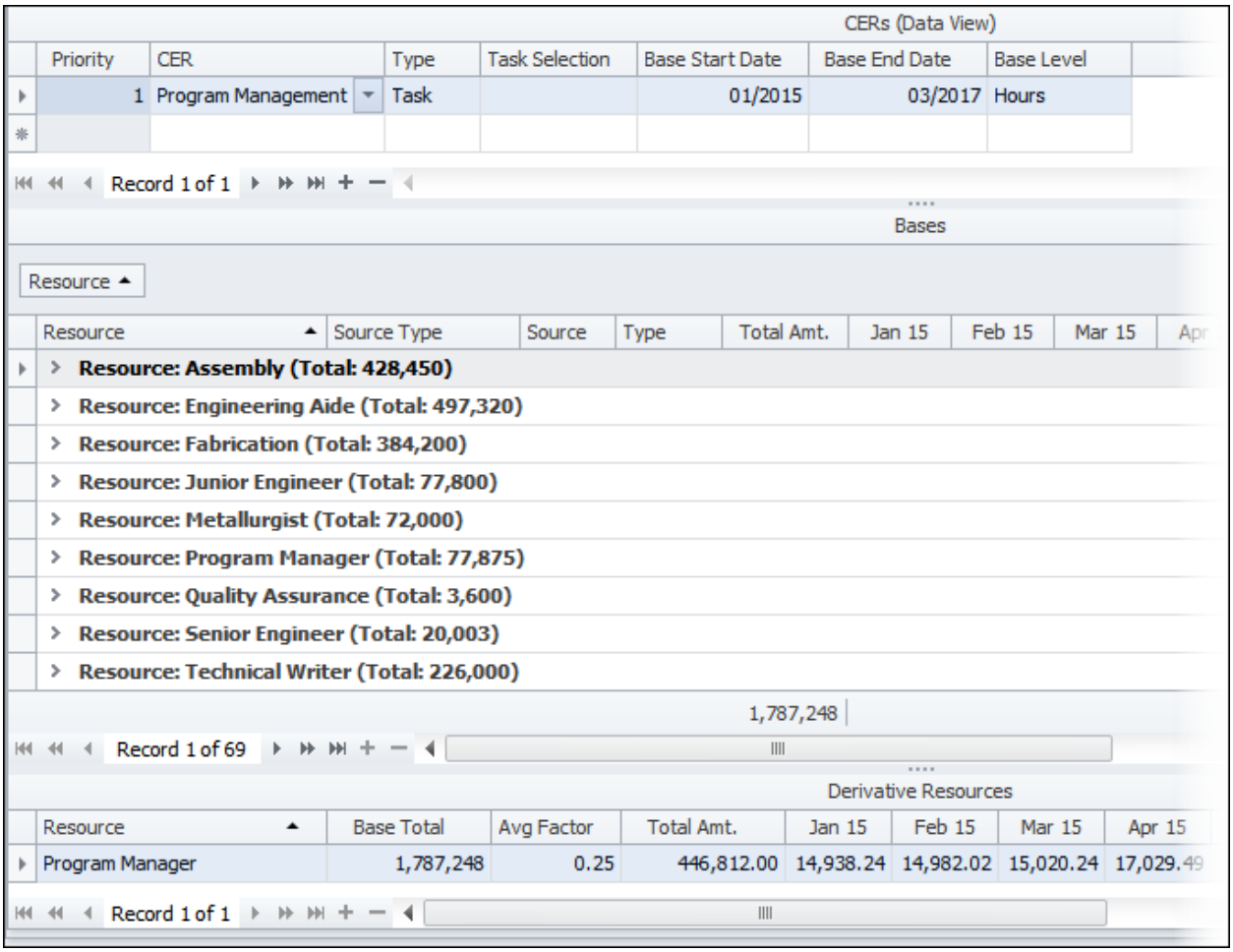
CERs and Summary Tasks

The input values of derivative resources in a CER are calculated differently depending on the type of task that the CER is added to. When you add a CER to a regular task, the input values of the derivative resources are calculated according to the base resource's effort in that task only. When you add a CER to a summary task, the input values are calculated according to the base resource's effort in all regular tasks unless a task selection is used.

Assigning a CER to a summary task is an easy way to spread a derivative resource based on the overall effort of the base resource in the proposal. Say, for example, you want to add the Program Manager's effort to the proposal, which is an additional 25% of the total labor hours. You could create a CER with Base Level *Hours*, one base for the resource type *Labor*, and add the Program Manager resource as a derivative with a factor of .25. Like this:



Then create a summary task and add the CER to the task on the **CERs** tab. When you save the task, the **Derivative Resources (Data View)** grid will show the hours spread for the Program Manager, which was calculated from all the regular tasks in the proposal (other summary tasks are not included in the calculation).



If you do not want to use the base resources of all the tasks, you can use a task selection. In this instance, only the base resource from the tasks specified in the task selection will be used to calculate the input values of the derivative resources.

Summary tasks have the following restrictions and specific features:

- The **Start Date** and **End Date** fields of summary tasks always show the start date and end date of the proposal and cannot be edited.
- If the **Multi-Currency** function is enabled for the proposal, the cost values of summary tasks are always shown in the proposal currency. The **Currency** field cannot be edited.
- You cannot add resources to a summary task on the **Resources** tab, **Travel** tab, **Material** tab, **Formula** tab, or **Resource Sets** tab.

- Proposal CERs are not applied to summary tasks.
- The **Calculation Order** option is disabled for CERs assigned to summary tasks since a base resource of one summary task has no bearing on the base resource of another summary task.

Change the Calculation Order of CERs

1. Right-click anywhere in the **CERs** grid on the **CERs** tab, and then click **Calculation Order** on the shortcut menu.
2. The CERs assigned directly to the task appear in the **CER Calculation Order** dialog box.
3. Select the CER you want to move, and then click the appropriate arrow as many times as needed to move it to the appropriate position.
4. Repeat step three with all the CERs whose position you want to change. When you are satisfied with the results, click **OK**. ProPricer will change the order of the task CERs and recalculate the new values.

Notes:

- *You cannot change the calculation order of Proposal CERs on the **CERs** tab. Their calculation order is defined on the **Proposal CERs** page of **Proposal Properties**.*
- *Calculation order does not apply to CERs assigned to summary tasks. Since their base resources come from other tasks, their position in a summary task does not affect other CERs in the task.*

Delete a CER from a Task

1. Select the task, and then click the **CERs** tab.
2. Right-click the CER you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when prompted.

Modify a CER

There are three areas of ProPricer where you can modify the structure a CER: In a CER Table, in the Proposal Properties, and in a task.

Where you modify a CER determines the scope of the changes. For example:

- Changes made in a CER Table apply to all proposals that use the table. You will need to run the **Update Current Proposal** option in every proposal to implement CER Table changes.
- Changes made to a CER on the **Proposal CERs** page of **Proposal Properties** are specific to that proposal.
- Changes made to a CER on the **CERs** task input tab are specific to the task to which the CER is assigned. You cannot make task-specific changes to Proposal CERs.

You can modify:

- The base level of the CER.
- The CER factor entered for the CER.
- The base resources.
- The derivative resources.
- The CER factors entered for the derivative resources.
- The base amount cap that limits the calculation of derivative resource input values.

Proposal CERs

If you have a Cost Estimating Relationship (CER) you know will be used in all the tasks of your proposal, you can define a Proposal CER. A Proposal CER is a CER that is automatically assigned to the tasks in your proposal, thus eliminating the need to manually assign it task-by-task.

Proposal CERs are defined on the Proposal CERs page of the Proposal Properties, which is available in proposal templates and individual proposals.

Change the Calculation Order of Proposal CERs

The position you enter for a Proposal CER, and the order in which you add Proposal CERs with the same position to this grid, play an important role in the calculation of the input values of the derivative resources. This is because the derivative resources added to the task from one Proposal CER can affect the input values of the derivative resources of the subsequent Proposal CERs. You can change the Calculation Order of the Proposal CERs so that they include or exclude specific base resources in the calculation of the input values of the derivative elements.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Proposal CERs** page.
3. Right-click anywhere in the **Proposal CERs** grid, and then click **Calculation Order** on the shortcut menu.
4. The Proposal CERs appear in the **Proposal CERs Calculation Order** dialog box.
5. Select the CER you want to move, and then click the up or down arrow as many times as needed to move it to the appropriate position.
6. Click **OK** twice.

Delete a Proposal CER

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. Click the **Proposal CERs** page in the **Proposal** folder.
3. Right-click the CER you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when prompted.

Enable Proposal CERs

The CERs entered on the **Proposal CERs** page of the Proposal Properties will not be added to the tasks of your proposal until you tell ProPricer to do so.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Proposal CERs** page in the **Proposal** folder.
3. Select the **Enable Proposal CERs** checkbox.
4. Click **OK**.

Restore the Default Proposal CERs

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Proposal CERs** page in the **Proposal** folder.
3. Click the **Restore Defaults** button.
4. Click **OK**.

Note: Any changes you have made here to a system-level Proposal CER will be lost. Likewise, any CER you added here that does not exist at the system level will be removed.

Set a Proposal CER

A Proposal CER is a Cost Estimating Relationship that is automatically assigned to the tasks in your proposal. You can set Proposal CERs in proposal templates and proposals.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Pricing** page.
3. In the **CER Table** field, enter a CER Table.
4. In the **Proposal** folder, click the **Proposal CERs** page.
5. Enter the name of the CER you want to use as a Proposal CER.
6. *(Optional)* Enter a **Task Selection** if you want to add the Proposal CER to specific tasks only.
7. Enter the position you want the Proposal CER to occupy.
8. Select the **Enable Proposal CERs** checkbox to add the CER to the tasks.
9. Click **OK**.

Update CERs

Incorporate CER Changes into a Proposal

If changes are made to a CER in a CER Table, and the CER is used in a proposal, the changes will not appear in the tasks until you explicitly request an update.

1. In the Navigation Pane, select or open the proposal.
2. On the **Proposal** ribbon, click **Update Current Proposal**.
3. *(Optional)* Click **Copy** to duplicate the proposal before updating the CERs. The updates will be applied to the copy, and the original proposal will remain unchanged.
4. Select the **Update Cost Estimating Relationships** checkbox.
5. Click **Process**.

Notes:

- *If a CER is assigned to a task and you change its base level to an element from a different Algorithm, the CER will not be updated.*
- *If a CER is assigned to a task and you change a base or derivative resource to a resource that does not exist in the proposal's Direct Rate Table, the CER will not be updated.*

Update a Single CER in a Single Task

If there are tasks in which you made direct changes to a CER on the **CERs** tab in **Structure View**, and you do not want to replace your direct changes with the updated definition of the CER from the CER Table, you can apply the update on a task-by-task basis.

1. Click the task that contains the CER you want to update, and then click the **CERs** tab.

2. In the **CERs** grid, right-click the CER you want to update, and then click **Update CER**.

Change Log

The Change Log records events performed by people who are logged into ProPricer, such as the creation, deletion, and movement of proposals, tables, and folders. It excludes any task-level and resource-level changes in proposals. You can enable the Change Log and select what it will record on the System Logs page of the System Options.

Importing, exporting, restoring, and archiving events are also kept in the Change Log, as well as changes to role permissions, user information, and system defaults. Compared to the Audit Log and the security-related events it can show, the Change Log only records data modification events.

For every event, the Change Log tracks the following information in separate columns:

- The date and time of the change.
- The user who made the change.
- The description of the user who made the change.
- The action that was taken.
- The item that was changed and its item type.
- The original location of the item that was changed.
- The new item that was potentially created and its location.

Note: Right-click the Change Log grid for filtering, sorting, and grouping options.

Enable the Change Log

1. On the **Setup** ribbon, in the **Preferences** group, click **System Options**.
2. On the **System Logs** page, open the **Modification** folder, and then select the events the Change Log will record. The Audit Log will also record the modification events you select. At least one event in this folder must be selected to enable the Change Log.
3. Click **OK** or **Apply**.

View the Change Log

1. On the **Miscellaneous** ribbon, click **Change Log**.
2. *(Optional)* In the **Filter** section, fill out the fields to narrow down the events that will be shown in the log.
3. Click **Find**.

Note: You must enable the Change Log before you can view it.

Chat

The Chat feature allows all users connected to the same database and application server to communicate with each other in ProPricer. Real-time messages can be sent to all connected users at once or to specific users individually.

You can copy any message from the Chat window and paste it within ProPricer or to another program.

Chat is accessed from the **Miscellaneous** ribbon. When you receive a new message from another user, a notification icon will appear on the ribbon.

By default, Chat is enabled for all users. However, you can disable this feature in **System Options**.

Copy a Message

1. On the **Miscellaneous** ribbon, click **Chat**.

2. Right-click a message, and then click **Copy Message**.

3. Paste the copied message in ProPricer or another program.

Enable and Disable Chat

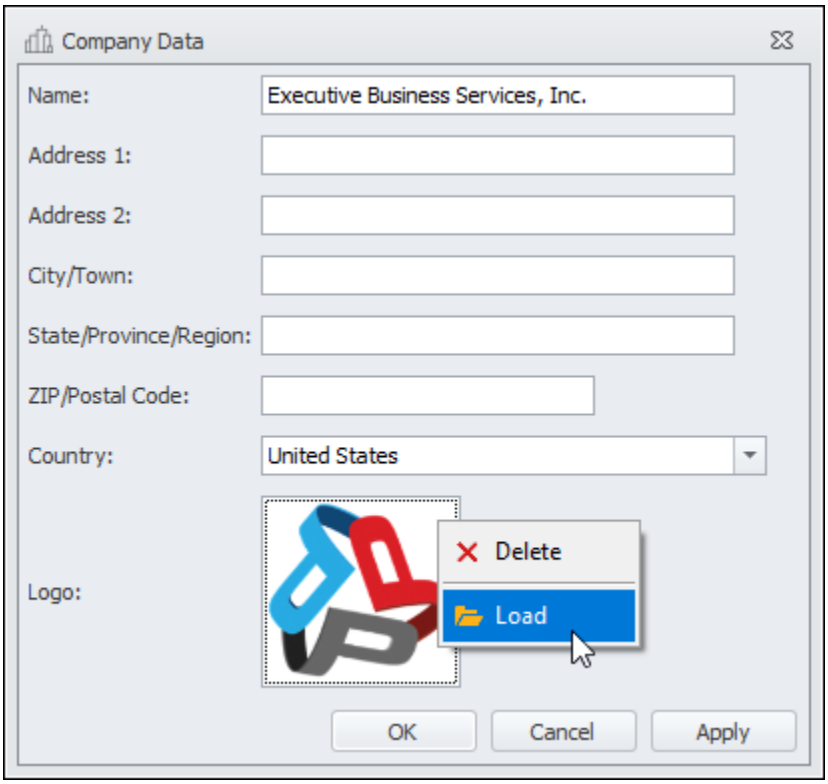
1. On the **Setup** ribbon, click **System Options**.
2. Click the **General** page.
3. Select the **Enable Chat** checkbox or clear it to disable Chat in your user account.

Send and View Messages

1. On the **Miscellaneous** ribbon, click **Chat**.
2. In the **Send To** drop-down menu, click the user with whom you want to chat.
3. In the text area, type your message.
4. *(Optional)* Right-click the text area and use the shortcut menu commands to format your message.
5. Click **Send** or press **Enter**.

Company Data

The information you enter in the **Company Data** dialog box appears on your reports. The name and logo of your company appear on all reports, but your address information only appears on the government forms.



Name

This field displays the name of your company.

Address 1 and 2

Enter your company's mailing address. Include any additional address information, such as Post Office Box Number, Suite, etc. if applicable.

City/Town

Enter the city or town where your company is located.

State/Province/Region

Enter the two-character state code or province/region where your company is located.

ZIP/Postal Code

Enter your company's ZIP/postal code.

Country

Enter the country where your company is located.

Logo

Right-click the box to load an image from your computer and use it as your company logo in reports. The logo appears when reports are printed to screen, PDF, and Word.

To include your logo in a report, go to the report's options and select **Display Company Logo**. To make this option selected by default in all reports, go to the Layout page of Report Defaults.

Enter Company Data

1. Click the **Setup** page on the ribbon, and then click **Company Data** in the **Company Data** group.
2. Enter the street name and number, and any additional information, such as a post office box, suite, etc.
3. Enter the city or town.
4. Enter the two-character state code, province, or region.
5. Enter the zip/postal code.
6. Enter or select the country.
7. Right-click the box and select **Load** to use an image on your computer as a company logo. The logo will appear at the top of all reports.
8. Click **OK** to save your work.

Comparison Projects

Comparison Projects allow you to compare proposals submitted from different customers to determine which one meets the requirements set forth in the RFP in the most appropriate manner.

All estimates and calculated costs are time-spread and segregated by the vendor's proposal chart of accounts, or by a new set of accounts created by you. The chart of accounts can be organized by one or more of the following data types:

- Work package
- Cost account
- Work Breakdown Structure
- Contract Line Item Number
- Organization Breakdown Structure

Normalizing the different Algorithm elements, resources, and summary fields allows you to compare apples to apples when running the project-specific reports: Comparison Project Detail, Comparison Project Rate, and Comparison Project Summary.

Add a Proposal to a Comparison Project

Method 1

1. Select the locked proposal in the **Proposals** folder.
2. Drag it to the Comparison Project.

Method 2

1. Right-click the Comparison Project.
2. Click **Add Proposals to Comparison Project**.
3. Select the proposals you want to add in the **Select Proposals** dialog box.
4. Click **OK**.

Method 3

1. Right-click the Comparison Project.
2. Click **Add Archived Proposal to Comparison Project**. The **Select Proposal Archive File** dialog box will open.
3. Select the .zip file.
4. Click **Open**.

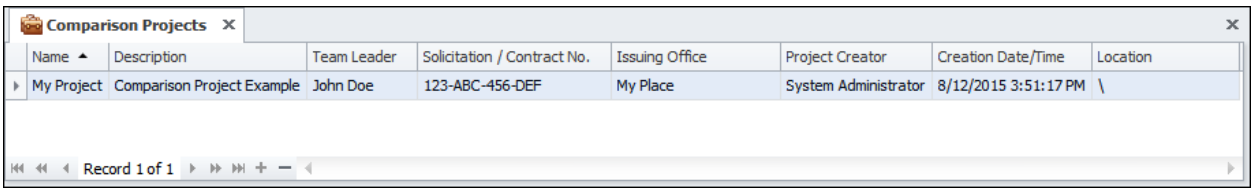
Notes:

- *Only locked proposals can be added to a Comparison Project. See Lock a Proposal.*

- *The currency of the proposals must be the same as that entered on the **General** page in the **Currency** folder of **System Options**.*

Comparison Project List

The **Comparison Project List** grid is accessed by double-clicking the **Comparison Projects** folder in the Navigation Pane. The grid lists all projects for which you have Access Rights, and it shows some administrative information for each project. It is also a convenient place to delete projects.



Name

The name of the project.

Description

The description of the project.

Team Leader

The name of the person who oversees the project.

Solicitation / Contract No.

The RFQ or RFP number.

Issuing Office

The name of the issuing office.

Project Creator

The name of the person who created the project.

Creation Date/Time

When the project was created.

Location

Where the project is located. If there is no folder name after the backslash, the project is stored in the root **Comparison Projects** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Comparison Project Properties

The **Comparison Project Properties** dialog box opens automatically when you create a new project. It is where you enter general information about the project, identify who has access to the project, and normalize the Algorithm elements, resources, and summary fields of the member proposals.

Dialog Box Options

The options are organized in a tree-like structure, consisting of folders that contain pages and, in some instances, subfolders. The options include:

Program folder

- General
- Proposals
- Rights
- Normalization folder
  - By Summary Field
  - By Resource
  - By Algorithm Element

Reports folder

- Title Definitions folder
  - Standard
- Footer

Dialog Box Commands

The following commands are common to all pages:

OK

Saves the changes and closes the dialog box.

Cancel

Closes the dialog box without saving the changes.

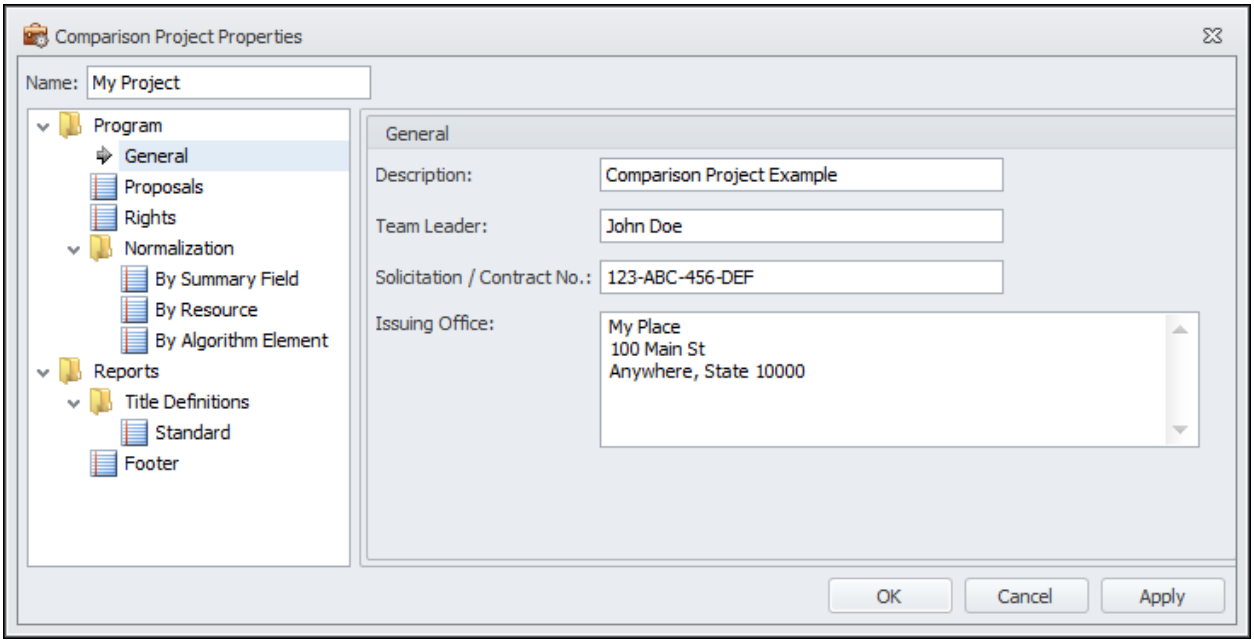
Apply

Saves the changes without closing the dialog box.

Program Folder

General Page

This is the first page you see when you create a new project. It is where you name the project and enter the description, team leader, solicitation or contract number, and the name of the issuing office.



Name

Enter a name for the project.

Description

Enter a description for the project.

Team Leader

Enter the name of the person who will oversee the project.

Solicitation / Contract No.

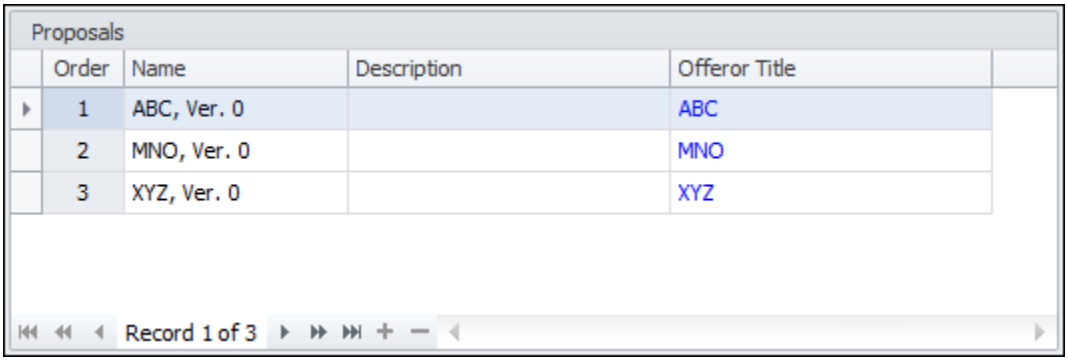
Enter the RFQ or RFP number.

Issuing Office

Enter the name of the issuing office. You can also include the address of the issuing office.

Proposals Page

This page shows the proposals that have been added to the project.



Proposal

This column shows the name of the proposal and cannot be edited.

Description

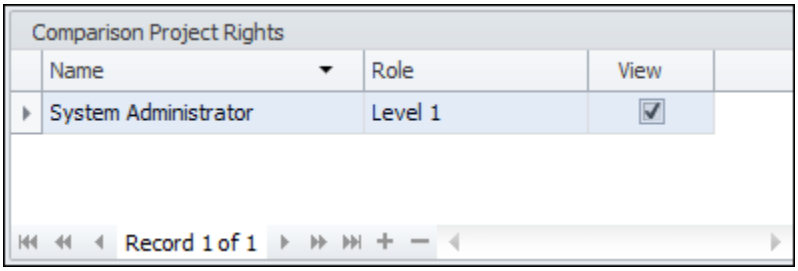
This column shows the description of the proposal and cannot be edited.

Offeror Title

The program automatically enters the name of the proposal, but you can change this information. The information entered here will automatically be entered as a title of a column on the **Normalization by Summary Field**, **Resource**, and **Algorithm Element** pages.

Rights Page

On this page, you specify which users can access the Comparison Project.



Name

Shows the name of the user.

Role

Shows the role assigned to the user.

View

Select this checkbox to enable the user to access the project.

Normalization Folder

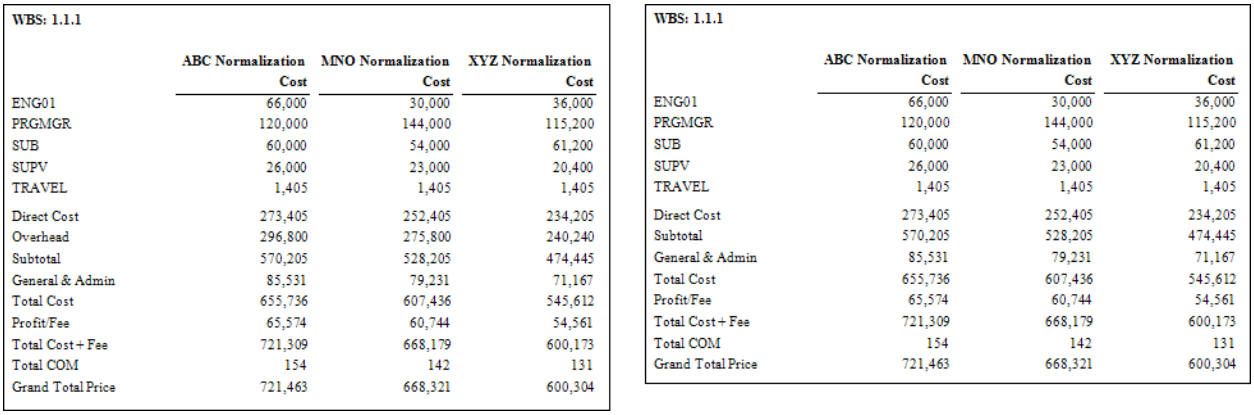
Normalization by Algorithm Element Page

On this page, you define how you want to normalize the Algorithm elements from the different proposals for the Comparison Project reports. Since companies will most likely use different terms for their Algorithm elements, you need to normalize them for them to appear on the reports.

During normalization, you define the term you want to use and then map the different Algorithm elements to your term. For example, you enter *Overhead* and then select the corresponding Algorithm elements from the member proposals (*O/H* from the first offeror, *OH* from the second offeror, and *O/H* from the third offeror). ProPricer will print *Overhead* every time it finds *O/H* or *OH*.

The normalized Algorithm elements are what will appear in the cost section of the Comparison Project Detail and Comparison Project Rate Reports, as well as in the Cost Element drop-down menu of the Comparison Project Summary Report. If none of the elements are normalized, then the reports will only show information for *Direct Cost*.

The following screenshot illustrates how the normalization process affects what will print on the reports. All the Algorithm elements were normalized in the report on the left. We omitted the normalization of *Overhead* in the report on the right.



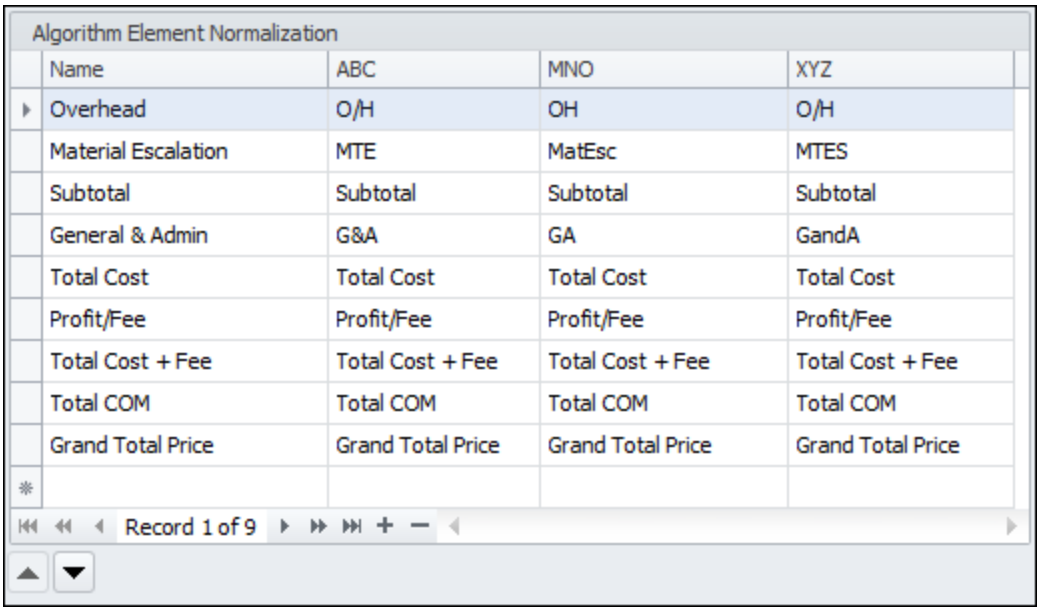
WBS: 1.1.1

	ABC Normalization Cost	MNO Normalization Cost	XYZ Normalization Cost
ENG01	66,000	30,000	36,000
PRGMGR	120,000	144,000	115,200
SUB	60,000	54,000	61,200
SUPV	26,000	23,000	20,400
TRAVEL	1,405	1,405	1,405
Direct Cost	273,405	252,405	234,205
Overhead	296,800	275,800	240,240
Subtotal	570,205	528,205	474,445
General & Admin	85,531	79,231	71,167
Total Cost	655,736	607,436	545,612
Profit/Fee	65,574	60,744	54,561
Total Cost + Fee	721,309	668,179	600,173
Total COM	154	142	131
Grand Total Price	721,463	668,321	600,304

WBS: 1.1.1

	ABC Normalization Cost	MNO Normalization Cost	XYZ Normalization Cost
ENG01	66,000	30,000	36,000
PRGMGR	120,000	144,000	115,200
SUB	60,000	54,000	61,200
SUPV	26,000	23,000	20,400
TRAVEL	1,405	1,405	1,405
Direct Cost	273,405	252,405	234,205
Subtotal	570,205	528,205	474,445
General & Admin	85,531	79,231	71,167
Total Cost	655,736	607,436	545,612
Profit/Fee	65,574	60,744	54,561
Total Cost + Fee	721,309	668,179	600,173
Total COM	154	142	131
Grand Total Price	721,463	668,321	600,304

The page consists of the following:



Name

Enter the name you want to use to represent the Algorithm elements from the other proposals.

Offeror Title Columns

Select the Algorithm element from the member proposals.

Normalization by Resource Page

On this page, you define how you want to normalize the resources from the different proposals for the Comparison Project reports. Since companies will most likely use different terms for their resources, you need to normalize them for them to appear on the reports.

During normalization, you define the term you want to use and then map the different resources to your term. For example, you enter *ENG01* and then select the corresponding engineering elements from the other proposals (*ENG01* from the first offeror, *ENG1* from the second offeror, and *E001* from the third offeror). ProPricer will print *ENG* every time it finds *ENG01*, *ENG1*, or *E001*.

The following screenshot illustrates how the normalization process affects what will print on the reports. All the resources were normalized in the report on the left. We omitted the normalization of *ENG01* in the report on the right. The report shows the direct cost but prints ****Not Normalized since*** ProPricer does not know what to call the resource.

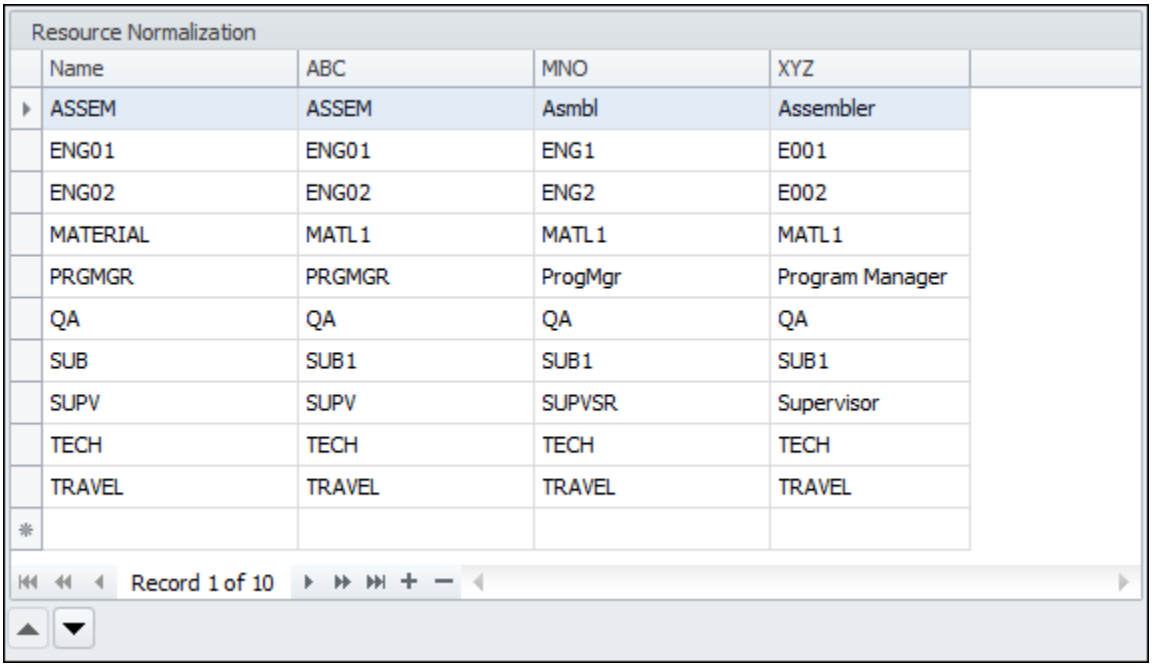
WBS: 1.1.1

	ABC Normalization Cost	MNO Normalization Cost	XYZ Normalization Cost
ENG01	66,000	30,000	36,000
PRGMGR	120,000	144,000	115,200
SUB	60,000	54,000	61,200
SUPV	26,000	23,000	20,400
TRAVEL	1,405	1,405	1,405

WBS: 1.1.1

	ABC Normalization Cost	MNO Normalization Cost	XYZ Normalization Cost
PRGMGR	120,000	144,000	115,200
SUB	60,000	54,000	61,200
SUPV	26,000	23,000	20,400
TRAVEL	1,405	1,405	1,405
***Not Normalized	66,000	30,000	36,000

The page consists of the following:


Resource Normalization

Name	ABC	MNO	XYZ
ASSEM	ASSEM	Asmbl	Assembler
ENG01	ENG01	ENG1	E001
ENG02	ENG02	ENG2	E002
MATERIAL	MATL1	MATL1	MATL1
PRGMGR	PRGMGR	ProgMgr	Program Manager
QA	QA	QA	QA
SUB	SUB1	SUB1	SUB1
SUPV	SUPV	SUPVSR	Supervisor
TECH	TECH	TECH	TECH
TRAVEL	TRAVEL	TRAVEL	TRAVEL

Record 1 of 10

Name

Enter the name you want to use to represent the resources from the other proposals.

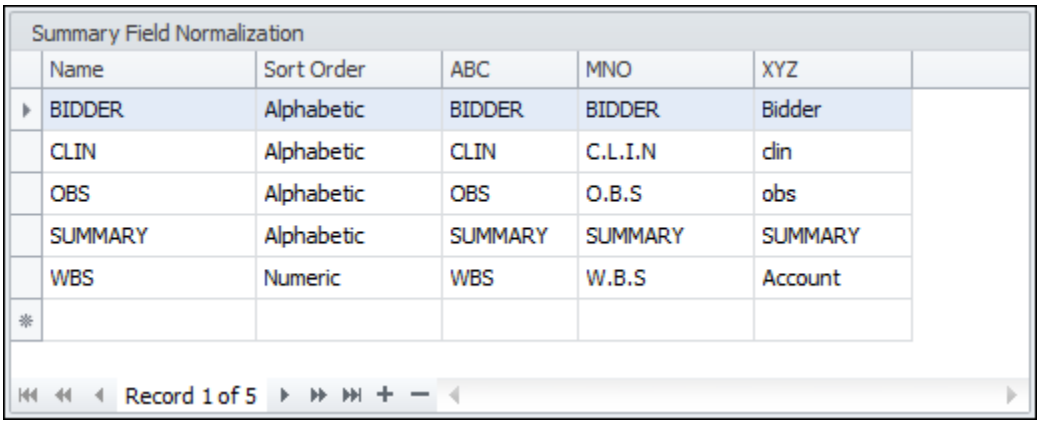
Offeror Title Columns

Select the resource from the member proposals.

Normalization by Summary Field Page

On this page, you define how you want to normalize the summary fields from the different proposals for the Comparison Project reports. Since companies will most likely use different terms for their summary fields, you need to normalize them to be able to summarize by the field of your choice.

During normalization, you define the term you want to use, and then map the different summary fields to your term. For example, you enter *WBS* and then select the corresponding summary fields from the member proposals (*WBS* from the first offeror, *W.B.S.* from the second offeror, and *Account* from the third offeror). The normalized summary fields will appear in the Summary Field drop-down menu on the Comparison Project reports. If you do not normalize the summary fields, *Task ID* will be the only option available.



Name

Enter the name you want to use to represent the summary fields from the member proposals.

Sort Order

Select how the summary field entries will be sorted on reports. There are two options to choose from:

- Alphabetic - The entries are treated as strings of characters. Words are sorted based on the order of the letters. The numbers 1, 2, 10, 20, 100, 200 sorted alphabetically would result in 1, 10, 100, 2, 20, 200.
- Numeric - The entries are treated as segmented strings that are sorted based on their value. The numeric sort of the numbers in the previous example would result in 1, 2, 10, 20, 100, 200.

Offeror Title Columns

Select the summary field from the member proposals.

Reports Folder

Footer Page

On this page, you enter the text you want to appear in the footer section of the Comparison Project reports.

Footer

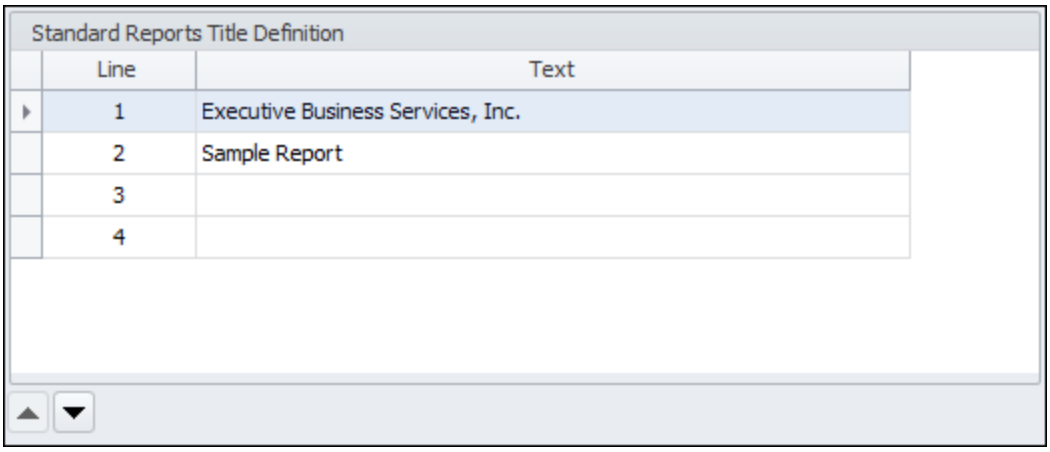
Enter the text you want to print in the footer of your reports. This text is optional. For example, you can enter a security message, such as Company Private, Proprietary, Confidential, etc. or any other text that is appropriate for your company.

Restore Defaults

Click this button to restore the default text entered on the **Footer** page of **Report Defaults**.

Standard Title Definition Page

On this page, you enter the text you want to appear in the header section of the Comparison Project reports. It may contain text entered on the **Title Definitions** page of **Report Defaults**. You can accept it or change it.



Line

Shows the positions of the lines of header text. Use the arrow buttons below the grid to change the positions.

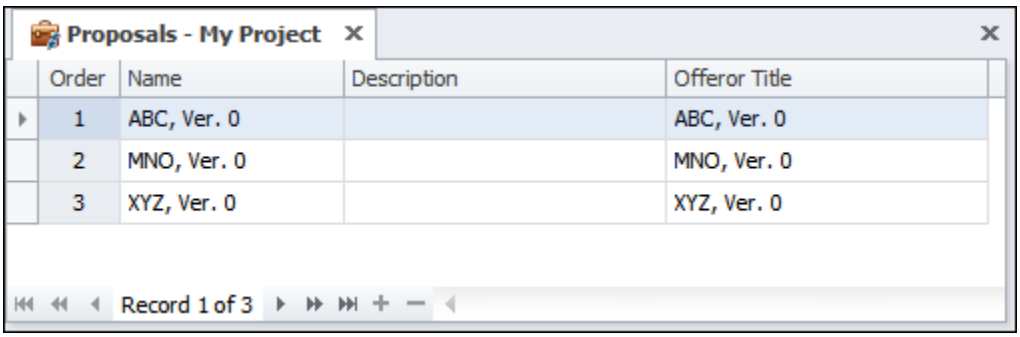
Text

There are four lines available for you to enter up to 255 characters per line, as well as two variables: [Company Name] and [Report Name]. These variables tell ProPricer to print the name of your company and the name of the report, respectively. These variables occupy lines 1 and 2 by default.

To restore the default settings from Report Defaults, right-click anywhere in the grid and then click **Restore Defaults** on the shortcut menu.

Comparison Project Proposal List

The **Comparison Project Proposal List** grid is accessed by double-clicking a specific Comparison Project in the Navigation Pane. It shows the proposals that have been added to the project.



Name

This column shows the name of the proposal.

Description

This column shows the description of the proposal.

Offeror Title

This column shows the text entered on the **Proposals** page in the **Program** folder of **Comparison Project Properties**.

Create a Comparison Project

1. In the Navigation Pane, right-click the **Comparison Projects** folder, and then click **New Comparison Project**.
2. In the **Comparison Project Properties** dialog box, enter a name for the project.
3. In the **Program** folder, on the **General** page:
    3.1. Enter a Description for the project.
    3.2. Enter the Team Leader.
    3.3. Enter the RFQ or RFP number.
    3.4. Enter the Name and Address of the office issuing the project.
4. On the **Rights** page, select the **View** checkbox of the people who will have access to the project.
5. In the **Reports** folder, on the **Title Definitions** and **Footer** pages, enter the text you want to appear in the headers and footers of the Comparison Project reports.
6. Click **OK** to close the **Comparison Project Properties** dialog box.
7. Add the appropriate proposals to the Comparison Project. Only locked proposals can be added to a project. They must also use the same currency as that entered on the **General** page in the **Currency** folder of **System Options**.
8. Right-click the project, and then click **Comparison Project Properties**.
9. In the **Program** folder, on the **Proposals** page, change the Offeror Title.
10. Expand the **Normalization** folder.
11. On the **By Summary Field** page:

11.1. Enter the term you want to use to normalize the summary fields in the **Name** column.

11.2. In the **Offeror Title** columns, select the summary field used in that proposal.

12. On the **By Resource** page:

12.1. Enter the term you want to use to normalize the resources in the **Name** column.

12.2. In the **Offeror Title** columns, select the resource used in that proposal.

13. On the **By Algorithm Element** page:

13.1. Enter the term you want to use to normalize the Algorithm elements in the **Name** column.

13.2. In the **Offeror Title** columns, select the Algorithm element used in that proposal.

14. Click **OK** to close the **Comparison Project Properties** dialog box.

Notes:

- *Only locked proposals can be added to a Comparison Project*.
- *The currency of the proposals must be the same as that entered on the **General** page in the **Currency** folder of **System Options***.

Delete a Comparison Project

1. Do one of the following:
   - In the Navigation Pane, expand the **Comparison Projects/Proposals** folder.
   - Double-click the **Comparison Projects** folder to open the list of projects.
2. Right-click the project you want to delete, and then click **Delete** on the shortcut menu.
3. Select the **Delete Proposals** checkbox if you want to delete the proposals as well. If you do not select the checkbox clear, the proposals will be returned to the **Proposals** folder.
4. Click **Yes** to confirm the deletion when prompted.

Grant/Revoke Access Rights to a Comparison Project

1. Right-click the project, and then click **Comparison Project Properties** on the shortcut menu.
2. Open the **Program** folder, and then click the **Rights** page.
3. Select the **View** checkbox for the users you want to grant access to the Comparison Project or clear it for those you do not.
4. Click **OK**.

Normalize the Algorithm Elements of a Comparison Project

The Algorithm elements of the different proposals must be normalized to print cost elements on the Comparison Project reports. If you do not normalize the Algorithm elements, only Direct Cost will appear. Normalization maps the Algorithm elements to other terms as desired. For example, ProPricer could print *Overhead* to represent *O/H* from one offeror and *OH* from another.

1. Right-click the project, and then click **Comparison Project Properties** on the shortcut menu.
2. Open the **Normalization** folder, and then click the **By Algorithm Element** page.
3. In the **Name** column, type the term you want to use.
4. In the **Offeror Title** columns, enter the Algorithm Element used in that proposal.
5. Click **OK**.

Normalize the Resources of a Comparison Project

The resources of the different proposals must be normalized for them to appear on the Comparison Project reports. Normalization maps the resources to other terms as desired. For example, ProPricer could print *ENG01* to represent *ENG01* from one offeror, *ENG1* from another offeror, and *E001* from another.

1. Right-click the project, and then click **Comparison Project Properties** on the shortcut menu.
2. Open the **Normalization** folder, and then click the **By Resource** page.
3. In the **Name** column, type the name you want to use.
4. In the **Offeror Title** columns, enter the resource used in that proposal.
5. Click **OK**.

Normalize the Summary Fields of a Comparison Project

The summary fields of the different proposals must be normalized in order to run the project comparison reports. Normalization maps the summary fields to other terms as desired. For example, ProPricer could print *WBS* to represent *W.B.S.* from one offeror, *WBS* from another offeror, and *Account* from another.

1. Right-click the project, and then click **Comparison Project Properties** on the shortcut menu.
2. Open the **Normalization** folder, and then click the **By Summary Field** page.
3. In the **Name** column, type the name you want to use.
4. In the **Offeror Title** columns, enter the summary field used in that proposal.
5. Click **OK**.

Remove a Proposal from a Comparison Project

1. In the Navigation Pane, expand the **Comparison Projects/Proposals** folder.
2. Expand the Comparison Project.
3. Right-click the proposal you want to remove, and then click **Remove from Comparison Project**.

Composite Rates

Composite rates combine the contribution of the direct rates of various resources in a single rate. A typical composite rate might look something like this:

Resource	Factor	Direct Rate	Composite
Engineering Aide	0.25	22	5.5
Junior Engineer	0.25	25	6.25
Senior Engineer	0.50	30	15
			Total
			26.75

We've defined this rate to use 25% of the Engineering Aide, 25% of the Junior Engineer, and 50% of the Senior Engineer rate. The resulting composite rate is 0.25 x 22 + 0.25 x 25 + 0.5 x 30 = 5.5 + 6.25 + 15 = 26.75. You can apply this single rate to a single resource that will then incorporate and represent the work of the three constituent resources.

The Composite Rate Table is where you assign a composite rate to a resource. Since composite rates are based on direct rates, other composite rates, or T&M rates, they are automatically recalculated when changes are made to the base rates.

Notes:

- *You need a Direct Rate Table, T&M Rate Table, or another Composite Rate Table to create a Composite Rate Table*.
- *Composite rates are essentially direct rates, which is why Composite Rate Tables can be assigned to proposals and used as bases for other Composite Rate Tables*.

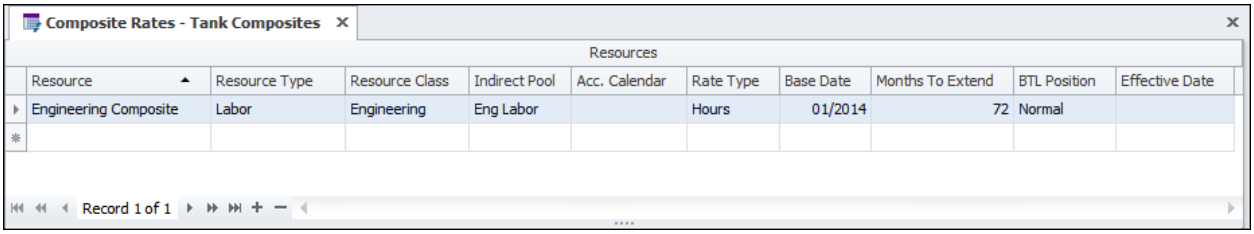
Composite Rate Tables

Composite Rate Tables are divided into three grids: Resources, Base Resources, and Rates.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resources

This grid shows all the resources in the table. It is also where you add new resources and remove unnecessary ones.



Resource

Enter the resource for which you want to define composite rates.

Description

You cannot enter data in this field. ProPricer extracts the description from the Resource Library and displays it here.

Resource Type

You cannot enter data in this field. ProPricer extracts the resource type from the Resource Library and displays it here.

Resource Class

This column shows the resource class entered for the composite resource in the Direct Rate Table. You can change the data in this field.

Indirect Pool

(Optional) Enter the indirect pool to price the indirect costs for this resource.

Accounting Calendar

You cannot enter data in this field. ProPricer uses the accounting calendar defined in the Resource Library for the resource.

Rate Type

Rate type determines how the resource input will be measured. There are three options available:

- Hours - the resource input is measured in hours or equivalent heads (typically for labor resources).
- Units - the resource input is measured in units (typically for non-labor resources).
- Cost - the units of the resource and the direct cost of the resource have the same numeric expression. This means that the resource input represents cost values (typically for non-labor resources).

Currency

This column appears only if the **Multi-Currency** option is selected for the Base Rate Table in the Composite Rate Table properties. It allows you to enter a different currency for the composite rate if the rate type is *Hours* or *Units*. The currency of the composite rate must match the currency of the base resources.

Base Date

Enter a base date. The base date you enter must fall within the system range.

Months To Extend

Enter the months to extend the composite rate.

BTL Position

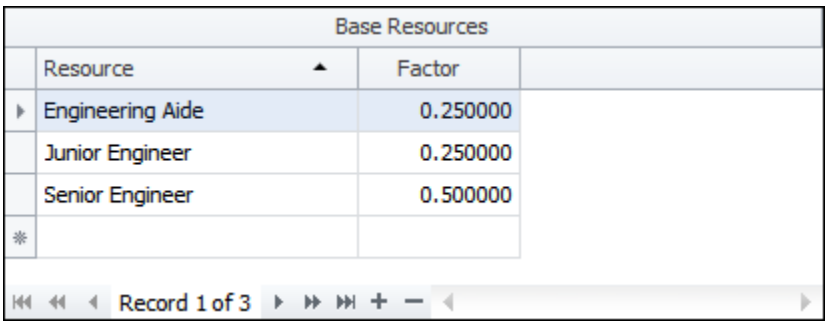
Select the below the line (BTL) position at which the resource will appear on reports. The lower the position, the less that the resource accumulates indirect cost. The available positions depend on the Algorithm, assigned to the table through the Indirect Rate Table. The default BTL position is *Normal*.

Effective Date

Enter the date the rate will take effect. This is for information only.

Base Resources

In this grid, you select the base resources from the Base Rate Table for the composite resource.



Resource

Enter the resources whose rates you want to use for the composite rate. You can only use resources from the Base Rate Table.

Factor

Enter the factor to be applied to the rates of each base resource.

Rates

This grid is for information only. It shows the composite rates calculated using the data in the **Resources** grid. The timescale is determined by the table properties.

Rates							
Month	2014	2015	2016	2017	2018	2019	2020
January	26.75	28.09	29.49	30.97	32.82	34.79	
February	26.75	28.09	29.49	30.97	32.82	34.79	
March	26.75	28.09	29.49	30.97	32.82	34.79	
April	26.75	28.09	29.49	30.97	32.82	34.79	
May	26.75	28.09	29.49	30.97	32.82	34.79	
June	26.75	28.09	29.49	30.97	32.82	34.79	
July	26.75	28.09	29.49	30.97	32.82	34.79	
August	26.75	28.09	29.49	30.97	32.82	34.79	
September	26.75	28.09	29.49	30.97	32.82	34.79	
October	26.75	28.09	29.49	30.97	32.82	34.79	
November	26.75	28.09	29.49	30.97	32.82	34.79	
December	26.75	28.09	29.49	30.97	32.82	34.79	

Assign a Composite Rate Table to a Proposal

All proposals require a rate table that will provide the resources for the tasks and, in turn, the rates of the resources.

1. In the Navigation Pane, click the **Proposals** button.
2. Right-click the appropriate proposal, and then click **Properties**.
3. In the **Proposal** folder, click the **Pricing** page.
4. In the **Direct Rate Table** field, enter the name of the Composite Rate Table you want to use.
5. Click **OK**.

Note: If you are replacing a proposal's rate table, the new table must contain all the resources used in the proposal. If the Indirect Rate Table of the new table differs from that of the proposal, you may lose proposal-specific indirect rates.

Change the Base Rate Table of a Composite Rate Table

1. Click the **Rates/Tables** button and expand the **Composite Rates** folder.
2. Right-click the Composite Rate Table whose base rate table you want to change, and then click **Properties** on the shortcut menu.
3. Enter the new Direct, Composite, or T&M Rate Table in the **Base Rate Table** field.
4. Click **OK**.

Composite Rate Table Properties

The **Composite Rate Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Timescale

Select a timescale for the rates in the table. The available options are Annual, Quarterly, Monthly, and Daily.

Base Rate Table

Select the rate table that will provide the resources and rates for the Composite Rate Table.

Multi-Currency

This checkbox indicates if the Base Rate Table entered has Multi-Currency functionality or not. You cannot select or clear this checkbox. If it is selected, a **Currency** column will appear in the Composite Rate Table that allows you to enter a different currency for the composite rate if the rate type is *Hours* or *Units*.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Composite Rate Tables and Multi-Currency

If the **Multi-Currency** checkbox is selected for the Base Rate Table assigned to the Composite Rate Table, a currency column appears that shows the default currency of the composite rate, which is the system currency. You can enter a different currency for the composite rate if the rate type is *Hours* or *Units*. Please note that the currency of the composite rate must match the currency of the base resources. You cannot enter Euro for the composite rate and then add a base resource with a currency other than Euro.

For example: Our system and proposal currency are USD. We created two composite resources, *Euro Composite* and *USD Composite*, and added them to a Composite Rate Table. The base resources and corresponding factors and rates were the same for both composite rates. The only difference is the currency.

Resources

Resource	Resource Type	Indirect Pool	Rate Type	Currency	Base Date	Months To Extend	BTL Position
USD Composite	Labor	Eng Labor	Hours	USD	01/2013	144	Normal
Euro Composite	Labor	Eng Labor	Hours	EUR	01/2013	144	Normal

Record 1 of 2

Base Resources

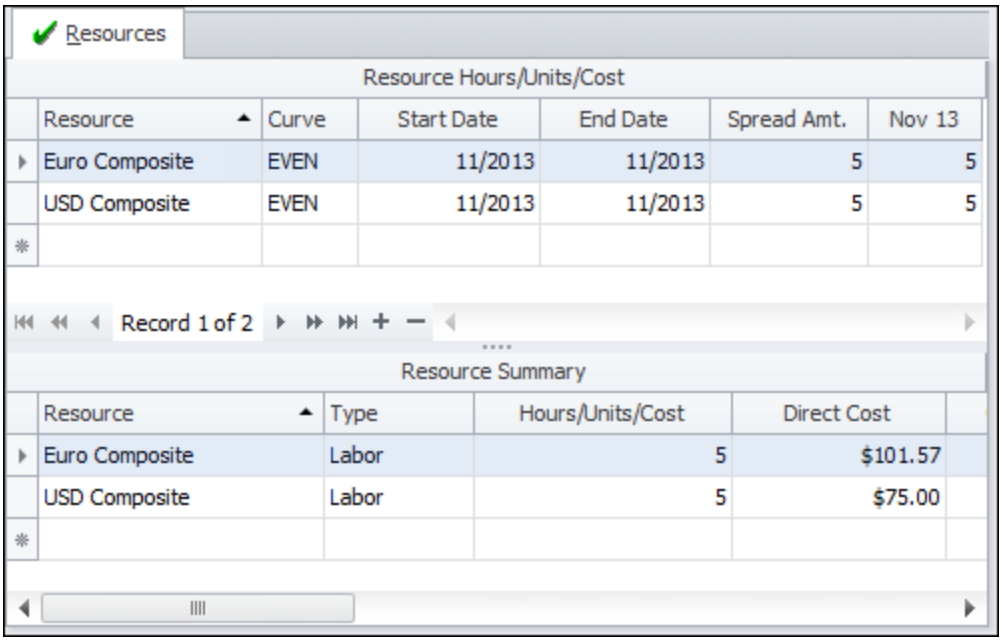
Resource	Factor
USD Res 1	0.500000
USD Res 2	0.500000

Record 1 of 2

Rates

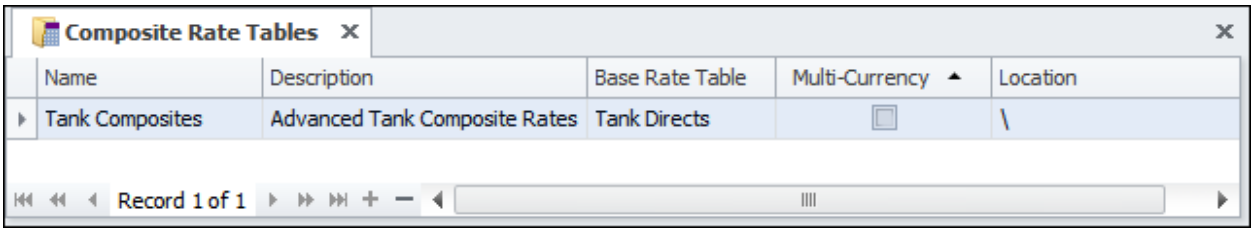
Month	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	20
January	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
February	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
March	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
April	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
May	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
June	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
July	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
August	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
September	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
October	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
November	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
December	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	

We added both resources to a task and spread five hours for them. The **Resources** tab shows $75.00 US dollars for the USD Composite and $101.57 US dollars for the Euro Composite. ProPricer used the rate from the Exchange Rate Table to convert the Euros to US dollars (the proposal currency).


Resources
Resource Hours/Units/Cost
Resource
Curve
Start Date
End Date
Spread Amt.
Nov 13
Euro Composite
EVEN
11/2013
11/2013
5
5
USD Composite
EVEN
11/2013
11/2013
5
5
Record 1 of 2
Resource Summary
Resource
Type
Hours/Units/Cost
Direct Cost
Euro Composite
Labor
5
$101.57
USD Composite
Labor
5
$75.00

Composite Rate Tables List

The Composite Rate Tables List shows all the Composite Rate Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Timescale

This column shows the measurement of time for rates in the table.

Base Rate Table

This column shows the name of the rate table that provides the resources and rates for the Composite Rate Table.

Multi-Currency

This column indicates if Multi-Currency functions have been enabled for the Base Rate Table.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Composite Rates** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Copy a Composite Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
   - Expand the **Composite Rates** folder.
   - Double-click the **Composite Rates** folder to open the list of Composite Rate Tables.
3. Right-click the Composite Rate Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy. Leave this field blank to store the copy in the root folder.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Copy a Composite Rate within a Table

1. Right-click the resource whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the resource to which you want to copy the rates.
3. Click **OK**.

ProPricer will check to see if rates have been entered for the target resource, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Create a Composite Rate Table

Before you can create a Composite Rate Table, you must have created a Direct, T&M, or another Composite Rate Table on which to base the Composite Rate Table.

1. Do one of the following:
   - In the Main Menu, click **New Composite Rate Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Composite Rates** folder, then click **New Composite Rate Table**.
2. Enter a name and description for the new table.
3. Select a timescale for the rates in the table. The rates can be annual, quarterly, monthly, or daily.
4. Select a Base Rate Table. ProPricer needs the rates from this table to calculate the composite rates of the resources included in the Composite Rate Table.
5. Click **OK**. The Composite Rate Table will open in the Workspace.

Define a Composite Rate for a Resource

1. Click the **Rates/Tables** button and expand the **Composite Rates** folder. Double-click the appropriate Composite Rate Table.
2. Enter a resource in the **Resource** column.
3. Change the resource class.
4. *(Optional)* Enter an indirect pool.
5. Define a period for the new rate by specifying its base (or start) date and the number of months to extend.
6. Enter base resources, and type factors for them.
7. Press **Ctrl**+**S** or move to another row to save your work.

ProPricer calculates the composite rates for the specified period. You can view the rates in the **Rates** grid.

Delete a Composite Rate from a Table

1. Click the **Rates/Tables** button and expand the **Composite Rates** folder. Double-click the appropriate Composite Rate Table.

2. Right-click the resource you want to delete, and then click **Delete** on the shortcut menu.

3. Confirm the deletion when prompted.

*Note: You can only delete composite rates that are not used anywhere in the system. If the composite rate is used, ProPricer will display the **Item Usage Info** box instead.*

Delete a Composite Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Composite Rates** folder.
    - Double-click the **Composite Rates** folder to open the list of Composite Rate Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete a Composite Rate Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Currency
Change the Currency of a Proposal

When you create a proposal, the System Currency entered on the **General** page in the **Currency** folder of **System Options** is automatically entered in the **Currency** field on the **Currency** page of **Proposal Properties**. You can use this currency or change it.

1. In the Navigation Pane, click the **Proposals** button, right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. In the **Proposal** folder, click the **Currency** page.
3. in the **Currency** field, enter the desired currency.
4. Click **OK**.

Notes:

- *You can only use currencies that are enabled on the **Currency** page of **System Options**.*
- *If you change the currency after entering an Exchange Rate Table, the currency must exist in the table.*
- *If you enter a currency that differs from the system currency without assigning an Exchange Rate Table to the proposal, you can add resources with the rate type **Hours** or **Units** if their rates are in the proposal currency. Changing the proposal currency does not affect resources with the rate type **Cost**.*
- *If you want to change the currency after resources have been added to the proposal, you must assign an Exchange Rate Table to the proposal first. If your proposal only uses resources with rate type Cost, you can change the currency without assigning an Exchange Rate Table. The **Change Currency** dialog box appears with two options:*
    - *Leave the existing costs unchanged.*

- *Convert the costs with the following exchange rate*.

Create a Custom Currency

Custom currencies provide solutions to special circumstances. For example, let's say you deal with subcontractors from different countries that use the same currency (France, Spain, and Germany) and the exchange rates you negotiated with each subcontractor are different. Creating a custom currency for each country (French Euro, Spanish Euro, German Euro) will allow you to enter the different exchange rates in an Exchange Rate Table for the different subcontractors. You could also create a Dollars K currency you can use in an Exchange Rate Table so that values are shown in thousands, rather than dollars and cents.

1. On the **Setup** ribbon, in the **Preferences** group, click **System Options**.
2. Click the **Currency** page.
3. Click the **Append** button (the plus sign) in the navigation tools.
4. Enter a **Name**, **Description**, and **Symbol** for the custom currency.
5. Select the **Enabled** checkbox.
6. Click **OK**.

Enable a Currency

You can use a currency in a proposal and an Exchange Rate Table after you enable the currency.

1. Click the **Setup** ribbon, and then click **System Options** in the **Preferences** group.
2. Click the **Currency** page.
3. Select the **Enabled** checkbox of the currency you want to use.
4. Click **OK**.

Enable Bid Currency Options

You can use Bid Currency Options to show the costs of a proposal in a different currency.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Currency** page in the **Proposal** folder of **Proposal Properties**.
3. Under the **Proposal Currency Options**, enter an Exchange Rate Table. This will provide the exchange rates needed to convert the costs.
4. Select the **Multi-Currency** checkbox to enable the Bid Currency Options.
5. Under the **Bid Currency Options**, select the **Enable** checkbox.
6. Enter the currency in which you want to show the costs.
7. Enter the level at which you want to convert the proposal costs.
8. Click **OK**.

Set the Default Currency

The default currency is the currency that will automatically be entered in the **Currency** field on the **Currency** page in the **Proposal** folder of **Proposal Properties** for every new proposal you create. It is the currency ProPricer will use to calculate costs.

1. Click the **Setup** ribbon, and then click **System Options** in the **Preferences** group.
2. Click the **Currency** page.
3. Enter the System Currency.
4. Click **OK**.

Decimal Display and Precision

ProPricer uses Decimal Display and Decimal Precision. Both can be adjusted with the following settings:

System Options

- Direct Rates Decimal Display
- Scheduled Rates Decimal Display
- Accounting Hours/Month Decimal Precision
- Associated Costs Decimal Display

Proposal Properties

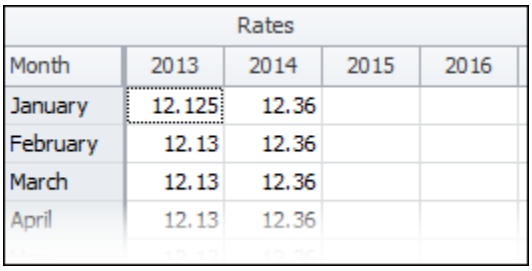
- Resource Decimal Precision
- Effective Scheduled Rate Decimal Precision

All the settings regulate the number of decimal places you will see in a given field, and will also round the value, if necessary, to the number of decimal places entered. The difference is that Decimal Display only rounds what you see. When you click a field, the value may have more decimal places. ProPricer will use the full value during calculations. Precision rounds what you see and the value used in calculations. Please note that costs are never rounded.

To illustrate Decimal Display, we entered rates with three decimal places in our Direct Rate Table. Our Direct Rates Decimal Display is *2*. When we open our Direct Rate Table, this is what we see:

Rates				
Month	2013	2014	2015	2016
January	12.13	12.36		
February	12.13	12.36		
March	12.13	12.36		
April	12.13	12.36		

When we click a rate, we see the three decimal places we entered.

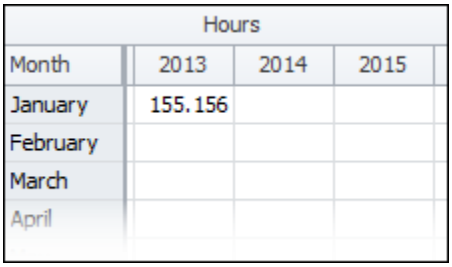


Rates

Month	2013	2014	2015	2016
January	12.125	12.36		
February	12.13	12.36		
March	12.13	12.36		
April	12.13	12.36		

Decimal Display regulates only what we see. Even though we entered three decimal places, we only see two. ProPricer rounded the rate to *12.13*. However, the rate ProPricer will use during pricing is *12.125*.

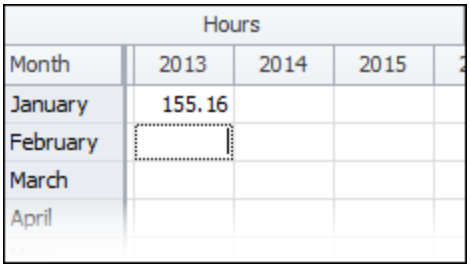
Decimal Precision, on the other hand, may alter the value. When you enter a number for Decimal Precision, you are telling ProPricer to use this number to round the value to that number of decimal places, as well as display that number of places after the decimal point. For example: We entered *2* for the Accounting Hours/Month Decimal Precision and then created an accounting calendar. We entered three numbers after the decimal point.



Hours

Month	2013	2014	2015
January	155.156		
February			
March			
April			

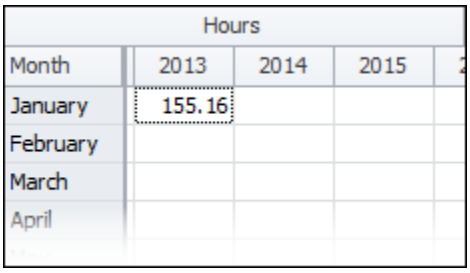
When we moved the cursor to enter February's hours, ProPricer applied the Decimal Precision and changed the value to *155.16*.



Hours

Month	2013	2014	2015
January	155.16		
February			
March			
April			

If we click January's hours again, the value does not change. ProPricer applied the Decimal Precision of *2* and rounded the original value of *155.156* to *155.16*.



Decimal Display

Set the Associated Costs Decimal Display

Associated Costs Decimal Display allows you to set the number of places after the decimal point that will be shown for associated costs in the material libraries, Task View and Material View, and material reports.

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **Material** page.
3. In the **Associated Costs Decimal Display** field, type a number between 0 and 6. The default number is 0.
4. Click **OK**.

Set the Average Indirect Rate Decimal Display

The average indirect rate decimal display defines the number of decimal places after the decimal point that will be shown for the average indirect rate on reports.

1. Click the **Setup** ribbon, and then **Report Defaults** in the **Preferences** group.
2. Click the **General** page.
3. In the **Average Indirect Rate Decimal Display** field, enter a number between 0 and 6, inclusive.
4. Click **OK**.

Set the Direct Rates Decimal Display

Direct Rates Decimal Display allows you to determine the number of places after the decimal point that will be shown for direct rates in Direct Rate Tables and on reports.

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **General** page.
3. In the **Direct Rates Decimal Display** field, enter a number between 2 and 6.
4. Click **OK**.

Set the Material Quantity Decimal Display

Material Quantity Decimal Display allows you to set the number of places after the decimal point that will be shown in the Assemblies Library, the Material tab of Task View, the Material Input grid of Material View, and in material reports.

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **Material** page.
3. In the **Material Qty Decimal Display** field, type a number between 0 and 6. The default number is 2.
4. Click **OK**.

Set the Scheduled Rates Decimal Display

The **Scheduled Rates Decimal Display** field allows you to determine the number of places after the decimal point that will be shown for scheduled rates in Scheduled Rate Tables and on reports.

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **General** page.
3. In the **Scheduled Rates Decimal Display** field, enter a number between 2 and 6.
4. Click **OK**.

Decimal Precision

Set the Accounting Hours per Month Decimal Precision

Accounting Hours/Month Decimal Precision tells ProPricer to use that number to round the accounting hours in calendars, Work Schedule Tables, and on reports.

1. On the **Setup** ribbon, click **System Options**.
2. Click the **Calendar** page.
3. In the **Accounting Hours/Month Decimal Precision** field, enter a number between 0 and 6.
4. Click **OK**.

Set the Effective Scheduled Rate Decimal Precision

Effective Scheduled Rate Decimal Precision tells ProPricer to use this number when rounding the rates.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. in the **Proposal** folder, click the **Pricing** page.
3. In the **Effective Scheduled Rate Decimal Precision** field, enter a number from 0 to 6.
4. Click **OK**.

Set the Resource Decimal Precision

Resource Decimal Precision tells ProPricer to use that number to round the hours/units/cost values entered for a resource.

Set the Resource Decimal Precision in a proposal

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **General** page.
3. In the **Resource Decimal Precision** field, enter a number from 0 to 12.
4. Click **OK**.

Direct Rates

Direct rates are the costs that are directly chargeable to a task in a contract. More specifically, direct rates are the hourly expenses for using a resource, so they show the amount of money one must pay to use a resource (person, service, tool, etc.) for one hour.

Direct Rate Tables are where you enter rates for the resources. Rates can be entered manually or with an escalation set. An escalation set specifies the period a given rate is to be charged for the resource, the rate itself, and the changes in the rate during the period. In addition to entering rates for the resources, you also associate every resource with an indirect pool from the Indirect Rate Table assigned to the Direct Rate Table. You can also associate resources with a resource class and an accounting calendar and define each resource's position in the calculation of costs.

Typically, you will create a Direct Rate Table once and then use the table across multiple proposals. There is no limit to the number of resources you can have in a Direct Rate Table. We recommend you create an Indirect Rate Table before you create a Direct Rate Table.

You can set a Direct Rate Table as the current Direct Rate Table, which will make it the default table for every new proposal you create. It will automatically be entered on the Pricing page in the Proposal folder of Proposal Properties. The name of the current Direct Rate Table appears in bold letters in the Direct Rates folder, and the icon will have a star.

Direct Rate Tables

Direct Rate Tables are where you define rates for the resources you will use in your proposals. You can use any of the resources from the Resource Library and define rates for any of the years within the system period.

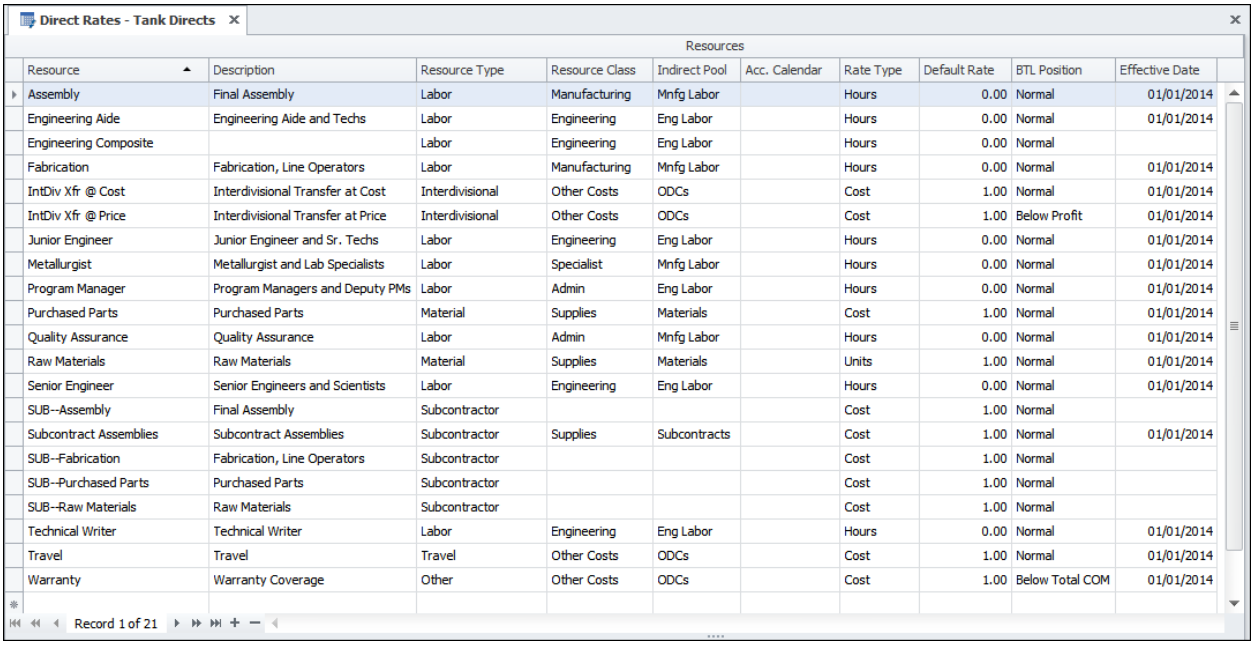
The table is divided into three grids: Resources, Escalation Sets, and Rates.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resources

This is where you add and change the resources in a Direct Rate Table. Some of the information here comes from the Resource Library and is read-only, but most of it is editable.

*Note: You can assign the same resource class, indirect pool, or accounting calendar to many resources in the table at once. Hold **Ctrl** or **Shift** to select multiple resources, right-click them, point to **Assign**, then select an option.*



Resource

Enter the name of the resource. You can replace a resource in the table with another one from the library if the first resource is not used in any task or rate table. If you enter a resource that does not exist in the Resource Library, ProPricer will ask if you want to add it to the library. In this way you can add resources to the Resource Library while working in the **Direct Rates** grid.

Rate Band

This column appears only if there is a Rate Band Table assigned to the Direct Rate Table. It allows you to assign a to the resource and thus apply the direct rates from the respective rate band.

Description

ProPricer extracts the description from the Resource Library and displays it here.

Resource Type

This column shows the resource type entered for the resource in the Resource Library.

Resource Class

This column shows the resource class entered for the resource in the Resource Library.

Indirect Pool

(Optional) Enter the indirect pool you want to use to price the indirect costs for the resource.

Accounting Calendar

This column displays the accounting calendar (if any) associated with the resource in the Resource Library.

Rate Type

Select how you want to measure the resource input. There are three options available:

- Hours - the resource input is measured in hours or equivalent heads (typically for labor resources).
- Units - the resource input is measured in units (typically for non-labor resources).
- Cost - the units of the resource and the direct cost of the resource have the same numeric expression, that is, the resource input represents cost values (typically for non-labor resources).

Currency

This column appears only if the **Multi-Currency** option is selected on the **Direct Rate Table Properties** dialog box. It will show the system currency for the resources by default. However, you can enter different currencies.

Default Rate

Enter a value if the rate is constant and does not require escalation. The flat rate of a resource covers the entire system period. If you define a flat rate, you do not have to create escalation sets or enter rates manually. The default flat rate is zero.

Every resource entered in the table will have a default rate of 0.00 until another rate is specified.

BTL Position

Select the Below The Line (BTL) position at which the resource will appear on reports. The lower the position, the less that the resource accumulates indirect cost. The available positions depend on the Algorithm assigned to the table through the Indirect Rate Table. The default BTL position is *Normal*.

Effective Date

Enter the date the rate will take effect. This is for information only.

Escalation Sets

In this grid, you can define one or more escalation sets to calculate rates for the resources in the table. The rates defined through escalation sets overwrite the default rate of a resource.

No.

The cells of this column cannot be edited. ProPricer assigns numbers to the escalation sets based on their start dates. The set with the earliest date receives number 1.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the beginning rate for the escalation set.

Factor

Enter the factor that is applied to the base rate to escalate it. For example, express 1% as *0.01*.

Step

Enter the number of months the base rate remains constant before the factor is applied. The default is 12 months.

Months to Extend

Enter the number of months that the escalation set should last.

Rates

This grid shows rates for the resource selected in the **Resources** grid. The value in every cell is the amount of money chargeable for using the resource.

The grid shows all years in the system period. However, you only need to enter rates for the years you require. The timescale is determined by the table properties.

You can use an escalation set to enter rates, or you can enter them manually. If you enter rates manually and then create an escalation set, ProPricer deletes the rates entered manually and enters the new calculated rates in the cells. Likewise, if you use an escalation set to enter rates, you can still enter rates manually if needed.

The **Rates** grid shows only the rates defined with escalation sets or entered manually. Default rate values are not shown. The rates calculated from the escalation set are green.

Rates					
Month	2016	2017	2018	2019	2020
January	14.00	14.70	15.44	16.21	17.02
February	14.00	14.70	15.44	16.21	17.02
March	14.00	14.70	15.44	16.21	17.02
April	14.00	14.70	15.44	16.21	17.02
May	14.00	14.70	15.44	16.21	17.02
June	14.00	14.70	16.00	16.21	17.02
July	14.00	14.70	16.00	16.21	17.02
August	14.00	14.70	16.00	16.21	17.02
September	14.00	14.70	16.00	16.21	17.02
October	14.00	14.70	16.00	16.21	17.02
November	14.00	14.70	16.00	16.21	17.02
December	14.00	14.70	16.00	16.21	17.02

ProPricer shows direct rates with two, three, four, five, or six digits after the decimal point, depending on the value entered on the **General** page in the **System** folder of **System Options**. If you enter rates with more digits after the decimal point, ProPricer rounds the rate to the value entered when you leave the cell. When you click the rate again, the complete rate appears.

*Note: If a rate band is associated with a resource, the **Escalation Sets** and the **Rates** grid of the grid are read only. They show the data extracted for the respective from the Rate Band Table assigned to the proposal.*

Assign a Direct Rate Table to a Proposal

All proposals require a rate table that will provide the resources for the tasks and, in turn, the rates of the resources.

1. Do one of the following:
   - In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties**.
   - Select the appropriate proposal. On the **Proposal** ribbon, in the **Proposal** group, click **Properties**.
2. In the **Proposal** folder, click the **Pricing** page.
3. In the **Direct Rate Table** field, enter the name of the Direct Rate Table you want to use.
4. Click **OK**.

Note: If you are replacing a proposal's Direct Rate Table, the new table must contain all the resources used in the proposal. The old table may contain resources that are not used in the proposal but have overriding rates defined for them. If the new table does not contain these resources, the overriding rates will be deleted for the missing resources. If the Indirect Rate Table of the new table differs from that of the proposal, you may lose proposal-specific indirect rates.

Copy a Direct Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
   - Expand the **Direct Rates** folder.
   - Double-click the **Direct Rates** folder to open the list of Direct Rate Tables.
2. Right-click the Direct Rate Table you want to copy, and then click **Copy** on the shortcut menu.
3. Enter where you want to store the copy.
4. Enter a name and description for the copy that will be created.
5. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
6. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Copy the Direct Rates of One Resource to Another within a Table

Once you have defined the rates for a resource in a Direct Rate Table, you can copy them into another resource in the table or a resource from the Resource Library.

1. Right-click the resource whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the resource to which you want to copy the rates.
3. Click **OK**.

ProPricer will check to see if rates have been entered for the target resource, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Note: If the target resource does not exist in the Resource Library, ProPricer will offer you the option to add it to the library. Click ***Yes*** *when prompted to add it to the library. ProPricer will create the resource in the library and then copy the rates for it in the table. The description of the new resource will be the same as that of the source resource.*

Create a Direct Rate Table

You can create a Direct Rate Table after you create an Indirect Rate Table.

1. Do one of the following:
   - In the Main Menu, click **New Direct Rate Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Direct Rates** folder, then click **New Direct Rate Table**.
2. Enter a name and description for the new table.
3. Select a timescale for the rates in the table. The rates can be annual, quarterly, monthly, or daily.
4. Select an Indirect Rate Table. The Indirect Rate Table provides the indirect pools and rates for the resources in the Direct Rate Table and for the tasks of the proposals to which the Direct Rate Table will be assigned.
5. *(Optional)* Select a Rate Band Table. The Rate Band Table provides rate bands and rates for the resources in the Direct Rate Table and for the resources of the proposals to which the Direct Rate Table will be assigned.
6. *(Optional)* Select the **Multi-Currency** checkbox to be able to enter different currencies for the rates of your resources.
7. Click **OK**. The Direct Rate Table will open in the Workspace.

Current Direct Rate Table

Setting a Direct Rate Table as the current one indicates which table has the rates your company wants to use. It will be the default table for every new proposal you create and will automatically be entered on the **Pricing** page in the **Proposal** folder of **Proposal Properties**.

The name of the current table will appear in bold letters in the **Direct Rates** folder in the Navigation Pane, and the icon will have a star. The table list has a **Current** checkbox as well.

You can open the table by clicking the Current Direct Rates icon on the **Rates** ribbon. Or you can double-click the table in the Navigation Pane.

You can run the Audit Report to determine if your proposal is using the current Direct Rate Table.

Notes:

- *There can only be one current Direct Rate Table at a time. You can set another Direct Rate Table as the new current table whenever necessary.*
- *You can switch the current Direct Rate Table assigned to the proposal at any time.*
- *If there is no table set as the current one, the **Direct Rate Table** field on the **Pricing** page in the **Proposal** folder of **Proposal Properties** will be blank when you create a new proposal.*
- *None of the exports distinguish if the Direct Rate Table is set as current.*

- *The Archive/Restore processes do not distinguish if the Direct Rate Table is set as current.*
- *Proposals that were locked with the current table are not affected by changes to the current table.*
- *You need the Associated Permission to be able to set a Direct Rate Table as the current one.*

Define a Direct Rate for a Resource

After you create a resource in the Resource Library, you can define a direct rate for the resource.

1. In the Navigation Pane, click the **Rates/Tables** button and expand the **Direct Rates** folder. Double-click the appropriate Direct Rate Table.
2. In the **Resource** column, enter the name of the resource. ProPricer will retrieve the resource description, type, and calendar from the library and enter them in the respective columns.
3. *(Optional)* Enter a for the resource if you assigned a Rate Band Table to the Direct Rate Table.
4. *(Optional)* Associate the resource with a resource class and indirect pool.
5. *(Optional)* Enter a Currency if the Multi-Currency checkbox is selected for the table.
6. If appropriate, type a default rate.
7. Define a BTL position if the resource needs some special application of indirect rates.
8. *(Optional)* Define an escalation set for the resource.
9. If you did not enter a default rate or escalation set for the resource, enter the rates in the **Rates** grid.
10. Press **Ctrl**+**S** or move to another row to save your work.

Notes:

- *If you enter a default rate for a resource, you do not have to create an escalation set or enter rates in the **Rates** grid for this resource. ProPricer applies the default rate as a constant rate across the entire period the resource is in use.*
- *If you select a BTL position for a resource, only the indirect costs below the selected position accumulates for this resource. For example, if you select Below Grand Total, the resource will display below the grand total on any applicable reports. The available BTL positions are defined in the Algorithm.*
- *If the resource you want to add does not exist in the Resource Library, ProPricer will offer you the option to add it to the library.*

Delete a Direct Rate from a Table

You can remove any direct rate defined for a resource from a Direct Rate Table.

1. In the Navigation Pane, click the **Rates/Tables** button and expand the **Direct Rates** folder. Double-click the appropriate Direct Rate Table.
2. Right-click the resource you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

*Note: You can only delete resources that are not used anywhere in the system. If the resources are used, ProPricer will display the **Item Usage Info** box instead.*

Delete a Direct Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Direct Rates** folder.
    - Double-click the **Direct Rates** folder to open the list of Direct Rate Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete a Direct Rate Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Direct Rate Table Properties

The **Direct Rate Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Timescale

Select a timescale for the rates in the table. The available options are Annual, Quarterly, Monthly, and Daily.

Indirect Rate Table

Select the Indirect Rate Table that will provide the indirect pools for the resources in the Direct Rate Table.

Rate Band Table

Select the Rate Band Table to attach to the Direct Rate Table. This allows you to associate rate bands with the resources in the table.

Multi-Currency

Select this checkbox to enable multi-currency functions for the table. This will allow you to enter different currencies for the rates of the resources if needed.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

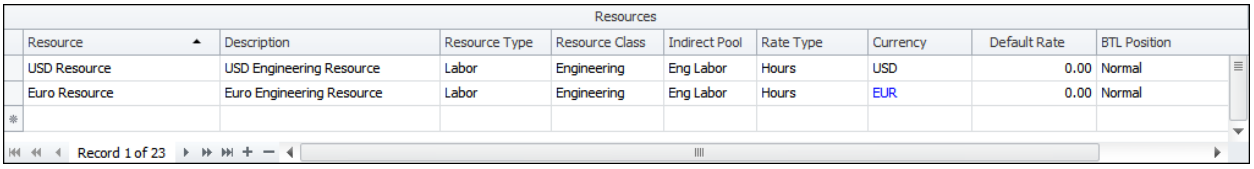
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Direct Rate Tables and Multi-Currency

Selecting the **Multi-Currency** checkbox for a Direct Rate Table allows you to enter rates in different currencies. When you add the resource to a task, ProPricer will use the rate from the Exchange Rate Table assigned to the proposal to convert the cost to the proposal currency. For example: our system and proposal currency are USD. We added two resources to the Direct Rate Table: USD Resource and Euro Resource. We entered a Base Rate of 10.00 for both resources. The only difference is the currency.

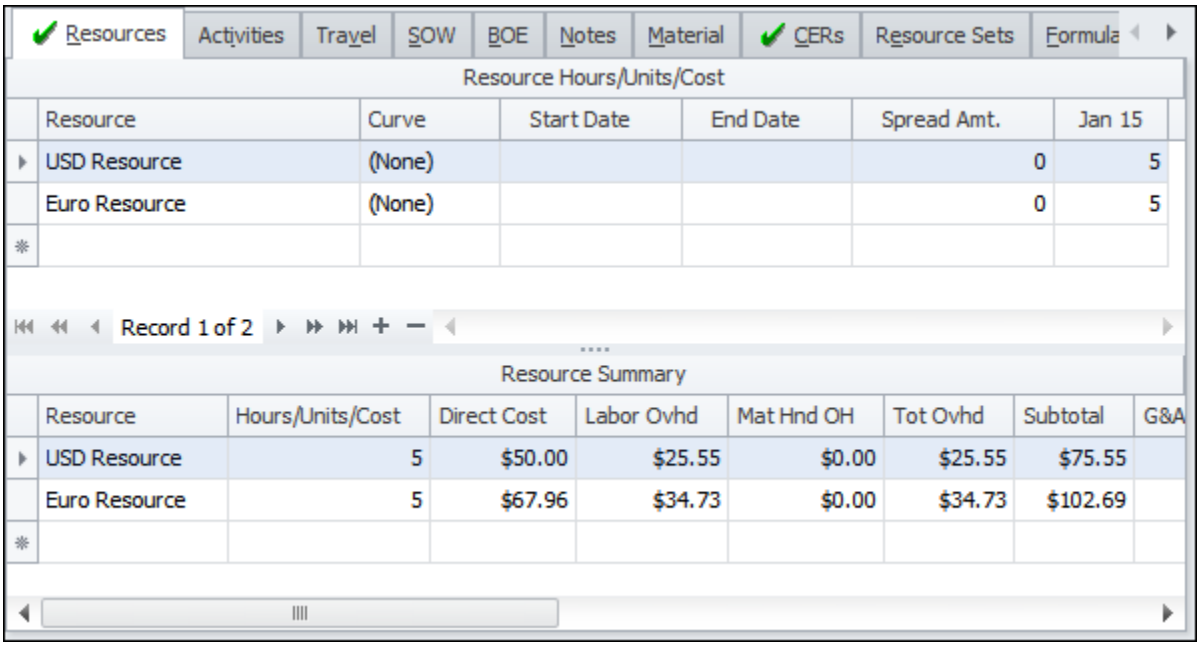


Resources

Resource	Description	Resource Type	Resource Class	Indirect Pool	Rate Type	Currency	Default Rate	BTL Position
USD Resource	USD Engineering Resource	Labor	Engineering	Eng Labor	Hours	USD	0.00	Normal
Euro Resource	Euro Engineering Resource	Labor	Engineering	Eng Labor	Hours	EUR	0.00	Normal

Record 1 of 23

We added both resources to a task and spread 5 hours for them. The Resource Summary grid shows a Direct Cost of $50.00 US dollars for the USD Resource and $67.96 US dollars for the Euro Resource. ProPricer used the rate from the Exchange Rate Table to convert the Euros to US dollars (the proposal currency).



Resources | Activities | Travel | SOW | BOE | Notes | Material | CERs | Resource Sets | Formula

Resource Hours/Units/Cost

Resource	Curve	Start Date	End Date	Spread Amt.	Jan 15
USD Resource	(None)			0	5
Euro Resource	(None)			0	5

Record 1 of 2

Resource Summary

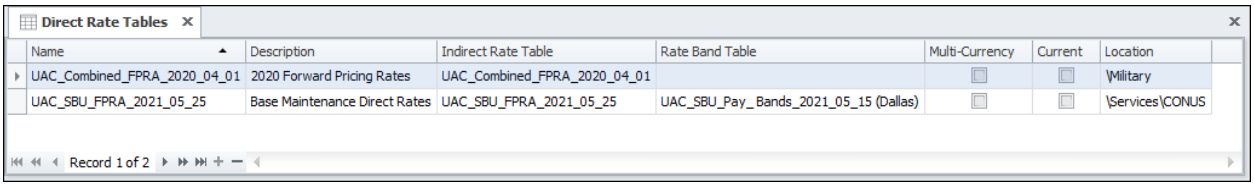
Resource	Hours/Units/Cost	Direct Cost	Labor Ovhd	Mat Hnd OH	Tot Ovhd	Subtotal	G&A
USD Resource	5	$50.00	$25.55	$0.00	$25.55	$75.55	
Euro Resource	5	$67.96	$34.73	$0.00	$34.73	$102.69	

Enable Multi-Currency in a Direct Rate Table

1. Right-click the appropriate Direct Rate Table, and then click **Properties** on the shortcut menu.
2. Select the **Multi-Currency** checkbox.
3. Click **OK**.

Direct Rate Tables List

The Direct Rate Tables List shows all the Direct Rate Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Timescale

This column shows the measurement of time for rates in the table.

Indirect Rate Table

This column shows the name of the Indirect Rate Table that provides the indirect rates for the Direct Rate Table.

Rate Band Table

This column shows the name of the Rate Band Table that provides the rate bands for the Direct Rate Table.

Multi-Currency

This column indicates if Multi-Currency functions have been enabled for the table.

Current

The checkbox indicates if a Direct Rate Table has been set as current. This table is the default table for every new proposal you create. In the Proposal Properties, It will be automatically entered on the **Pricing** page in the **Proposal** folder.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root folder. The root folder is named **Direct Rates** and is in the **Rates/Tables** section of the Navigation Pane.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Escalation Sets

Escalation sets are used to calculate rates in a Direct Rate Table and Rate Band Table. You supply some basic information and ProPricer does the rest.

For example: We have a resource we will employ for two years starting January 2012. His Base Rate is 10.00, which will increase 20% every three months. We could manually calculate the rates and enter them in the **Rates** grid of our Direct Rate Table, or create an escalation set that would look like this:

Escalation Sets

No.	Base Date	Base Rate	Factor	Step	Months To Extend
1	01/2012	10.00	0.2000	3	24

Once we save the escalation set, the **Rates** grid will look like this:

Rates

Month	2012	2013
January	10.00	12.00
February	10.00	12.00
March	10.00	12.00
April	10.50	12.60
May	10.50	12.60
June	10.50	12.60
July	11.00	13.20
August	11.00	13.20
September	11.00	13.20
October	11.50	13.80
November	11.50	13.80
December	11.50	13.80

The **Rates** grid shows eight three-month periods, indicated by the different highlights. The first period uses the Base Rate entered in the escalation set. The rates of the subsequent periods are calculated using: Rate of the previous period + {Base Rate x [(Step / 12) x Factor]}. For example:

Second Period	Third Period
10.00 + {10.00 x [(3 / 12) x .2]}	10.50 + {10.00 x [(3 / 12) x .2]}
10.00 + (10.00 x .05)	10.50 + (10.00 x .05)
10.00 + .50	10.50 + .50
10.50	11.00

The Base Rate for 2013 is *12.00*. This is because ProPricer changes the Base Rate every twelve months. The rate entered for January of a specific year becomes the new Base Rate for that year. For example:

Sixth Period	Seventh Period
12.00 + {12.00 x [(3 / 12) x .2]}	12.60 + {12.00 x [(3 / 12) x .2]}
12.00 + (12.00 x .05)	12.60 + (12.00 x .05)
12.00 + .60	12.60 + .60
12.60	13.20

Let's look at another example. Everything is the same as above, except for the Step, which is seven months. The escalation set will look like this:

Escalation Sets

No.	Base Date	Base Rate	Factor	Step	Months To Extend
1	01/2012	10.00	0.2000	7	24

The **Rates** grid will look like this:

Rates		
Month	2012	2013
January	10.00	11.17
February	10.00	11.17
March	10.00	12.47
April	10.00	12.47
May	10.00	12.47
June	10.00	12.47
July	10.00	12.47
August	11.17	12.47
September	11.17	12.47
October	11.17	13.77
November	11.17	13.77

The first period uses the Base Rate entered in the escalation set. The rates of the subsequent periods are calculated:

Second Period	Third Period	Fourth Period
10.00 + {10.00 x [(7 / 12) x .2]}	11.17 + {11.17 x [(7 / 12) x .2]}	12.47 + {11.17 x [(7 / 12) x .2]}
10.00 + (10.00 x .117)	11.17 + (11.17 x .117)	12.47 + (11.17 x .117)
10.00 + 1.17	11.17 + 1.3	12.47 + 1.3
11.17	12.47	13.77

The third and fourth periods use the Base Rate of *11.17*, which is the rate entered for January 2013.

Set a Direct Rate Table as Current

Setting a Direct Rate Table as current makes it the default Direct Rate Table for every new proposal you create. ProPricer will automatically assign it in the Pricing page of the Proposal Properties.

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand the **Direct Rates** folder.

2. Right-click the appropriate Direct Rate Table, and then click **Current**. In the **Direct Rates** folder, the name of the current Direct Rate Table will appear in bold letters and its icon will have a star.

Set the Direct Rates Decimal Display

Direct Rates Decimal Display allows you to determine the number of places after the decimal point that will be shown for direct rates in Direct Rate Tables and on reports.

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **General** page.
3. In the **Direct Rates Decimal Display** field, enter a number between 2 and 6.
4. Click **OK**.

Exchange Rates

You need an Exchange Rate Table if you would like to account for costs in a currency other than the system currency or present your proposal in a different currency. ProPricer uses the rates from the table to convert the different currencies.

Every Exchange Rate Table has a base currency. The rates you enter for the foreign currencies represent the number of units of the base currency you can buy with one unit of the foreign currency. ProPricer will calculate the inverse rates (green) that represent the number of units of the foreign currency you can buy with one unit of the base currency.

Exchange Rates

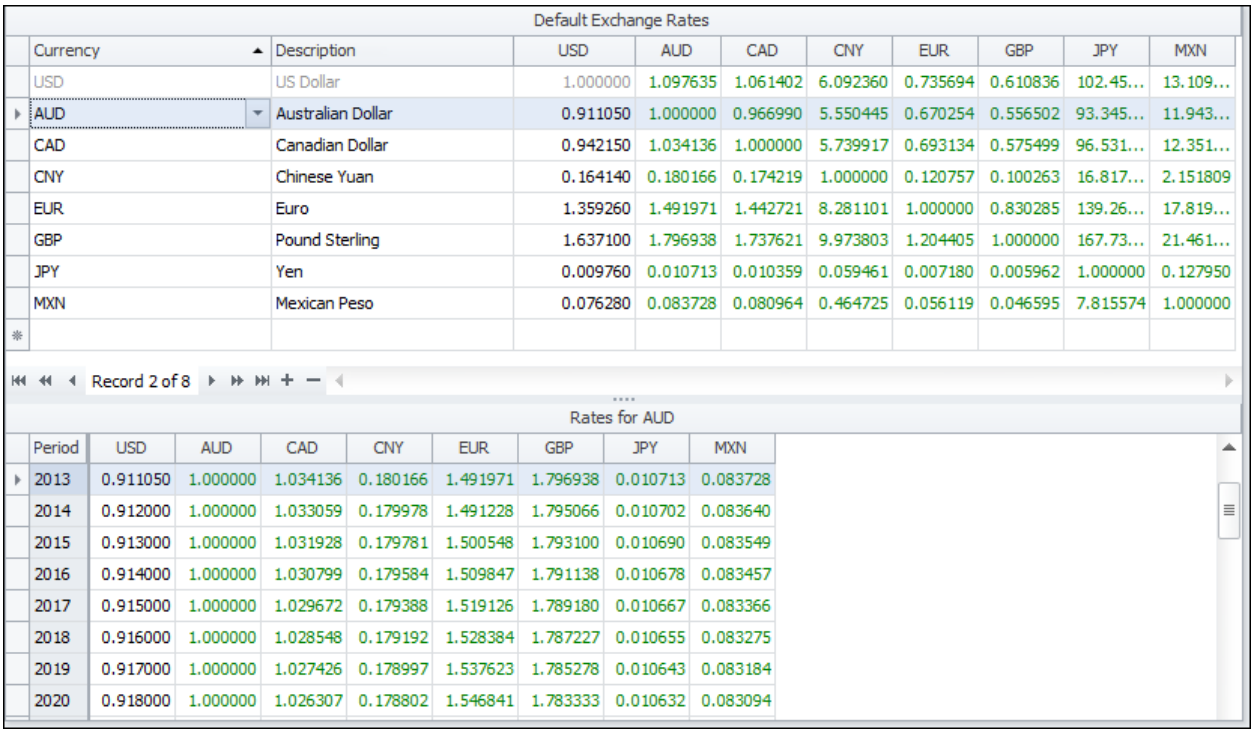
Currency	Description	USD	AUD	CAD	CNY	EUR	GBP	JPY	MXN
USD	US Dollar	1.000000	1.097635	1.061402	6.092360	0.735694	0.610836	102.459016	13.109596
AUD	Australian Dollar	0.911050	1.000000	0.966990	5.550445	0.670254	0.556502	93.345287	11.943498
CAD	Canadian Dollar	0.942150	1.034136	1.000000	5.739917	0.693134	0.575499	96.531762	12.351206
CNY	Chinese Yuan	0.164140	0.180166	0.174219	1.000000	0.120757	0.100263	16.817623	2.151809
EUR	Euro	1.359260	1.491971	1.442721	8.281101	1.000000	0.830285	139.268443	17.819350
GBP	Pound Sterling	1.637100	1.796938	1.737621	9.973803	1.204405	1.000000	167.735656	21.461720
JPY	Yen	0.009760	0.010713	0.010359	0.059461	0.007180	0.005962	1.000000	0.127950
MXN	Mexican Peso	0.076280	0.083728	0.080964	0.464725	0.056119	0.046595	7.815574	1.000000

Record 1 of 8

The first currency column in any table is the base currency. The above screenshot shows a table with the base currency USD. The rates entered in the USD column represent the USD equivalent for one unit of the foreign currency: 1 AUD equals 0.911050 USD, 1 EUR equals 1.359260 USD, etc. The top row of the table shows the inverse rates for the base currency: 1 USD equals 1.097635 AUD, 0.735694 EUR, 13.109596 MXN, etc.

Exchange Rate Tables can be created with a yearly, quarterly, or monthly timescale if you would like to enter projected exchange rates. The following screenshot shows an Exchange Rate Table with a yearly timescale. The top grid is where you enter the

default exchange rates for the currencies and the bottom grid is where you enter the projected rates for the currency selected in the top grid.



Default Exchange Rates

Currency	Description	USD	AUD	CAD	CNY	EUR	GBP	JPY	MXN
USD	US Dollar	1.000000	1.097635	1.061402	6.092360	0.735694	0.610836	102.45...	13.109...
AUD	Australian Dollar	0.911050	1.000000	0.966990	5.550445	0.670254	0.556502	93.345...	11.943...
CAD	Canadian Dollar	0.942150	1.034136	1.000000	5.739917	0.693134	0.575499	96.531...	12.351...
CNY	Chinese Yuan	0.164140	0.180166	0.174219	1.000000	0.120757	0.100263	16.817...	2.151809
EUR	Euro	1.359260	1.491971	1.442721	8.281101	1.000000	0.830285	139.26...	17.819...
GBP	Pound Sterling	1.637100	1.796938	1.737621	9.973803	1.204405	1.000000	167.73...	21.461...
JPY	Yen	0.009760	0.010713	0.010359	0.059461	0.007180	0.005962	1.000000	0.127950
MXN	Mexican Peso	0.076280	0.083728	0.080964	0.464725	0.056119	0.046595	7.815574	1.000000

Record 2 of 8

Rates for AUD

Period	USD	AUD	CAD	CNY	EUR	GBP	JPY	MXN
2013	0.911050	1.000000	1.034136	0.180166	1.491971	1.796938	0.010713	0.083728
2014	0.912000	1.000000	1.033059	0.179978	1.491228	1.795066	0.010702	0.083640
2015	0.913000	1.000000	1.031928	0.179781	1.500548	1.793100	0.010690	0.083549
2016	0.914000	1.000000	1.030799	0.179584	1.509847	1.791138	0.010678	0.083457
2017	0.915000	1.000000	1.029672	0.179388	1.519126	1.789180	0.010667	0.083366
2018	0.916000	1.000000	1.028548	0.179192	1.528384	1.787227	0.010655	0.083275
2019	0.917000	1.000000	1.027426	0.178997	1.537623	1.785278	0.010643	0.083184
2020	0.918000	1.000000	1.026307	0.178802	1.546841	1.783333	0.010632	0.083094

You can set an Exchange Rate Table as the current Exchange Rate Table, which will make it the default table for every new proposal you create. It will automatically be entered on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The name of the current Exchange Rate Table appears in bold letters in the **Exchange Rates** folder and the icon will have a star.

Exchange Rate Tables

In Exchange Rate Tables, you can enter exchange rates for the currencies in your proposals.

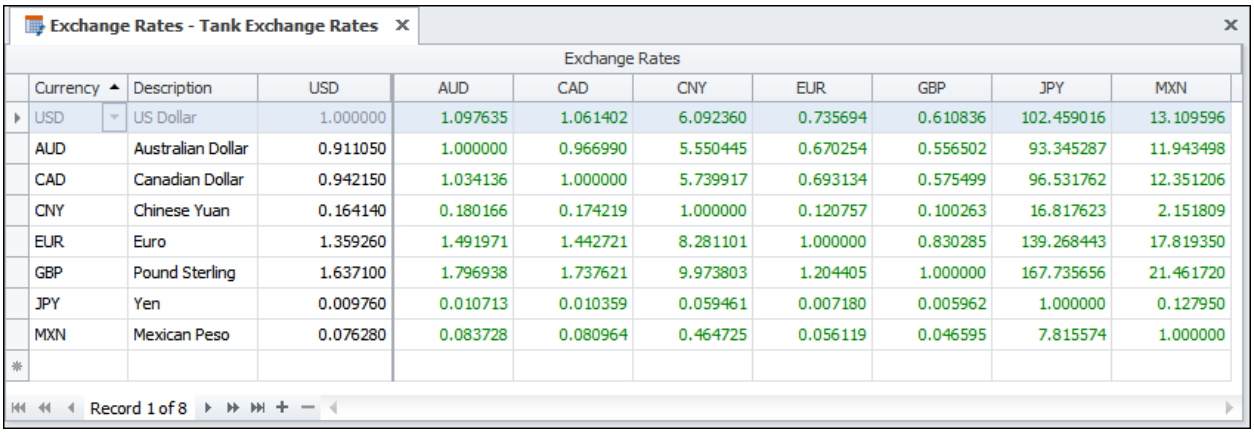
Every Exchange Rate Table has a base currency, and as you add currencies to the table, you can enter how many units of the base currency you can buy with one unit of the foreign currency.

If you did not select a timescale in the Exchange Rate Table properties, the table only has the Exchange Rates grid. If you entered a timescale for the table, it has two grids: Default Exchange Rates and Rates for *Currency Code*.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Exchange Rates/Default Exchange Rates

The following Exchange Rate Table has US Dollar as its base currency. The USD column is where you input how many US Dollars you can buy with one unit of the foreign currency; for example, 0.911050 US dollars with one Australian Dollar, 0.164140 US Dollars with one Chinese Yuan, 0.076280 US Dollars with one Mexican Peso. A new column will appear to the right of the base currency (USD in this example) for each currency you add to the table. These columns show the inverse exchange rates. The top row shows the inverse rates for US Dollar. One US Dollar buys 1.097635 Australian Dollars, 6.092360 Chinese Yuan, 13.109596 Mexican Pesos.



Currency	Description	USD	AUD	CAD	CNY	EUR	GBP	JPY	MXN
USD	US Dollar	1.000000	1.097635	1.061402	6.092360	0.735694	0.610836	102.459016	13.109596
AUD	Australian Dollar	0.911050	1.000000	0.966990	5.550445	0.670254	0.556502	93.345287	11.943498
CAD	Canadian Dollar	0.942150	1.034136	1.000000	5.739917	0.693134	0.575499	96.531762	12.351206
CNY	Chinese Yuan	0.164140	0.180166	0.174219	1.000000	0.120757	0.100263	16.817623	2.151809
EUR	Euro	1.359260	1.491971	1.442721	8.281101	1.000000	0.830285	139.268443	17.819350
GBP	Pound Sterling	1.637100	1.796938	1.737621	9.973803	1.204405	1.000000	167.735656	21.461720
JPY	Yen	0.009760	0.010713	0.010359	0.059461	0.007180	0.005962	1.000000	0.127950
MXN	Mexican Peso	0.076280	0.083728	0.080964	0.464725	0.056119	0.046595	7.815574	1.000000

Currency

Enter the ISO 4217 code of the currency you want to add to the table. You can only add currencies that have been enabled on the **General** page in the **Currency** folder of **System Options**.

Description

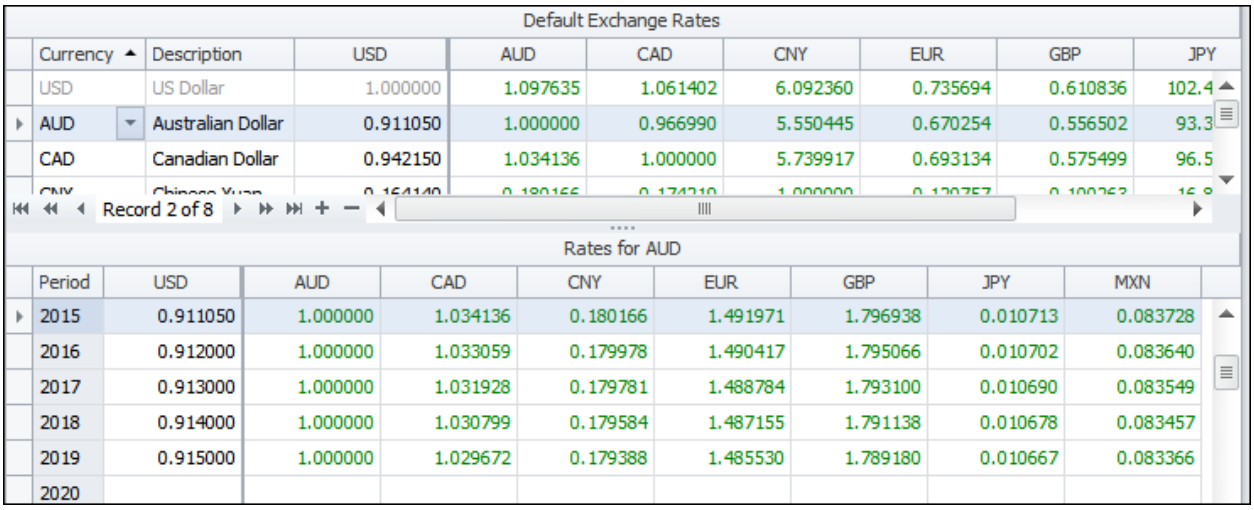
This column shows the full name of the currency. It is for information only.

Exchange Rates

Enter the number of units of the base currency you can purchase with one unit of the foreign currency.

Rates for *Currency Code*

This grid appears if a timescale is selected in the table properties. It allows you to enter annual, quarterly, monthly, or daily rates to adjust for exchange rate fluctuations. If you do not enter an exchange rate, ProPricer uses the default exchange rate in the **Exchange Rates** grid.



Default Exchange Rates

Currency	Description	USD	AUD	CAD	CNY	EUR	GBP	JPY
USD	US Dollar	1.000000	1.097635	1.061402	6.092360	0.735694	0.610836	102.4
AUD	Australian Dollar	0.911050	1.000000	0.966990	5.550445	0.670254	0.556502	93.3
CAD	Canadian Dollar	0.942150	1.034136	1.000000	5.739917	0.693134	0.575499	96.5
CNY	Chinese Yuan	0.164140	0.180166	0.174210	1.000000	0.120757	0.100263	16.8

Record 2 of 8

Rates for AUD

Period	USD	AUD	CAD	CNY	EUR	GBP	JPY	MXN
2015	0.911050	1.000000	1.034136	0.180166	1.491971	1.796938	0.010713	0.083728
2016	0.912000	1.000000	1.033059	0.179978	1.490417	1.795066	0.010702	0.083640
2017	0.913000	1.000000	1.031928	0.179781	1.488784	1.793100	0.010690	0.083549
2018	0.914000	1.000000	1.030799	0.179584	1.487155	1.791138	0.010678	0.083457
2019	0.915000	1.000000	1.029672	0.179388	1.485530	1.789180	0.010667	0.083366
2020								

Assign an Exchange Rate Table to a Proposal

1. Do one of the following:

   - In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties**.
   - Select the appropriate proposal. On the **Proposal** ribbon, in the **Proposal** group, click **Properties**.

2. In the **Proposal** folder, click the **Currency** page.
3. In the **Exchange Rate Table** field, enter the name of the Exchange Rate Table to use.
4. Click **OK**.

Follow the same steps to change an Exchange Rate Table that is already assigned to a proposal.

Copy an Exchange Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
   - Expand the **Exchange Rates** folder.
   - Double-click the **Exchange Rates** folder to open the list of Exchange Rate Tables.
3. Right-click the Exchange Rate Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Create an Exchange Rate Table

1. Do one of the following:
   - In the Main Menu, click **New Exchange Rate Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Exchange Rates** folder, then click **New Exchange Rate Table**.
2. Enter a name and description for the new table.
3. Select the base currency of the table.
4. Select a timescale for the rates in the table if it is needed. The rates can be annual, quarterly, monthly, or daily. For no timescale, select **None**.
5. Click **OK**. The Exchange Rate Table will open in the Workspace.

Current Exchange Rate Table

Setting an Exchange Rate Table as the current one indicates which table has the rates your company wants to use. It will be the default table for every new proposal you create and will automatically be entered on the **Currency** page in the **Proposal** folder of **Proposal Properties**.

The name of the current table will appear in bold letters in the **Exchange Rates** folder in the Navigation Pane, and the icon will have a star. The table list has a **Current** checkbox as well.

You can open the table by clicking the Current Exchange Rates icon on the **Rates** ribbon. Or you can double-click the table in the Navigation Pane.

You can run the Audit Report to determine if your proposal is using the current Exchange Rate Table.

Notes:

- *There can only be one current Exchange Rate Table at a time. You can set another Exchange Rate Table as the new current table whenever necessary.*
- *You can switch the current Exchange Rate Table assigned to the proposal at any time.*
- *If there is no table set as the current one, the **Exchange Rate Table** field on the **Currency** page in the **Proposal** folder of **Proposal Properties** will be blank when you create a new proposal.*
- *None of the exports distinguish if the Exchange Rate Table is set as current.*

- *The Archive/Restore processes do not distinguish if the Exchange Rate Table is set as current.*
- *Proposals that were locked with the current table are not affected by changes to the current table.*
- *You need the Associated Permission to be able to set an Exchange Rate Table as the current one.*

Delete an Exchange Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Exchange Rates** folder.
    - Double-click the **Exchange Rates** folder to open the list of Exchange Rate Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete an Exchange Rate Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Exchange Rate Table Properties

The **Exchange Rate Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Base Currency

By default, this field will show the currency entered in the **Currency** field on the **Currency** page in the **Proposal** folder of **Proposal Properties**, but you can change it.

Timescale

You can select a timescale for the rates in the table, but it is not required. The available options are None, Annual, Quarterly, Monthly, and Daily.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

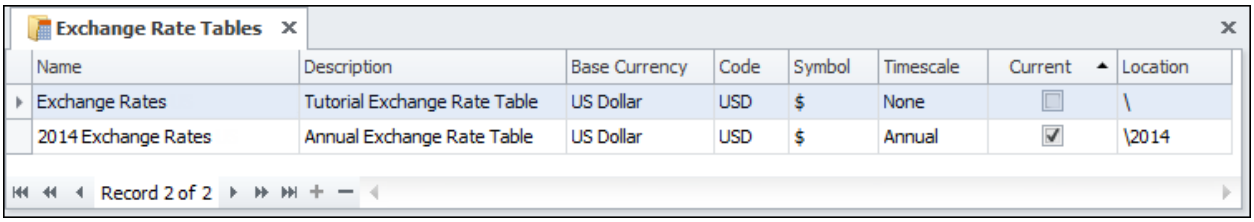
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Exchange Rate Tables List

The Exchange Rate Tables List shows all the Exchange Rate Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Timescale

This column shows the measurement of time for rates in the table.

Base Currency

This column shows the base currency of the table.

Code

This column shows the ISO 4217 unique three-letter alphabetic currency code.

Symbol

This column shows the symbol entered for the currency.

Timescale

This column shows the timescale of the table.

Current

The checkbox indicates if an Exchange Rate Table has been set as current. This table is the default table for every new proposal you create and will be

automatically entered on the **Currency** page in the **Proposal** folder of **Proposal Properties**.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Exchange Rates** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Set an Exchange Rate Table as Current

Setting an Exchange Rate Table as current makes it the default Exchange Rate Table for every new proposal you create. ProPricer will automatically assign it in the Currency page of Proposal Properties.

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand the **Exchange Rates** folder.

2. Right-click the appropriate table, and then click **Current**. In the **Exchange Rates** folder, the name of the current Exchange Rate Table will appear in bold letters and its icon will have a star.

Export and Import

Export

ProPricer allows you to export various types of data formats that you can use for evaluation, to export to other applications, or to import back into ProPricer after editing it. Everything is automatic, which makes your work faster and easier. Exporting includes:

- ASCII
- Excel
- Interdivisional Transfer Data
- Microsoft Project
- Open Plan
- Prepare for Contractor
- Proposal Data
- ProPricer Import/Export Tool
- Subcontractor Data
- XML

Once you have exported the data, you can review the ASCII files in Microsoft Notepad, the XML files in Microsoft XML Notepad, and the Microsoft Project and Excel files directly in the respective program. If you do not have Microsoft Project installed on your computer or on the network server, you can review the exported files in Notepad as well.

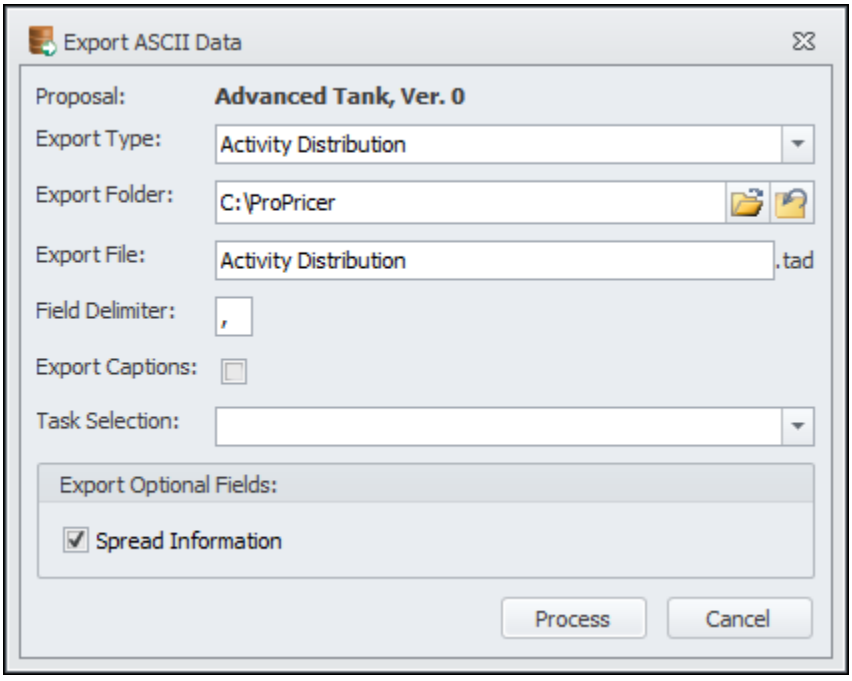
ASCII Data

The Export ASCII option generates ASCII files that contain ProPricer data. In general, ASCII refers to the formatting of the records in a file. In ProPricer, the term is also used as a generic name for the files that are not exported to a specific program. The ASCII files ProPricer creates will be formatted as text files, each record in the file will appear on a separate line, and the fields in the records will be separated by a delimiter.

1. Click the **External Data** ribbon and then click **ASCII** in the **Export** group. The **Export ASCII Data** dialog box will open.
2. Select the type of data you want to export.
3. The **Export Folder** field may show the location of the last file you exported. Click to browse to a different folder. Click to clear it.
4. In the **Export File** field, enter a name for the export file, or accept the name suggested.
5. Change the field delimiter.
6. Select the **Export Captions** checkbox if you want to export the column captions of the grids whose data you are exporting.
7. Click **Process**.

Activity Distribution

This option will export distribution data of the resources assigned to the activity.



Proposal

Displays the name and version of the proposal.

Export Type

Activity Distribution

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the selected file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a task selection to export only the activities contained in the selection. Leave the field blank to export all the activities of the proposal.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

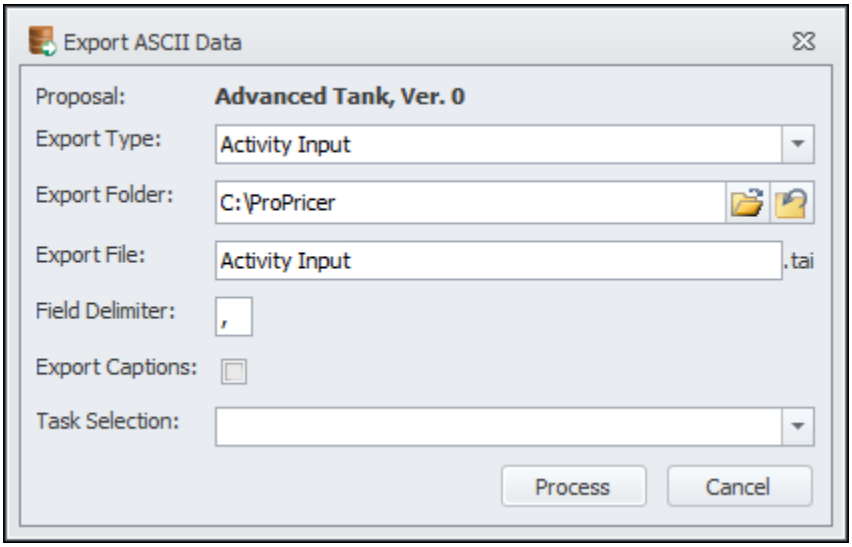
Click to start the export.

Cancel

Click to close the dialog box without exporting data.

Activity Input

This option allows you to export activities.



Proposal

Displays the name and version of the proposal.

Export Type

Activity Input

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the selected file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a task selection to export only the activities contained in the selection. Leave the field blank to export all the activities of the proposal.

Process

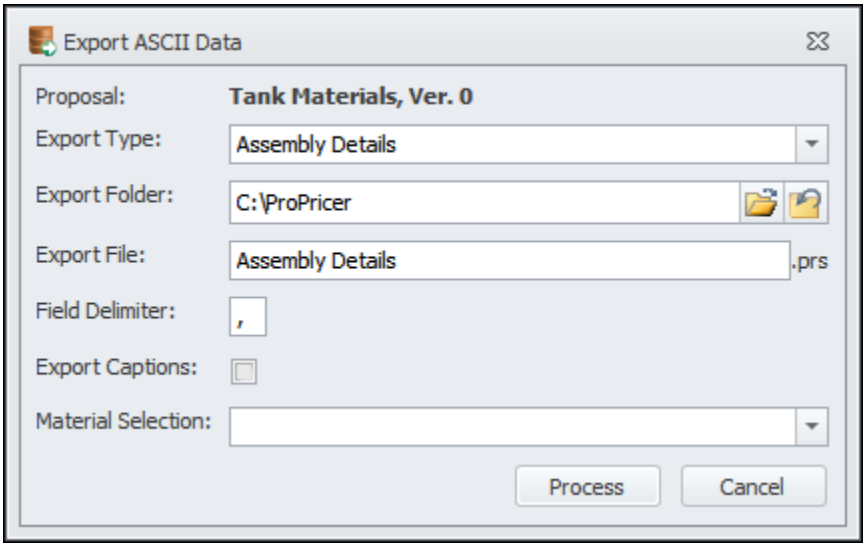
Click to start the export.

Cancel

Click to close the dialog box without exporting data.

Assembly Details

This option allows you to export assembly element details.



Proposal

Displays the name and version of the proposal.

Export Type

Assembly Details

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the selected file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Material Selection

Enter a material selection to export only the element details of the assemblies contained in the selection. Leave the field blank to export the element details of the assemblies from all material libraries.

Process

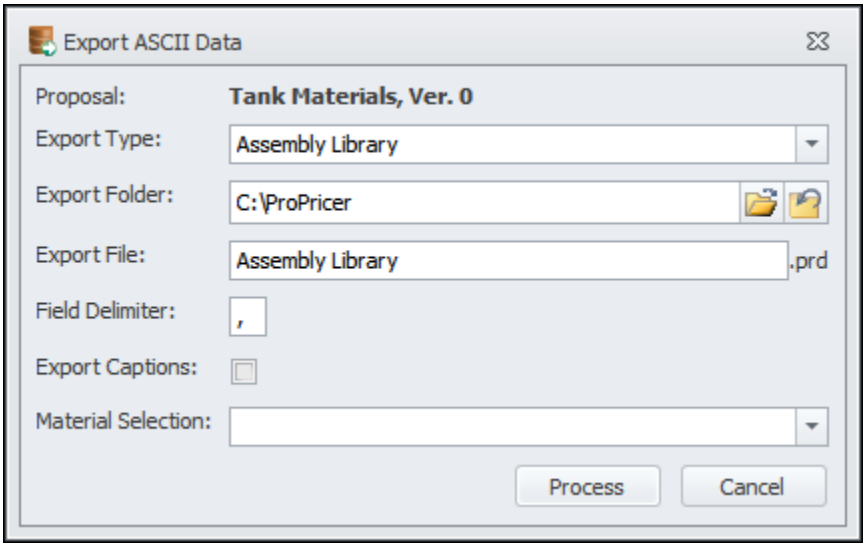
Click to start the export.

Cancel

Click to close the dialog box without exporting data.

Assembly Library Data

This option will export Assembly Library data.



Proposal

Displays the name and version of the proposal.

Export Type

Assembly Library

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the selected file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Material Selection

Enter a material selection to export only the assemblies contained in the selection. Leave the field blank to export the assemblies from all material libraries.

Process

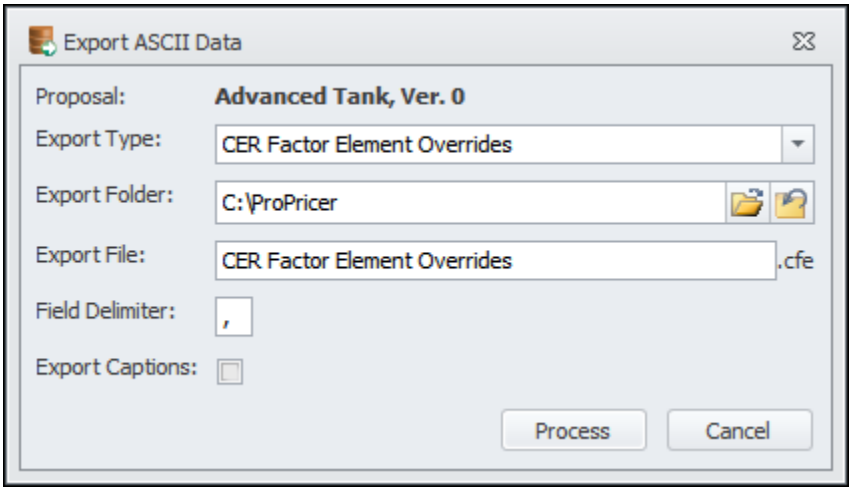
Click to start the export.

Cancel

Click to close the dialog box without exporting data.

CER Factor Element Overrides

This option will export the overriding descriptions of the CER factors.



Proposal

Displays the name and version of the proposal.

Export Type

CER Factor Element Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

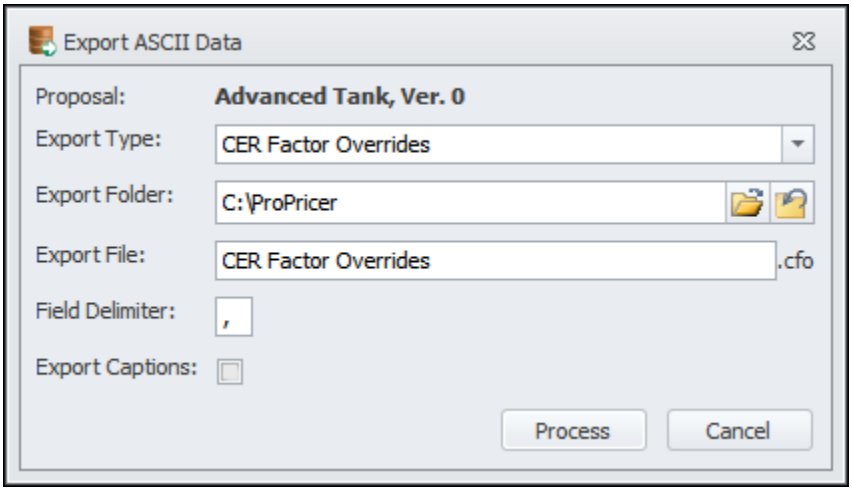
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

CER Factor Overrides

This option will export the overriding CER factors.



Proposal

Displays the name and version of the proposal.

Export Type

CER Factor Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

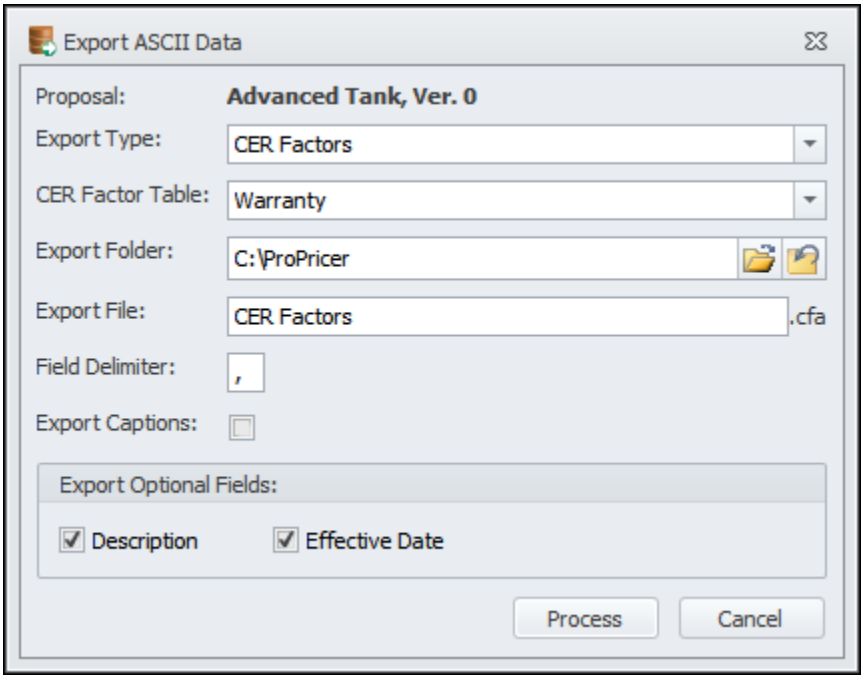
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

CER Factors

This option will export CER factors.



Proposal

Displays the name and version of the proposal.

Export Type

CER Factors

CER Factor Table

Enter the name of the CER Factor Table whose factors you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.*

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional element you want to include in the export file.

Process

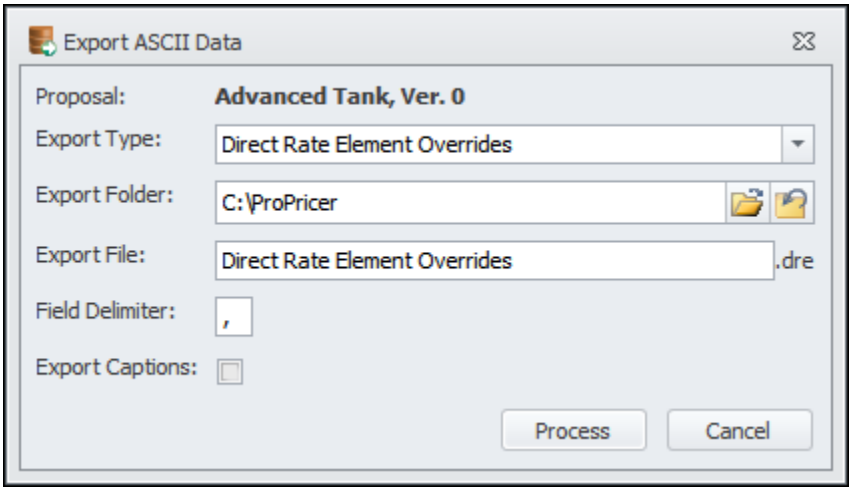
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Direct Rate Element Overrides

This option will export the overriding descriptions of the resources in the Direct Rate Table.



Proposal

Displays the name and version of the proposal.

Export Type

Direct Rate Element Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

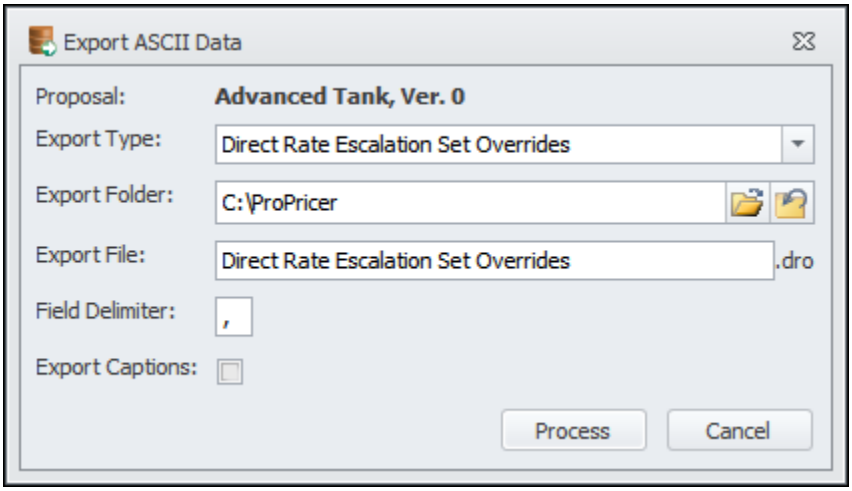
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Direct Rate Escalation Set Overrides

This option will export the overriding direct rate escalation sets.



Proposal

Displays the name and version of the proposal.

Export Type

Direct Rate Escalation Set Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

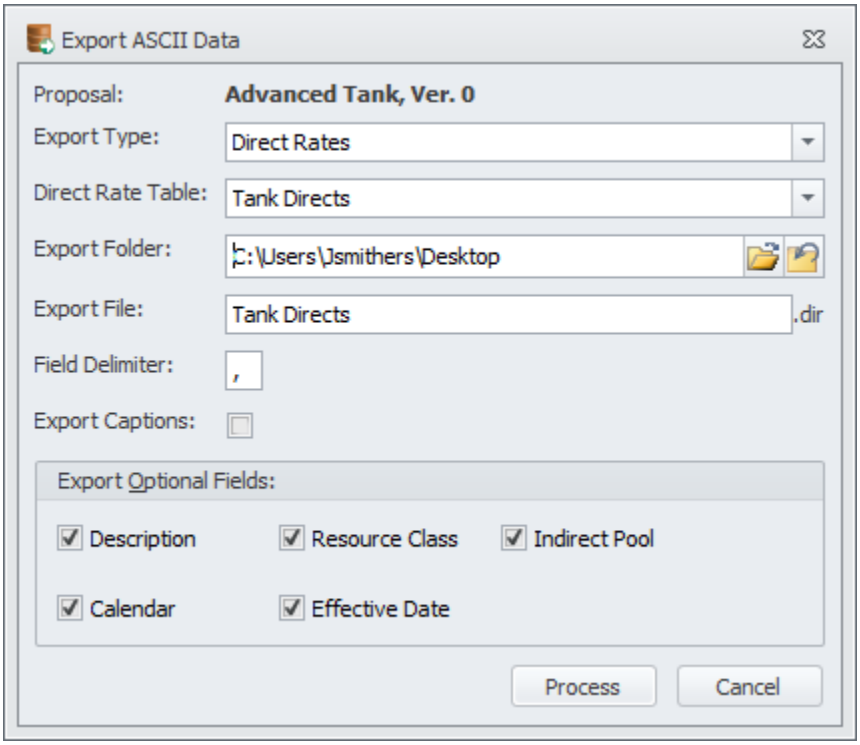
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Direct Rates

This option will export information from a specific Direct Rate Table. Only resources that use escalation sets will be included in the export.



Proposal

Displays the name and version of the proposal.

Export Type

Direct Rates

Direct Table

Enter the name of the Direct Rate Table whose rates you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

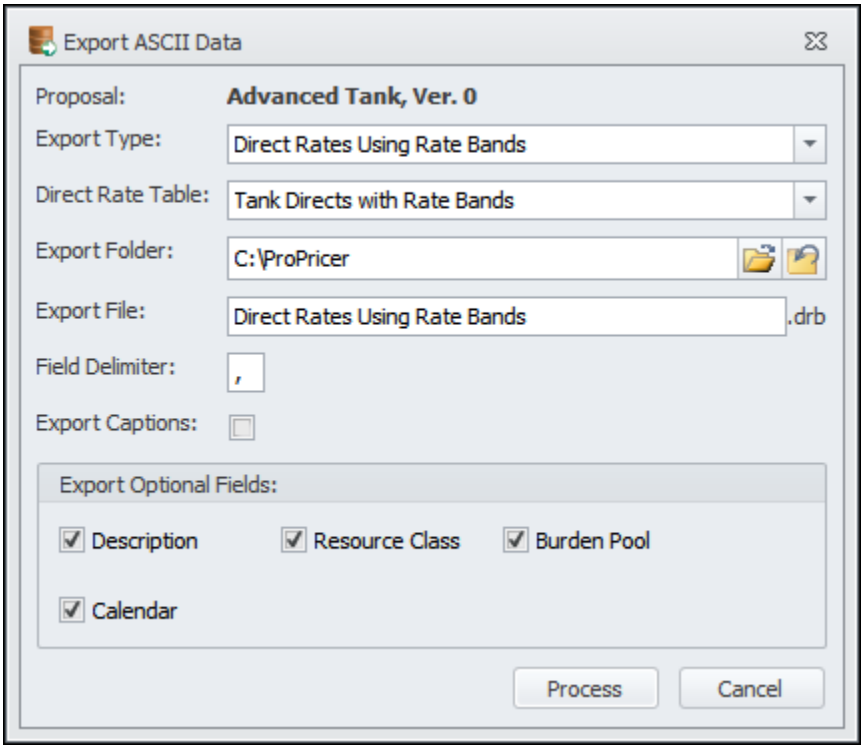
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Direct Rates Using Rate Bands

This option will export the resources from a specific Direct Rate Table that uses rate bands.



Proposal

Displays the name and version of the proposal.

Export Type

Direct Rates Using Rate Bands

Direct Table

Enter the name of the Direct Rate Table that is associated with the appropriate Rate Band Table.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

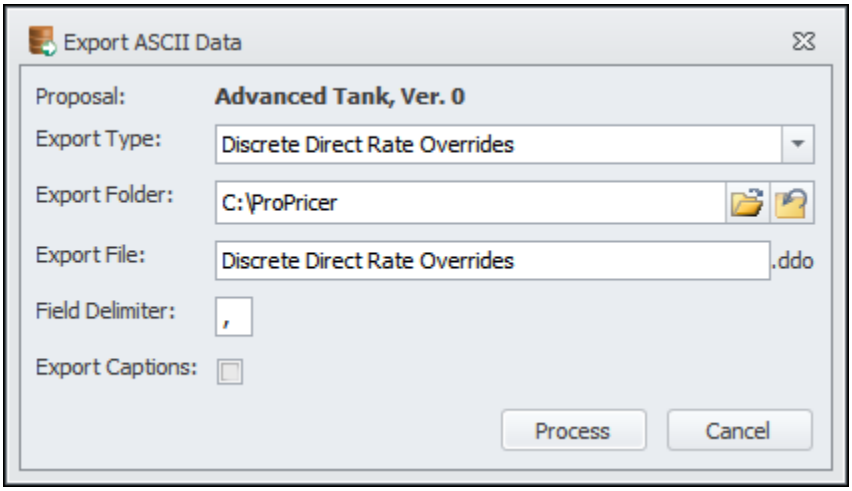
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Discrete Direct Rate Overrides

This option will export the overriding direct rates.



Proposal

Displays the name and version of the proposal.

Export Type

Discrete Direct Rate Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

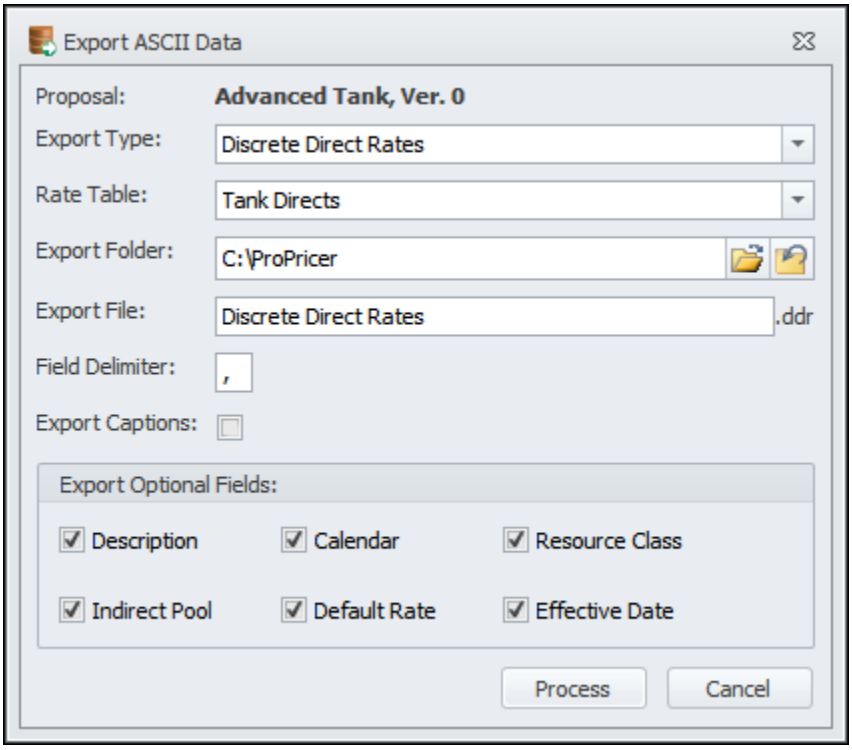
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Discrete Direct Rates

This option will export any discrete and default rates entered in a specific Direct Rate Table.



Proposal

Displays the name and version of the proposal.

Export Type

Discrete Direct Rates

Rate Table

Enter the name of the Direct, Composite, or T&M Rate Table whose rates you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

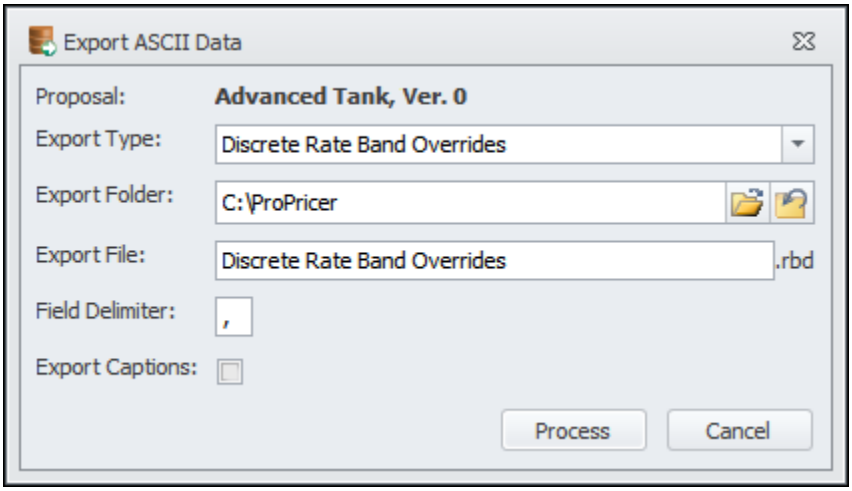
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Discrete Rate Band Overrides

This option will export the overriding rate bands rates.



Proposal

Displays the name and version of the proposal.

Export Type

Discrete Rate Band Rate Overrides.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

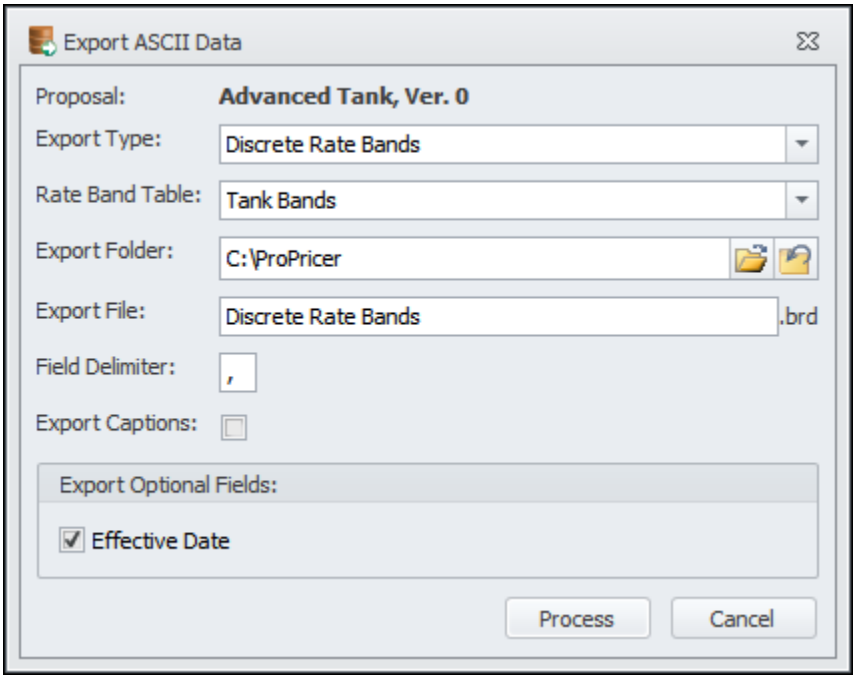
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Discrete Rate Bands

This option will export discrete rate band data.



Proposal

Displays the name and version of the proposal.

Export Type

Discrete Rate Bands

Rate Band Table

Enter the name of the Rate Band Table whose rates you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.*

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

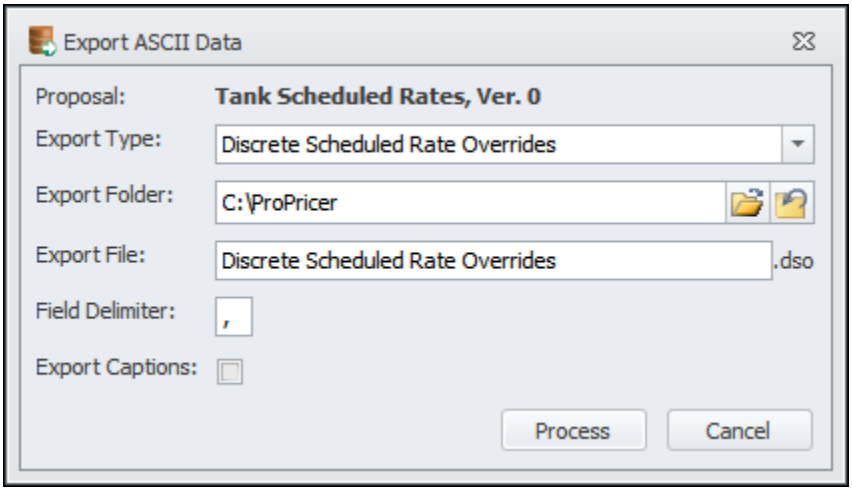
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Discrete Scheduled Rate Overrides

This option will export discrete scheduled rate override data.



Proposal

Displays the name and version of the proposal.

Export Type

Discrete Scheduled Rate Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

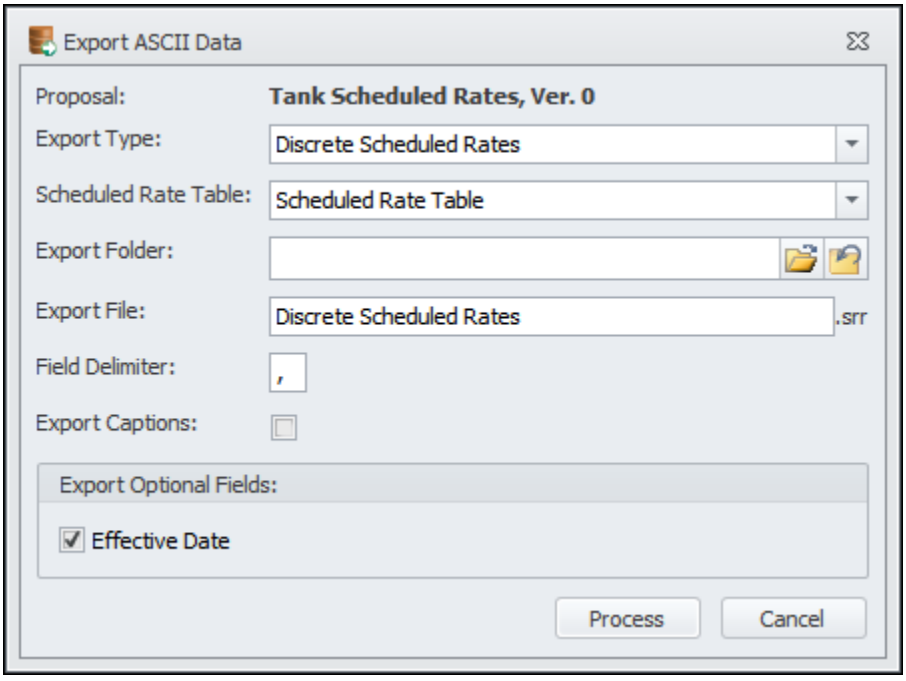
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Discrete Scheduled Rates

This option will export discrete scheduled rates.



Proposal

Displays the name and version of the proposal.

Export Type

Discrete Scheduled Rates

Scheduled Rate Table

Enter the name of the Scheduled Rate Table whose rates you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

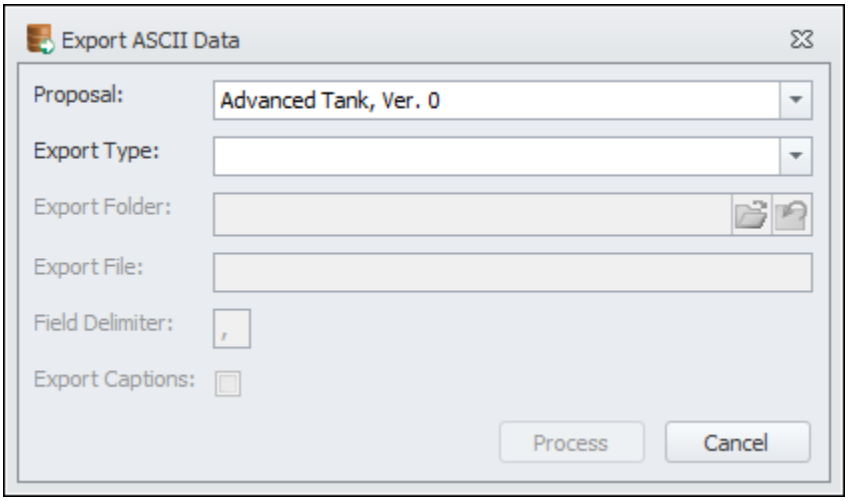
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Export ASCII Data Dialog Box

The **Export ASCII Data** dialog box is where you select the proposal elements you want to export.



Proposal

Select a proposal. The data in the export file will come from this proposal.

Export Type

Select the type of data you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. ProPricer automatically adds the file name extension.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

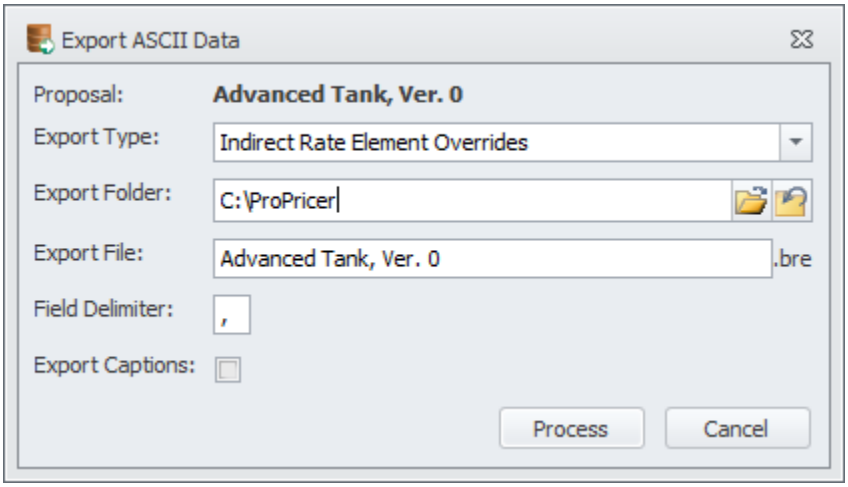
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Indirect Rate Element Overrides

This option will export the overriding descriptions of the indirect pools.



Proposal

Displays the name and version of the proposal.

Export Type

Indirect Rate Element Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

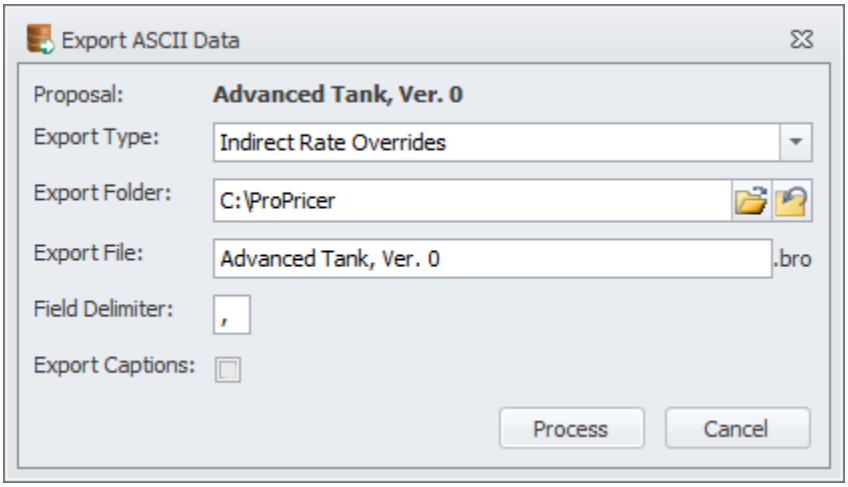
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Indirect Rate Overrides

This option will export the overriding indirect rates.



Proposal

Displays the name and version of the proposal.

Export Type

Indirect Rate Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

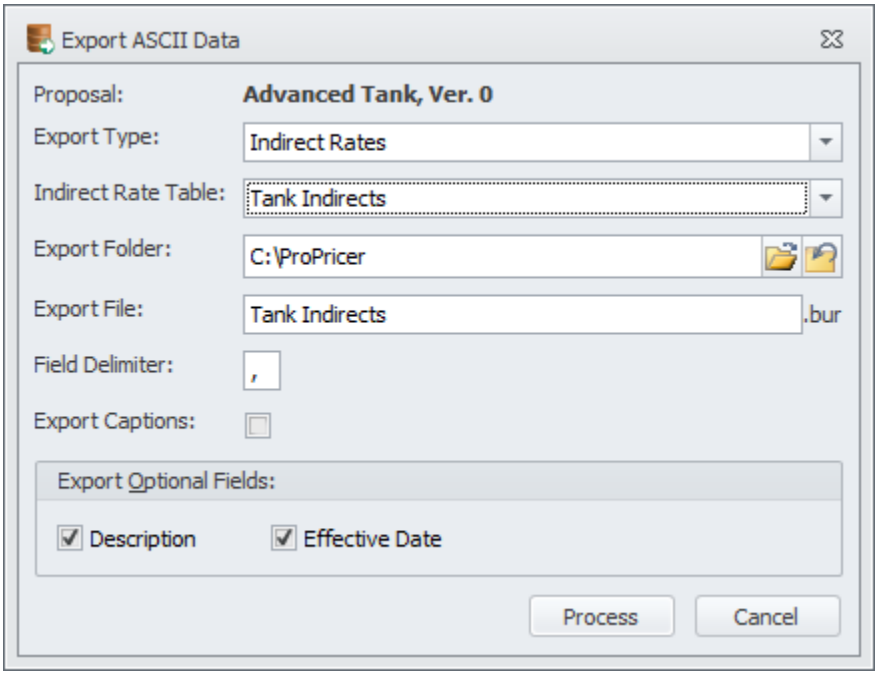
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Indirect Rates

This option will export indirect rate information from a specific Indirect Rate Table.



Proposal

Displays the name and version of the proposal.

Export Type

Indirect Rates

Indirect Rate Table

Enter the name of the Indirect Rate Table whose rates you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.*

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

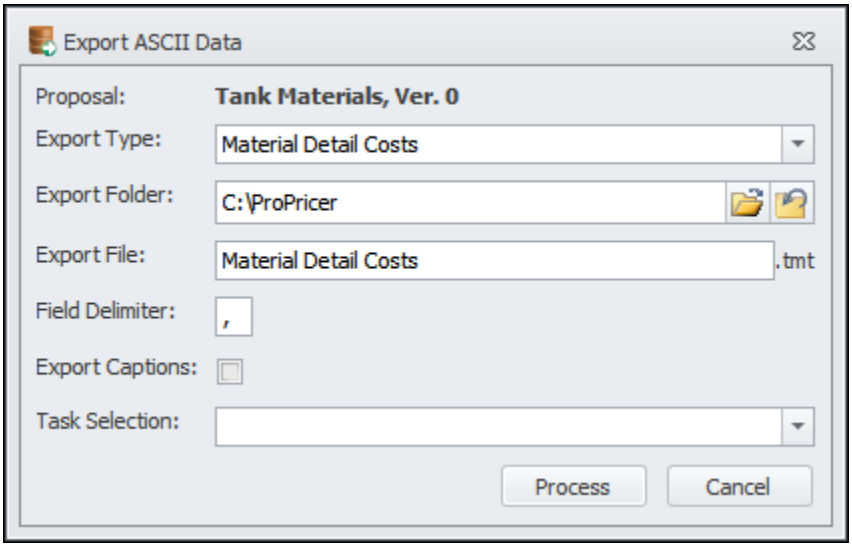
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Material Detail Costs

This option will export the materials assigned to the proposal on the **Material** tab. Please note that only the top-level parts and assemblies will be exported.



Proposal

Displays the name and version of the proposal.

Export Type

Material Detail Costs

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a Task Selection to limit the export to the data in those tasks. Leave this field blank to process all the tasks in the proposal.

Process

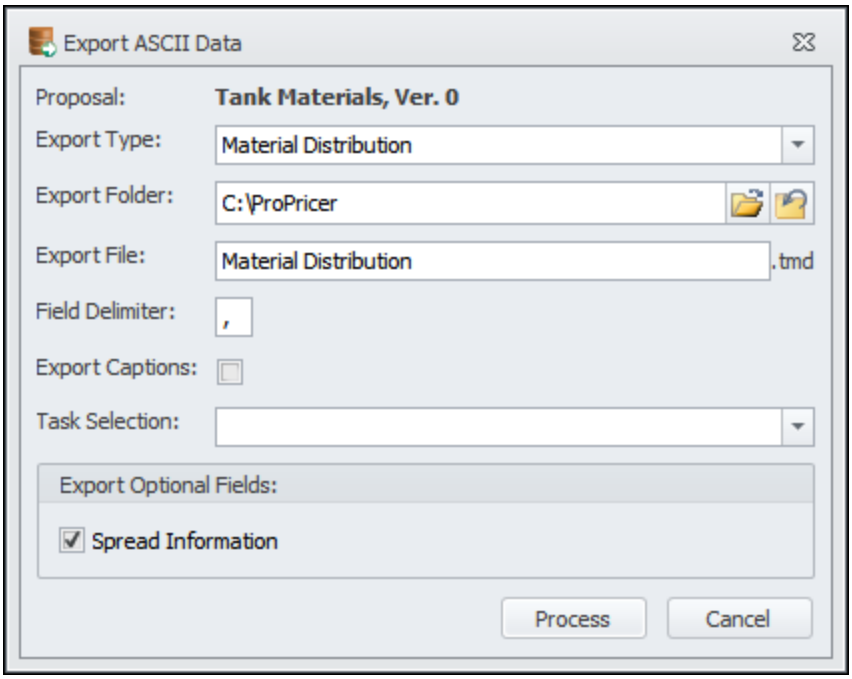
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Material Distribution

This option will export the distribution of the materials assigned directly to the **Material** tab of Task View or the **Miscellaneous** tab of Material View. It does not include the distribution of materials pertaining to a product.



Proposal

Displays the name and version of the proposal.

Export Type

Material Distribution

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a Task Selection to limit the export to the data in those tasks. Leave this field blank to process all the tasks in the proposal.

Export Optional Fields

Select the checkbox of the optional element you want to include in the export file. The only field available is **Spread Information**. If selected, the exported records will include the spread parameters (Curve, Spread Amount, Start and End Date) entered for the material. If the checkbox is cleared, the units of all materials will be exported as discrete values.

Process

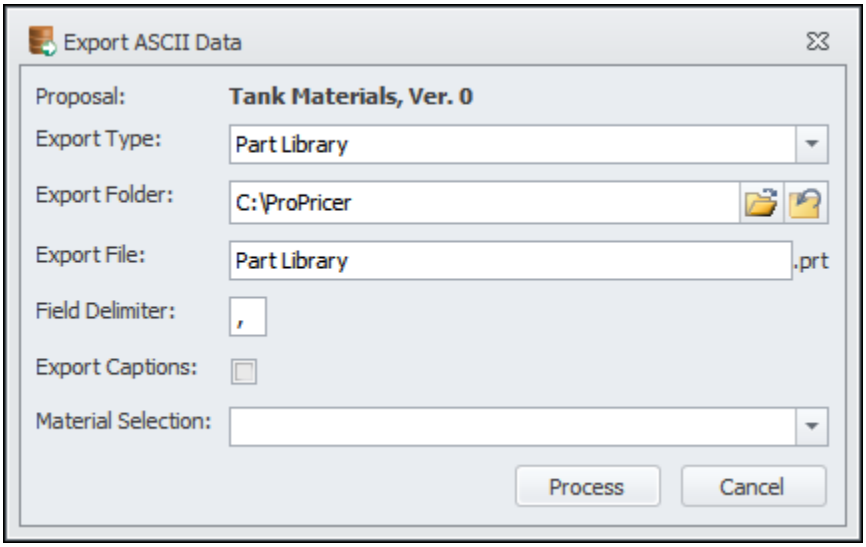
Click to start the export.

Cancel

Click to close the dialog box without exporting data.

Part Library Data

This option will export Parts Library data.



Proposal

Displays the name and version of the proposal.

Export Type

Part Library

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Material Selection

Enter a material selection to export only the parts contained in the selection. Leave the field blank to export the parts from all material libraries.

Process

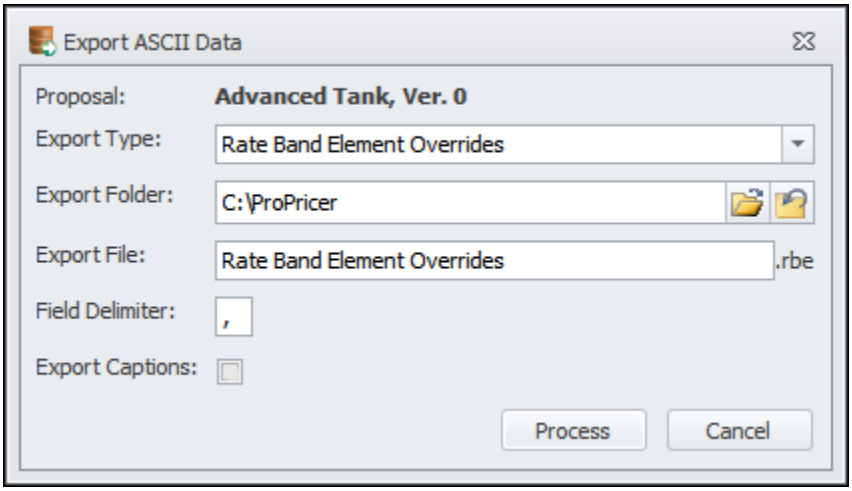
Click to start the export.

Cancel

Click to close the dialog box without exporting data.

Rate Band Element Overrides

This option will export the overriding descriptions of the rate bands in the Rate Band Table.



Proposal

Displays the name and version of the proposal.

Export Type

Rate Band Element Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

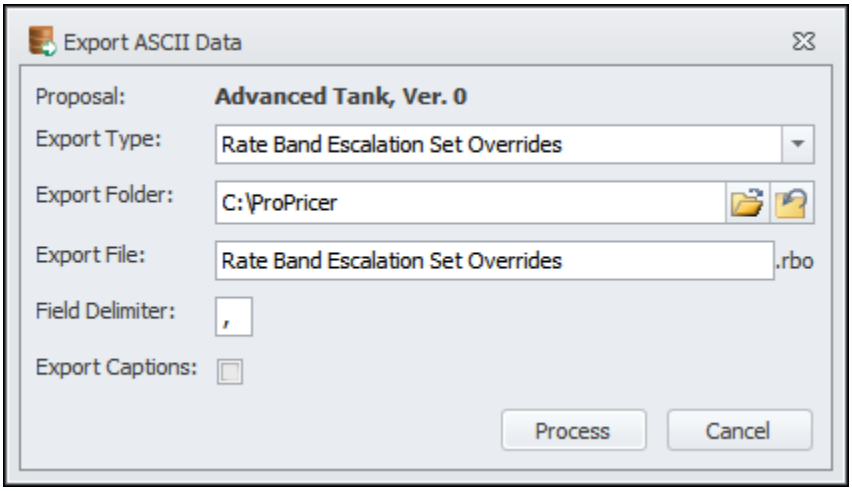
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Rate Band Escalation Set Overrides

This option will export the overriding rate band escalation sets.



Proposal

Displays the name and version of the proposal.

Export Type

Rate Band Escalation Set Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

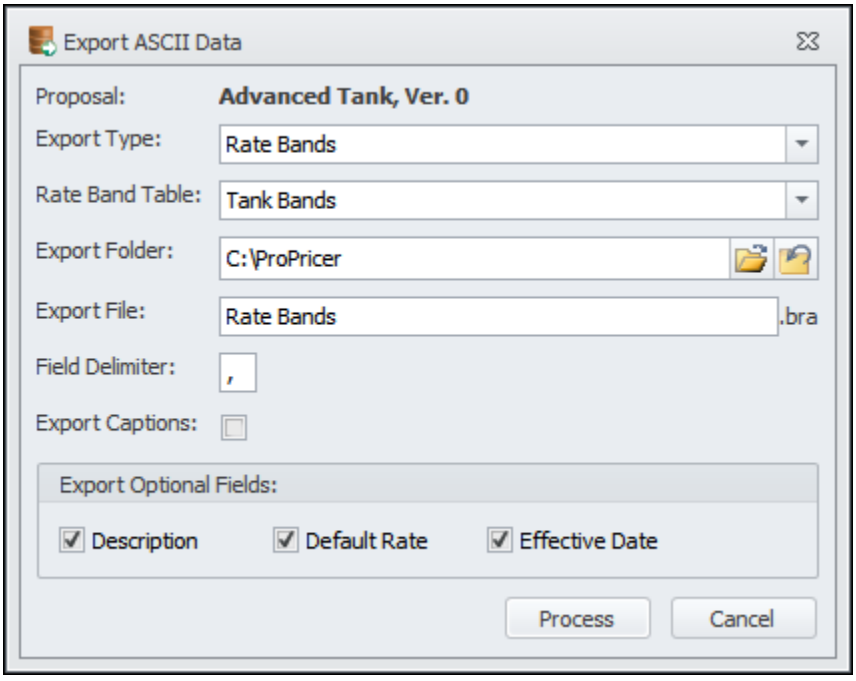
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Rate Bands

This option will export rate band data.



Proposal

Displays the name and version of the proposal.

Export Type

Rate Bands

Rate Band Table

Enter the name of the Rate Band Table whose rate bands you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.*

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

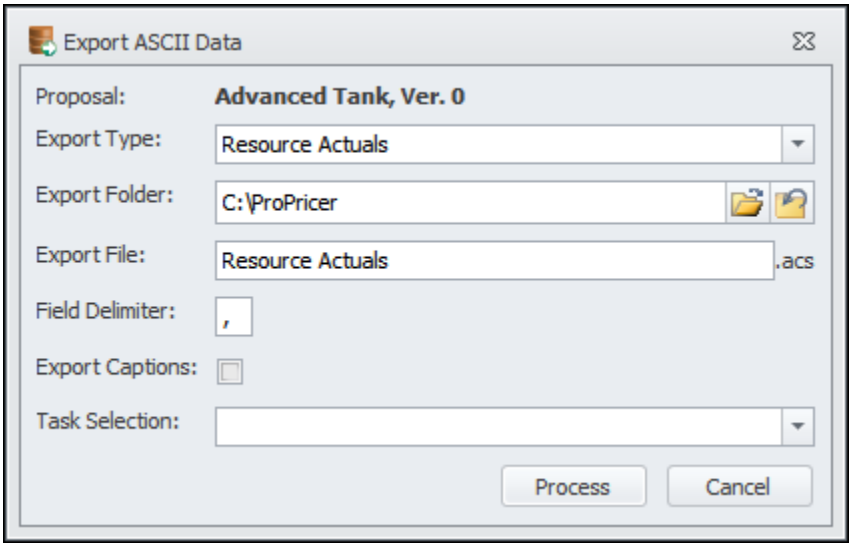
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Resource Actuals

This option will export fixed resource hours/cost data.



Proposal

Displays the name and version of the proposal.

Export Type

Resource actuals

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a Task Selection to limit the export to the data in those tasks. Leave this field blank to process all the tasks in the proposal.

Process

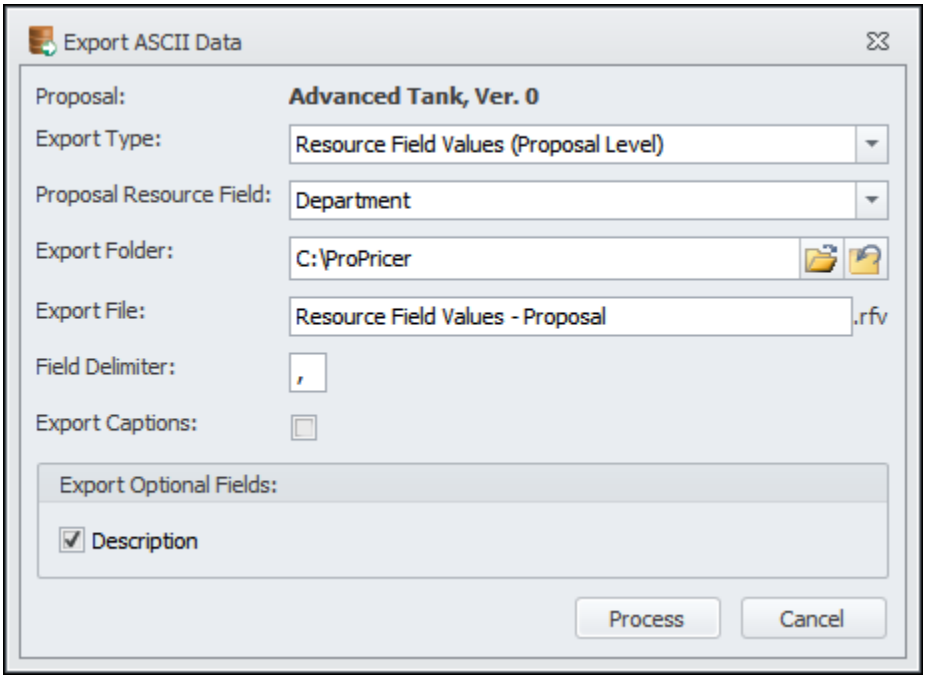
Click to start the export.

Cancel

Click to close the dialog box without exporting data.

Resource Field Values (Proposal Level)

This option will export the values of a resource field defined on the **Resource Fields** page in the **Proposal** folder of **Proposal Properties**.



Proposal

Displays the name and version of the proposal.

Export Type

Resource field Values (Proposal Level)

Proposal Resource Field

Enter the name of the resource field whose values you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.*

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

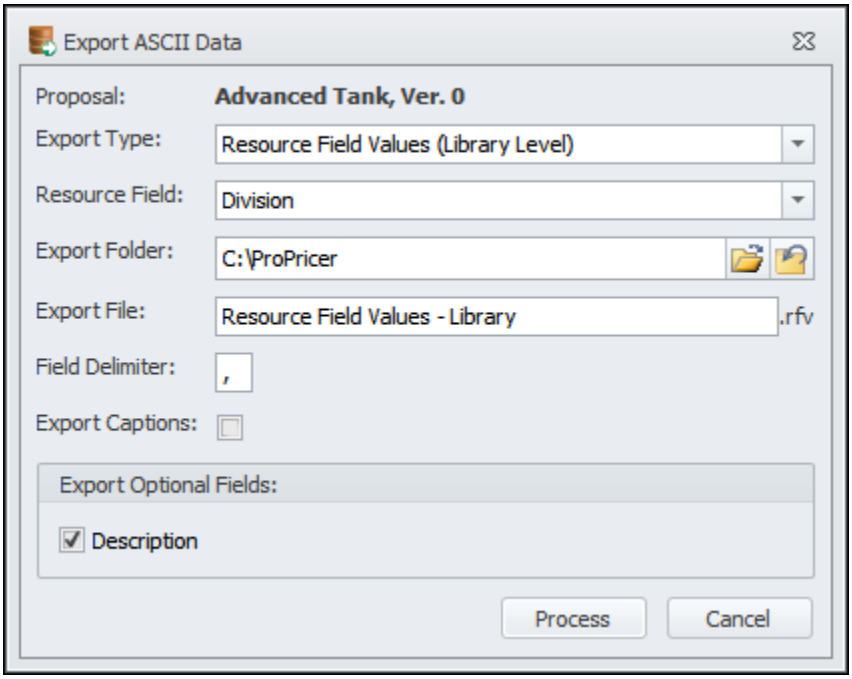
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Resource Field Values (Library Level)

This option will export the values of a resource field defined in the Resource Field Library. Only one resource field value list can be exported at a time.



Proposal

Displays the name and version of the proposal.

Export Type

Resource Field Values (Library Level)

Resource Field

Enter the name of the resource field whose values you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.*

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

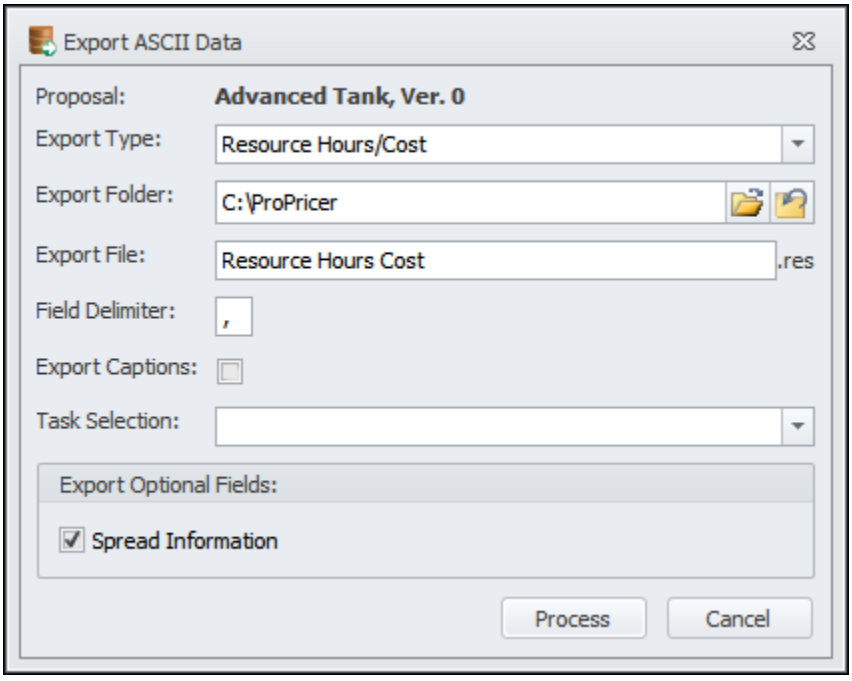
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Resource Hours/Cost

This option will export hours/cost data for the direct resources in your proposal.



Proposal

Displays the name and version of the proposal.

Export Type

Resource Hours/Cost

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a Task Selection to limit the export to the data in those tasks. Leave this field blank to process all the tasks in the proposal.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

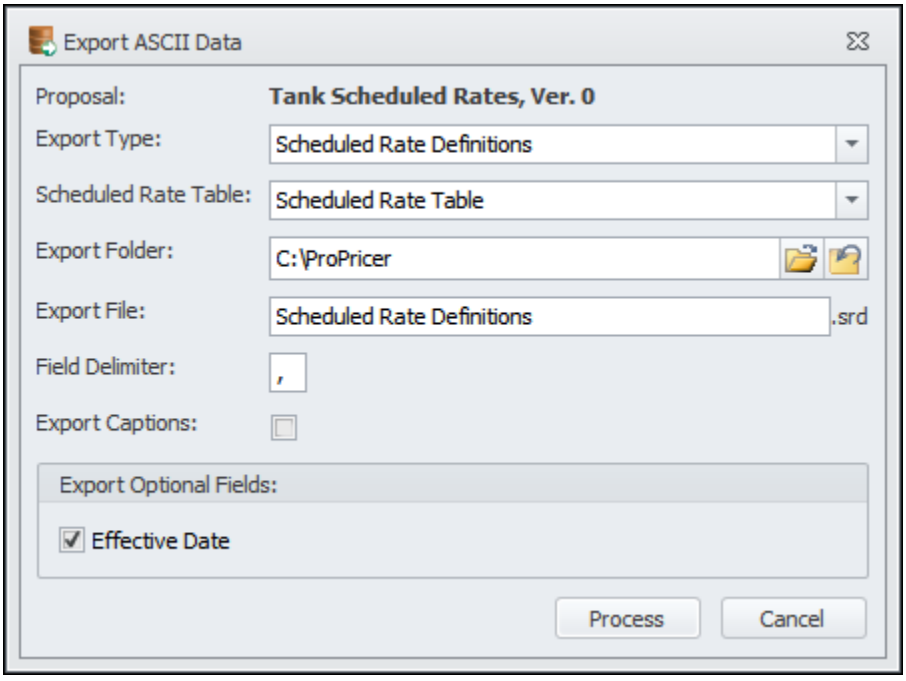
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Scheduled Rate Definitions

This option will export scheduled rate definitions.



Proposal

Displays the name and version of the proposal.

Export Type

Scheduled Rate Definitions

Scheduled Rate Table

Enter the name of the Scheduled Rate Table whose rates you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

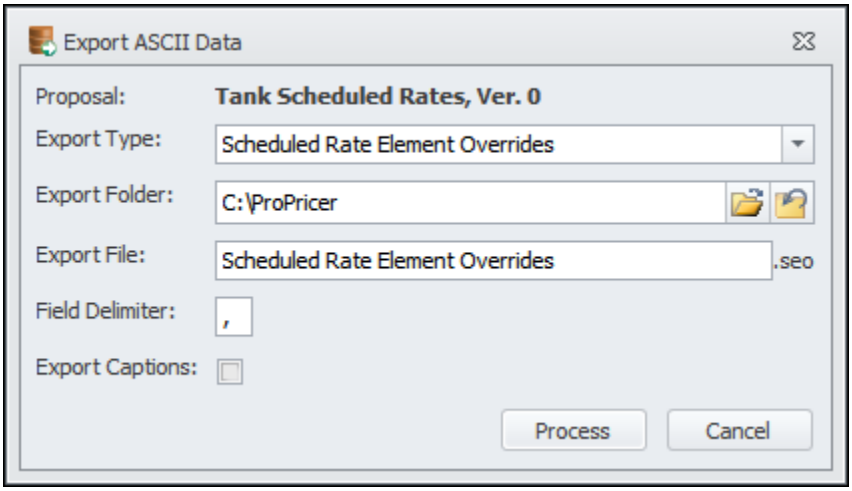
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Scheduled Rate Element Overrides

This option will export the overriding descriptions and discounts of the scheduled rates in the Scheduled Rate Table.



Proposal

Displays the name and version of the proposal.

Export Type

Scheduled Rate Element Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

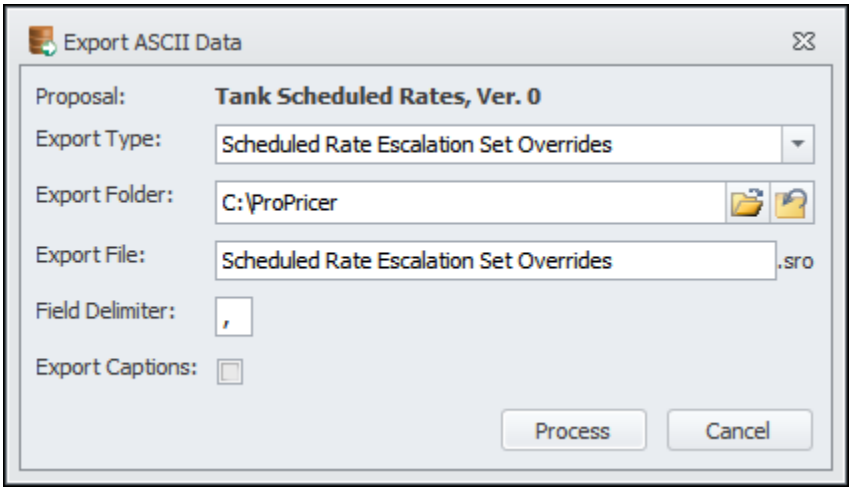
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Scheduled Rate Escalation Set Overrides

This option will export the overriding scheduled rate escalation sets.



Proposal

Displays the name and version of the proposal.

Export Type

Scheduled Rate Escalation Set Overrides

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

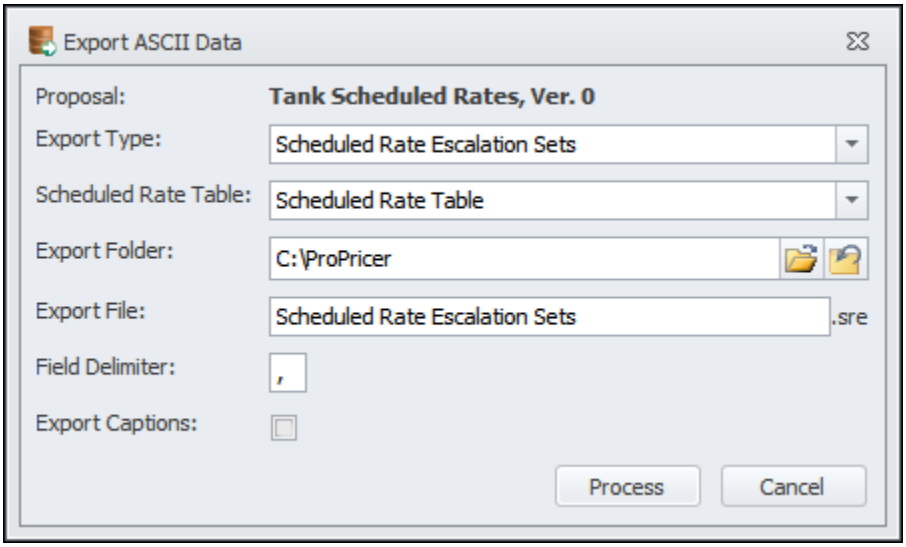
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Scheduled Rate Escalation Sets

This option will export scheduled rate escalations sets.



Proposal

Displays the name and version of the proposal.

Export Type

Scheduled Rate Escalation Sets

Scheduled Rate Table

Enter the name of the Scheduled Rate Table whose escalation sets you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

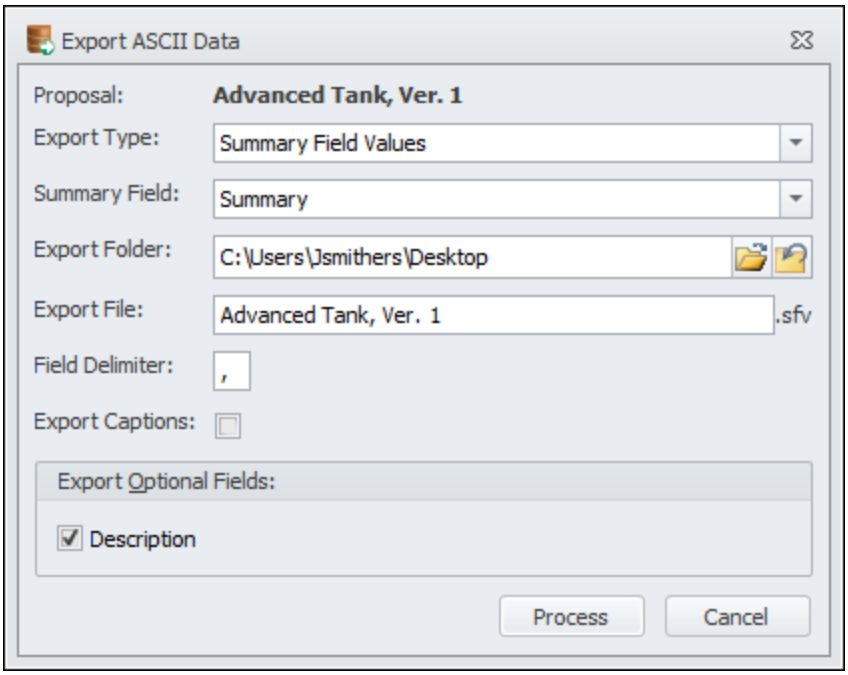
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Summary Field Values

This option exports the values of the summary fields defined on the **Summary Fields - General** page of **Proposal Properties**. Only one summary field value list can be exported at a time.



Proposal

Displays the name and version of the proposal.

Export Type

Summary Field Values.

Proposal Resource Field

Enter the name of the summary field whose values you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

> *Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.*

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

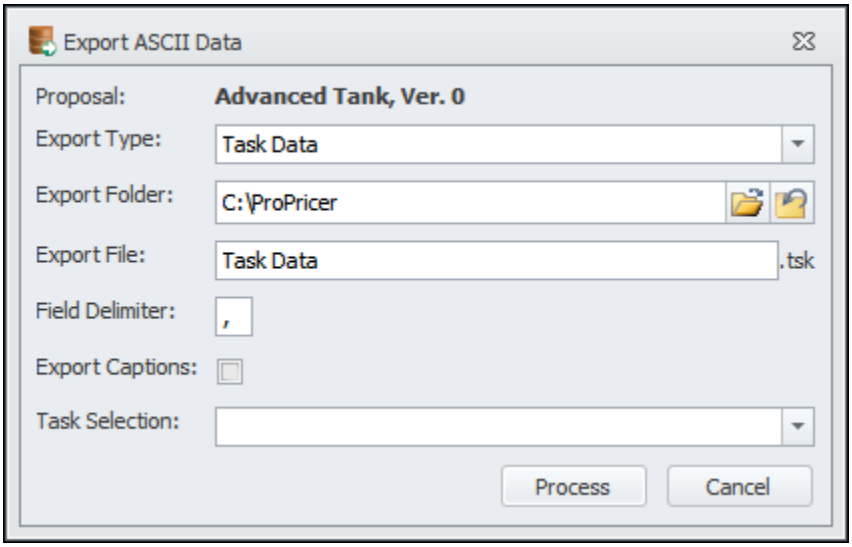
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Task Data

This option will export the data from the columns in the **Tasks** grid.



Proposal

Displays the name and version of the proposal.

Export Type

Task Data

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a Task Selection to limit the export to the data in those tasks. Leave this field blank to process all the tasks in the proposal.

Process

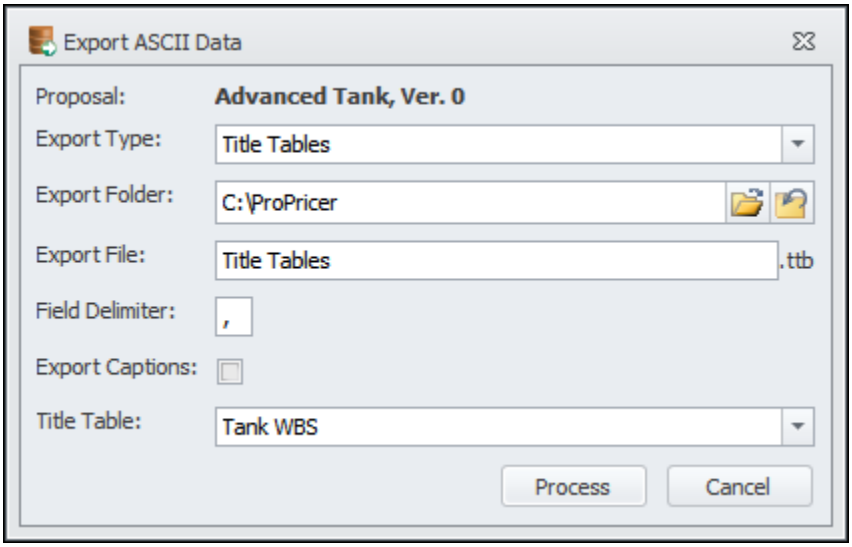
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Title Tables

This option will export Title Table data.



Proposal

Displays the name and version of the proposal.

Export Type

Title Tables

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the selected file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Title Table

Enter the name of the Title Table whose elements you want to export. Leave the field blank to export the data of all Title Tables in the system.

Process

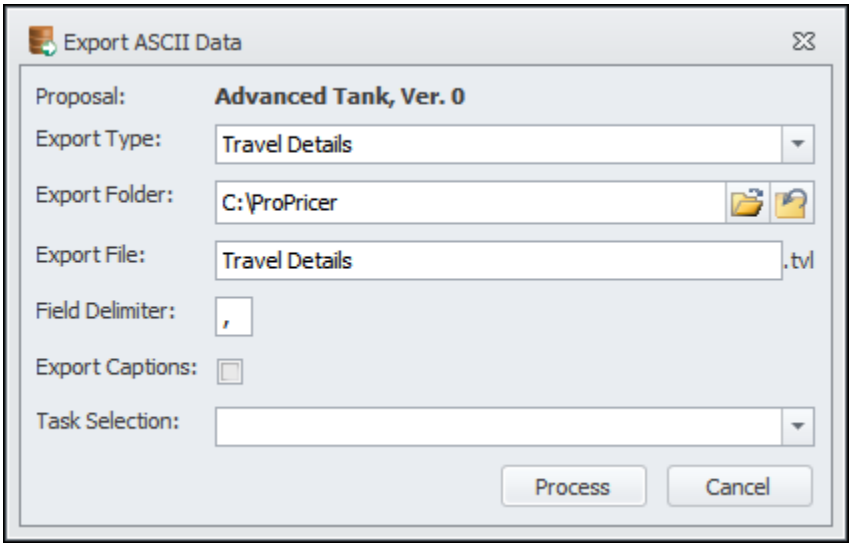
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Travel Details

This option will export travel details and expenses from the **Travel Info** grid of the **Travel** tab.



Proposal

Displays the name and version of the proposal.

Export Type

Travel Details

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a Task Selection to limit the export to the data in those tasks. Leave this field blank to process all the tasks in the proposal.

Process

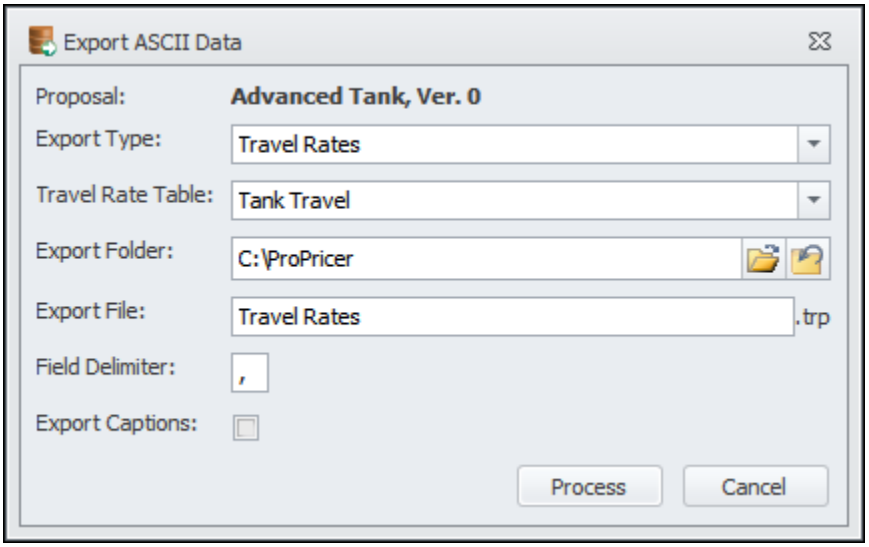
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Travel Rates

This option will export Travel Rate Table data.



Proposal

Displays the name and version of the proposal.

Export Type

Travel Rates

Travel Rate Table

Enter the name of the Travel Rate Table whose rates you want to export.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Process

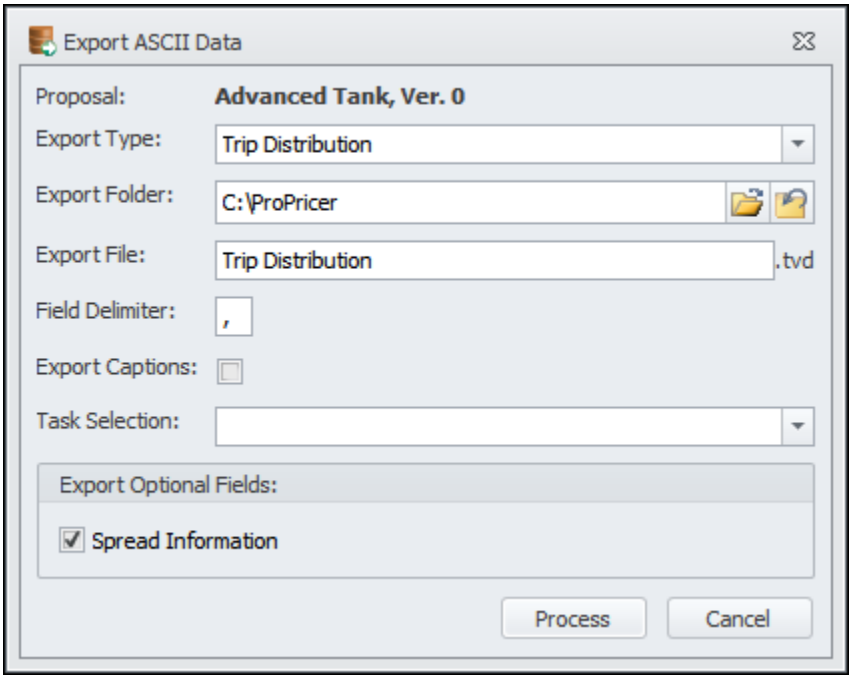
Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Trip Distribution

This option will export trip distribution data.



Proposal

Displays the name and version of the proposal.

Export Type

Trip Distribution

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Export Captions

Select this checkbox to export the captions of the columns of the grids whose data you are exporting. The column captions will appear on the first line of the export file.

Task Selection

Enter a Task Selection to limit the export to the data in those tasks. Leave this field blank to process all the tasks in the proposal.

Export Optional Fields

Select the checkbox of the optional elements you want to include in the export file.

Process

Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Excel

The Export Excel option generates Excel spreadsheets that contain ProPricer data. This option allows you to quickly and easily extract task and resource information from the current proposal that will be ready for immediate use in Excel. You can also export proposal data in the Excel format even if Excel is not installed on your computer. However, the results will differ:

- If you have Excel installed, ProPricer saves the exported data in **a .xlsx** file, which is a standard Microsoft Excel Workbook format.
- If you do not have Excel installed, ProPricer exports the data in a **.csv** file (comma delimited).

Follow these steps to export the data:

1. Close Excel if it is running.
2. Click the **External Data** ribbon and then click **Excel** in the **Export** group. The **Export Excel Spreadsheet** dialog box will open.
3. The **Export Folder** field may show the location of the last file you exported. Click to browse to a different folder. Click to clear it.
4. In the **Export File** field, enter a name for the export file, or accept the name suggested.
5. In the **Export File Format** field, select a format for the exported file, such as **.xlsx** or **.csv**.
6. *(Optional)* Enter a task selection to limit the export to the tasks in the selection.
7. From the **Available Elements** list, select the elements you want to include in the export file.
8. Under **Data to Export**, select the level of detail for the Excel file.

9. *(Optional)* Select the **Export Source Info** checkbox to include the Source Type, Source, and Source Item of the resources.

10. *(Optional)* Select the **Export Resource Description** checkbox to include the descriptions of the resources.

11. *(Optional)* Select the **Export Resource Fields** checkbox to include the resource fields.

12. *(Optional)* Select the **Export Currency** *Info* checkbox to include the currency of resources with rate type *Cost*.

13. *(Optional)* Select the **Export Comments** checkbox to include any comment entered for the resources.

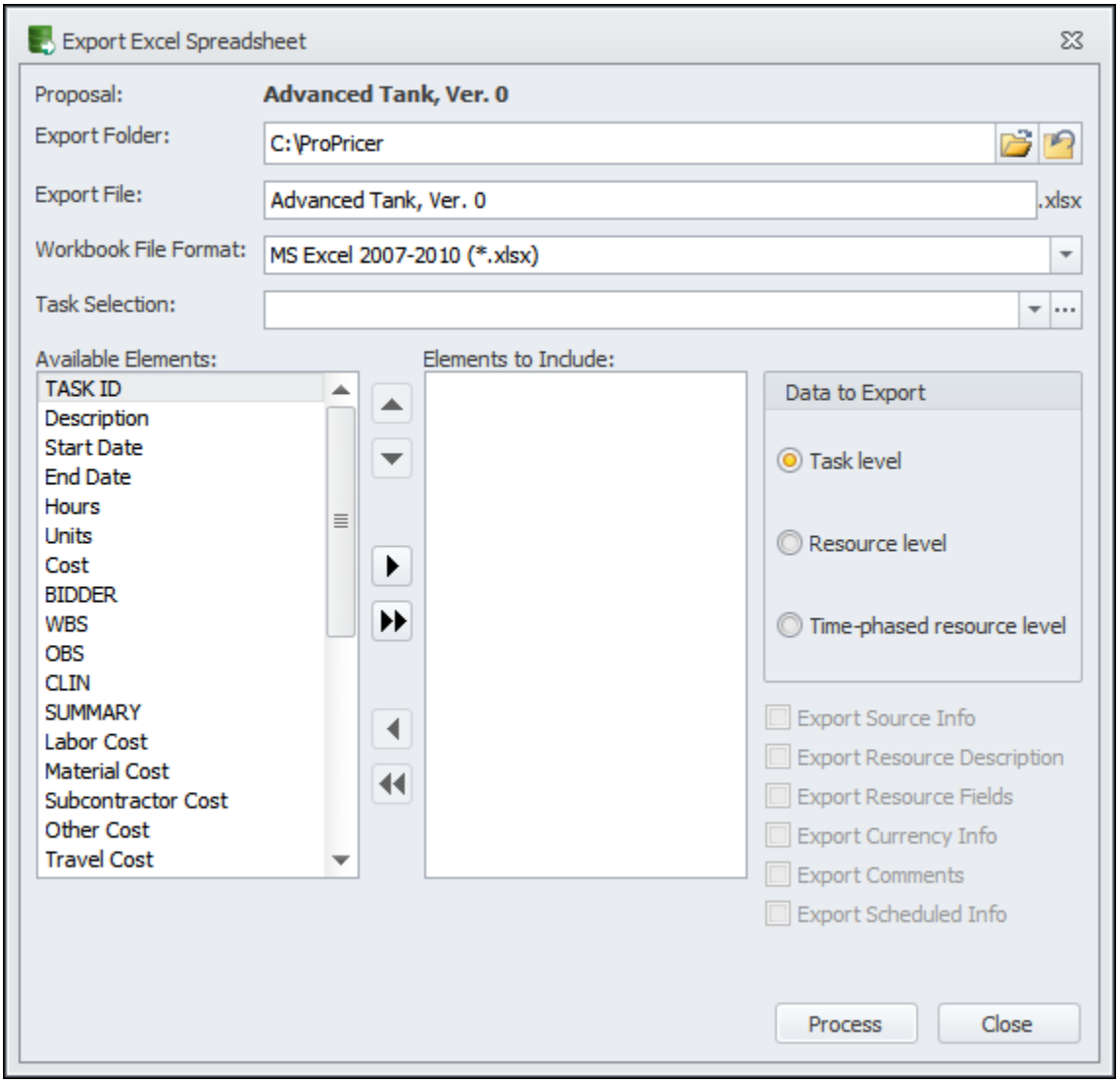
14. *(Optional)* Select the **Export Scheduled Info** checkbox to include scheduled rate data. With the resource level option, the export will include the name of the scheduled rate, its description and discount. With the timephased resource level option, the export will include the name of the scheduled rate, its description, rate, discount, and discounted rate.

15. Click **Process**.

16. To open the file immediately in Excel, click **Yes** when prompted.

Export Excel Spreadsheet Dialog Box

The **Export Excel Spreadsheet** dialog box is where you select the proposal elements you want to export in an Excel spreadsheet.



Proposal

Displays the name and version of the proposal.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Workbook File Format

Select the format of the exported file.

Task Selection

Enter a task selection to limit the export to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click to open the Task Selections grid to create or modify an existing one. For additional information, see Task Selections.

Available Elements

This list shows the proposal and task elements you can choose to include in the export file.

Elements to Include

This list shows the elements you have chosen to include in the export file. The elements are arranged in the order in which you select them, which will also be the order of the columns in the Excel file.

Use the buttons between the lists to include/exclude elements from the export file, as well as change their position.

Data to Export

This group of options allows you to select the level of detail you want to use for the exported data.

Task level

Exports only tasks.

Resource level

Exports tasks and resources per task.

Timephased resource level

Exports tasks and resource usage per task broken down by months.

Export Source Info

Select this option to export the Source Type, Source and Source Item of the resources. It is available when you have chosen to export resource level or timephased resource level data.

Export Resource Description

Select this option to export the descriptions of the resources. It is only available if you have chosen to export resource level or Timephased resource level data.

Export Resource Fields

Select this option to export the resource fields. This option is only available if you have chosen to export resource level or Timephased resource level data and there are resource fields defined for the proposal.

Export Currency Info

Select this option to export the currency of the resources with rate type *Cost*. The costs are shown in the proposal currency. If Bid Currency is enabled, the costs will be shown in the currency selected. This option is only available if you have chosen to export resource level or timephased resource level data and Multi-Currency is enabled for the proposal.

Export Comments

Select this option to include any Comment entered for the resources. This option is only available if you have chosen to export resource level or timephased

resource level data. If resource fields are defined, you must also select Export Resource Fields.

Export Scheduled Info

This option is only available if you have chosen to export resource level or timephased resource level data and have a Scheduled Rate Table assigned to the proposal. With the resource level option, the export will include the name of the scheduled rate, its description, and discount. With the timephased resource level option, the export will include the name of the scheduled rate, its description, rate, discount, and discounted rate.

Process

Click this button to start the export.

Close

Click this button to close the dialog box without exporting data.

When exporting begins, a progress indicator appears at the bottom of the screen. At the same time, the **Close** button changes to **Cancel**. Click it to stop the export. Please note that if you click **Cancel** when the progress indicator passes the 75-80% range, you may not be able to stop the export.

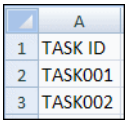
Export Excel Spreadsheet Examples

This topic illustrates the three levels of detail available for exporting ProPricer data to Excel.

The same proposal was exported five times, with a different level of detail selected for each session. The proposal contains two tasks: TASK001 and TASK002, two resources: ENG01 and ENG02, and one resource Field: Department with two values: Development and QA. Both resources are used for two months in each task. The images were captured from Microsoft Excel immediately after exporting the data from ProPricer. Only one element, **Task ID**, was selected from the **Available Elements** box. The results of the exports are as follows:

Task Level

Only tasks are exported. The number of rows in the Excel document equals the number of tasks in the proposal from which the data is extracted (two in this case). The number of columns equals the number of ProPricer elements you selected from the **Available Elements** list to export.



	A
1	TASK ID
2	TASK001
3	TASK002

Resource Level

Resources by task are exported. The number of rows in the document equals the number of tasks times the number of resources per task (four in this case - two tasks with two resources). The number of columns equals the number of ProPricer elements you selected from the **Available Elements** list to export. The first column of the exported Excel file is *Resource ID* regardless of your selection.

	A	B
1	Resource ID	TASK ID
2	ENG01	TASK001
3	ENG02	TASK001
4	ENG01	TASK002
5	ENG02	TASK002

Resource Level Exported with Resource Fields

	A	B	C
1	Resource ID	Department	TASK ID
2	ENG01		TASK001
3	ENG02		TASK001
4	ENG01		TASK002
5	ENG02	QA	TASK002
6	ENG02	Development	TASK002

Resources and resource fields by task are exported. This example duplicates the previous export with the addition of resource Field *Department* that has two values: *QA* and *Development*.

Timephased Resource Level

Resources per month by task are exported. The number of rows equals the sum of the months every resource is used in every task (eight in this case - two resources are used for two months in two tasks). The number of columns equals the number of ProPricer elements you selected from the **Available Elements** list to export. The first two columns of the exported Excel file are *Resource ID* and *Period* regardless of your selection. The Timephased option provides the highest level of detail.

	A	B	C
1	Resource ID	Period	TASK ID
2	ENG01	01/2009	TASK001
3	ENG01	02/2009	TASK001
4	ENG02	01/2009	TASK001
5	ENG02	02/2009	TASK001
6	ENG01	01/2009	TASK002
7	ENG01	02/2009	TASK002
8	ENG02	01/2009	TASK002
9	ENG02	02/2009	TASK002

Timephased Resource Level Exported with Resource Fields

Resources and resource fields per month by task are exported. This example duplicates the previous export with the addition of resource field *Department* that has two values *QA* and *Development*.

	A	B	C	D
1	Resource ID	Department	Period	TASK ID
2	ENG01		01/2009	TASK001
3	ENG01		02/2009	TASK001
4	ENG02		01/2009	TASK001
5	ENG02		02/2009	TASK001
6	ENG01		01/2009	TASK002
7	ENG01		02/2009	TASK002
8	ENG02	QA	01/2009	TASK002
9	ENG02	Development	01/2009	TASK002
10	ENG02	QA	02/2009	TASK002
11	ENG02	Development	02/2009	TASK002

Interdivisional Transfer Data

The Export Interdivisional Transfer option generates XML files that contain ProPricer data, which facilitates data integration with other applications and systems. During the export, ProPricer data is converted into an XML file format. Every XML file can only contain one complete ProPricer proposal. You cannot export parts of proposals or multiple proposals in the same session.

The export file will contain different proposal information, depending on the level of detail you selected for the export. You can export proposal tasks, the task period, task currency, summary fields, and the resources and their usage in the tasks.

When exporting interdivisional transfer data, you can summarize the proposal records based on Task ID or another summary field, and you can apply a Mask to the exported entries. The Summary Level you select will determine how the data will be summarized.

- Resource - Resource data is not summarized, that is, each resource used in a task corresponds to one resource in the exported file.
- Type - Resources are grouped based on their type.
- Class - Resources are grouped based on their class. If a proposal contains resources that are not assigned to a class, these resources are summarized in a resource class named *None*, but you can change it.
- All(Cost Only) - the sum of the costs calculated for the input hours/units/cost of all resources used in a task is exported as a single resource. The resulting values are calculated based on the proposal's timescale, and the export file contains a separate record for each month, quarter, or year of the task period.
- All(Hours Only) - the sum of the hours calculated for the input hours/units/cost of all resources used in a task is exported as a single resource. The resulting values are calculated based on the proposal's timescale, and the export file contains a separate record for each month, quarter, or year of the task period.
- All(Hrs+Cost) - the sum of all hours of the resources with rate type *Hours* and the sum of the calculated costs for the use of all resources are exported as two

separate resources. The values in the export file are presented in a timephased format and there is a discrete record for each month, quarter, or year of the task period.

- Resource Fields - Resources are grouped based on the values in the selected resource field. Resources that do not have values in the selected resource field are summarized in a single field called *Empty*.

The **Cost Level** option allows you to choose the proposal cost data that will be exported. The available elements you can select are the *Cost Level* type and *Subtotal* type elements in the proposal's Algorithm. Since these types of Algorithm elements are totals of other elements, each one represents a separate cost level. Review the Elements Pane help information to learn more about the different types of Algorithm elements.

Note: Direct Cost is the lowest cost level, and it is selected by default. At this level, no indirect costs are included in the exported records.

If the Multi-Currency feature is enabled for a proposal and the task currency is different from the proposal currency, the resource costs are exported in the currency of the task unless you choose to override the task and proposal currency with the **Currency Options** on the **Export Interdivisional Transfer Data** dialog box.

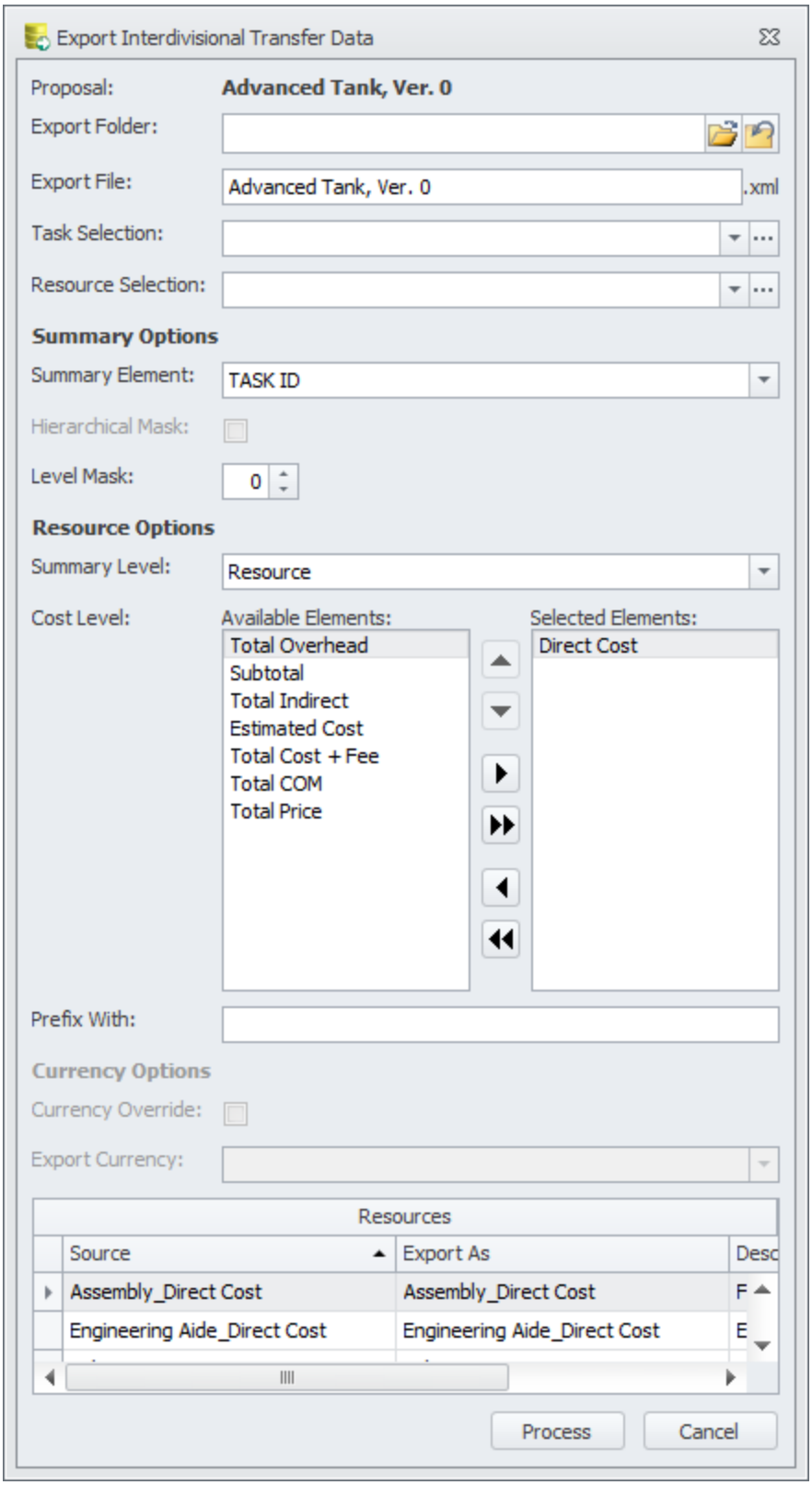
Follow these steps to export the data:

1. On the **External Data** ribbon, in the **Export** group, click **Interdiv. Transfer**. The **Export Interdivisional Transfer Data** dialog box will open.
2. The **Export Folder** field shows the location of the last file you exported. Click to browse to a different location.
3. In the **Export File** field, enter a name for the export file, or accept the name suggested.
4. Select a summary element for the export.

5. *(Optional)* Enter a **Level Mask** value.
6. Select the **Summary Level**.
7. Set the **Cost Level** by selecting the available *Cost Level* type and *Subtotal* type elements from the proposal's Algorithm.
8. *(Optional)* Enter the characters with which you want to prefix the exported resources.
9. In the **Export As** and **Description** columns of the **Resources** grid, enter a name and description for each source element, or accept the default.
10. Click **Process**.

Export Interdivisional Transfer Data Dialog Box

The **Export Interdivisional Transfer Data** dialog box is where you select the proposal elements you want to export in an XML format.


Export Interdivisional Transfer Data
Proposal:
Advanced Tank, Ver. 0
Export Folder:
Export File:
Advanced Tank, Ver. 0
.xml
Task Selection:
Resource Selection:
Summary Options
Summary Element:
TASK ID
Hierarchical Mask:
Level Mask:
0
Resource Options
Summary Level:
Resource
Cost Level:
Available Elements:
Total Overhead
Subtotal
Total Indirect
Estimated Cost
Total Cost + Fee
Total COM
Total Price
Selected Elements:
Direct Cost
Prefix With:
Currency Options
Currency Override:
Export Currency:
Resources
Source
Export As
Assembly_Direct Cost
Assembly_Direct Cost
Engineering Aide_Direct Cost
Engineering Aide_Direct Cost
Process
Cancel

Proposal

Displays the name and version of the proposal.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Task Selection

Enter a Task Selection to limit the export to the data in those tasks. Leave this field blank to process all the tasks in the proposal.

Resource Selection

Enter a Resource Selection to limit the export to the data for those resources. Leave this field blank to process all the resources in the proposal.

Summary Options

These options allow you to summarize the export data.

Summary Element

Enter the base element for the export.

Hierarchical Mask

This checkbox acts as a task filter. If selected, the tasks will be exported, based on the summary field's Title Table or value list. INVALID ENTRY will appear for those tasks whose entries are not included in the Title Table. If the checkbox is cleared, the tasks and their respective entries for the selected summary element will be exported. EMPTY will appear for those tasks whose cells (in the Task Input spreadsheet) for the selected summary element are empty.

Level Mask

Enter the mask you want to apply to the entries of the summary element selected. The default value is 0, which is equivalent to no mask. Level Mask refers to the characters of the summary element entry for each task. Mask matches the first *m* characters (or parts of segmented strings) of all entries and combines the matching entries. The export data will be summarized differently, depending on the Sort Order of the summary element selected. For example, applying a Level Mask of two to the numeric Task ID entries Task1.1, Task1.12, and Task1.2.1 results in Task1.1, Task1.12, and Task1.2 in the export file. Applying a mask of two to the same Task ID entries, but this time, alphabetic, produces Ta in the export file.

If the **Hierarchical Mask** checkbox is selected, Level Mask refers to the level in the Title Table or summary field value list. The levels are defined by the parent-child relationships of the elements, starting from the first or top level.

Resource Options

These options allow you to select the level of detail for the exported data.

Summary Level

Enter the level at which you want ProPricer to summarize the proposal data.

Cost Level

If you have permission to view indirect cost data, you can specify how much of it will be exported by selecting cost levels. If you don’t have permission to see indirect cost data, then only the default level *Direct Cost* will be available.

You can double-click *Cost Level* type and *Subtotal* type Algorithm elements to move them into and out of the **Available Elements** and **Selected Elements** sections, or you can use the left and right arrow buttons. The single-arrow buttons move individual elements one at a time, and the double-arrow buttons move all elements simultaneously.

You can click the up and down arrows to change the order of the elements in the **Selected Elements** section.

Prefix With

Enter the characters you want to use as the default prefix for all resources exported.

Currency Options

These options allow you to change the currency of the data to be exported. It is only available if you have an Exchange Rate Table assigned to the proposal. It contains two elements:

Currency Override

Select this option to override the currency specified on the **Currency** page in the **Proposal** folder of **Proposal Properties**.

Export Currency

Enter the currency you want to use.

Resources

The lower part of the dialog box displays the **Resources** grid that consists of the following elements:

Source

The information displayed depends on the Summary Level selected. It lists the resources, resource types, resource classes, or resource fields contained in the current proposal. If the Summary Level is *All(Cost Only)* or *All(Hours+Cost)*, the cells of this column show the source elements summarizing the cost or hours/cost data. If the Summary Level is *All(Hours Only)*, the cells show just the Summary Level, and the Cost Level options are disabled.

Export As

Enter a name for each source element. ProPricer automatically enters the names of the resources, resource types, resource classes, and resource fields from the current proposal, but you can change them.

Description

This column shows the descriptions of the exported source elements, but you can change them.

Process

Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Microsoft Project

The Export Microsoft Project feature creates files that can be used directly in Microsoft Project 2000 or subsequent versions. Every Microsoft Project file can only contain one complete ProPricer proposal. You cannot export parts of proposals or multiple proposals in the same session. Since Microsoft Project and ProPricer solve different types of problems, only certain ProPricer data can be exported to Microsoft Project. This includes:

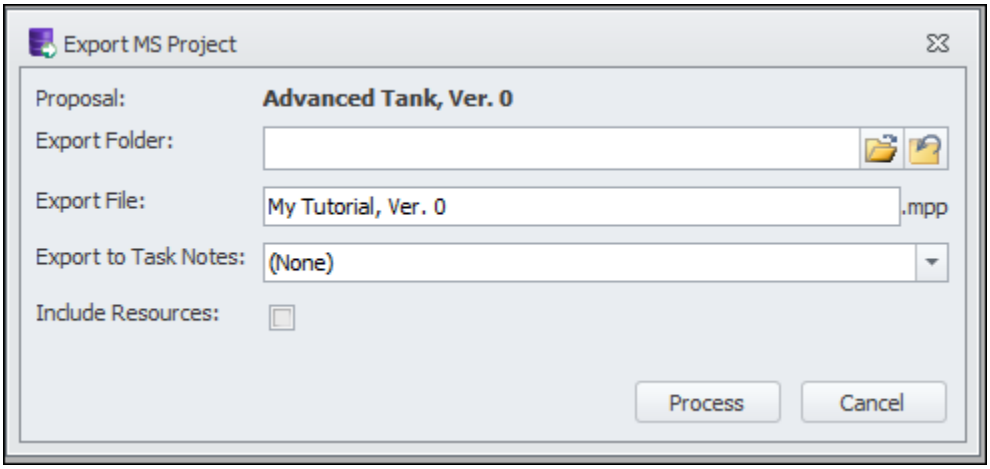
- Tasks, task description and duration, predecessors, and proposal summary fields.
- Resources, resource description, rate type, resource type, resource class, resource indirect pool and rate band, accounting calendar, BTL position, resource rates, and resource usage in tasks.

Follow these steps to export the data:

1. On the **External Data** ribbon, in the **Export** group, click **MS Project**. The **Export MS Project** dialog box will open.
2. The **Export Folder** field may show the location of the last file you exported. Click to browse to a different folder. Click to clear it.
3. In the **Export File** field, enter a name for the export file, or accept the name suggested.
4. Select whether or not to export any SOW or BOE information as Microsoft Project task notes.
5. Select the **Include Resources** checkbox to include the resources, their hours, and their direct cost in the export process.
6. Click **Process**.

Export Microsoft Project Dialog Box

The **Export MS Project** dialog box is where you select the export options and name the export file that will be created.



Proposal

Displays the name and version of the proposal.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. ProPricer automatically adds the file name extension.

Export to Task Notes

Select whether or not to export any SOW or BOE information as Microsoft Project task notes. The default setting is (None).

Include Resources

This checkbox determines the level of export detail. If the checkbox is cleared, ProPricer exports tasks, their description, and duration; proposal summary fields;

all the resources from the proposal’s Direct Rate Table; and the resource descriptions, rate types, rate band IDs, classes, indirect pools, accounting calendars, BTL positions, and rates (including overriding rates if any are entered in the proposal).

If the checkbox is selected, the resources are added to the tasks with the number of hours they are used and their direct cost.

Process

Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Notes on Exporting to Microsoft Project

Important notes on exporting ProPricer data to Microsoft Project:

- ProPricer resource descriptions become resource names, and resource IDs become initials when exported to Microsoft Project.
- ProPricer resources with rate type *Hours* are exported as Microsoft Project work resources. Resources with rate types *Units* and *Cost* are exported as material resources.
- ProPricer resource classes are exported as Microsoft Project groups.
- Some task fields, like Task Description, and proposal summary fields are exported as Microsoft Project custom text fields. The entries in summary field *WBS* are an exception because they are exported as Microsoft Project WBS codes.
- If the accounting calendar *STANDARD* already exists in Microsoft Project when the export begins, you will get a message that the existing calendar will be replaced with the incoming. In Microsoft Project, calendars apply only to work resources, not material resources. Therefore, the calendars assigned to resources with rate type *Units* and *Cost* will be ignored during the export process. The proposal’s calendar becomes the project's calendar in the export file. The project calendar is automatically assigned to all work resources that do not have accounting calendars assigned to them.
- Resource rates are exported in Cost Rate Tables. Microsoft Project sets limits to the number of resource rates a Cost Rate Table can contain. Therefore, if the exported direct rates or ranges of direct rates exceed 120, ProPricer will inform you that there is no Cost Rate Table available to accommodate the rates of the exported resource, and the export process will be interrupted.
- If there is a resource that is used more than once in a task (that is, the resource is assigned with different resource field values or has different source types), the resource hours/units/cost will be summarized in a single value in the exported file.

This is because Microsoft Project does not allow multiple resource assignments to the same task.

- If different rates are used to price a resource that appears more than once in a proposal (that is, in one assignment the resource uses the rates from the proposal's Direct Rate Table, and in another, the rates from an overriding rate band assigned at the resource level), ProPricer will only export the rates from the Direct Rate Table. The same is true if different rate bands are assigned to a resource that is used more than once in a proposal, so the rates from the Direct Rate Table will be exported. If, however, the same rate band is used in all instances, ProPricer will export the rates of the respective rate band.
- You can export SOW or BOE text to Microsoft Project Task Notes. However, any SOW or BOE attachments will not be exported.

Open Plan

Export Open Plan

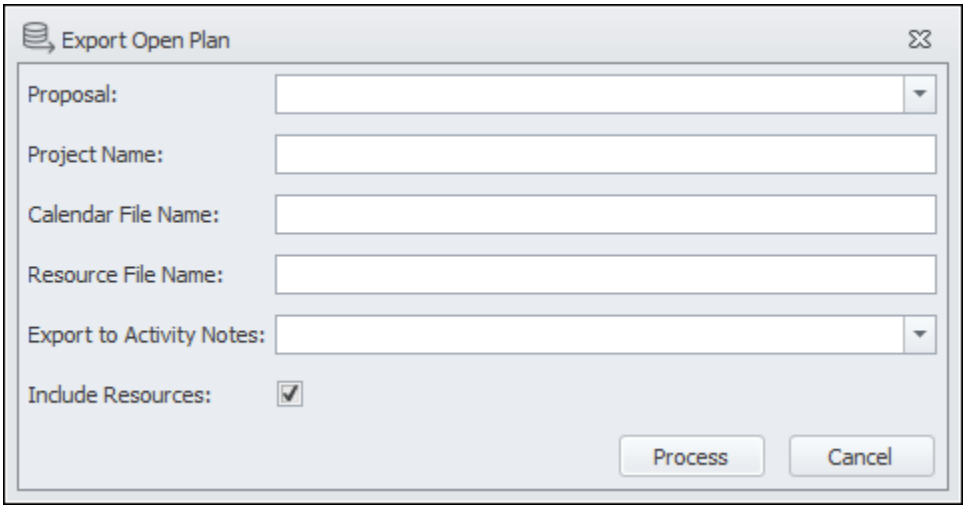
The Export Open Plan feature integrates Deltek Open Plan with ProPricer. You must have valid licenses and logins for Open Plan and ProPricer to use this feature.

You can export task and resource data directly to Open Plan without creating any intermediate files. If the names of tasks or resources contain non-alphanumeric characters as separators, such as a period, the export process automatically creates a hierarchical roll-up in Open Plan for each segment in the name.

1. On the **External Data** ribbon, in the **Export** group, click **Open Plan**. The **Export Open Plan** dialog box will open.
2. Select the proposal that contains the data to export.
3. Enter a name for the Open Plan project.
4. Enter a name for the Open Plan calendar file.
5. Enter a name for the Open Plan resource file.
6. Select whether or not to export any SOW or BOE information as Open Plan activity notes.
7. Select the **Include Resources** checkbox to include the resources, their hours, and their direct cost in the export process.
8. Click **Process**.

Export Open Plan Dialog Box

The **Export Open Plan** dialog box is where you select the export options and name the project that will be created with the exported proposal data.



Proposal

Select the proposal that contains the data to export.

Project Name

Enter a name for the Open Plan project.

Calendar File Name

Enter a name for the Open Plan calendar file.

Resource File Name

Enter a name for the Open Plan resource file.

Export to Activity Notes

Select whether or not to export any SOW or BOE information as Open Plan activity notes. The default setting is (None).

Include Resources

This checkbox determines the level of export detail. If the checkbox is cleared, ProPricer exports tasks, their description, and duration; proposal summary fields; all the resources from the proposal's Direct Rate Table; and the resource descriptions, rate types, rate band IDs, classes, indirect pools, accounting calendars, BTL positions, and rates (including overriding rates if any are entered in the proposal).

If the checkbox is selected, the resources are added to the tasks with the number of hours they are used and their direct cost.

Process

Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Prepare for Contractor

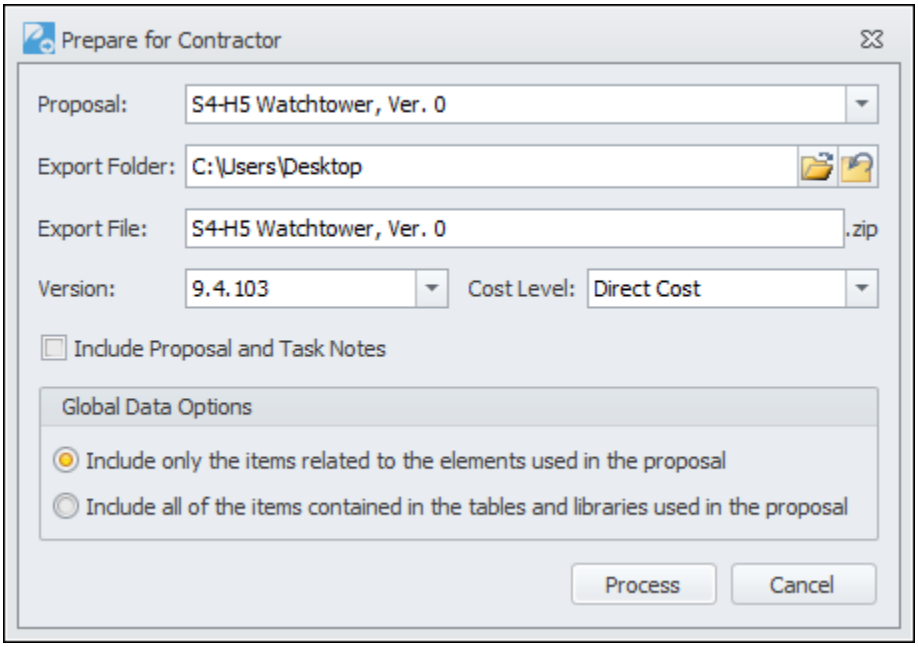
Prepare for Contractor allows you to export your current, accurate, and complete proposal as a .zip file for ProPricer Contractor Edition. The available options let you choose the ProPricer version for the proposal, as well as the data it will include and show.

1. On the **External Data** ribbon, in the **Export** group, click **Prepare for Contractor**. The **Prepare for Contractor** dialog box will open.
2. The **Export Folder** field may show the location of the last file you exported. Click to browse to a different folder. Click to clear it.
3. In the **Export File** field, type a name for the export file, or accept the name suggested.
4. In the **Version** field, select the ProPricer version that you want the file to be compatible with. The most recent version is the default selection.
5. In the **Cost Level** field, you can select *Direct Cost* for any of the available versions of ProPricer. If you select a different cost level, the proposal can only be compatible with the most recent version of ProPricer.
    - The cost levels you can select are determined by the proposal's Algorithm elements.
    - To sanitize the rates in the proposal, select your Total Price cost level. Once restored in ProPricer Contractor Edition, only the input costs and calculated total price of resources will be visible. All rates and other costs will be hidden.
6. Select the **Include Proposal Notes** checkbox to include any text entered on the **Notes** page in the **Proposal** folder of **Proposal Properties**, as well as any attachments or images.
7. Select the global data related to the proposal you want to include in the archive.

8. Click **Process**.

Prepare for Contractor Dialog Box

The **Prepare for Contractor** dialog box is where you export your current, accurate, and complete proposal as a .zip file.



Proposal

Shows the name and version of the proposal.

Export Folder

Enter the path of the folder where the exported file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the file ProPricer is going to create. ProPricer automatically adds the .zip file name extension.

Version

Select the version of ProPricer that the file will be compatible with. The most recent version is selected by default.

Cost Level

Select the cost level that will be shown when the proposal is restored. *Direct Cost* will show the most detail for the direct and indirect costs of resources, and this option can be selected for any of the available ProPricer versions. The other cost levels are determined by your Algorithm elements, and they are only selectable for proposals that will be restored in the most recent version of ProPricer.

To sanitize the rates in the proposal, select your Total Price cost level. Once restored in ProPricer Contractor Edition, only the input costs and calculated total price of resources will be visible. All rates and other costs will be hidden.

Include Proposal Notes

Select this checkbox to include any text entered on the **Notes** page in the **Proposal** folder of **Proposal Properties**.

Global Data Options

These two options allow you to select which global elements you want to include in the archive. You can:

- Include only the items related to the elements used in the proposal. For example, only the resources from the Direct Rate Table assigned to in the proposal.
- Include all the items in the table and/or library related to the elements used in the proposal. For example, all the resources in the Direct Rate Table, regardless of whether or not they are used in the proposal.

Process

Click this button to start the process.

Cancel

Click this button to close the dialog box without creating the .zip file.

Proposal

The Export Proposal (ASCII) option generates four ASCII files that contain task and resource data from the current proposal. These files essentially contain your entire proposal and can also include resource and travel spread information, as well as travel resources. The files that will be created are:

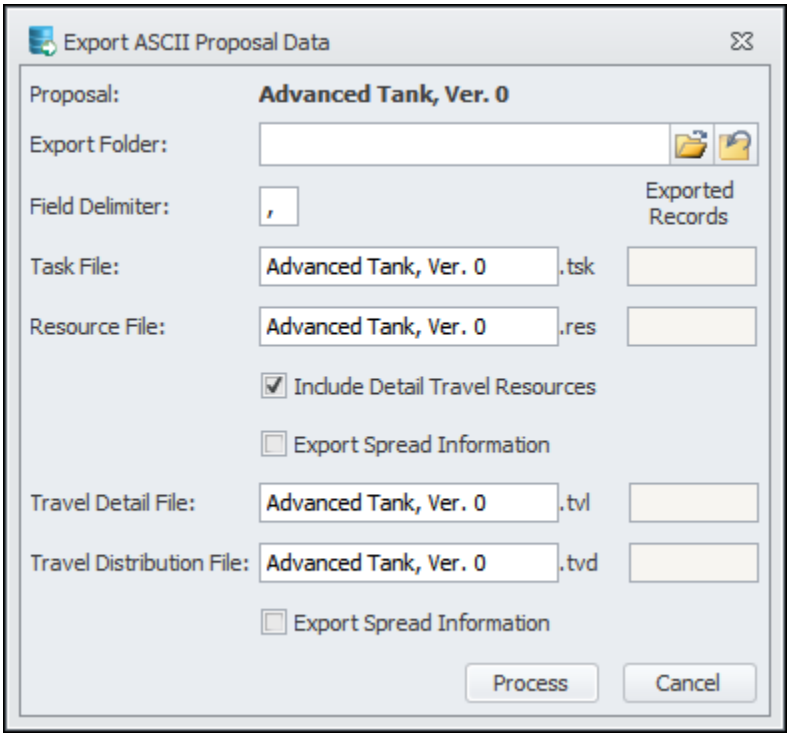
- A **.tsk** file that contains the tasks.
- A **.res** file that contains the resources.
- A **.tvl** file that contains travel details.
- A **.tvd** file that contains travel distribution.

Follow these steps to export the data:

1. Click the **External Data** ribbon and then click **Proposal (ASCII)** in the **Export** group. The **Export ASCII Proposal Data** dialog box will open.
2. The **Export Folder** field may show the location of the last file you exported. Click to browse to a different folder. Click to clear it.
3. Change the field delimiter.
4. Enter a name for each type of data you want to export or accept the names suggested. If you do not want to export a type of data, clear the text from the respective box.
5. Select the respective checkboxes if you want to include the detail travel resources and spread information in the resource file.
6. Select the checkbox if you want to include spread information in the travel distribution file.
7. Click **Process**.

Export ASCII Proposal Data Dialog Box

This option will export task and resource data from the current proposal in four ASCII files.



Proposal

Displays the name and version of the proposal.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry contains characters that are the same as the selected delimiter, ProPricer will enclose it in double quotation marks.

Task File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name. If you do not want to export task data, leave this field blank.

Resource File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name. If you do not want to export resource hours/cost, leave this field blank.

Include Detail Travel Resources

Select this checkbox if you want to export resource data entered through the **Travel** tab.

Export Spread Information

Select this checkbox if you want to export the full spread information for the resources used in a proposal task: Curve, Spread Amount, and Start and End Dates of the spread period.

Travel Detail File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name. If you do not want to export trip data, leave this field blank.

Travel Distribution File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name. If you do not want to export trip distributions, leave this field blank.

Export Spread Information

Select this checkbox if you want to export full spread information for the trips assigned to a proposal task: Curve, Spread Amount, and Start and End Dates of the spread period.

Exported Records

This field shows the number of records exported for each file.

Process

Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Subcontractor Data

The Export Subcontractor option generates XML files that contain ProPricer data, which facilitates data integration with other applications and systems. During the export, ProPricer data is converted into an XML file format. Every XML file can only contain one complete ProPricer proposal. You cannot export parts of proposals or multiple proposals in the same session.

The export file will contain different proposal information, depending on the level of detail you selected for the export. You can export proposal tasks, the task period, task currency, summary fields, and the resources and their usage in the tasks.

When exporting subcontractor data, you can summarize the proposal records, based on Task ID or another summary field and apply a Mask to the exported entries. The Summary Level you select will determine how the data will be summarized.

- Resource - Resource data is not summarized, that is, each resource used in a task corresponds to one resource in the exported file.
- Type - Resources are grouped based on their type.
- Class - Resources are grouped based on their class. If a proposal contains resources that are not assigned to a class, these resources are summarized in a resource class named *None*, but you can change it.
- All(Cost Only) - the sum of the costs calculated for the input hours/units/cost of all resources used in a task is exported as a single resource. The resulting values are calculated based on the proposal's timescale, and the export file contains a separate record for each month, quarter, or year of the task period.
- All(Hrs+Cost) - the sum of all hours of the resources with rate type *Hours* and the sum of the calculated costs for the use of all resources are exported as two separate resources. The values in the export file are presented in a timephased format, and there is a discrete record for each month, quarter, or year of the task period.

- Resource Fields - Resources are grouped based on the values in the selected resource field. Resources that do not have values in the selected resource field are summarized in a single field called *Empty*.

The **Cost Level** feature allows you to define the level at which the proposal cost values will be exported. The levels are defined by the subtotals preset in the Algorithm. Every element in the Algorithm that is a subtotal, designates one cost level. The lowest level is Direct Cost. If selected, no indirect expenses will be included in the exported cost records for the resources. The tutorial Algorithm named A100 has four subtotals. They are:

- Subtotal - adds overhead expenses and material escalation to the Direct Cost.
- Total Cost - adds general and administrative expenses to the Subtotal.
- Total Cost + Fee - adds the profit to the Total Cost.
- Grand Total Price - adds the tax expenses to the Total Cost + Fee

If the Multi-Currency feature is enabled for a proposal and the task currency is different from the proposal currency, the resource costs are exported in the currency of the task unless you choose to override the task and proposal currency with the **Currency Options** on the **Export Subcontractor Data** dialog box.

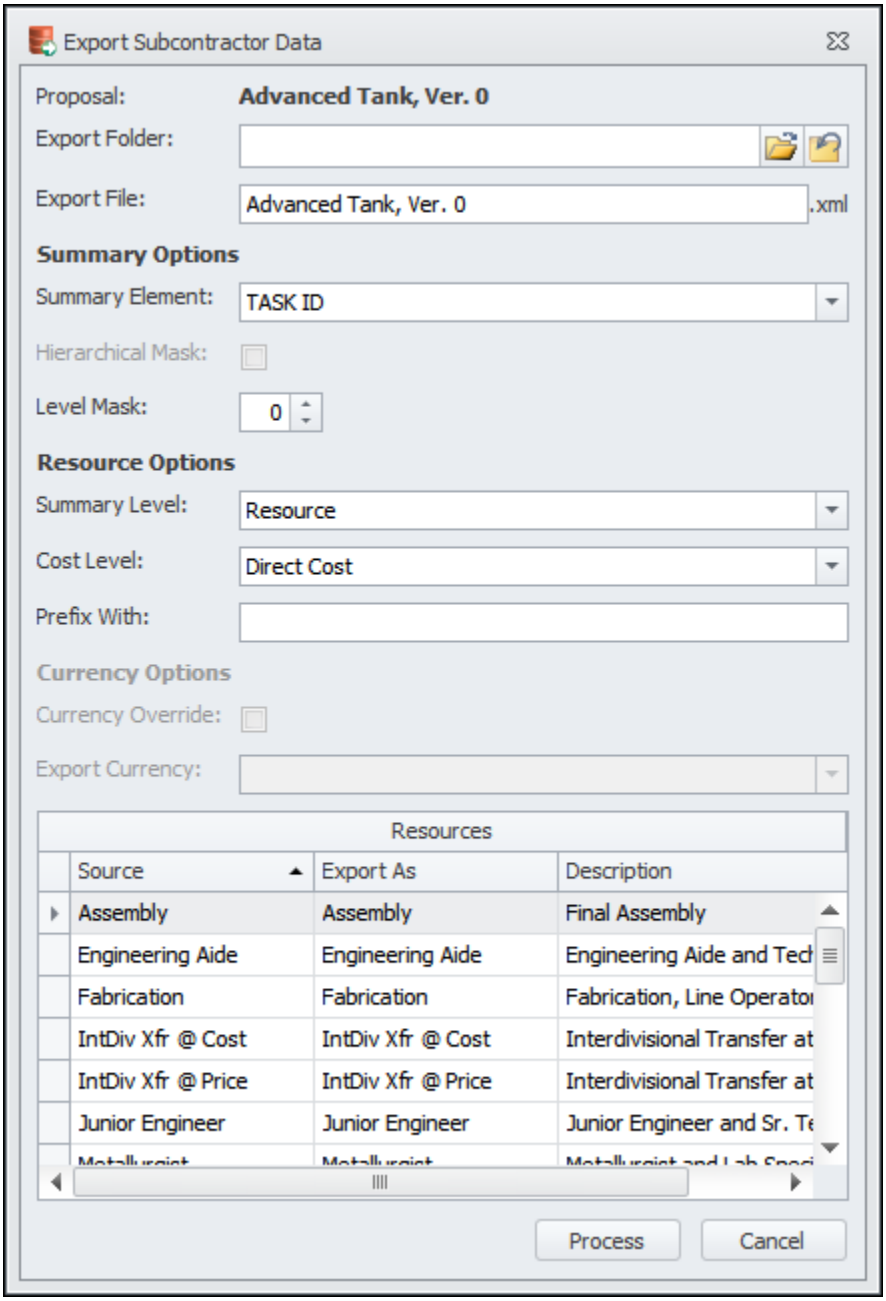
Follow these steps to export the data:

1. Click the **External Data** ribbon and then click **Subcontractor** in the **Export** group. The **Export Subcontractor data** dialog box will open.
2. The **Export Folder** field shows the location of the last file you exported. Click to browse to a different location.
3. In the **Export File** field, enter a name for the export file, or accept the name suggested.
4. Select a summary element for the export.

5. *(Optional)* Enter a Level Mask value.
6. Select the Summary Level.
7. Select the Cost Level.
8. *Optional* Enter the characters with which you want to prefix the exported resources.
9. In the **Export As** column of the **Resources** grid, enter a name for each source element or accept the default.
10. Click **Process**.

Export Subcontractor Data Dialog Box

The **Export Subcontractor Data** dialog box is where you select the proposal elements you want to export in an XML format.



Proposal

Displays the name and version of the proposal.

Export Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. The file name extension is automatically added to the file name.

Summary Options

These options allow you to summarize the export data.

Summary Element

Enter the base element for the export.

Hierarchical Mask

This checkbox acts as a task filter. If selected, the tasks will be exported, based on the summary field's Title Table or value list. INVALID ENTRY will appear for those tasks whose entries are not included in the Title Table. If the checkbox is cleared, the tasks and their respective entries for the selected summary element will be exported. EMPTY will appear for those tasks whose cells (in the Task Input spreadsheet) for the selected summary element are empty.

Level Mask

Enter the mask you want to apply to the entries of the summary element selected. The default value is 0, which is equivalent to no mask. Level Mask refers to the characters of the summary element entry for each task. Mask matches the first *m* characters (or parts of segmented strings) of all entries and combines the matching entries. The export data will be summarized differently, depending on the Sort Order of the summary element selected. For example, applying a Level Mask of two to the numeric Task ID entries Task1.1, Task1.12, and Task1.2.1 results in Task1.1, Task1.12, and Task1.2

in the export file. Applying a mask of two to the same Task ID entries, but this time, alphabetic, produces Ta in the export file.

If the **Hierarchical Mask** checkbox is selected, Level Mask refers to the level in the Title Table or summary field value list. The levels are defined by the parent-child relationships of the elements, starting from the first or top level.

Resource Options

These options allow you to select the level of detail for the exported data.

Summary Level

Enter the level at which you want ProPricer to summarize the proposal data.

Cost Level

If you are permitted to view indirect cost information, you can specify how much of it will be included in the cost totals and subtotals. If you cannot see indirect cost information, the only level available is *Direct Cost*, which is also the default level.

Prefix With

Enter the characters you want to use as the default prefix for all resources exported.

Currency Options

These options allow you to change the currency of the data to be exported. It is only available if you have an Exchange Rate Table assigned to the proposal. It contains two elements:

Currency Override

Select this option to override the currency specified on the **Currency** page in the **Proposal** folder of **Proposal Properties**.

Export Currency

Enter the currency you want to use.

Resources

The lower part of the dialog box displays the **Resources** grid that consists of the following elements:

Source

The information displayed depends on the Summary Level selected. It lists the resources, resource types, resource classes, or resource fields contained in the current proposal. If the Summary Level is *All(Cost Only)* or *All(Hours+Cost)*, the cells of this column show the source elements summarizing the cost or hours/cost data.

Export As

Enter a name for each source element. ProPricer automatically enters the names of the resources, resource types, resource classes, and resource fields from the current proposal, but you can change them.

Description

This column shows the descriptions of the exported source elements, but you can change them.

Process

Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

XML

The Export XML option generates XML files that contain ProPricer data, which facilitates data integration with other applications and systems. You can export global and/or proposal data. Global data refers to any information that pertains to a library or table. You can export data from all libraries and tables, or a select few. Proposal data pertains to the proposal selected in the Navigation Pane. This information can include:

- Properties: proposal name and version, proposal currency, and summary fields.
- Tasks: the data entered on the **Tasks** grid.
- Resource assignments: resource, resource field values, the indirect pool, and rate band assigned to the resource, the distribution of resource hours/units/cost, profit/fee values entered at the resource level, and scheduled rates, if available.
- Resource assignments: resource, resource field values, the distribution of resource hours/units/cost, profit/fee values entered at the resource level, and scheduled rates, if available.
- Travel data: information for each separate trip assigned to the task, trip distribution, and related travel expenses.
- SOW and BOE attachments and texts entered for each task.
- Materials: task material assignments, material quantities, spread info, associated costs, and cost source data entered for the parts and assemblies.

Follow these steps to export data to a .xml file:

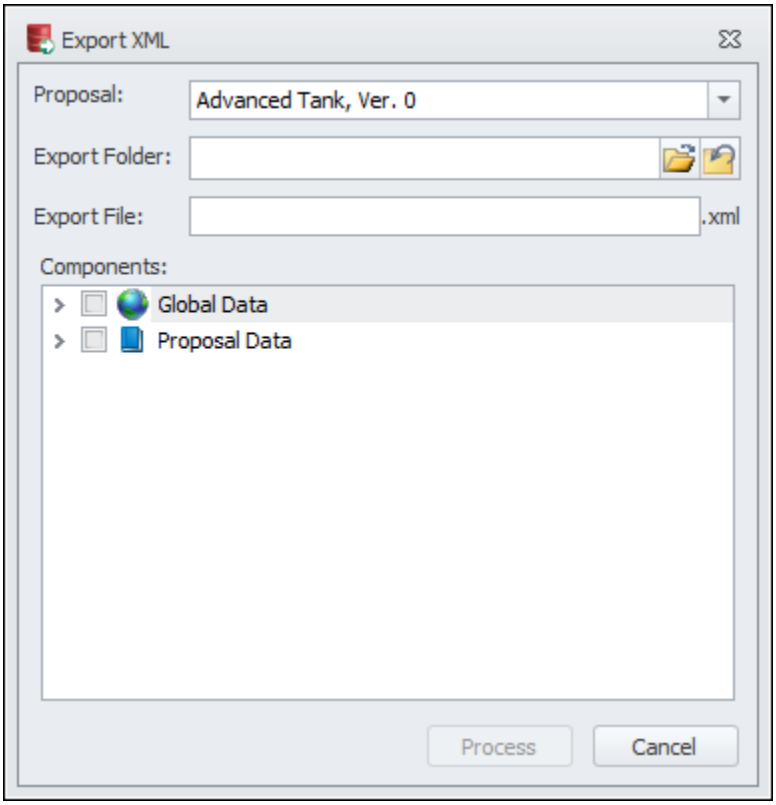
1. Click the **External Data** ribbon and then click **XML** in the **Export** group. The **Export XML** dialog box will open.
2. The **Export Folder** field may show the location of the last file you exported. Click to browse to a different folder. Click to clear it.
3. In the **Export File** field, type a name for the export file, or accept the name suggested.

4. Select the checkboxes of the elements you want to export. Selecting the checkbox to the left of a top-level folder tells ProPricer to select the checkboxes of all the elements within it. If you only want to export specific data, expand the respective folder, and select the checkboxes of the individual elements.

5. Click **Process**.

Export XML Dialog Box

The **Export XML Data** dialog box is where you select the global and/or proposal elements you want to export in an XML file format.



Proposal

Select a proposal. The data in the export file will come from this proposal.

Export Folder

Enter the path of the folder where the exported file will be saved. This field may show the location of the last file you exported. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

Export File

Enter a name for the export file ProPricer is going to create. ProPricer automatically adds the file name extension.

Components

This area lists all the items you can include in the export file. The global and proposal-specific records are organized in two separate folders, each of which provides access to several subfolders. A plus sign in front of a folder indicates that the folder has subordinate items. Click the plus sign to expand the folder to see the items stored in it. Click the minus sign to collapse the folder and hide the items from view. Selecting the checkbox to the left of a top-level folder tells ProPricer to select the checkboxes of all the elements within it. If you only want to export specific data, expand the respective folder, and select the checkboxes of the individual elements.

Process

Click this button to start the export.

Cancel

Click this button to close the dialog box without exporting data.

Import

Importing allows you to bring outside data into ProPricer. If you have preexisting data that you want to use, importing it will save you from entering it in ProPricer again.

You can import the following:

- ASCII/Excel
- Interdivisional Transfer Data
- Microsoft Project
- Open Plan
- ProPricer Import/Export Tool
- Subcontractor Data
- XML

ASCII/Excel

The ASCII/Excel Import brings data from an Excel spreadsheet or ASCII file into ProPricer.

If your proposals often have resource fields, especially ones with many different values, the ASCII/Excel Import can help you bring in default resource field values quickly. In your import file, go to a resource field and type *(Default)* in a cell. ProPricer will recognize that placeholder during the import process, and the real default value will be entered in the resource field instead.

The ASCII files should have the following format:

- Each record in the file appears on a separate line.
- The fields in the records are separated by a delimiter.
- Certain import types may require a period on a new line to indicate separate a record.

The Excel files should have the following format:

- Each record appears on a separate row.
- Each field in a record appears in a separate column.

Follow these steps to import ASCII/Excel data into ProPricer:

1. Click the **External Data** ribbon and then click **ASCII/Excel** in the **Import** group. The **Import ASCII/Excel Data** dialog box will open.
2. Select the type of data you want to import.
3. The **Import Folder** field shows the location of the last file you imported. Click to clear the field.
4. In the **Import File** field, enter the name of the file you want to import, or click to browse for it.

5. Change the field delimiter.

6. Select how you want to handle duplicate data.

7. Click **Preview** to view the import data in the preview area:

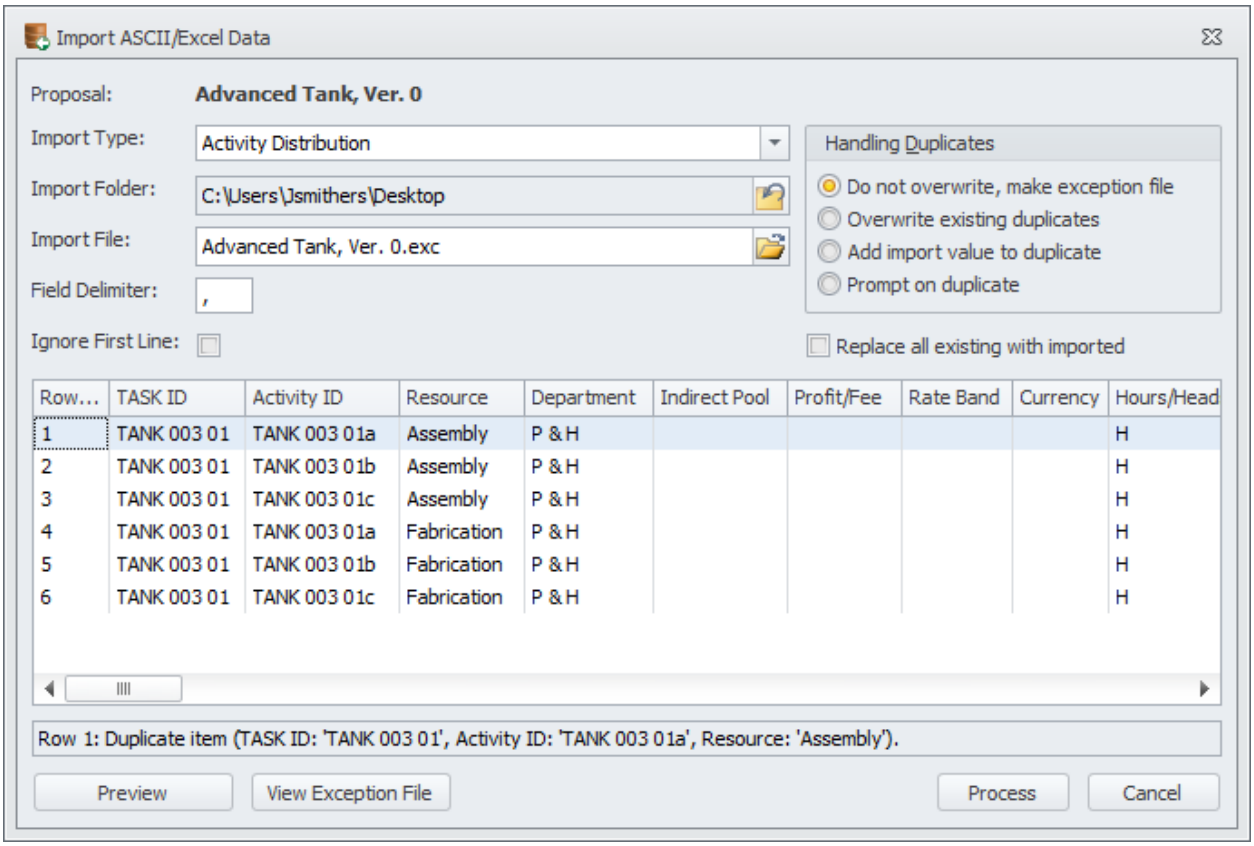
    7.1. Select the **Ignore First Line** checkbox if the first line contains explanatory or other data that need not be imported.

    7.2. If the fields in your ASCII file are not arranged in the order of the headings in the preview table, rearrange the headings to match the column content. Click the column heading, and from the shortcut menu choose **Move Left** or **Move Right** to move the selected heading to the left or right, respectively. Repeat this process until the selected heading is above the appropriate data.

8. Click **Process**.

Activity Distribution

This option will bring distribution data of the resources assigned to the activity into ProPricer. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tad.



Proposal

Displays the name and version of the proposal.

Import Type

Activity Distribution

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

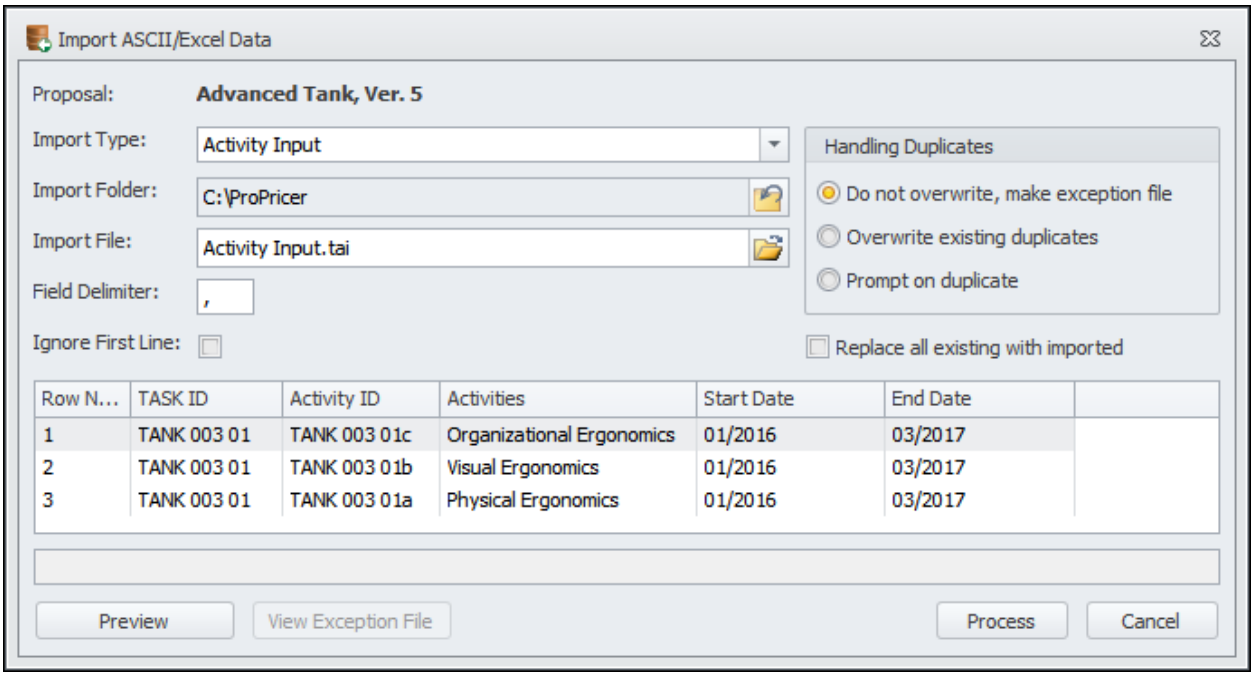
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Activity Input

This option will bring task activities in the current proposal. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tai.



Proposal

Displays the name and version of the proposal.

Import Type

Activity Input

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

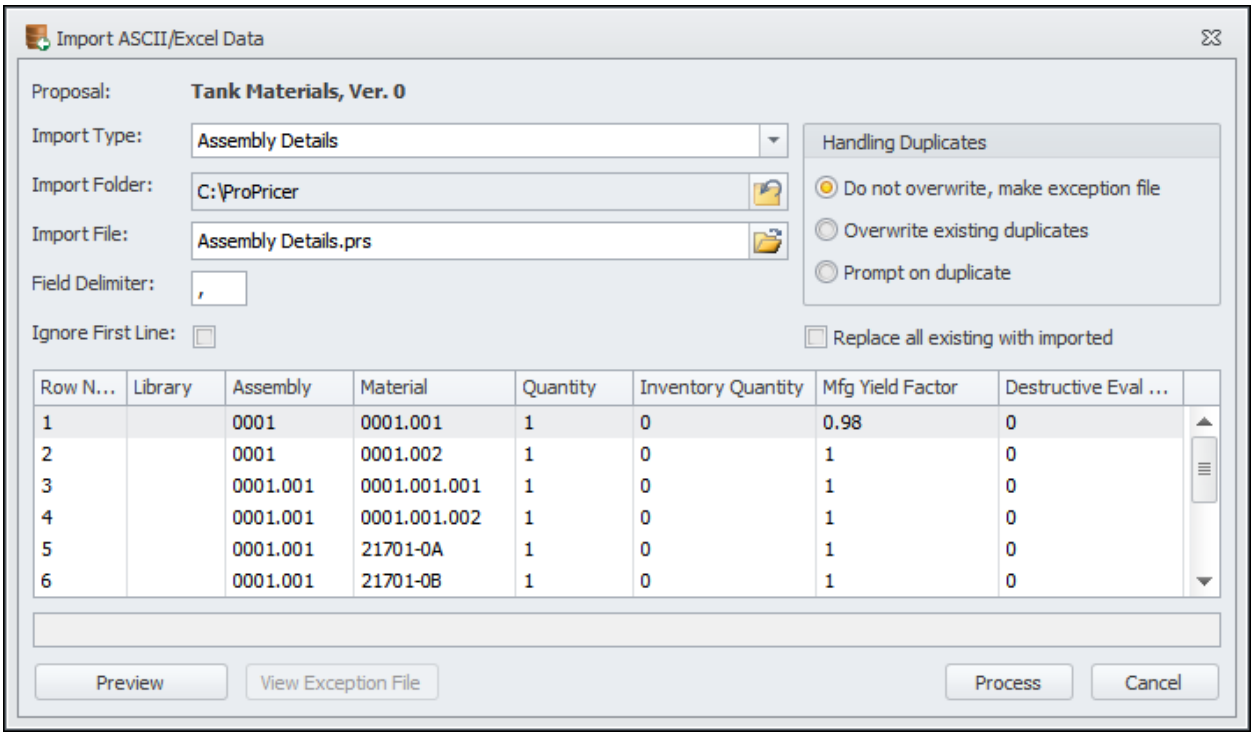
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Assembly Details

This option will import assembly element details. The screenshot of the dialog box also includes a partial preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .prs.



Proposal

Displays the name and version of the proposal.

Import Type

Assembly Details

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

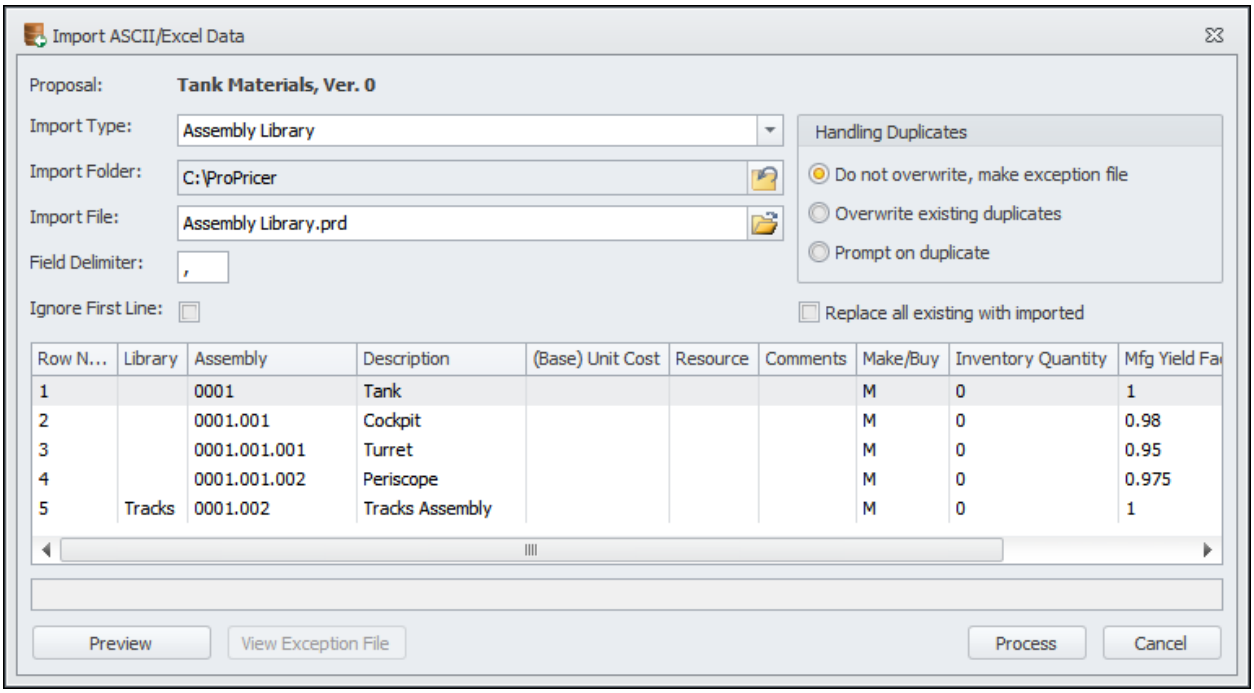
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Assembly Library Data

This option will import assemblies into any Assemblies Library. The screenshot of the dialog box also includes a partial preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .prd.



Proposal

Displays the name and version of the proposal.

Import Type

Assembly Details

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

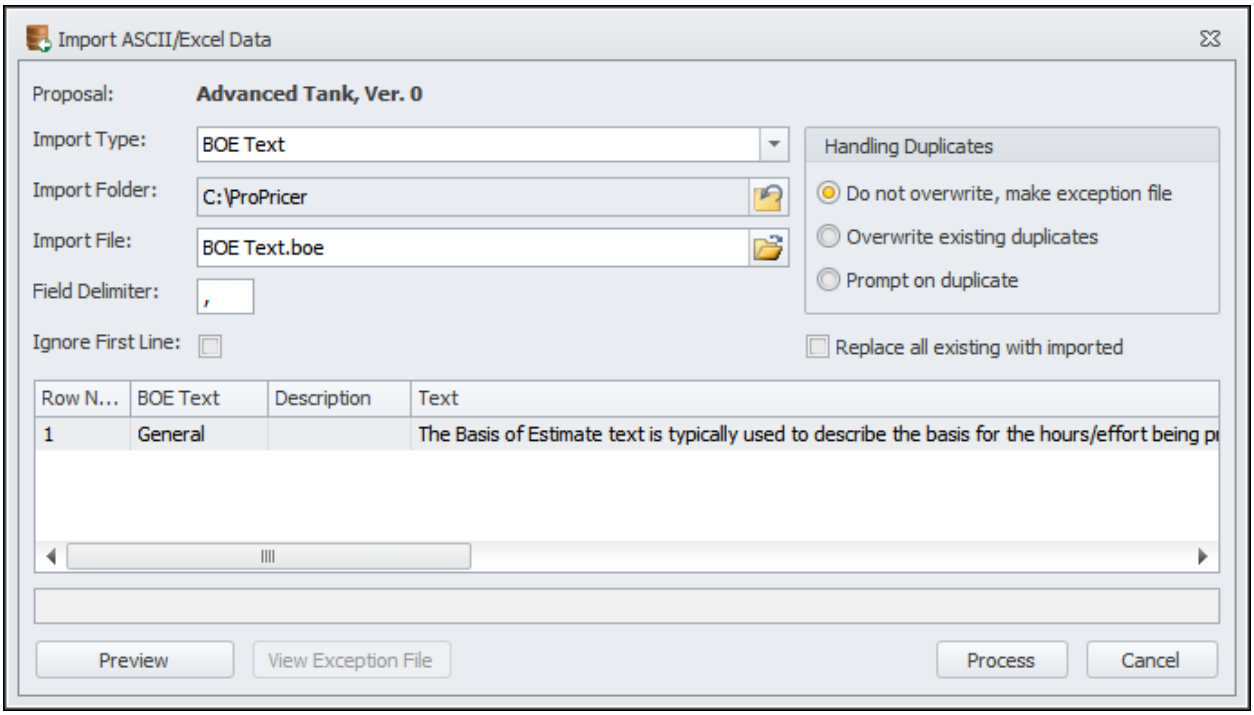
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

BOE Text

This option will bring text entries into the BOE Text Library. There should be three fields per record. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .boe.



Proposal

Displays the name and version of the proposal.

Import Type

BOE Text

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

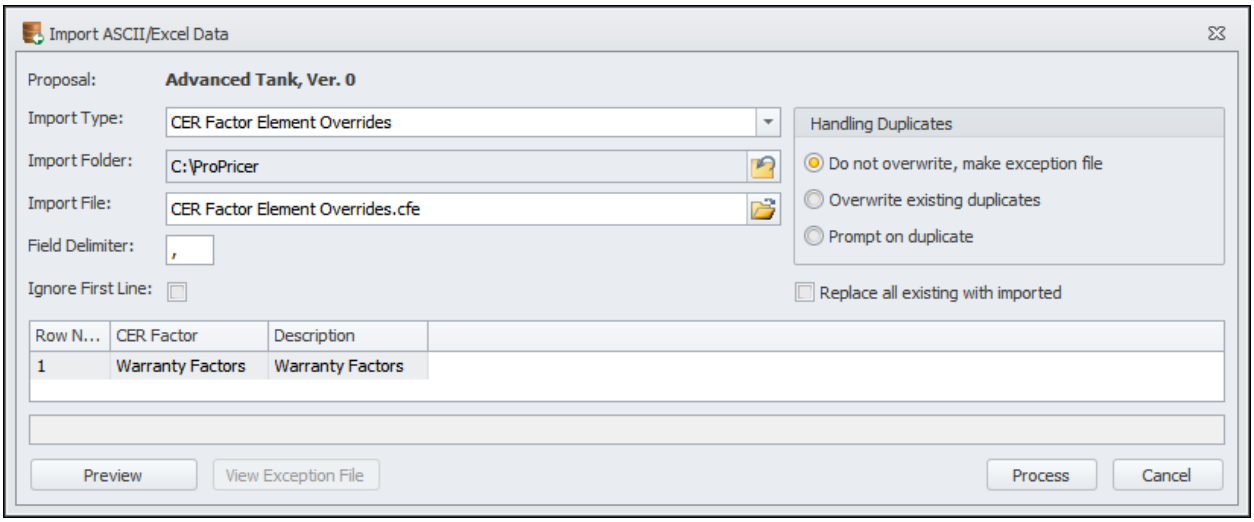
Click to start the import.

Cancel

Click to close the dialog box without importing data.

CER Factor Element Overrides

This option will bring overriding CER factor descriptions into ProPricer. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .cfe.



Proposal

Displays the name and version of the proposal.

Import Type

CER Factor Element Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

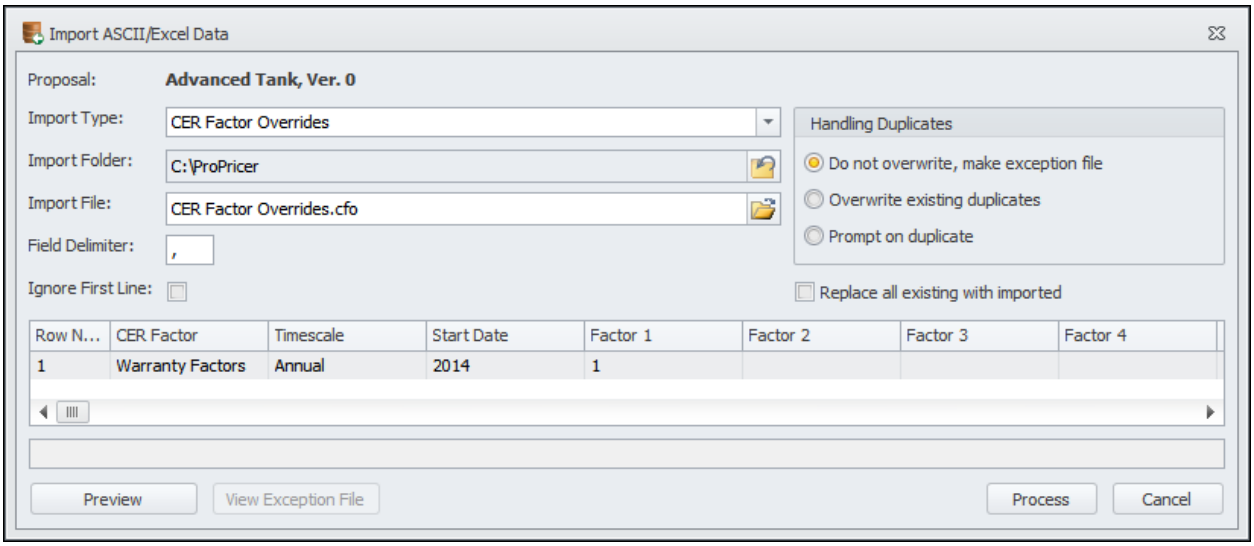
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

CER Factor Overrides

This option will bring CER factor overrides into ProPricer. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .cfo.



Proposal

Displays the name and version of the proposal.

Import Type

CER Factor Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

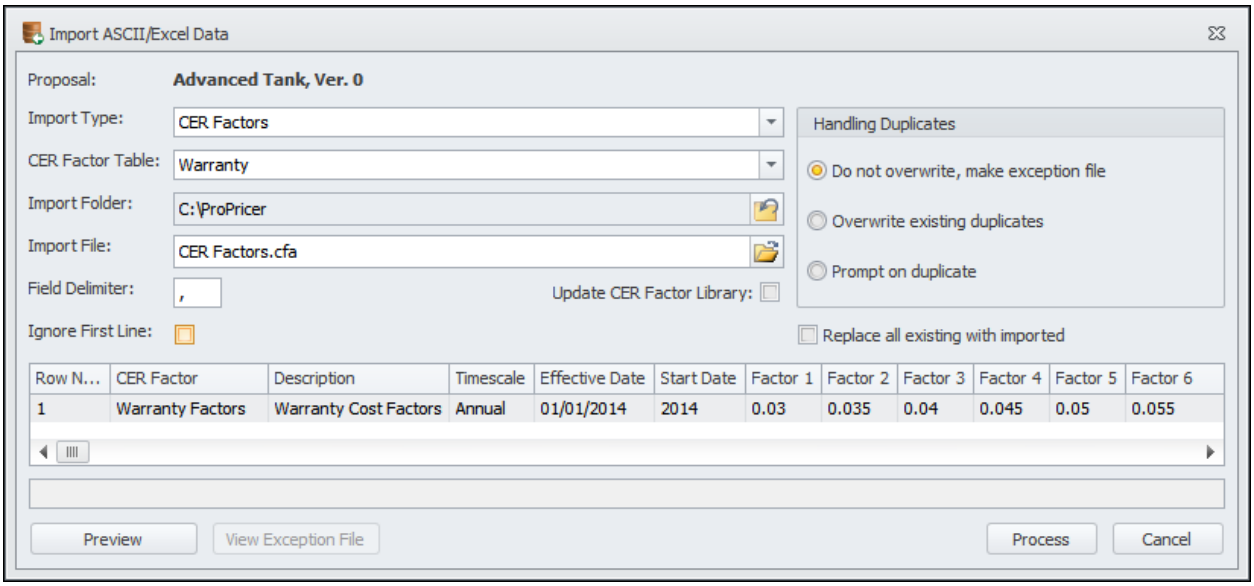
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

CER Factors

This option will bring CER factors into ProPricer. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .cfa.



Proposal

Displays the name and version of the proposal.

Import Type

CER Factors

CER Factor Table

Enter the CER Factor Table to which you want to import the CER factors.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Update CER Factor Library

Select this checkbox if you want to import CER factor rates for CER factors that do not exist in the CER Factor Library. If new CER factors are encountered during importing, the program will automatically add them to the library. If an incoming CER factor exists in the CER Factors Library, the existing CER factor will be replaced by the incoming.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records

is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

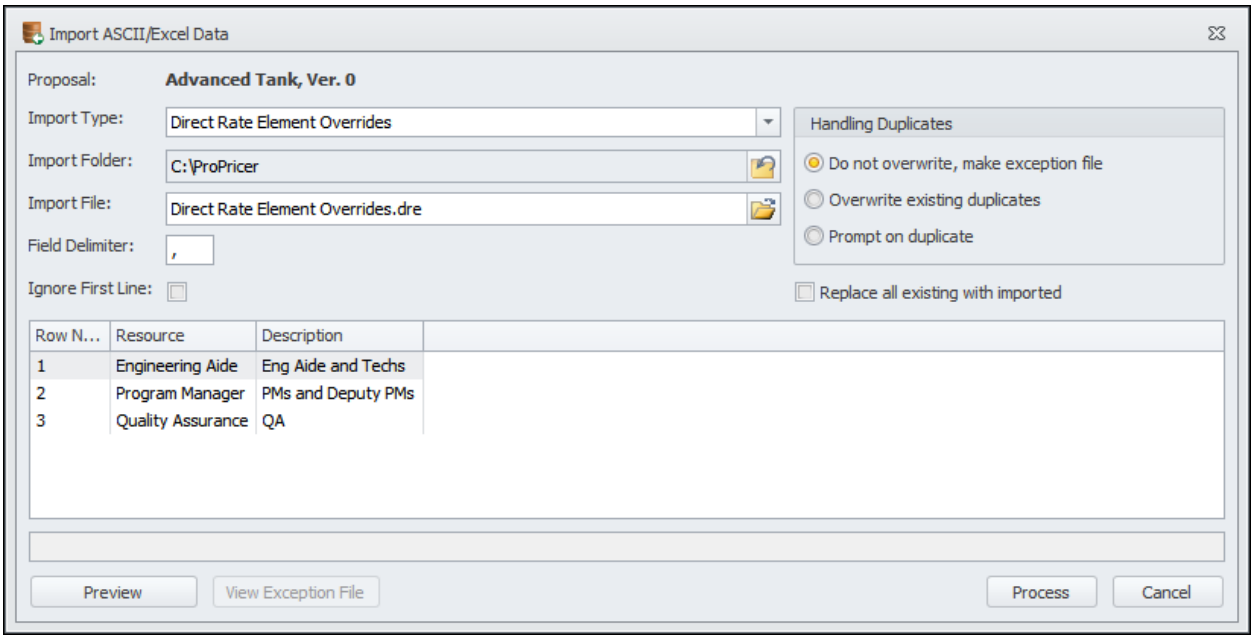
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Direct Rate Element Overrides

This option will import overriding resource descriptions. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .dre.



Proposal

Displays the name and version of the proposal.

Import Type

Direct Rate Element Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

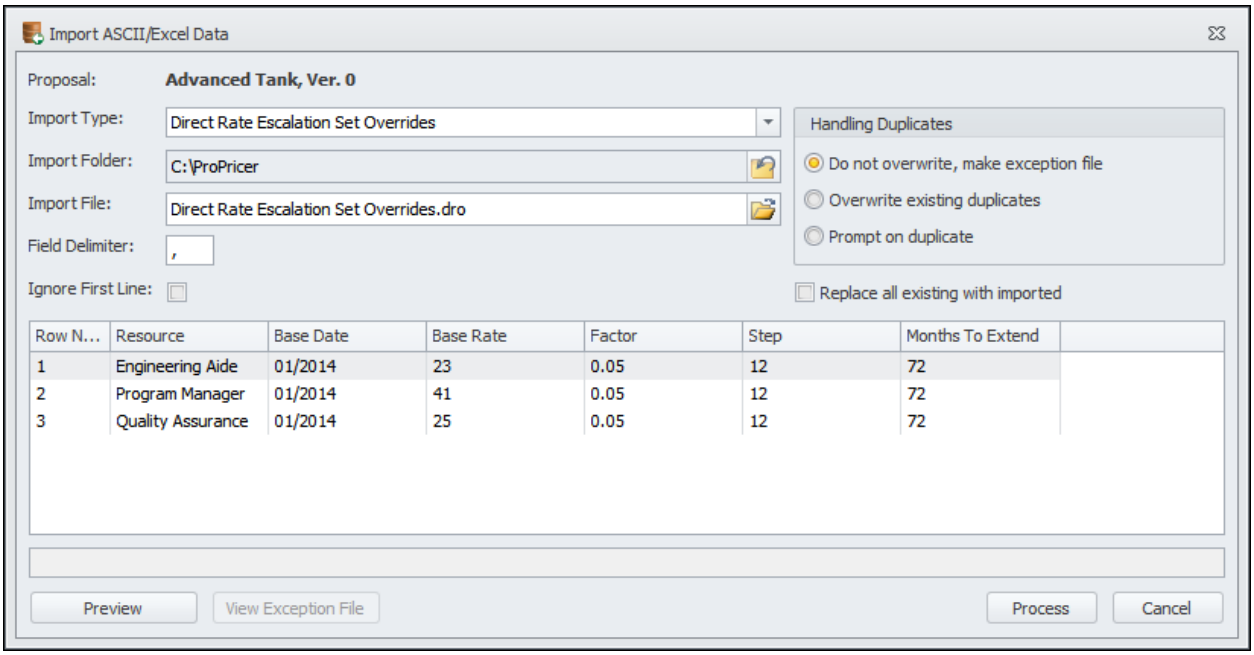
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Direct Rate Escalation Set Overrides

This option will import overriding direct rate escalation sets. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .dro.



Proposal

Displays the name and version of the proposal.

Import Type

Direct Rate Escalation Set Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

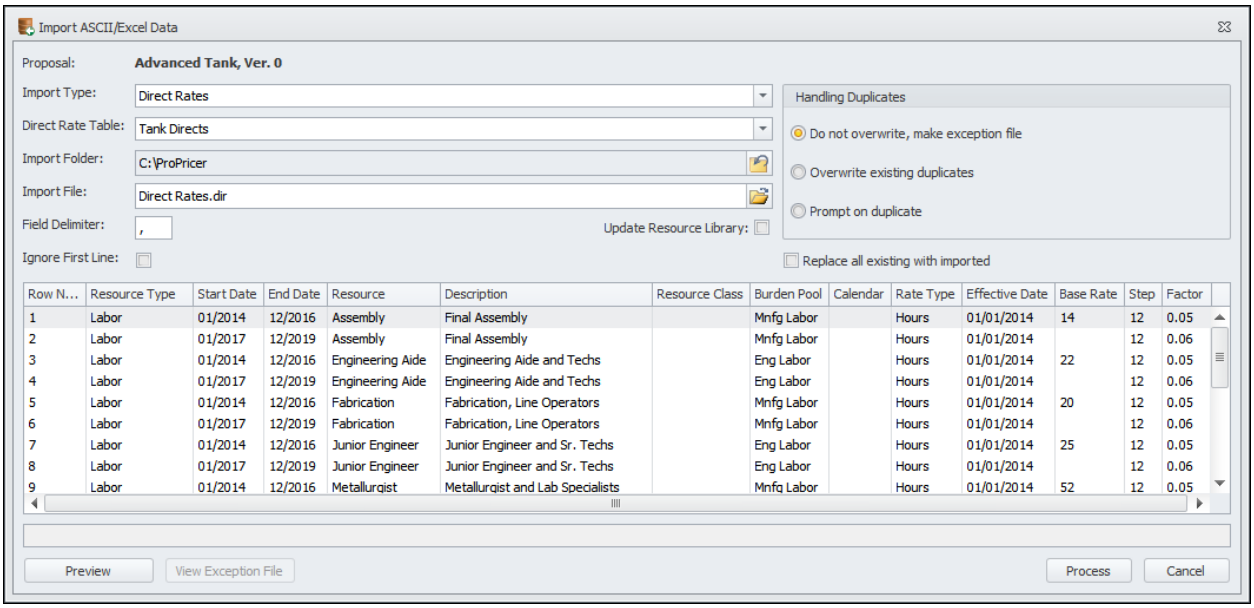
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Direct Rates

This option will import direct rates into a Direct Rate Table. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .dir.



Proposal

Displays the name and version of the proposal.

Import Type

Direct Rates

Direct Table

Enter the Direct Rate Table to which you want to import the direct rates.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Update Resource Library

Select this checkbox if you want to import direct rates for resources that do not exist in the Resource Library. If new resources are encountered during importing, the program will automatically add them to the library. If an incoming resource exists in the Resource Library, the existing resource will be replaced by the incoming.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

*Note: If duplicate resources are found, the **Overwrite Existing Duplicates** option will not change the resource ID, resource type, description, or accounting calendar of the incoming resource in the Direct Rate Table since this information is stored*

in the Resource Library. Select the ***Update Resource Library*** *checkbox if you want to replace the data in the Resource Library as well.*

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

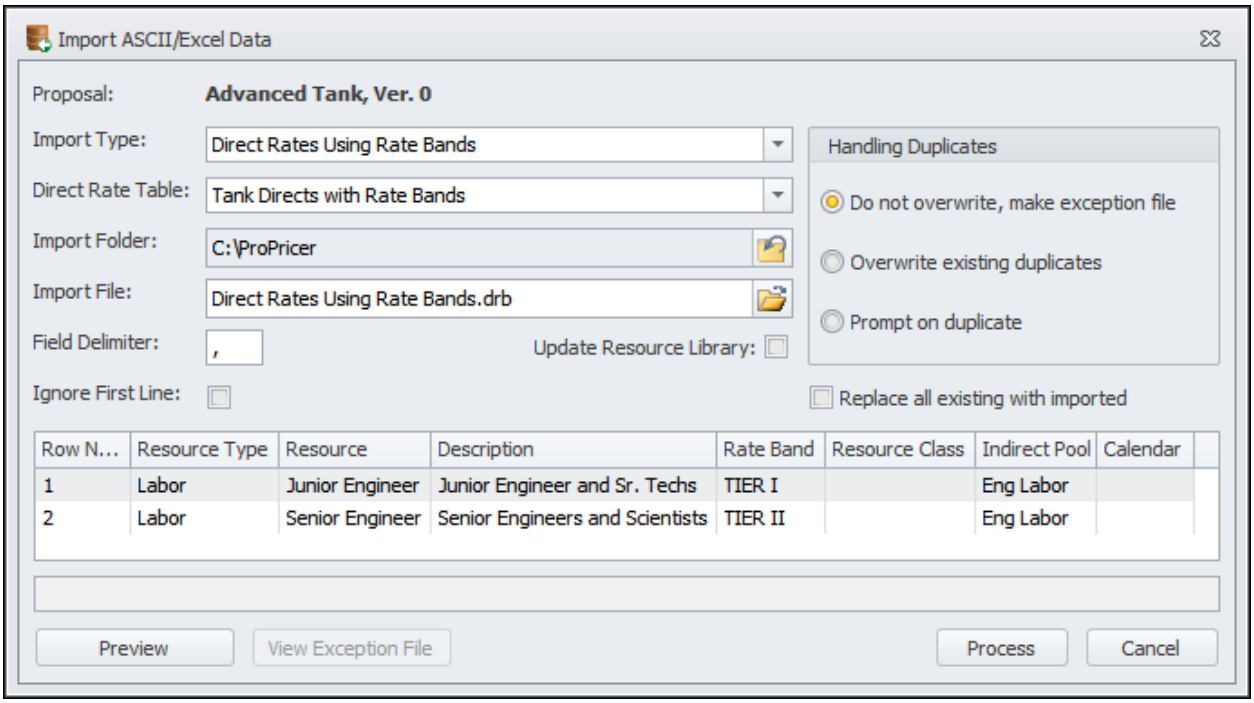
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Direct Rates Using Rate Bands

This option will import direct rates with their associated rate bands into a Direct Rate Table. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .drb.



Proposal

Displays the name and version of the proposal.

Import Type

Direct Rates Using Rate Bands

Direct Table

Enter the Direct Rate Table to which you want to import the rate bands.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Update Resource Library

Select this checkbox if you want to import direct rates for resources that do not exist in the Resource Library. If new resources are encountered during importing, the program will automatically add them to the library. If an incoming resource exists in the Resource Library, the existing resource will be replaced by the incoming.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

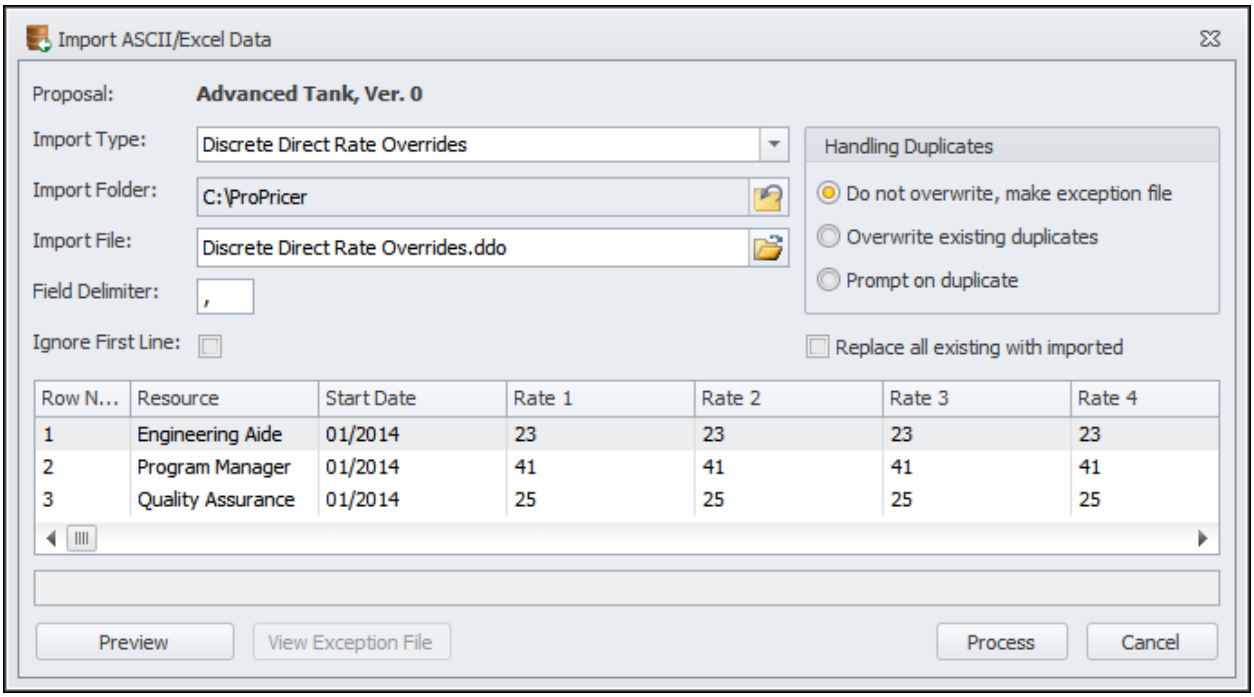
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Discrete Direct Rate Overrides

This option will import overriding discrete direct rates. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .ddo.



Proposal

Displays the name and version of the proposal.

Import Type

Discrete Direct Rate Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

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View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

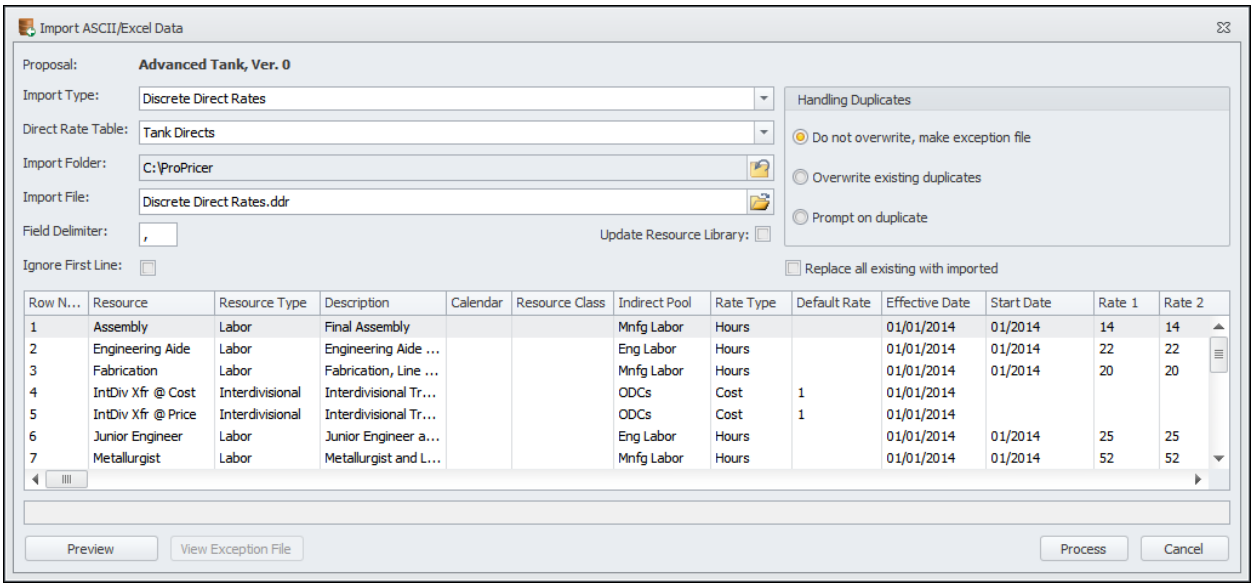
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Discrete Direct Rates

This option will import discrete direct rates into a Direct Rate Table. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .ddr.



Proposal

Displays the name and version of the proposal.

Import Type

Discrete Direct Rates

Direct Table

Enter the Direct Rate Table to which you want to import the discrete direct rates.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Update Resource Library

Select this checkbox if you want to import discrete direct rates for resources that do not exist in the Resource Library. If new resources are encountered during importing, the program will automatically add them to the library. If an incoming resource exists in the Resource Library, the existing resource will be replaced by the incoming.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Note: *If duplicate resources are found, the **Overwrite Existing Duplicates** option will not change the resource ID, resource type, description, or accounting calendar of the incoming resource in the Direct Rate Table since this information is stored*

in the Resource Library. Select the ***Update Resource Library*** *checkbox if you want to replace the data in the Resource Library as well.*

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

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View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

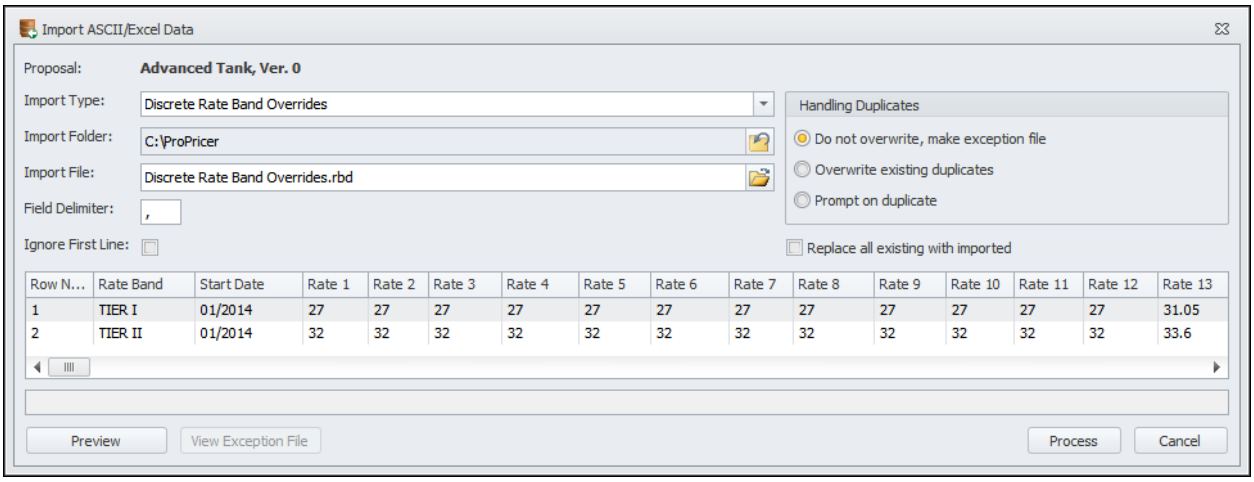
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Discrete Rate Band Overrides

This option will import overriding discrete rate band rates. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rbd.



Proposal

Displays the name and version of the proposal.

Import Type

Discrete Rate Band Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

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Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

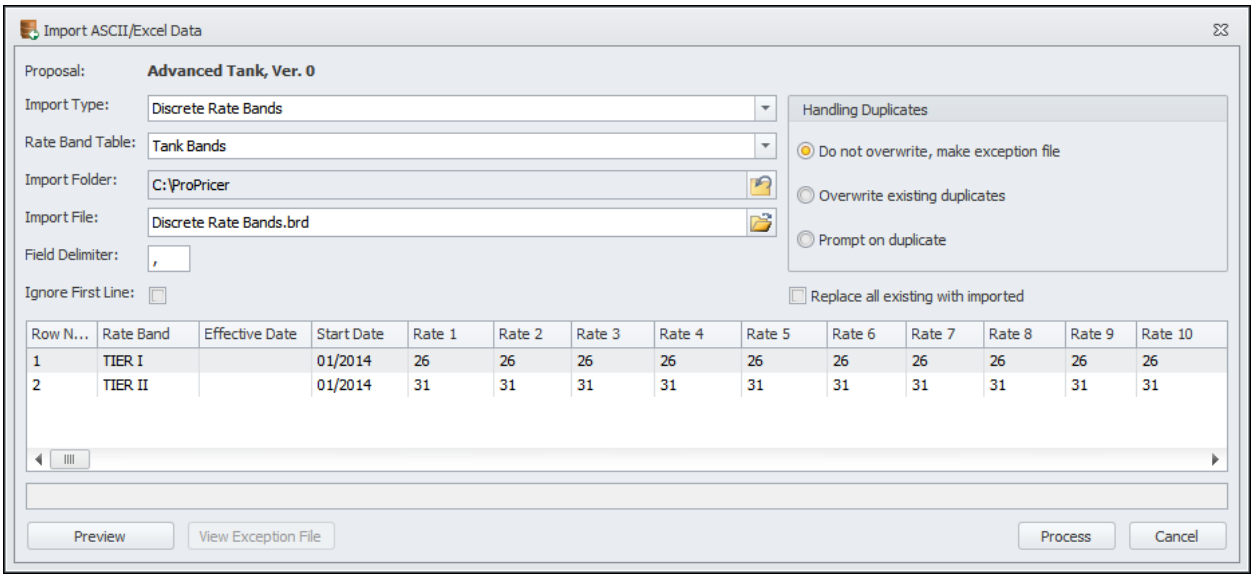
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Discrete Rate Bands

This option will import discrete rate band rates into a Rate Band Table. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .brd.



Proposal

Displays the name and version of the proposal.

Import Type

Discrete Rate Bands

Rate Band Table

Enter the Rate Band Rate Table to which you want to import the rate bands.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

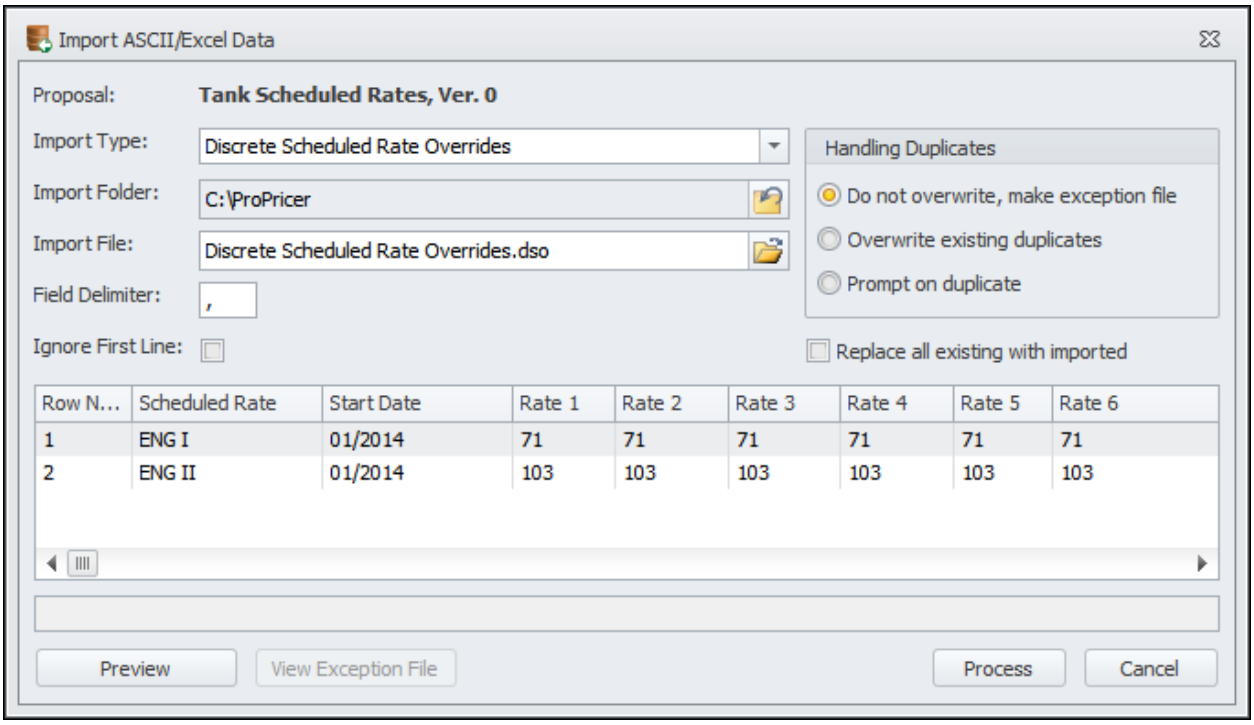
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Discrete Scheduled Rate Overrides

This option will import overriding discrete scheduled rates. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .dso.



Proposal

Displays the name and version of the proposal.

Import Type

Discrete Scheduled Rate Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

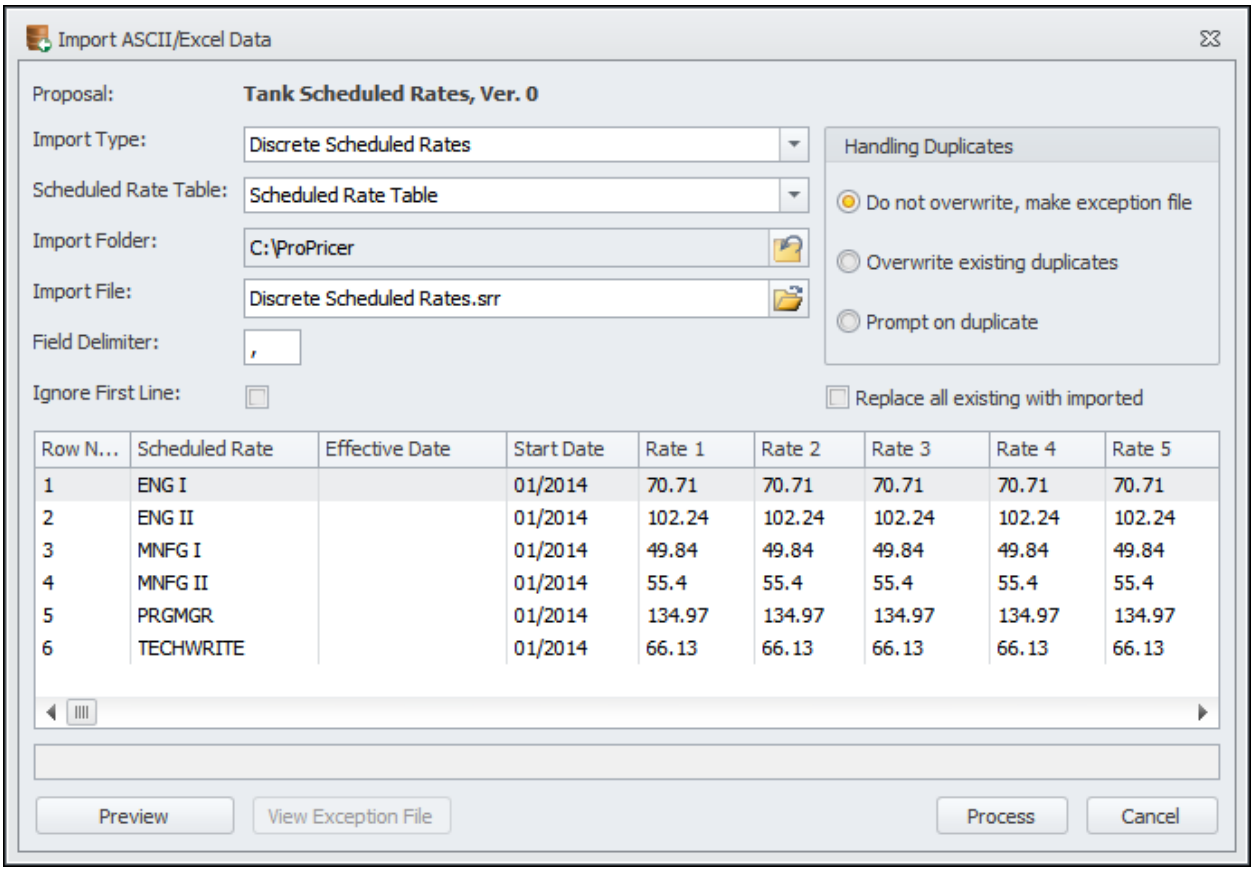
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Discrete Scheduled Rates

This option will import discrete scheduled rates into a Scheduled Rate Table. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .srr.



Proposal

Displays the name and version of the proposal.

Import Type

Discrete Scheduled Rates

Scheduled Rate Table

Enter the Scheduled Rate Table to which you want to import the scheduled rates.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Update Resource Library

Select this checkbox if you want to import direct rates for resources that do not exist in the Resource Library. If new resources are encountered during importing, the program will automatically add them to the library. If an incoming resource exists in the Resource Library, the existing resource will be replaced by the incoming.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

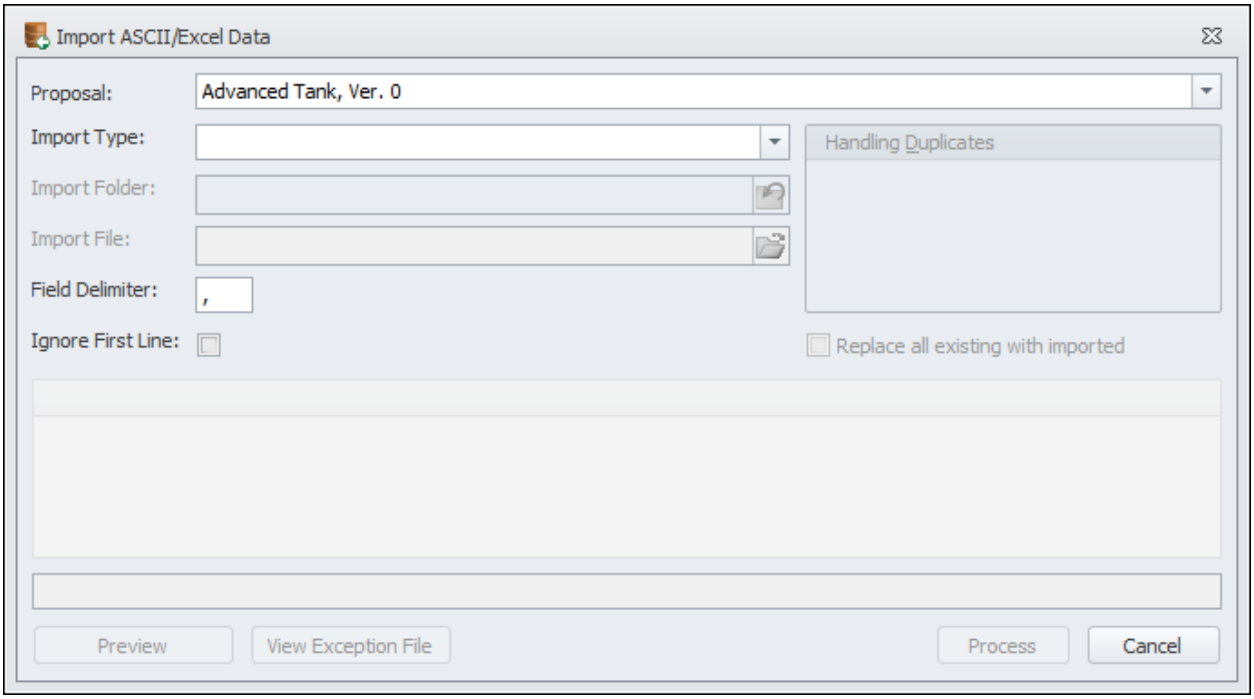
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Import ASCII/Excel Data Dialog Box

The **Import ASCII/Excel Data** dialog box is where you select the elements you want to import.



Proposal

Select a proposal. The data in the import file will go to this proposal.

Import Type

Select the type of data you want to import.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to process duplicate records. You can learn more about each option in the following topic: Import ASCII/Excel - Handling Duplicates.

Replace all existing with imported

This checkbox is mutually exclusive with the Handling Duplicates group. If the checkbox is selected, the Handling Duplicates group is unavailable. If you select this option, the import will be implemented in two stages that differ for global and proposal imports.

Global

- All existing records used in a proposal are deleted.
- The remaining target records that are duplicated by incoming records are overwritten by the incoming duplicates.

Proposal

- All existing records in the affected tasks are deleted.
- The records from the incoming file are imported in their place.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

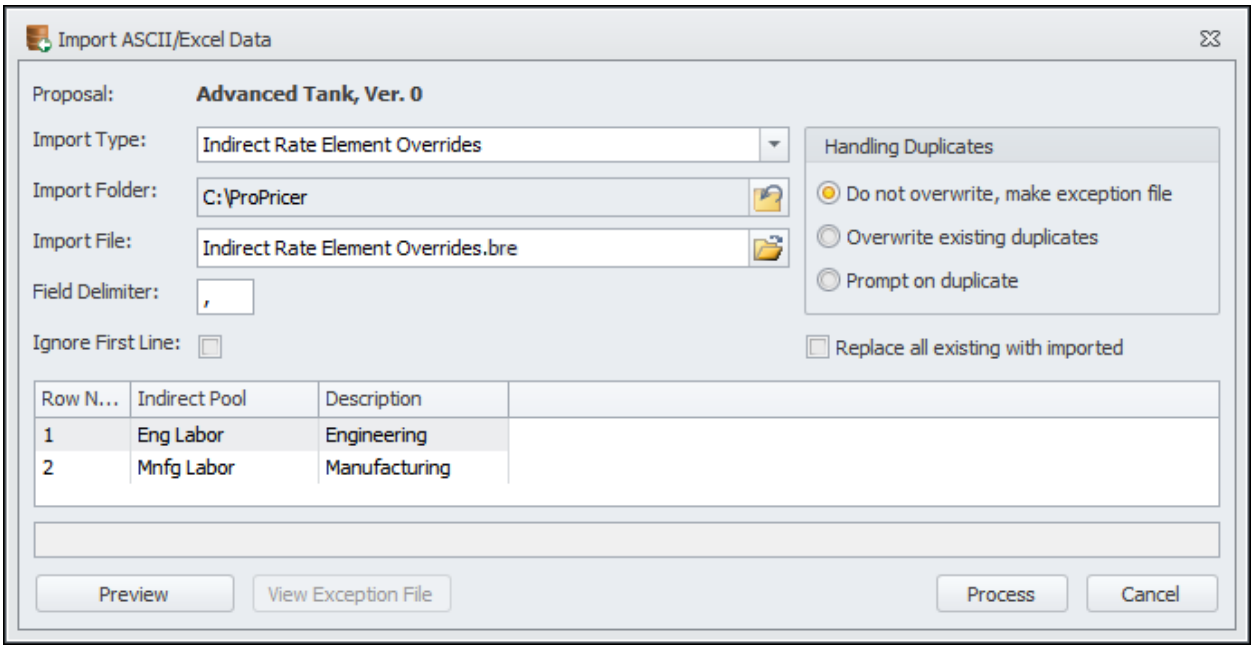
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Indirect Rate Element Overrides

This option will import the overriding descriptions of the indirect pools. The screenshot of the dialog box includes a preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .bre.



Proposal

Displays the name and version of the proposal.

Import Type

Indirect Rate Element Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

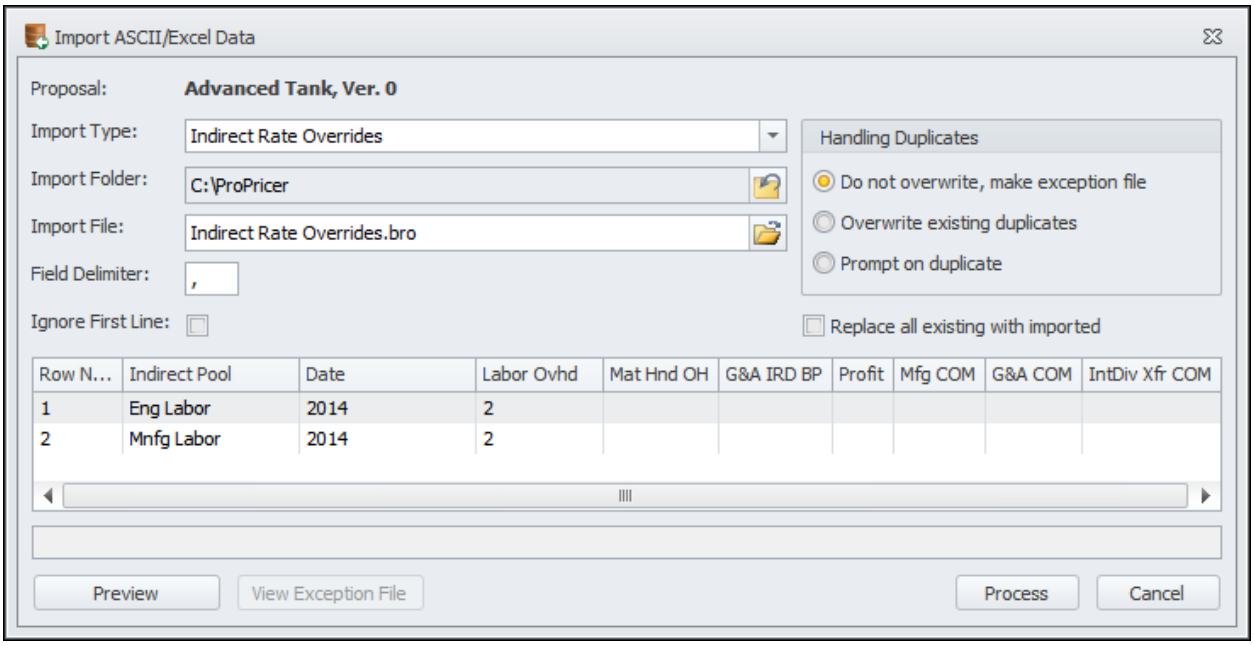
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Indirect Rate Overrides

This option will import the overriding indirect rates. The screenshot of the dialog box includes a partial preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .bro.



Proposal

Displays the name and version of the proposal.

Import Type

Indirect Rate Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

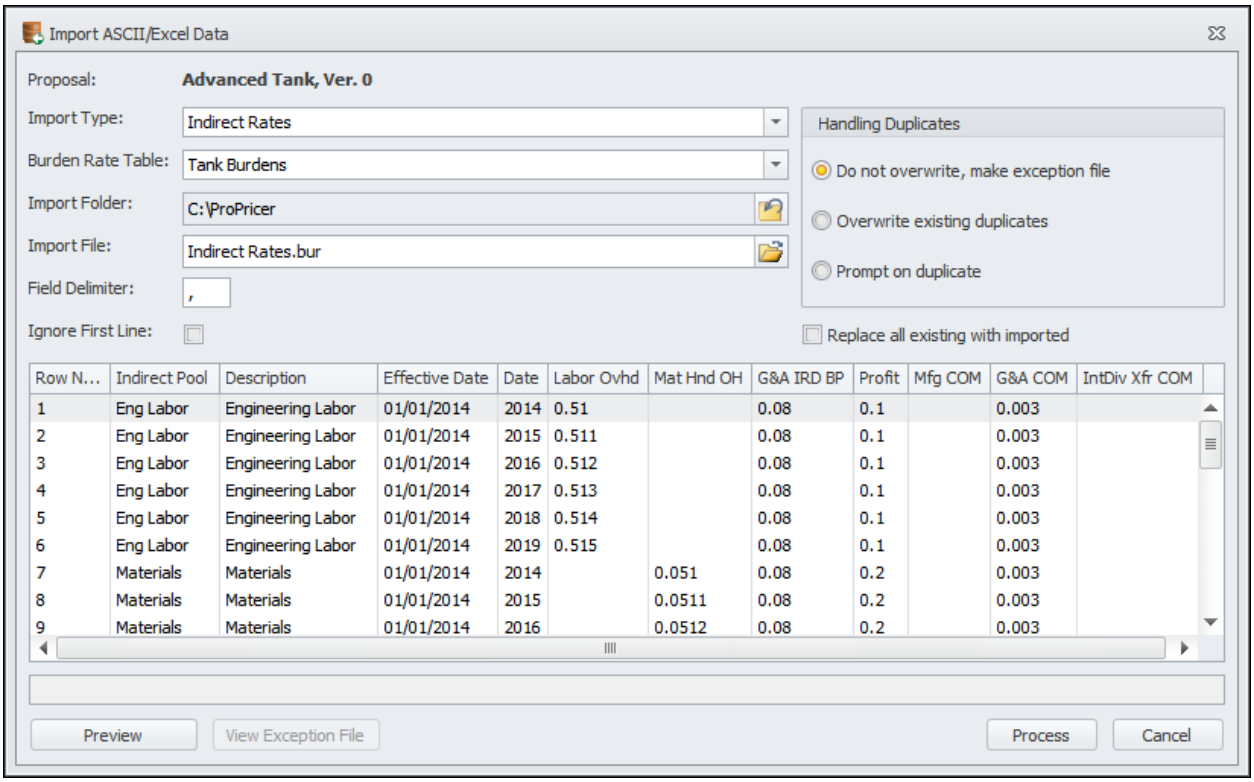
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Indirect Rates

This option will import indirect rates into an Indirect Rate Table. The screenshot of the dialog box also includes a partial preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .bur.



Proposal

Displays the name and version of the proposal.

Import Type

Indirect Rates

Indirect Rate Table

Enter the Indirect Rate Table to which you want to import the indirect rates.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

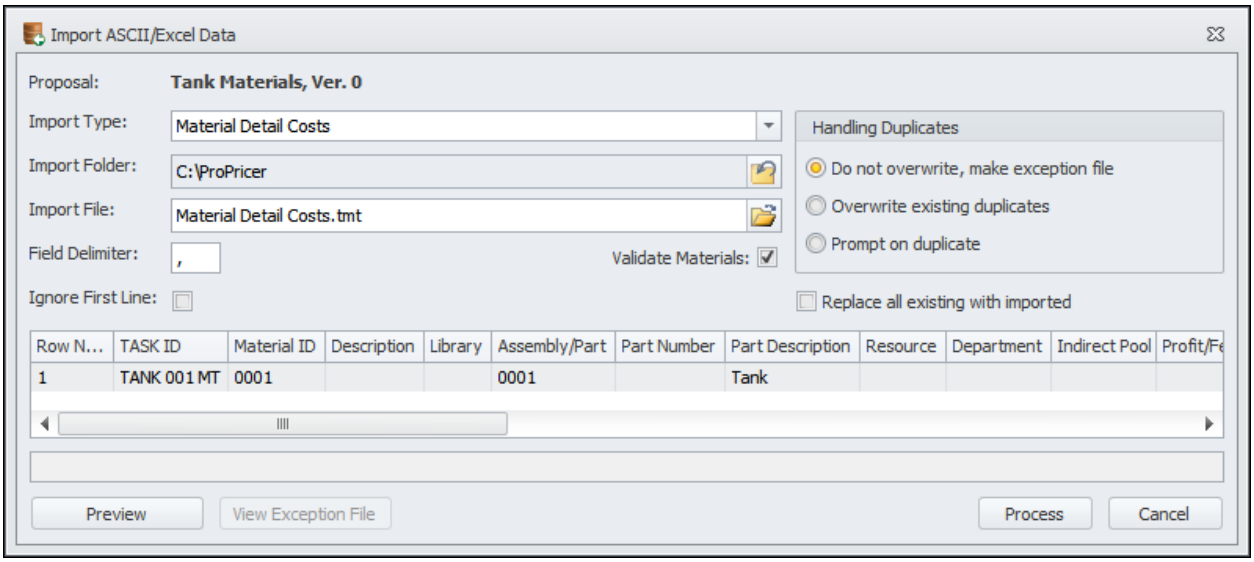
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Material Detail Costs

This option will bring material data into the tasks of the proposal. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tmt.



Proposal

Displays the name and version of the proposal.

Import Type

Material Detail Costs

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Validate Materials

Select this checkbox if you want to import only Assembly/Part IDs that exist in the Common and Product Libraries. Leave the checkbox clear to import parts or assemblies that are not contained in the material libraries.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

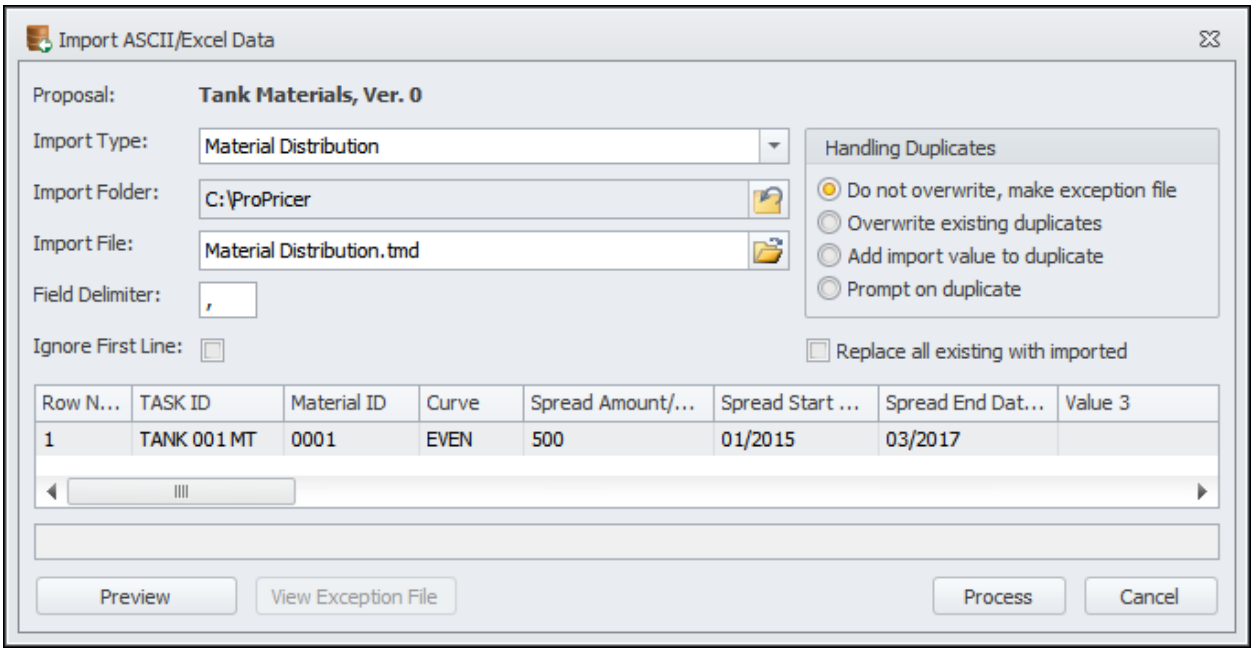
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Material Distribution

This option will import material distribution data into the tasks of the proposal. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tmd.



Proposal

Displays the name and version of the proposal.

Import Type

Material Distribution

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

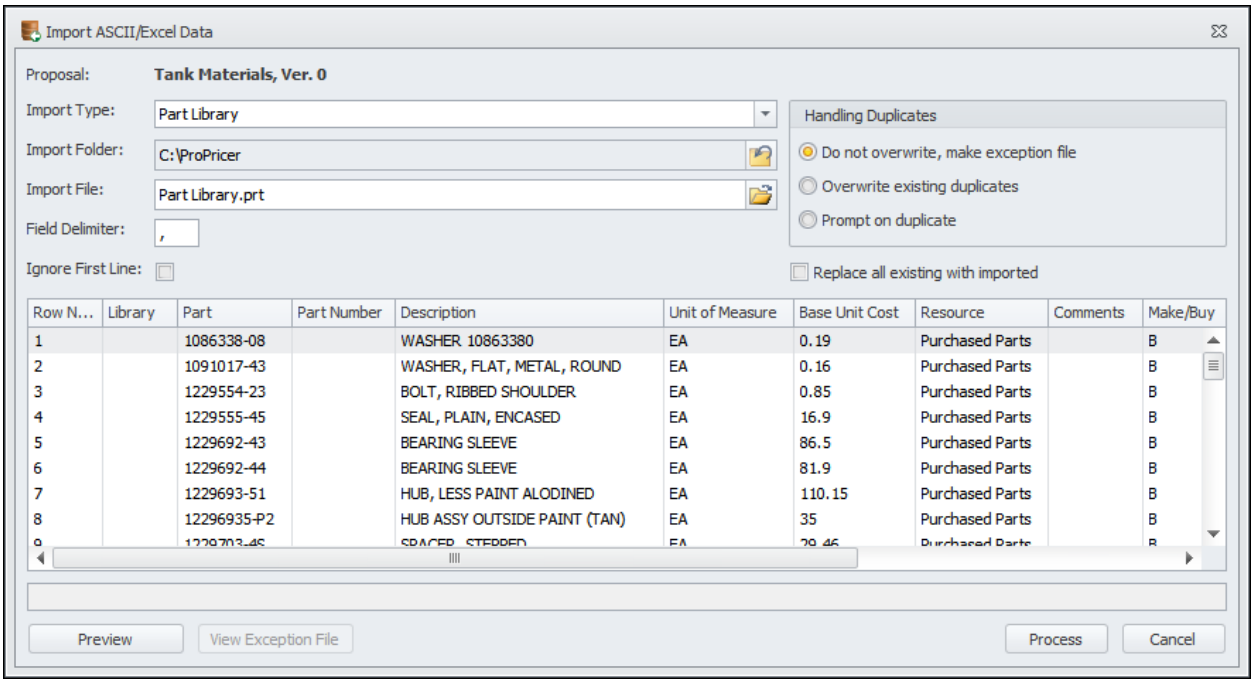
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Part Library Data

This option will import parts into any Parts Library. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .prt.



Proposal

Displays the name and version of the proposal.

Import Type

Part Library

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

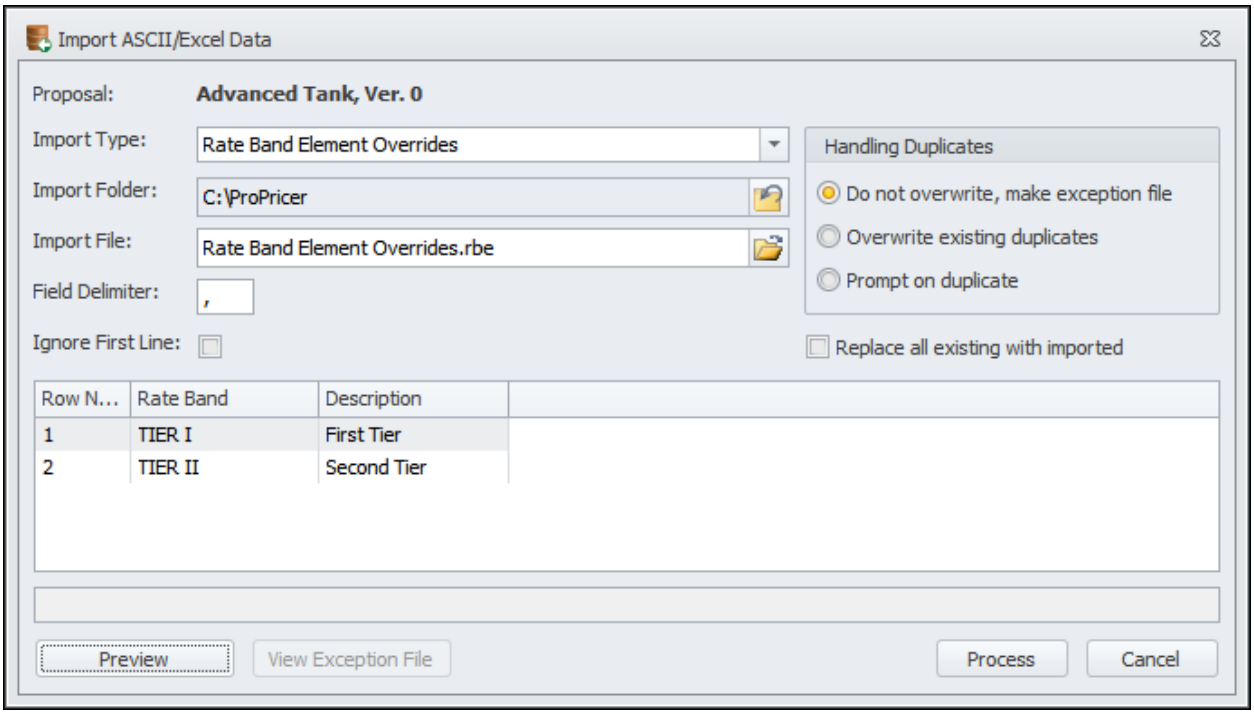
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Rate Band Element Overrides

This option will import the overriding descriptions of the rate bands. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rbe.



Proposal

Displays the name and version of the proposal.

Import Type

Rate Band Element Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

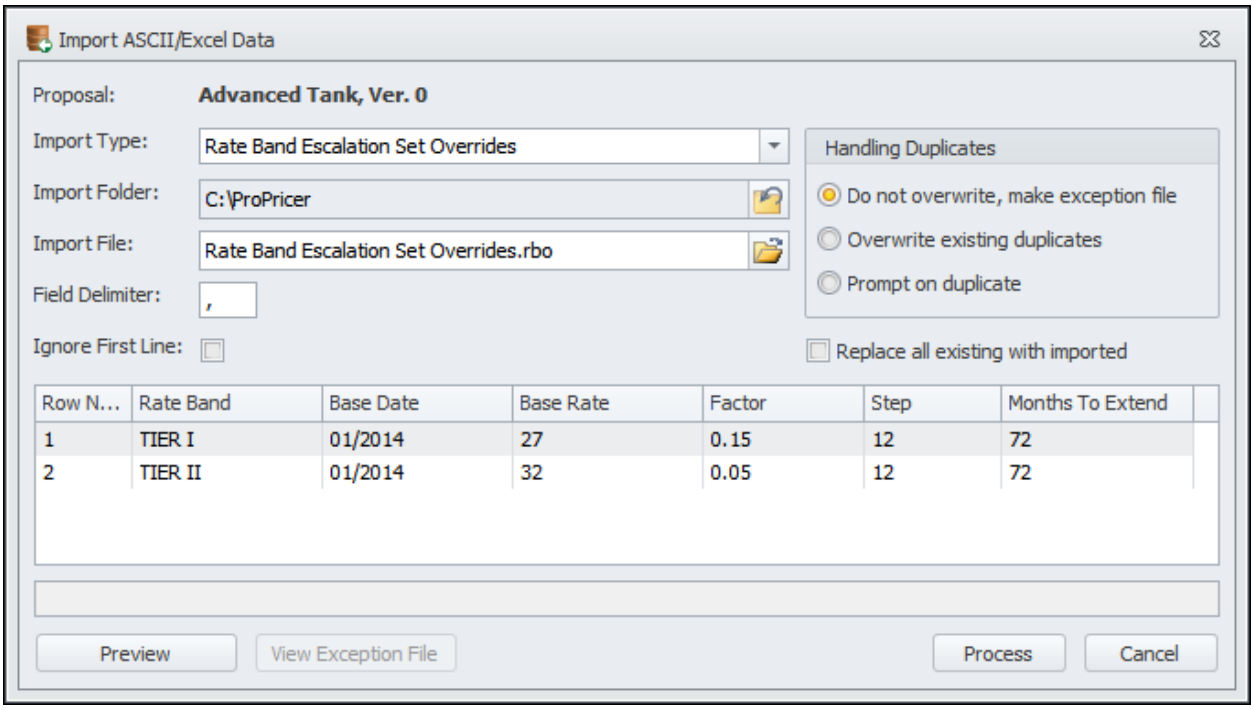
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Rate Band Escalation Set Overrides

This option will import the overriding rate band escalation sets. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rbo.



Proposal

Displays the name and version of the proposal.

Import Type

Rate Band Escalation Set Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

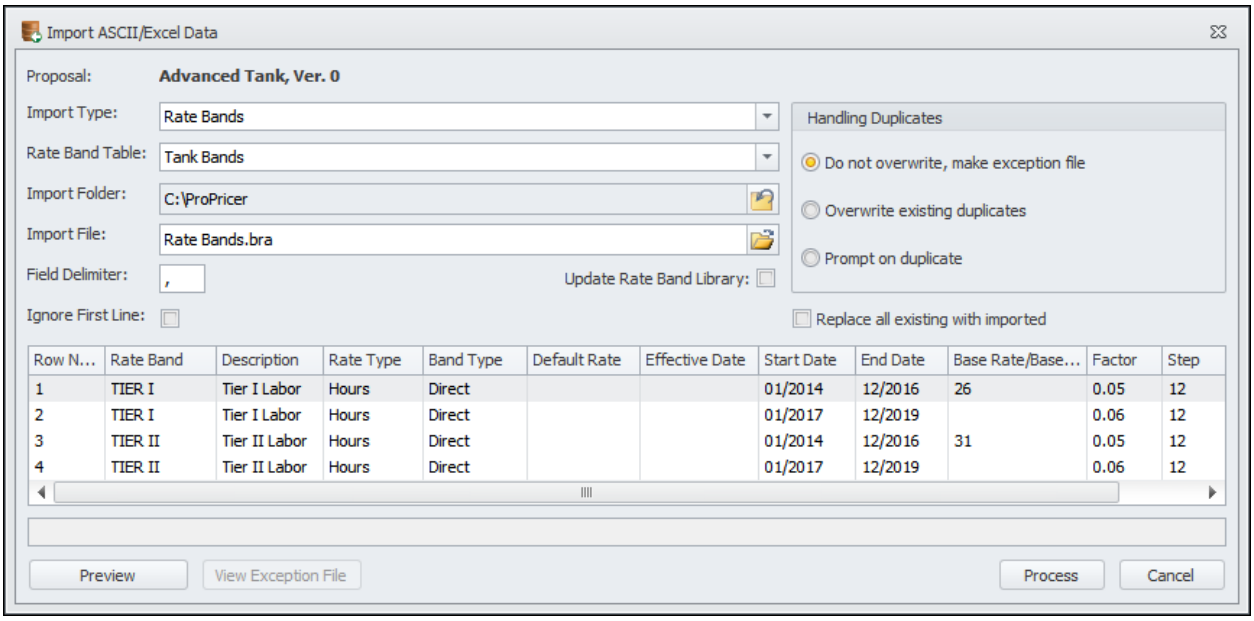
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Rate Bands

This option will bring rate bands into ProPricer. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .bra.



Proposal

Displays the name and version of the proposal.

Import Type

Rate Bands

Rate Band Table

Enter the Rate Band Table to which you want to import the rate bands.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Update Rate Band Library

Select this if you want to import rates for rate bands that do not exist in the Rate Band Library. If such rate bands are encountered during importing, the program will automatically add them to the library. If an incoming rate band exists in the Rate Band Library, the existing rate bands will be replaced by the incoming.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records

is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

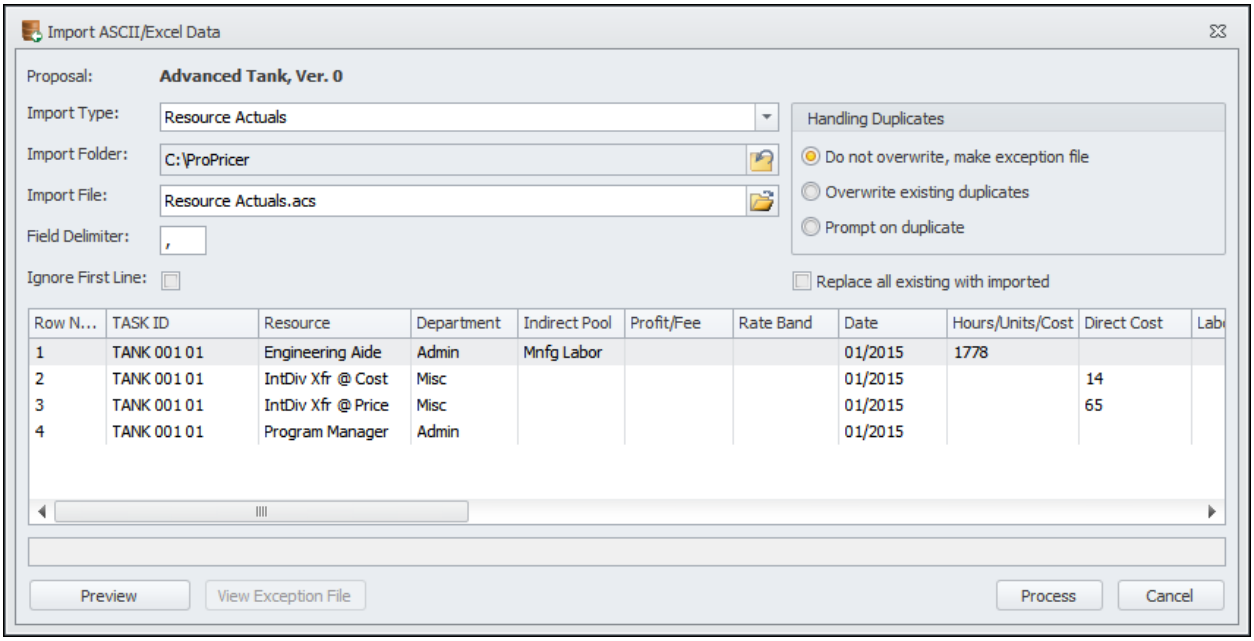
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Resource Actuals

This option will bring actual costs/hours into the resources in the tasks. The total number of fields per record the file should contain depends on the Algorithm, but there are five required fields. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .acs.



Proposal

Displays the name and version of the proposal.

Import Type

Resource actuals

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

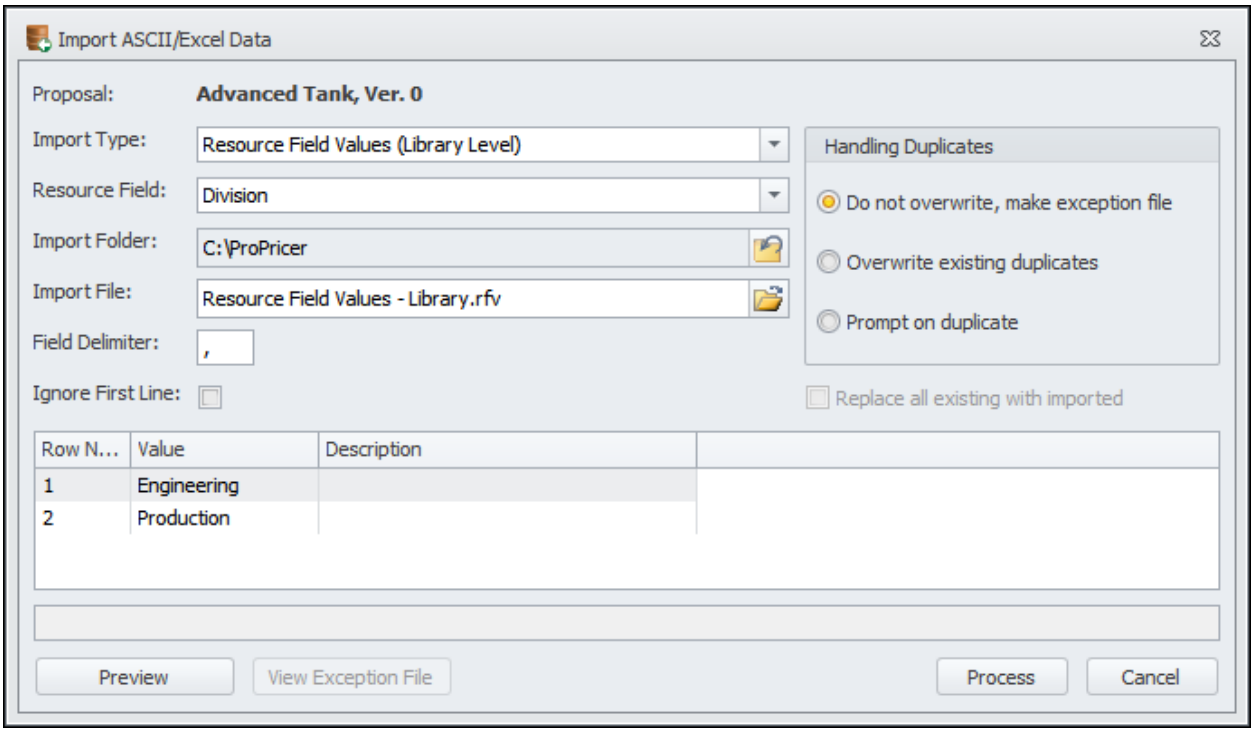
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Resource Field Values (Library Level)

This option will bring resource field values into the library. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rfv.



Proposal

Displays the name and version of the proposal.

Import Type

Resource fields

Resource Field

Enter the resource field to which you want to import the values.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

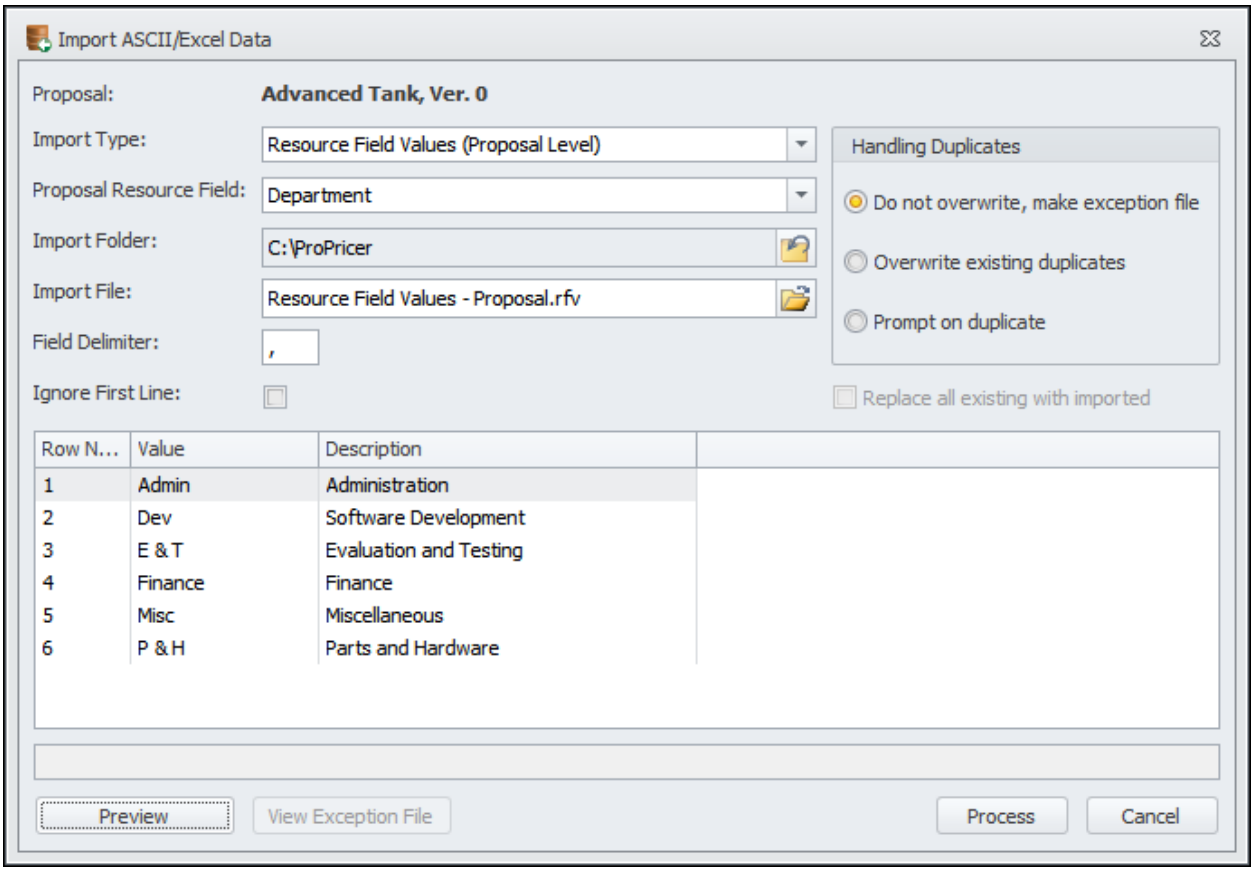
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Resource Field Values (Proposal Level)

This option will bring resource field values into the proposal. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rfv.



Proposal

Displays the name and version of the proposal.

Import Type

Proposal Resource Fields

Resource Field

Enter the resource field to which you want to import the values.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

This option is unavailable for proposal-level resource field values. They cannot be deleted while being used in tasks.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

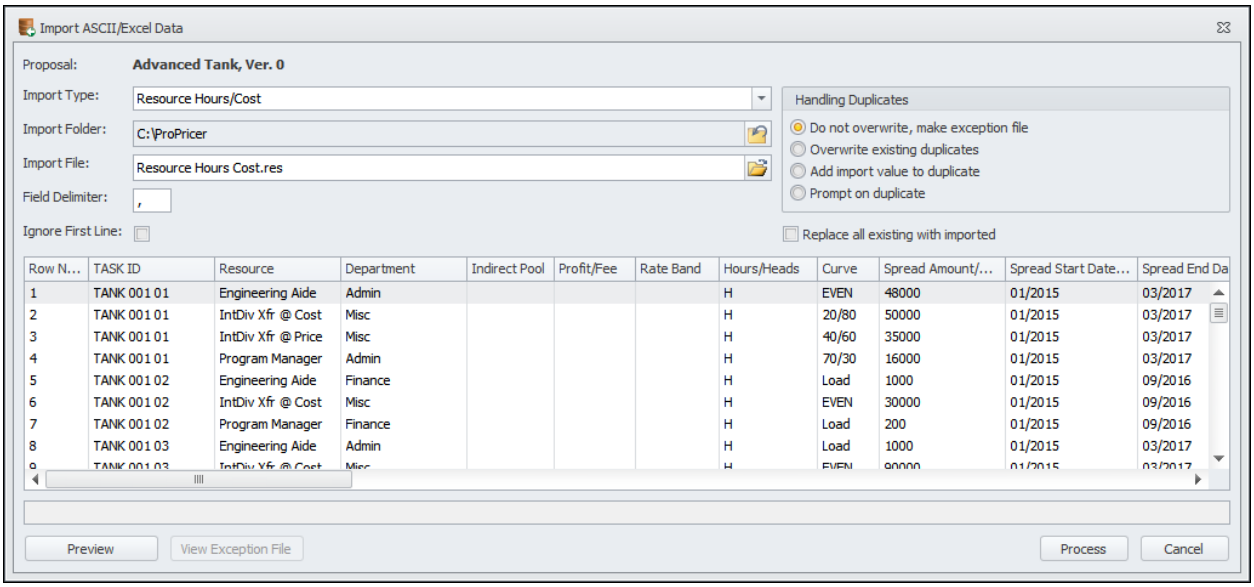
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Resource Hours/Cost

This option will bring resource hours or cost into ProPricer. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .res.



Proposal

Displays the name and version of the proposal.

Import Type

Resource Hours/Cost

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Option**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

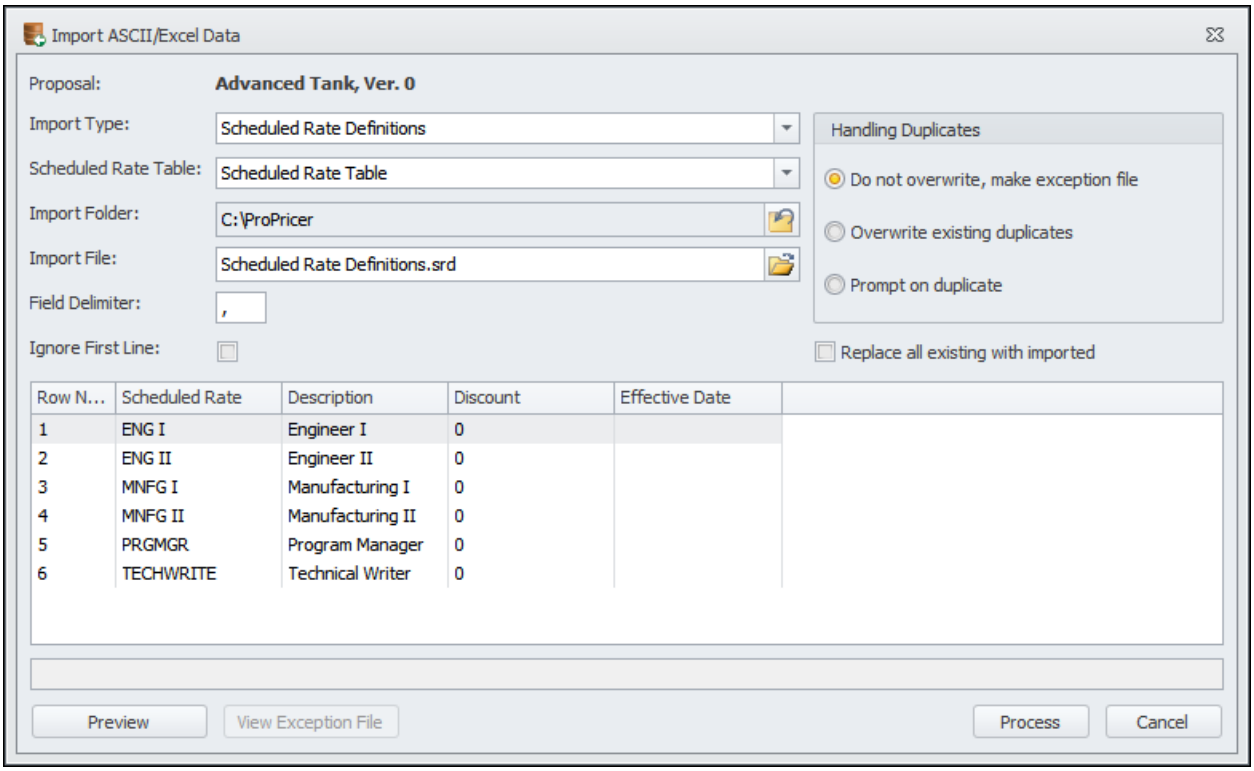
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Scheduled Rate Definitions

This option will import scheduled rate definitions into a Scheduled Rate Table. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .srd.



Proposal

Displays the name and version of the proposal.

Import Type

Scheduled Rate Definitions

Scheduled Rate Table

Enter the Scheduled Rate Table to which you want to import the definitions.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

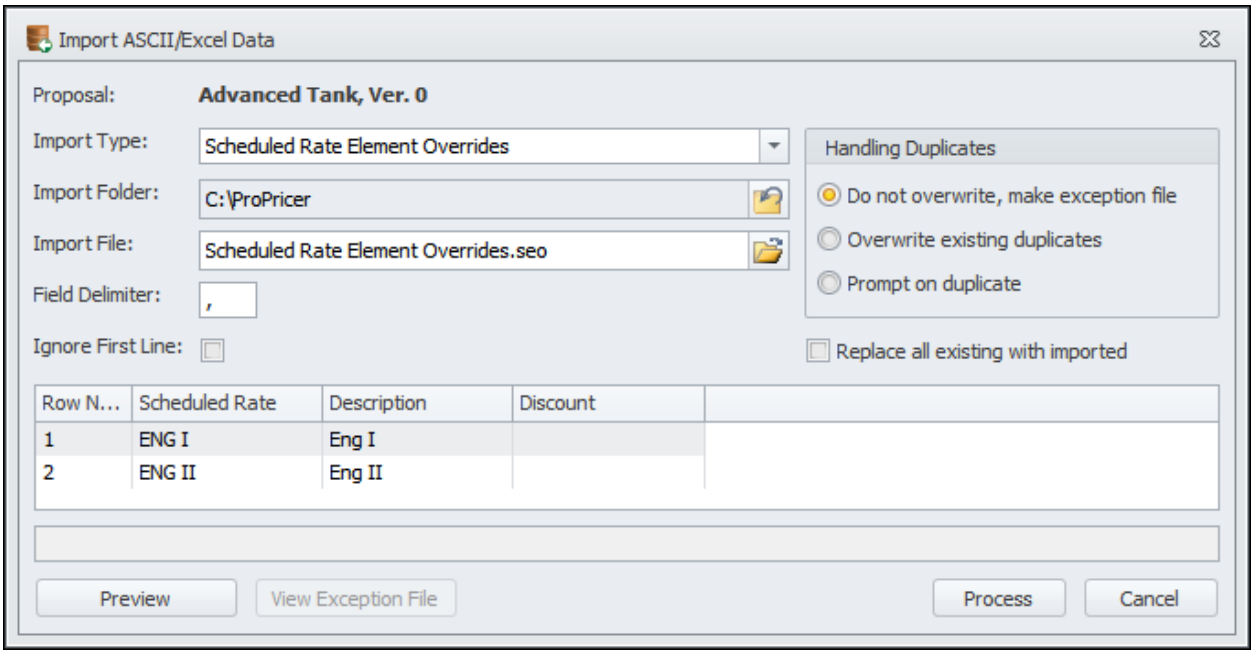
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Scheduled Rate Element Overrides

This option will import overriding scheduled rate descriptions and discounts. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .seo.



Proposal

Displays the name and version of the proposal.

Import Type

Scheduled Rate Element Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

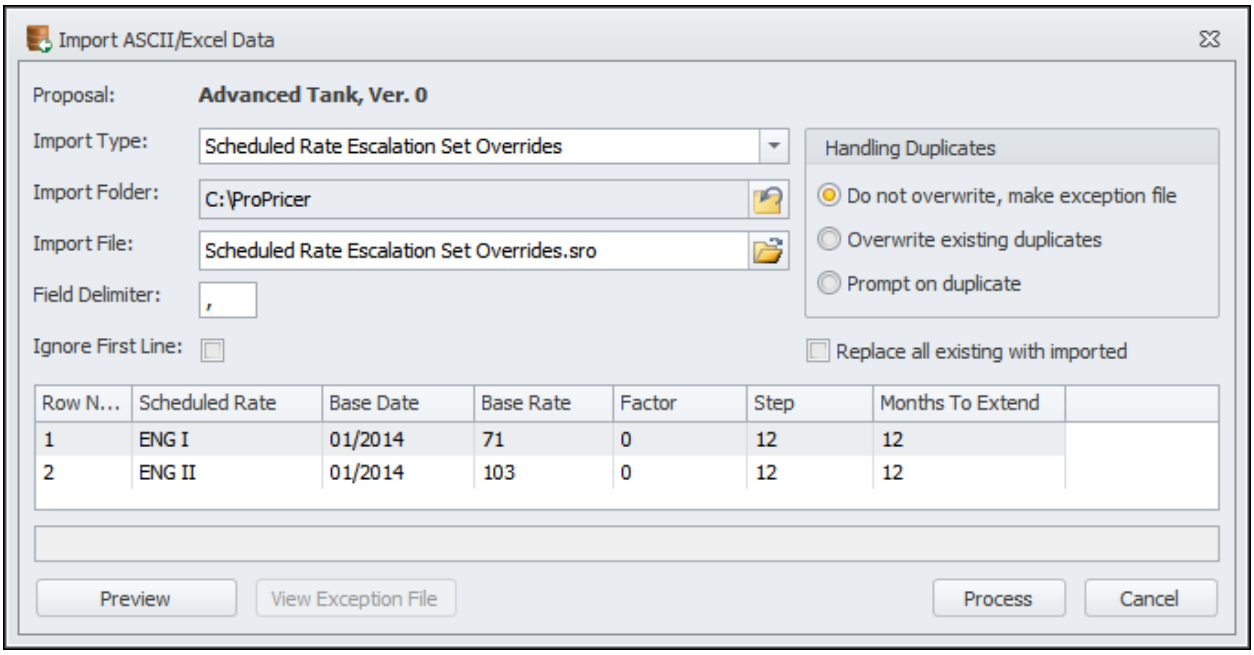
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Scheduled Rate Escalation Set Overrides

This option will import the overriding scheduled rate escalation sets. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .sro.



Proposal

Displays the name and version of the proposal.

Import Type

Scheduled Rate Escalation Set Overrides

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

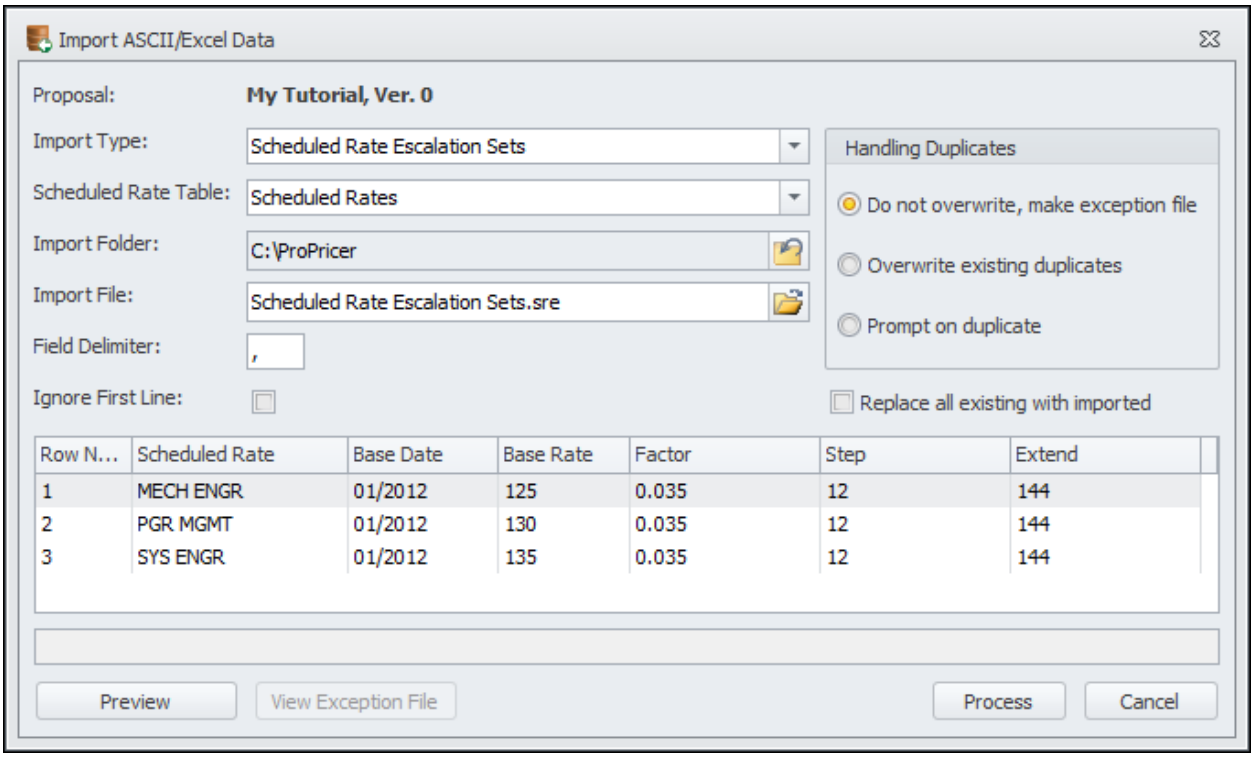
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Scheduled Rate Escalation Sets

This option will import scheduled escalation sets into a Scheduled Rate Table. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .sre.



Proposal

Displays the name and version of the proposal.

Import Type

Scheduled Rate Escalation Sets

Scheduled Rate Table

Enter the Scheduled Rate Table to which you want to import the escalation sets.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

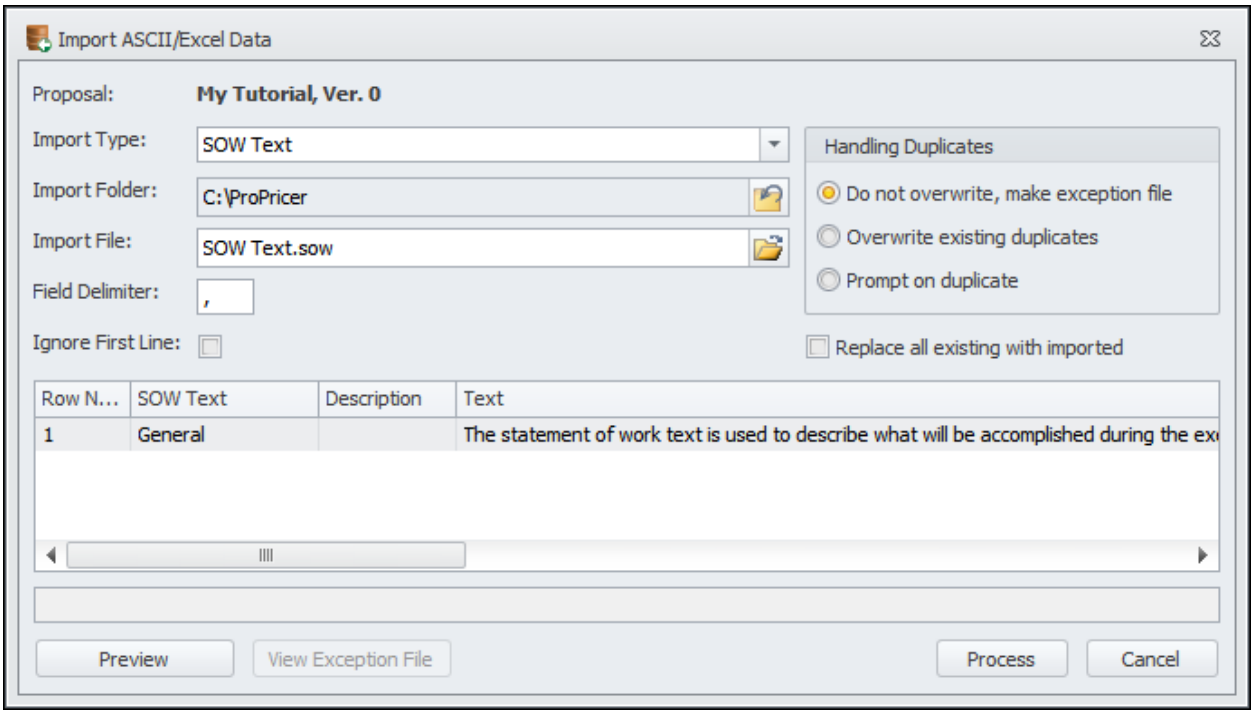
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

SOW Text

This option will bring text entries into the SOW Text Library. There should be three fields per record. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .sow.



Proposal

Displays the name and version of the proposal.

Import Type

SOW Text

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

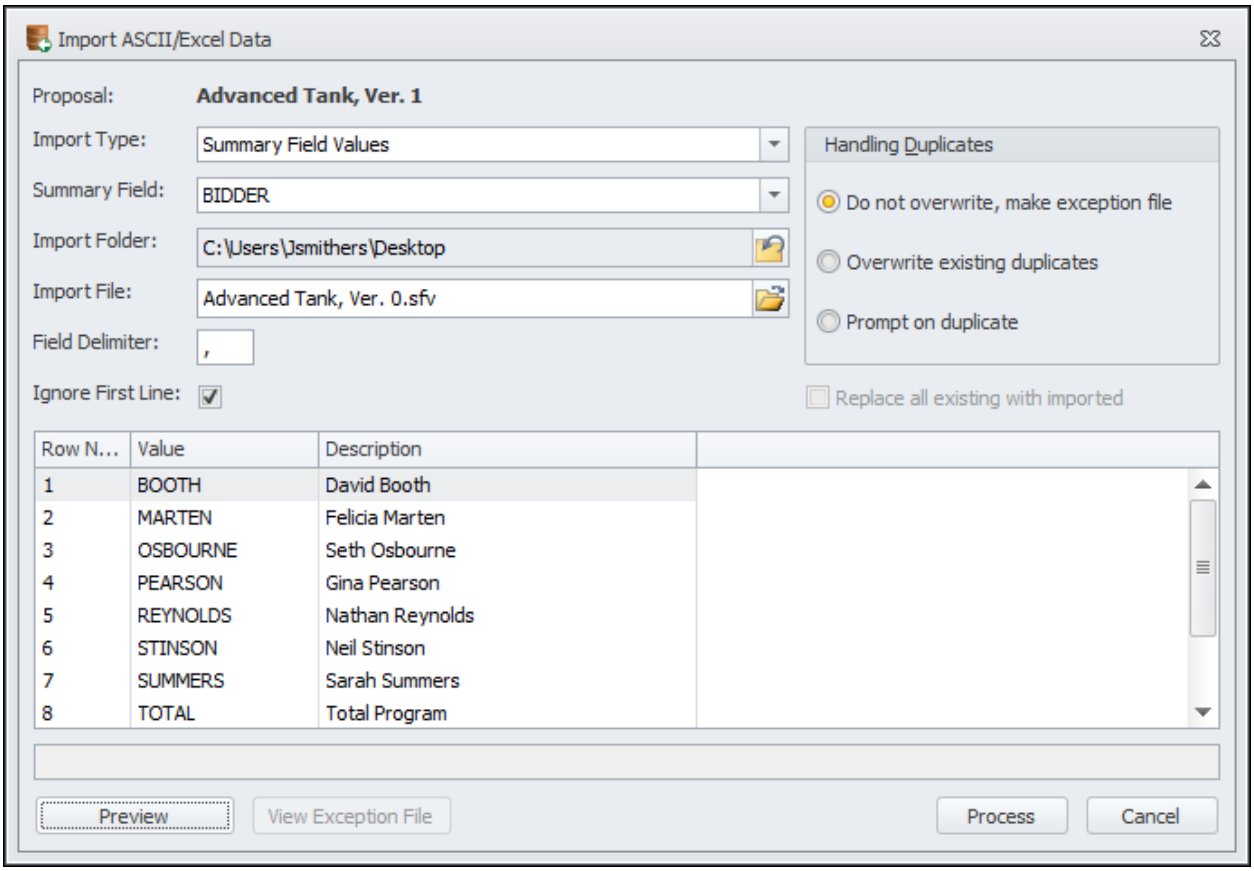
Click to start the import.

Cancel

Click to close the dialog box without importing data.

Summary Field Values

This option will bring summary field values into the proposal. You can use an Excel or ASCII file for import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default, .sfv.



Proposal

Displays the name and version of the proposal.

Import Type

Summary Field Values

Resource Field

Enter the summary field to which you want to import the values.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

> *Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the first line of data differs from the rest. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

This option is unavailable for summary field values. They cannot be deleted while being used in tasks.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The column headings in the table indicate the expected import type for the data.

The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* to be in column three and the incoming data has *Description* in column two. You can rearrange the columns to match the expected order by right-clicking on the column header and selecting the action you would like to take.

Please note that text entries are not case sensitive, ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

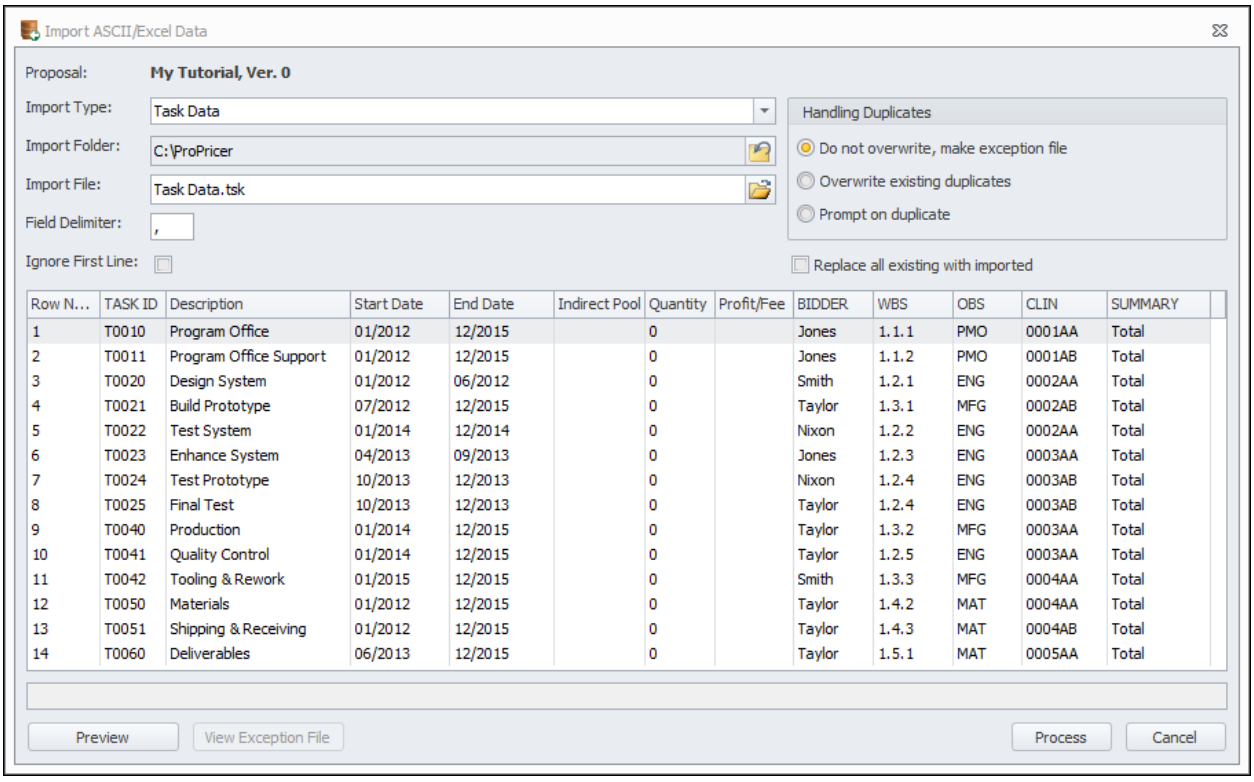
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Task Data

This option will bring entire tasks in the current proposal. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tsk.



Proposal

Displays the name and version of the proposal.

Import Type

Task Data

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

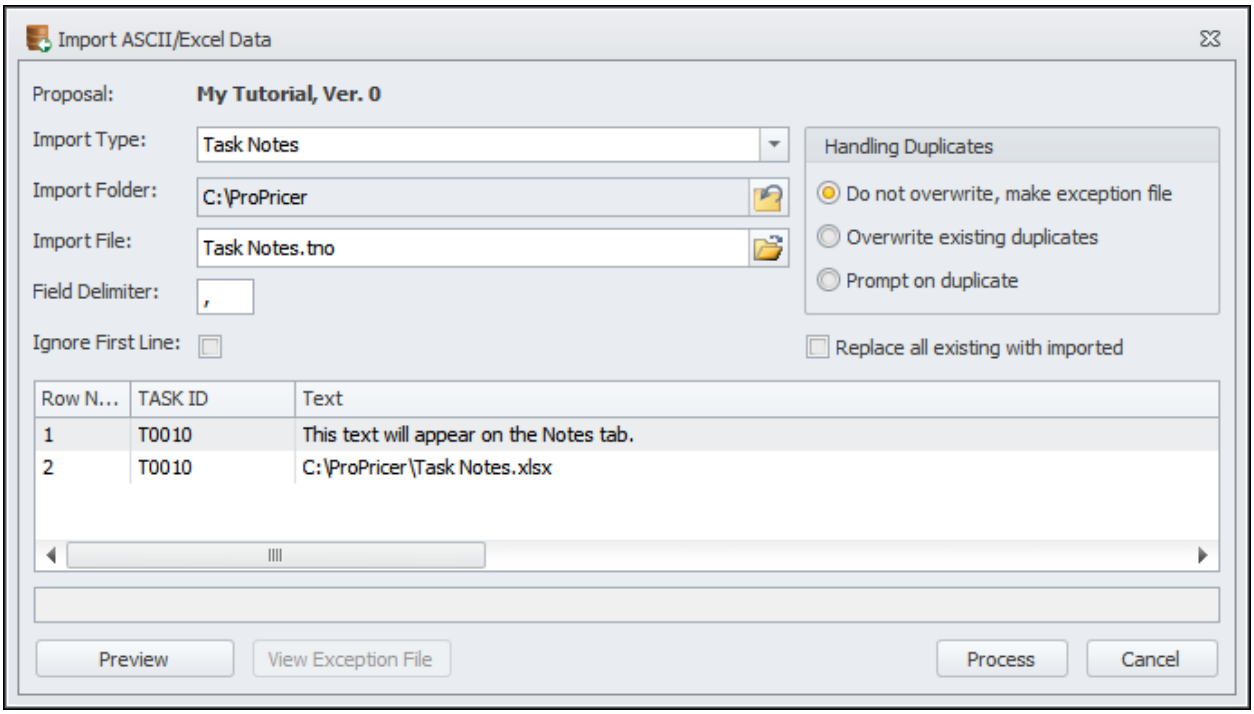
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Task Notes

This option will import text to the **Notes** tab. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tno.



Proposal

Displays the name and version of the proposal.

Import Type

Task Notes

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

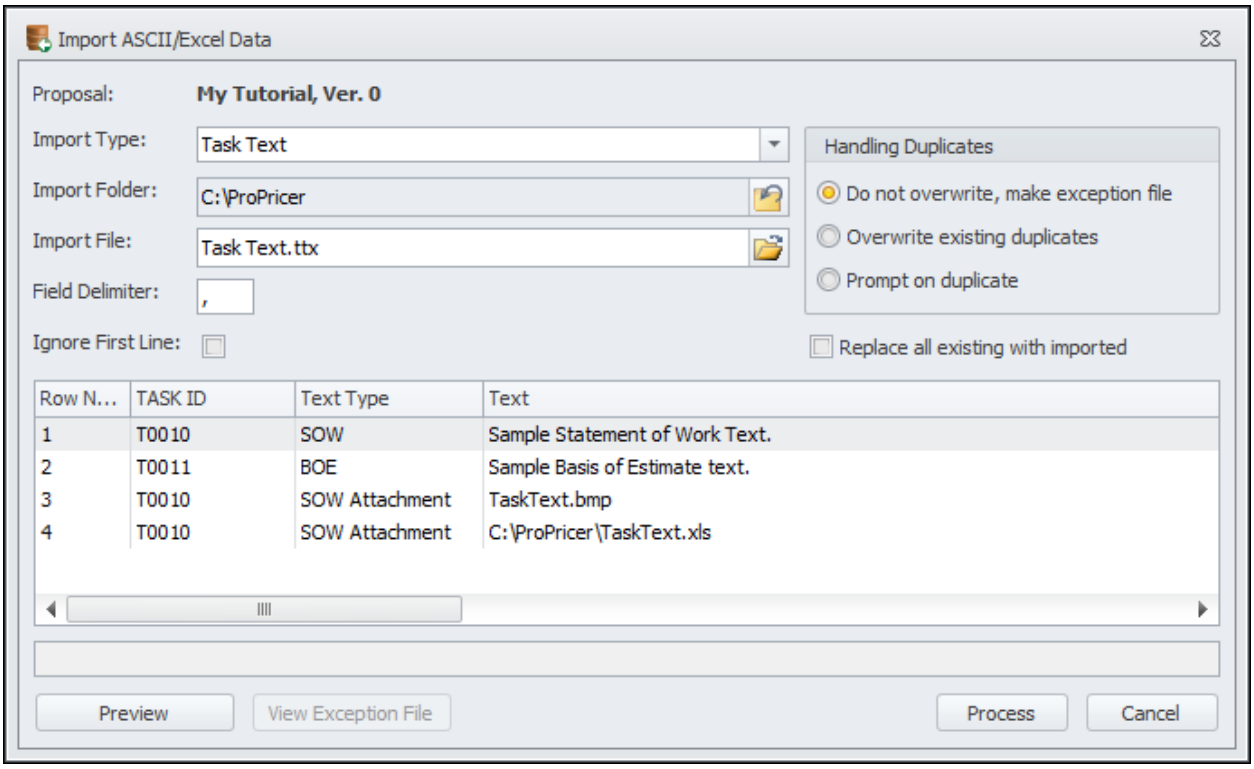
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Task Text

This option will bring SOW/BOE texts and attachments into the tasks. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .ttx.



Proposal

Displays the name and version of the proposal.

Import Type

Task Text

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

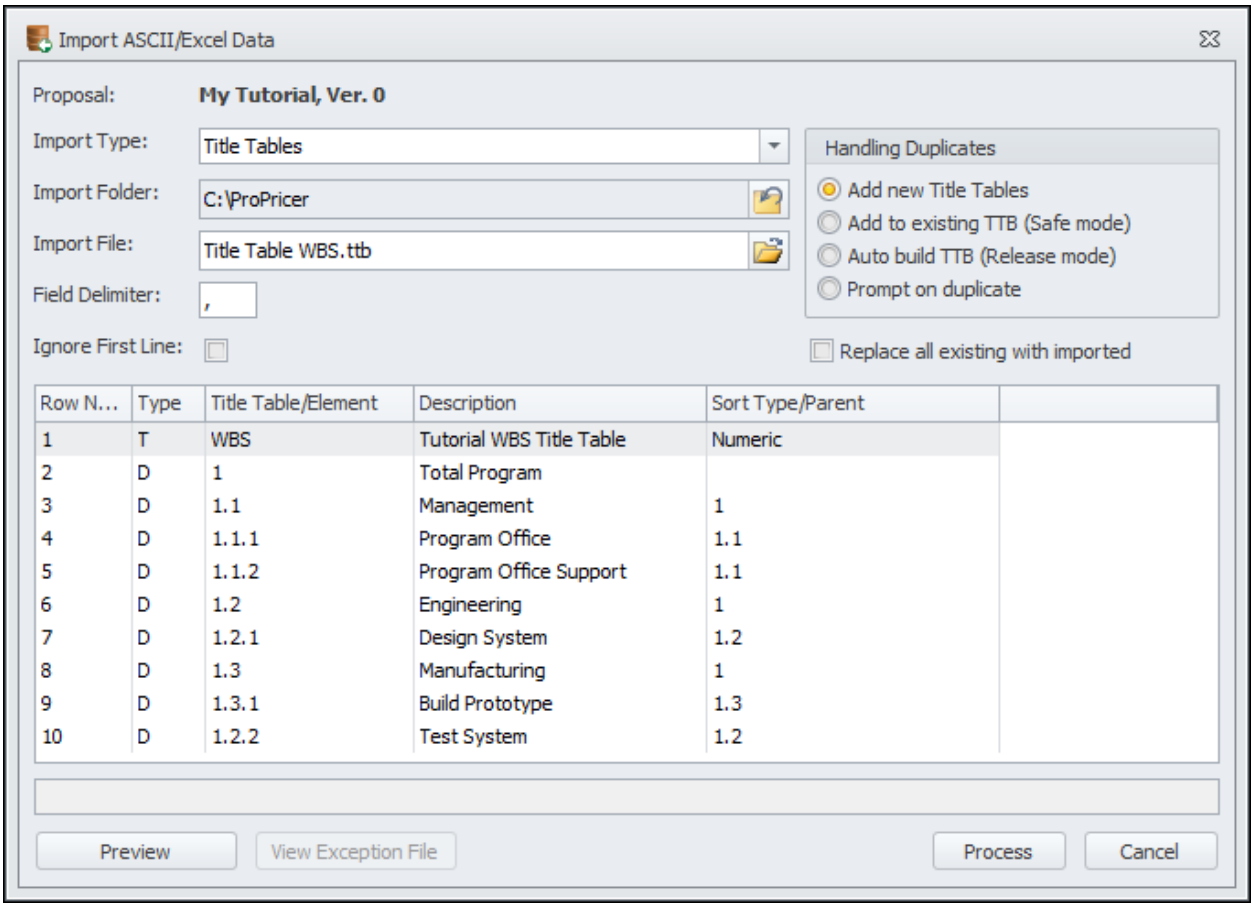
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Title Tables

This option will bring a Title Table into ProPricer. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .ttb.



Proposal

Displays the name and version of the proposal.

Import Type

Title Tables

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Note: *Be careful when importing Title Tables, because the first line differs from the rest of the lines.*

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records

is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

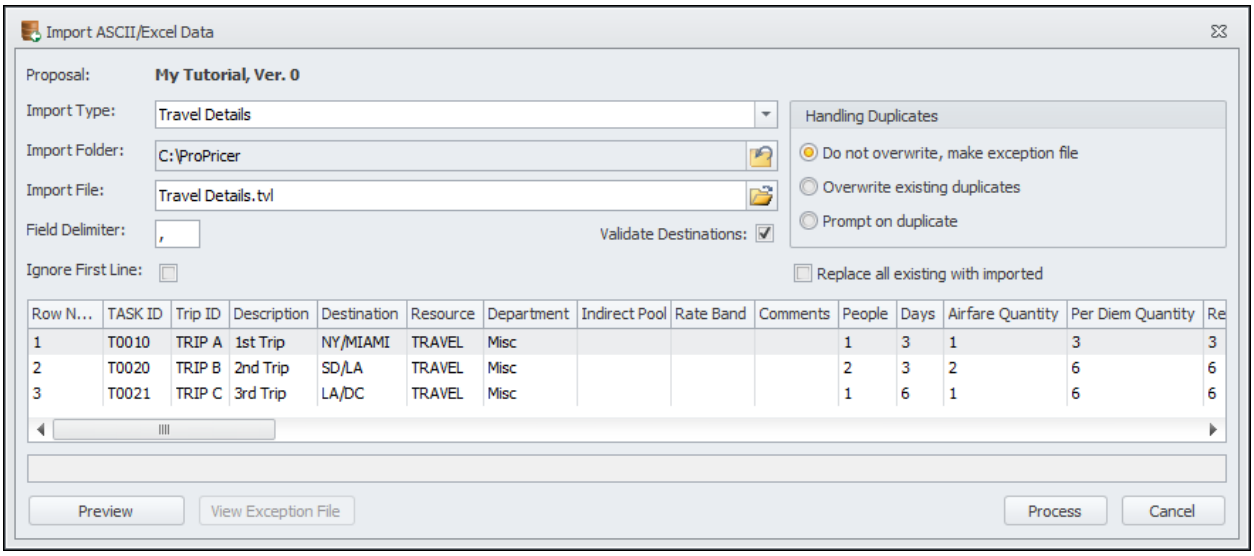
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Travel Details

This option will bring travel details into the **Travel Info** grid on the **Travel** tab. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tvl.



Proposal

Displays the name and version of the proposal.

Import Type

Travel Details

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Validate Destinations

Select this checkbox, if you only want to import Destination IDs that exist in the Travel Library. Leave the checkbox cleared to import destinations that are not contained in the Travel Library.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

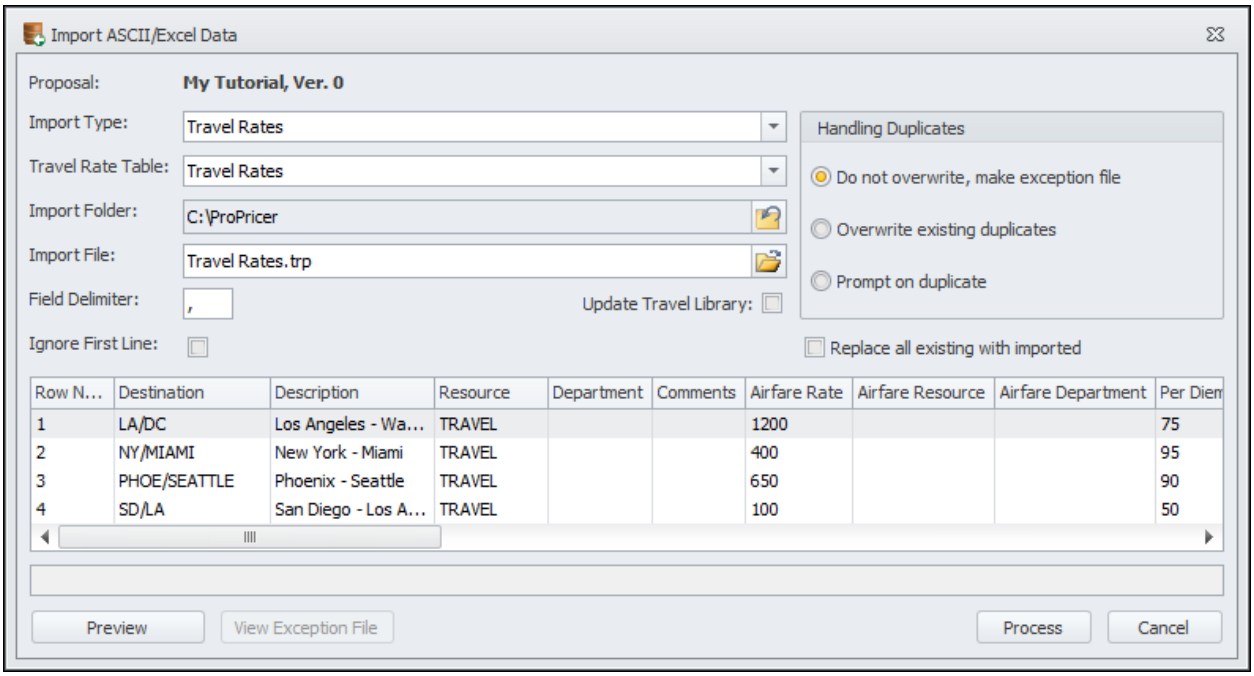
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Travel Rates

This option will import travel rates into a Travel Rate Table. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .trp.



Proposal

Displays the name and version of the proposal.

Import Type

Travel Rates

Travel Rate Table

Enter the Travel Rate Table to which you want to import the travel rates.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Update Travel Library

Select this checkbox if you want to import Travel Rates for destinations that do not exist in the Travel Library. If new destinations are encountered during importing, the program will automatically add them to the library. If an incoming destination exists in the Travel Library, the existing destination will be replaced by the incoming.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records

with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

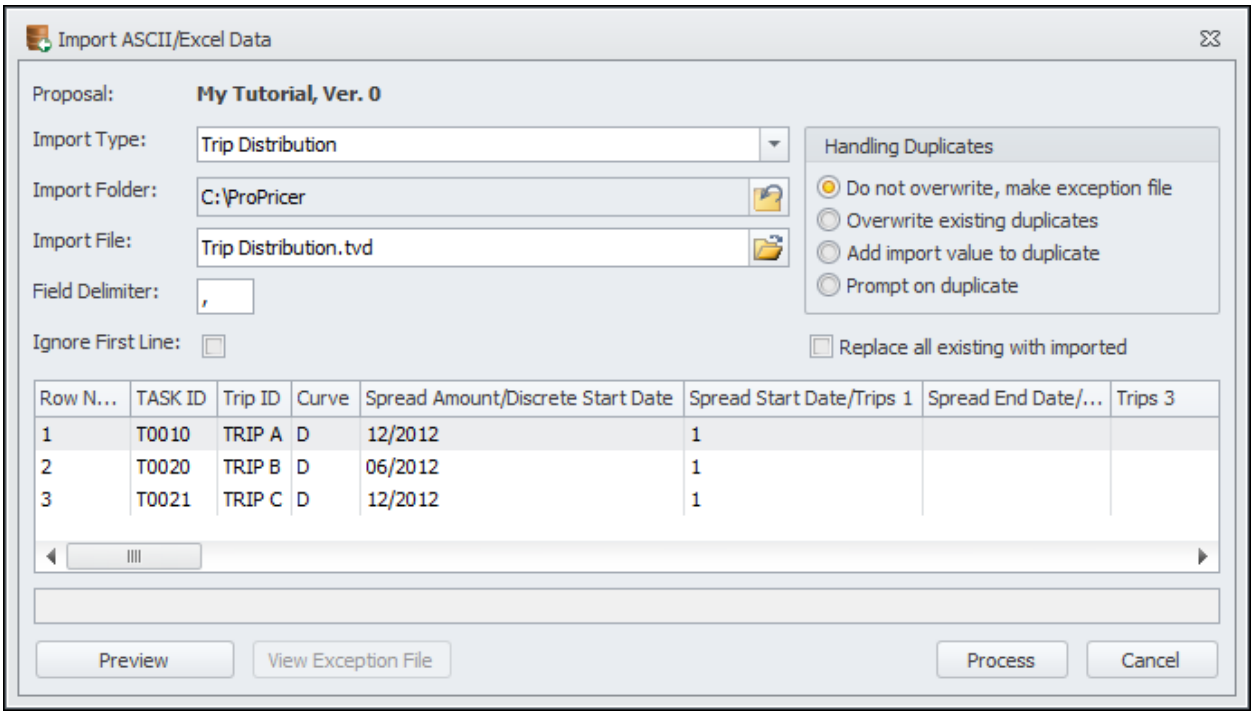
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Trip Distribution

This option will bring trips into the **Trip Distribution** grid of the **Travel** tab. The screenshot of the dialog box also includes the preview of the records that will be imported. You can use an Excel or ASCII file for the import. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tvd.



Proposal

Displays the name and version of the proposal.

Import Type

Trip Distribution

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Field Delimiter

Enter the delimiter you want to use to separate the records. ProPricer will automatically enter the default delimiter entered on the **General** page in the **System** folder of **System Options**.

Note: *If an entry in the Import File contains characters that are the same as the delimiter selected, please make sure that the entry is enclosed in double quotation marks.*

Ignore First Line

Select this checkbox if you want to exclude the first line of the file from the import. Use this checkbox if the data in the first line contains information that differs from that expected. For example, if you are importing a table from Excel, the first line may contain the titles of the columns. This information is not needed in ProPricer and, therefore, does not need to be imported.

Handling Duplicates

Select how you want to handle duplicate records. See the *Import ASCII/Excel - Handling Duplicates* help topic for descriptions of each option.

Replace all existing with imported

Select this option to permanently delete all duplicate and non-duplicate records of the selected type from a library, table, or proposal, and then replace those records with the imported data. For example, if a *.dir* file (direct rates file) with 10 records is imported to a Direct Rate Table with 50 existing records, then all 50 would be deleted from the table and replaced with the 10 incoming records.

This option is unavailable for proposal-level resource field values and summary field values because they cannot be deleted while being used in tasks.

The options for Handling Duplicates cannot be used with this option.

Global data cannot be deleted from a library or table while being used in proposals.

Preview

This button allows you to view the data before importing it. The data is displayed in the preview area above the button. The headings in the table indicate the fields expected for each type of import. The data that is imported may or may not agree with the default column headings in the table. For example, ProPricer may expect the field *Description* in position three and the incoming data has *Description* in position two. You can rearrange the columns to match the order expected by ProPricer. Please note that text entries are not case sensitive. ProPricer recognizes both 'ENGR' and 'engr' as the same entry.

View Exception File

If records were sent to the exception file during the import, this button will become available after the import has finished. Click the button to open the exception file in Notepad so you can you edit the records in the file.

Process

Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Exceptions

Exception File

An exception file is created after every import session if ProPricer encounters data that does not qualify for importing (duplicate records and/or illegal file formats). The exception file stores the data that was not imported. The exception file receives the name of the import file and a .exc file name extension. It is saved in the same folder as the file that was imported.

The exception file allows you to edit the records that were not imported and import the modified data. The modified exception file is deleted after the import and is replaced with another exception file if additional exceptions occur after the import. If you want to keep an exception file, save it with a different name or file name extension.

A log file is created together with the exception file. You can consult the log file for the explanations of the exceptions.

Import Exceptions

If ProPricer encounters records in the import file that do not qualify for importing, it isolates these records in an exception file. After the import process is finished, you can open the exception file and edit the records that were not imported. Once you are satisfied with the modifications, you can import the data again.

1. After the import session is over, click **Yes** in the **Import ASCII/Excel** dialog box. ProPricer displays all exceptions in the preview area and enters the name of the exception file in the **Import File** box.
2. Select a record in the preview area. The explanation for the exception of the record appears in the message area below the preview area.
3. Click **View Exception File** to open the file in Notepad.
4. Edit the record in Notepad and save the file.
5. You can click **Preview** to view the changed data in the preview area.
6. Click **Process** to import the data.

Log File

A log file is a text file that explains each exception in the exception file. It is created every time an exception file is created.

The log file receives the name of the import file and a *.log* file name extension. It is saved in the same folder as the file that was imported. You can review this file in Microsoft Notepad.

Each message in the log file explains why the respective record in the exception file was not imported.

The log file exists only as long as the exception file exists. Upon subsequent importing, it is deleted from memory. If you want to preserve a given log file, you have to save it with a different name or file name extension.

Handling Duplicates

ASCII/Excel

When data is imported into ProPricer, some records in the import file might already exist in your libraries, tables, or proposals. This creates duplicate records which can be handled in the following ways.

Do not overwrite, make exception file

The incoming duplicate records are not imported into the proposal, and are sent to the exception file. Once the import has finished, you can view the exception file by enabling the **View Exception File** checkbox at the bottom of the **Import ASCII/Excel Data** dialog box.

Overwrite existing duplicates

ProPricer replaces the target data with the incoming data. This is a record-by-record procedure in which duplicate records are overwritten when encountered.

Prompt on duplicate

ProPricer will inform you of the duplicate record and ask how you want to handle it. It will display the values of the duplicate records so you can compare them, and then select one of five options:

Yes

Replaces the target record with the incoming one.

Yes All

Replaces the target record with the incoming one.

No

Leaves the target record and sends the incoming duplicate to the exception file.

No All

Leaves all target records and sends all incoming duplicates to the exception file.

Cancel

Quits the current import session without making any changes.

Add import value to duplicate

This option appears only for imports that spread hours or units: Resource Hours/Cost, Trip Distribution, and Material Distribution. If you select this option, the value of the incoming duplicate record is added to the value of the target record.

Interdivisional Transfer Data Duplicates

Duplicate Resources

Duplicates are records that exist in the target and incoming data. ProPricer offers the following options for handling duplicate resources.

Skip incoming duplicate resources

The incoming duplicate resources are not imported into the proposal.

Overwrite duplicate resources

ProPricer replaces the target data with the incoming data. This is a resource-by-resource procedure in which duplicate resources are overwritten when encountered.

Add to existing resources

ProPricer adds the value of the incoming resource to the value of the target resource.

Prompt on duplicate resources

ProPricer will inform you of a duplicate resource and ask how to handle it. The values of the duplicate resources will be displayed so you can compare them. Then you can select one of four options:

Skip

Leaves the existing resource and does not import the new one.

Overwrite

Replaces the existing resource with the imported resource.

Add To

Adds the values of the incoming resource to the values of the existing resource.

Cancel

Quits the current import session without making any changes.

Duplicate Tasks

Duplicates are tasks that exist in the target and incoming data. ProPricer offers the following options for handling duplicate tasks.

Skip incoming duplicate tasks

The incoming duplicate tasks are not imported into the proposal.

Replace duplicates with incoming

ProPricer replaces the target data with the incoming data. This is a task-by-task procedure in which duplicate tasks are overwritten when encountered.

Add duplicates with a new name

ProPricer allows you to enter a new name for the duplicate task. Every time a duplicate task is encountered, the program displays the **New Task Name** dialog box where you can type a new name for the duplicated task.

Add incoming to existing tasks

ProPricer adds the incoming resources to the target task. If an incoming resource is duplicated in the target proposal, it is treated according to the option selected for handling duplicate resources.

Prompt on duplicate tasks

ProPricer will inform you of a duplicate task and ask how to handle it. The values of the duplicate tasks will be displayed so you can compare them. Then you can select one of five options:

Skip

Leaves the existing task and does not import the duplicate task.

Replace

Replaces the existing task with the duplicate task.

New Name

Allows you to type a different name for the duplicate task so it can be imported without replacing the existing task.

Add To

Adds the incoming resources to the existing task. If an incoming resource is duplicated in the target proposal, it is treated according to the option selected for handling duplicate resources.

Cancel

Quits the current import session without making any changes.

*Note: If you select **Add incoming to existing tasks** or **Prompt on duplicate tasks**, then you must also select one of the **Duplicate Resource Options**. See the Import Interdivisional Transfer Data - Handling Duplicate Resources help page.*

Microsoft Project

Duplicates are records that exist in the target and incoming data. ProPricer offers the following options for handling duplicate records.

Do not overwrite

The incoming duplicate records are not imported into the proposal.

Overwrite existing duplicates

ProPricer replaces the target data with the incoming data. This is a record-by-record procedure in which duplicate records are overwritten when encountered.

Add import value to duplicate

The value of the incoming duplicate record is added to the value of the target record.

Prompt on duplicate

ProPricer will inform you of the duplicate record and ask how you want to handle it. It will display the duplicate record, then prompt you to choose one of four options:

Skip

Prevents the incoming duplicate from being imported.

Overwrite

Replaces the target record with the incoming one.

Add To

Adds the value of the duplicate record to the value of the target record.

Cancel

Ends the import of all data.

Subcontractor Data Duplicates

Duplicate Resources

Duplicates are records that exist in the target and incoming data. ProPricer offers the following options for handling duplicate resources.

Skip incoming duplicate resources

The incoming duplicate resources are not imported into the proposal.

Overwrite duplicate resources

ProPricer replaces the target data with the incoming data. This is a resource-by-resource procedure in which duplicate resources are overwritten when encountered.

Add to existing resources

ProPricer adds the value of the incoming resource to the value of the target resource.

Prompt on duplicate resources

ProPricer will inform you of a duplicate resource and ask how to handle it. The values of the duplicate resources will be displayed so you can compare them. Then you can select one of four options:

Skip

Leaves the existing resource and does not import the new one.

Overwrite

Replaces the existing resource with the imported resource.

Add To

Adds the values of the incoming resource to the values of the existing resource.

Cancel

Quits the current import session without making any changes.

Duplicate Tasks

Duplicates are records that exist in the target and incoming data. ProPricer offers the following options for handling duplicate records.

Skip incoming duplicate tasks

The incoming duplicate records are not imported into the proposal.

Replace duplicates with incoming

ProPricer replaces the target data with the incoming data. This is a record-by-record procedure in which duplicate records are overwritten when encountered.

Add duplicates with a new name

ProPricer allows you to enter a new name for the duplicate record. Every time a duplicate task is encountered, the program displays the **New Task Name** dialog box where you can type a new name for the duplicated record.

Add incoming to existing tasks

ProPricer adds the incoming resources to the target task. If an incoming resource is duplicated in the target proposal, it is treated according to the option selected for handling duplicate resources.

Prompt on duplicate tasks

ProPricer will inform you of each duplicate resource and ask how you want to handle it. It will display the values of the duplicate records so you can compare them, and then select one of five options:

Skip

Leaves the existing record and does not import the task.

Replace

Replaces the existing record with the imported record.

New Name

Allows you to type a new name for the duplicate task and imports it.

Add To

Adds the incoming resources to the existing task. If an incoming resource is duplicated in the target proposal, it is treated according to the option selected for handling duplicate resources.

Cancel

Quits the current import session without making any changes.

Title Table Duplicates

Title Table import files include information for both the table and its elements. Therefore, Title Tables Import has special options for handling duplicate records.

Add new Title Tables

The incoming Title Table is added to the Title Table Library if a Title Table with the same name does not exist in the database. If the Title Table exists, ProPricer sends the incoming duplicate along with its elements to the exception file.

Add to existing TTB (Safe Mode)

ProPricer overwrites the existing duplicate Title Table. New elements are added and duplicate elements are overwritten only if these actions do not change the hierarchy of the existing Title Table. In other words, you cannot overwrite an element if its parent differs from the parent of the incoming element. This is also the case if there are no elements in the existing Title Table and the incoming elements have undefined parents (that is, the parents are not elements of the Title Table). *See* Title Table Safe Mode Import example.

Auto Build TTB (Release Mode)

ProPricer overwrites the existing Title Table. It adds all incoming elements and creates a new hierarchy. In other words, existing parents are ignored with this option. After the new elements have been added, a roll-up is performed. *See* Title Table Release Mode Import example.

A box will appear to the left of the **Handling Duplicates** group if Release Mode is selected.

Roll-Up Step Size

You can select a value from 1 through 20, or leave the default value 1. In this mode, ProPricer performs a roll-up of the Title Table elements. It does not matter whether the imported table is duplicated or not. *See* Title Table Import Roll-Up example.

Prompt on duplicate

Upon detecting a duplicate record, ProPricer asks you to select an **Overwrite** option: either *Safe Mode* or *Release Mode*. *See* Title Table Prompt Option dialog box.

Prompt Options

When the **Prompt on duplicate** option is selected, ProPricer displays a dialog box that allows you to select an option for every duplicate Title Table.

Title Table Name

The name of the duplicated Title Table is displayed in blue.

Description

The description of the duplicated Title Table is displayed in blue.

Handling Duplicates

You have two options to choose from:

Add to existing TTB (Safe Mode)

AutoBuild TTB (Release Mode)

Note: You cannot select the roll-up value here. If you choose AutoBuild TTB, a roll-up with a value of two will be performed on the new Title Table upon importing the duplicate table.

Yes

Refers only to the current duplicate table. Only that table is added to the database. The dialog box appears again for the next duplicate table.

Yes All

Refers to all duplicate tables. All subsequent duplicate tables are treated the same way. The dialog box does not appear again.

No

Refers only to the current duplicate table. The incoming table is skipped. The dialog box appears again for the next duplicate table.

No All

Refers to all duplicate tables. All subsequent duplicate tables are skipped. The dialog box does not appear again.

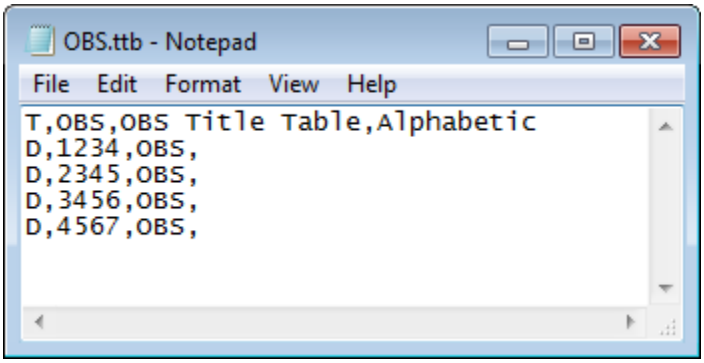
Cancel

Interrupts the importing. The import process is stopped, and nothing is imported to the database.

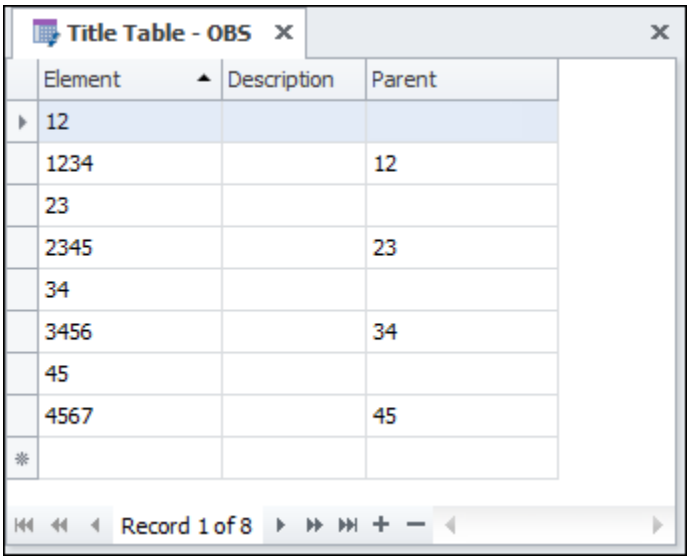
Release Mode

This topic demonstrates the Auto-build TTB (Release mode) option.

This screenshot shows the obs.ttb file we are going to use for the import. The name of the Title Table is OBS, and the sort order is alphabetic.

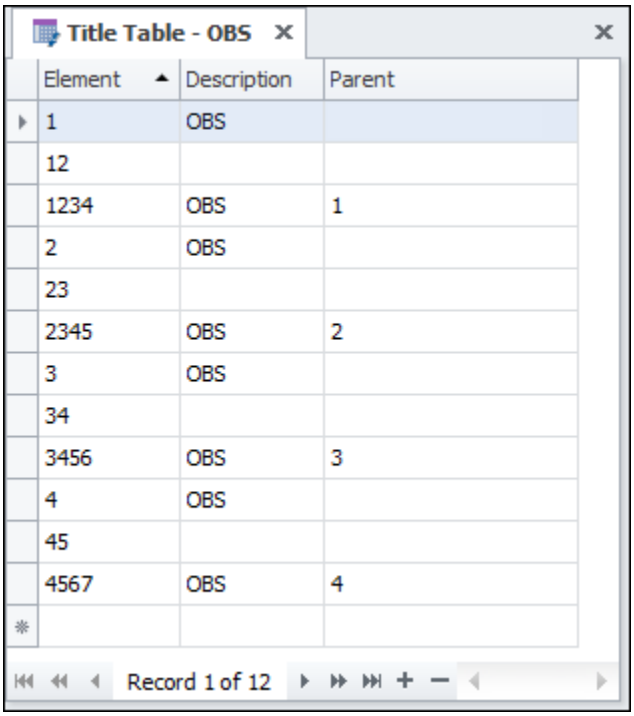


This screenshot shows the OBS Title Table that already exists in ProPricer. Its sort order is also alphabetic.



Please note the differences in the elements. The Notepad table has four elements, and they all have descriptions. The ProPricer table has the same four elements, plus four more. It was created with a roll-up step size of 2 and it does not have descriptions.

We imported the Notepad table into ProPricer with a roll-up step of three. The new ProPricer OBS Title Table is shown below.



Title Table - OBS

Element	Description	Parent
1	OBS	
12		
1234	OBS	1
2	OBS	
23		
2345	OBS	2
3	OBS	
34		
3456	OBS	3
4	OBS	
45		
4567	OBS	4

Record 1 of 12

You can see that:

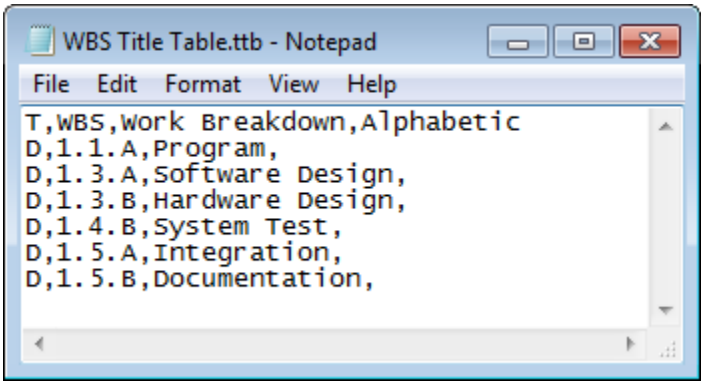
- The duplicate incoming elements replaced the existing elements. Descriptions have appeared.
- New elements appeared. Elements 1, 2, 3, and 4 were created as a result of the roll-up step size of three.
- The hierarchy is different. Before importing, the parent of element 1234 was 12 and now the parent is 1. This is due to the roll-up that was performed.
- The existing elements 12, 23, 34, and 45 were not changed by the import. They were not duplicated in the incoming table, nor were they duplicated by the newly created elements.

Roll-Up

This topic discusses the Roll-Up Step Size option when importing with the Auto Build TTB (Release mode) option.

Entering a roll-up step size creates a hierarchy (tree-like structure) of the elements. How the hierarchy will look is determined by the step value. The value defines how many characters will be cut from the end of every element. Cutting continues until the remaining characters in the name become less than or equal to the value of the roll-up step size. Elements that produce the same name after cutting are added together under the respective name.

This is the Wbs.ttb file viewed in Notepad. The Sort Order of the Title Table elements is *alphabetic*. You can see that none of the elements have a parent. Judging by the descriptions, the order of the elements describes the process of creating a computer program. Every element in the table is a separate task in the process.



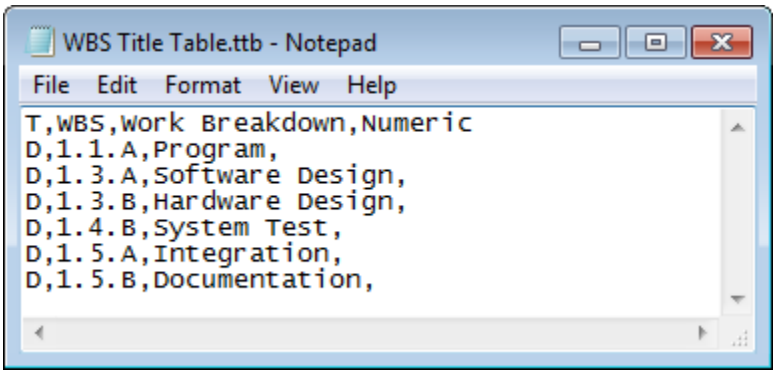
We imported WBS Title Table.ttb into ProPricer using the **Auto Build TTB (Release Mode)** option and a Step Size of 2. Below is the Title Table:

Element	Description	Parent
1	Program	
1.1	Program	1
1.1.A	Program	1.1
1.3	Software Design	1
1.3.A	Software Design	1.3
1.3.B	Hardware Design	1.3
1.4	System Test	1
1.4.B	System Test	1.4
1.5	Integration	1
1.5.A	Integration	1.5
1.5.B	Documentation	1.5

Record 1 of 11

You can see the results of the step size. Removing two characters from each element in the file created new elements in the table:1.1, 1.3, 1.4 and 1.5. Look at elements 1.3.A, and 1.3.B. 1.3 became the parent for both 1.3.A and 1.3.B. This is also the case for 1.5.A and 1.5.B. Their new parent is 1.5. The advantage of combining elements into one element is that the new element will display the combined cost of the components. When we remove two characters from 1.1, 1.3, 1.4 and 1.5, we obtain the top parent 1.

This screenshot shows the same .ttb file, but this time the sort order of the elements in *numeric*.



We imported the file using the **AutoBuild TTB (Release Mode)** option with a step size of 2.

Element	Description	Parent
1	Program	
1.1.A	Program	1
1.3.A	Software Design	1
1.3.B	Hardware Design	1
1.4.B	System Test	1
1.5.A	Integration	1
1.5.B	Documentation	1

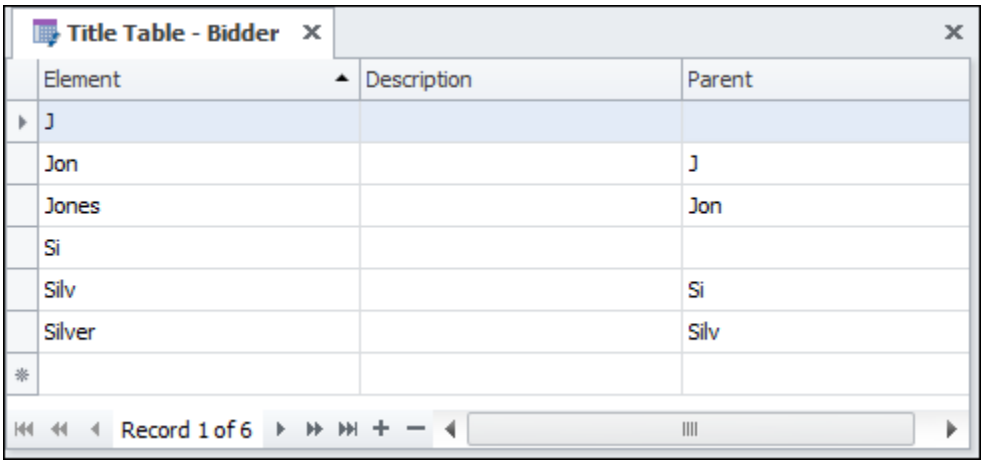
Record 1 of 7

Since the sort order of the Title Table elements is *numeric*, the Title Table entries are treated as segmented strings, separated by a period. Each segment provides a separate roll-up step. Therefore, a roll-up step size of 2 produces 1 after the last two segments are cut from the end of every Title Table element.

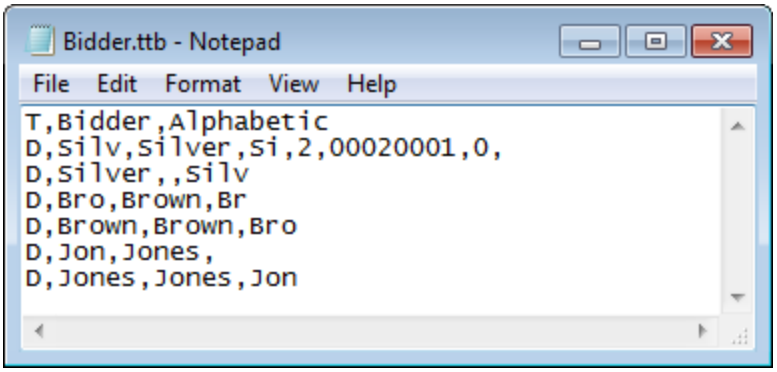
Safe Mode

This topic demonstrates the Add to existing TTB (Safe mode) option.

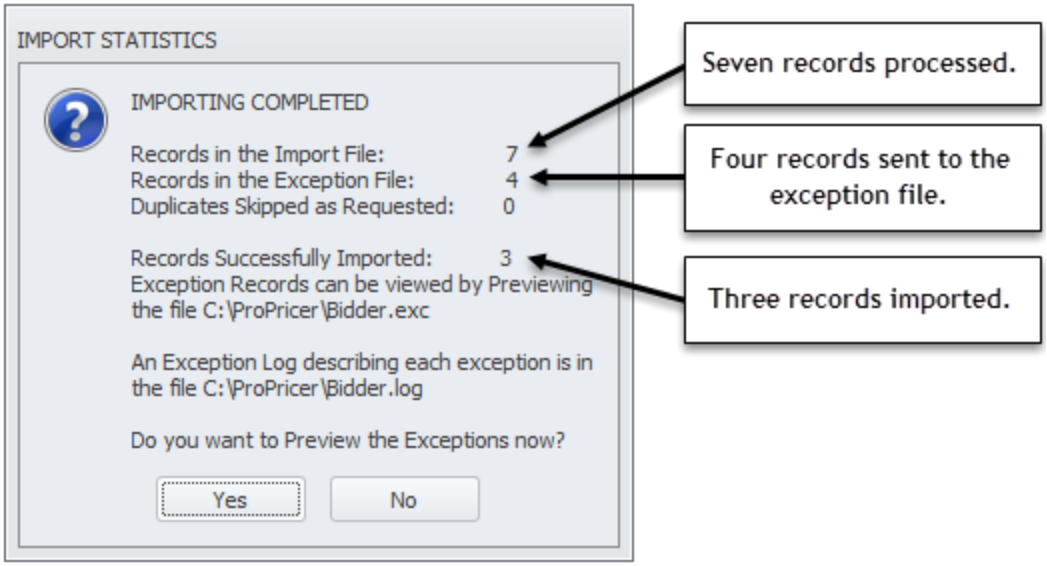
This screenshot shows the Bidder Title Table that already exists in ProPricer.



This screenshot shows the Bidder.ttb file we are going to use for the import.



We imported the Bidder.ttb into ProPricer. The following is the **Import Statistics** dialog box that appeared after the import, and the individual element-by-element explanations.



- The Title Table was imported; the incoming table replaced the existing duplicate. Had the incoming table not been a duplicate of the existing table, the incoming would have been imported as a separate Title Table with all its elements, and the results would have been different.
- Element SILV was not imported, because it contained eight fields and ProPricer expected only four.
- Element SILVER replaced the existing duplicate SILVER. This was possible, because the existing table contained parent SILV and, therefore, overwriting the existing element did not change the hierarchical structure of the existing Title Table.
- Element BRO was not imported, because parent BR did not exist in the target Title Table.
- Element BROWN was not imported for the same reason: parent BRO did not exist in the target Title Table. This is important to understand. Since a Title Table is a tree-like structure, most elements have parent elements. If a parent cannot be imported, the children cannot be imported either. The same parent must exist in the target table (see element JONES below). Even though the incoming table had element BRO, element BROWN was not imported, because BRO did not qualify

for importing in the previous step and, therefore, did not become part of the existing table.

- Element JON was not imported, because the existing table contained a similar element with a parent. If an element has a parent, it can only be overwritten by a duplicate that has the same parent (the way SILVER was imported), or in Release Mode.
- Element JONES was imported, because its parent existed in the target table. This is the reverse case of BROWN. Even though its parent JON was not imported, JONES was imported, because the existing table contained the element JON.

XML

Duplicates are records that exist in the target and incoming data. ProPricer offers the following options for handling duplicate records.

Skip duplicates, make exception file

The incoming duplicate records are not imported into the proposal, and are sent to the exception file.

Overwrite duplicates

ProPricer replaces the target data with the incoming data. This is a record-by-record procedure in which duplicate records are overwritten when encountered.

Add to existing

This option appears only for imports that spread hours, units, or cost estimates in tasks. If you have duplicate records and select this option, the value of the incoming record will be added to the value of the target record.

Prompt on duplicates

ProPricer will inform you of a duplicate record and ask how to handle it. The values of the duplicate records will be displayed so you can compare them. Then you can select one of four options:

Skip

Leaves the existing entry and does not import the record.

Overwrite

Replaces the existing record with the imported.

Add to existing

Adds the value of the incoming record to the value of the target record.

Cancel

Quits the current import session without making any changes.

Interdivisional Transfer Data

The Import Interdivisional Transfer option allows you to bring interdivisional transfer data into ProPricer via an XML file. The data your XML file contains will be imported into the proposal selected in the Navigation Pane. The data includes the tasks and their start and end dates, the summary fields, the resources used in the tasks, and the distribution of hours for each resource.

Before processing the import, you can match resources in the XML file to interdivisional type resources in the proposal's Direct Rate Table. You can also edit resource descriptions and enter values in resource fields.

You cannot import empty summary fields if the **Required** option is selected for the target summary fields.

Imported values are rounded to the number of decimal places entered in the **Resource Decimal Precision** field in **Proposal Properties** > **Proposal** > **General**.

Follow these steps to import the data:

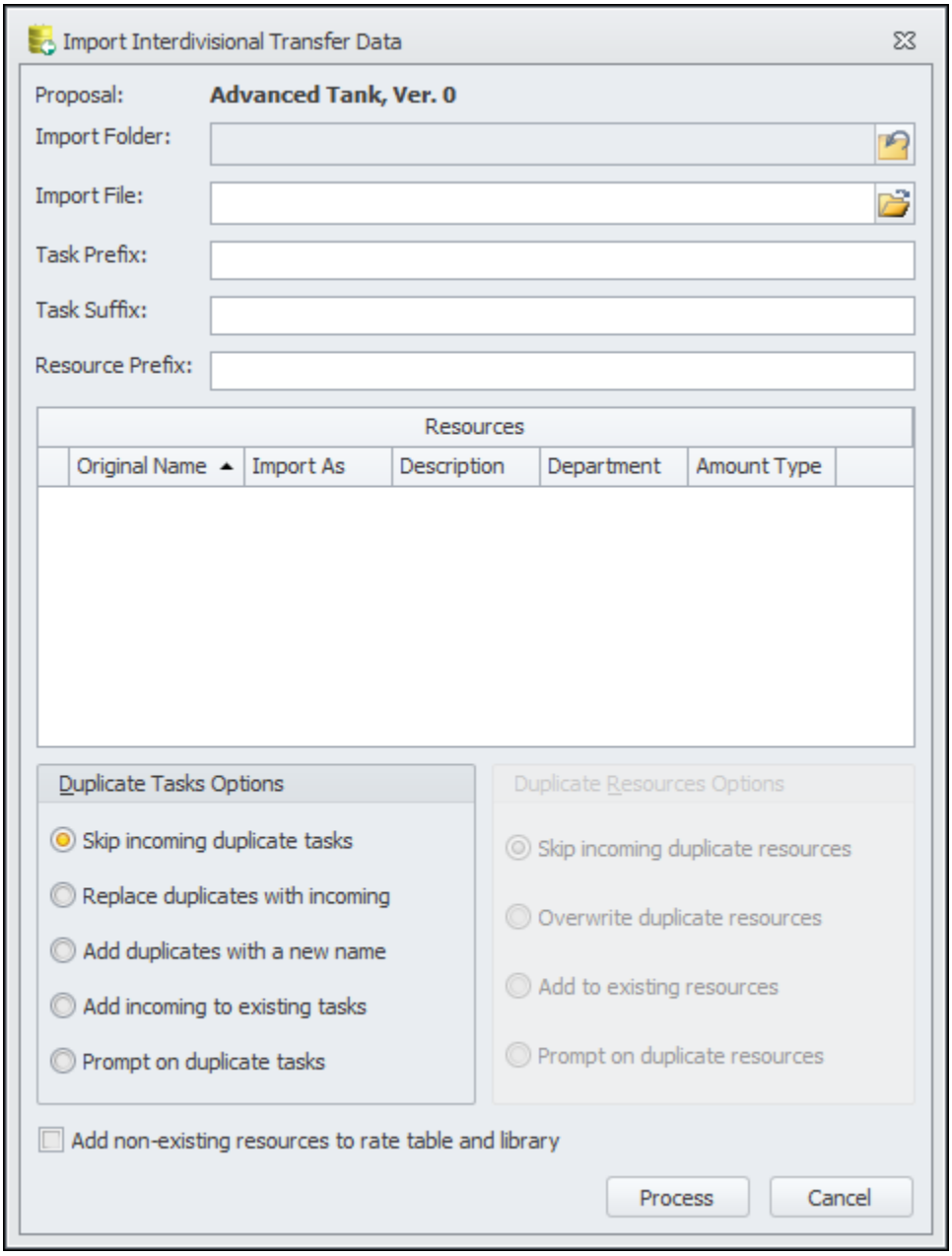
1. On the **External Data** ribbon, in the **Import** group, click **Interdiv. Transfer**. The **Import Interdivisional Transfer Data** dialog box will open.
2. In the **Import File** field, browse your computer for the file to import by clicking . When you find the file, double-click it.
3. *(Optional)* In the **Task Prefix** and **Task Suffix** fields, enter text that will appear before and after each task name, respectively.
4. *(Optional)* In the **Resource Prefix** field, enter text that will appear before each resource name.
5. *(Optional)* In the **Import As** column, change any resource in the XML file to an existing interdivisional type resource in the proposal's Direct Rate Table. To see

all resources in the table, expand the menu in a cell and select **Show All Resources**.

6. *(Optional)* Edit the resource descriptions. If the proposal uses other resource fields, you can change the values in those fields as well.
7. Select how to handle duplicate tasks.
8. Select how to handle duplicate resources.
9. *(Optional)* Select the **Add non-existing resources to rate table and library** checkbox if you want ProPricer to add any resources that do not exist in the target proposal to the proposal's Direct Rate Table and the Resource Library.
10. Click **Process**.

Import Interdivisional Transfer Data Dialog Box

The **Import Interdivisional Transfer Data** dialog box is where you select the file you want to import, as well as how you want to handle duplicate tasks and/or resources.



Proposal

Displays the name and version of the proposal.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Task Prefix

Enter a prefix for the names of all imported tasks.

Task Suffix

Enter a suffix for the names of all imported tasks.

Resource Prefix

Enter a prefix for the names of all imported resources. The names in the **Import As** will be automatically updated.

Resources

Original Name

The resource name as it appears in the XML file. This field cannot be changed.

Import As

How the resource name will appear after the import. You can change this field. To see the available interdivisional type resources, expand the drop-down menu in a cell. In the expanded menu, select **Show All Resources** to see every resource in the proposal's Direct Rate Table.

Description

How the resource description will appear after the import. You can change this field.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. You can change resource fields.

Amount Type

Displays the resource amount type from the XML file. This field cannot be changed.

Duplicate Tasks Options

Select how you want to handle duplicate tasks. The options are mutually exclusive - selecting one of them clears the rest.

Duplicate Resources Options

Select how you want to handle duplicate resources. The options are mutually exclusive - selecting one of them clears the rest.

*Note: These options are available only if the **Add incoming to existing tasks** or **Prompt on duplicate tasks** option is selected.*

Add non-existing resources to rate table and library

Select this checkbox if you want ProPricer to add resources that do not exist in the target proposal to the Resource Library and Direct Rate Table assigned to the proposal.

Note: This option is not available if you do not have Access Rights to add new items to the Direct Rate Table assigned to the proposal or to edit the data in the Resource Library.

Process

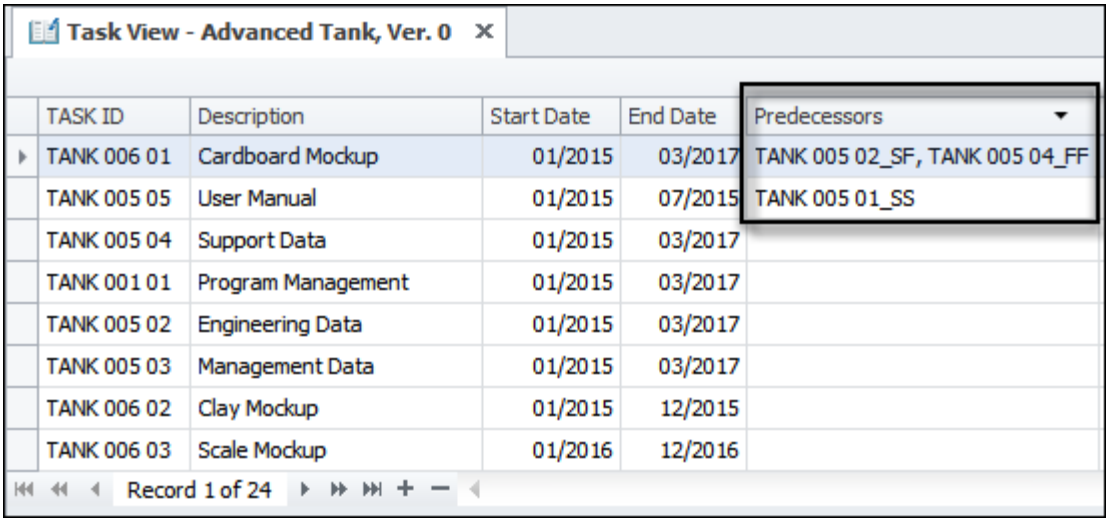
Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Microsoft Project

The Import Microsoft Project feature brings Microsoft Project data into ProPricer. Since both programs are compatible, the exchange of information between them is easy. When you import predecessor data from MS Project, that data will appear in the **Predecessors** field of the task grid.



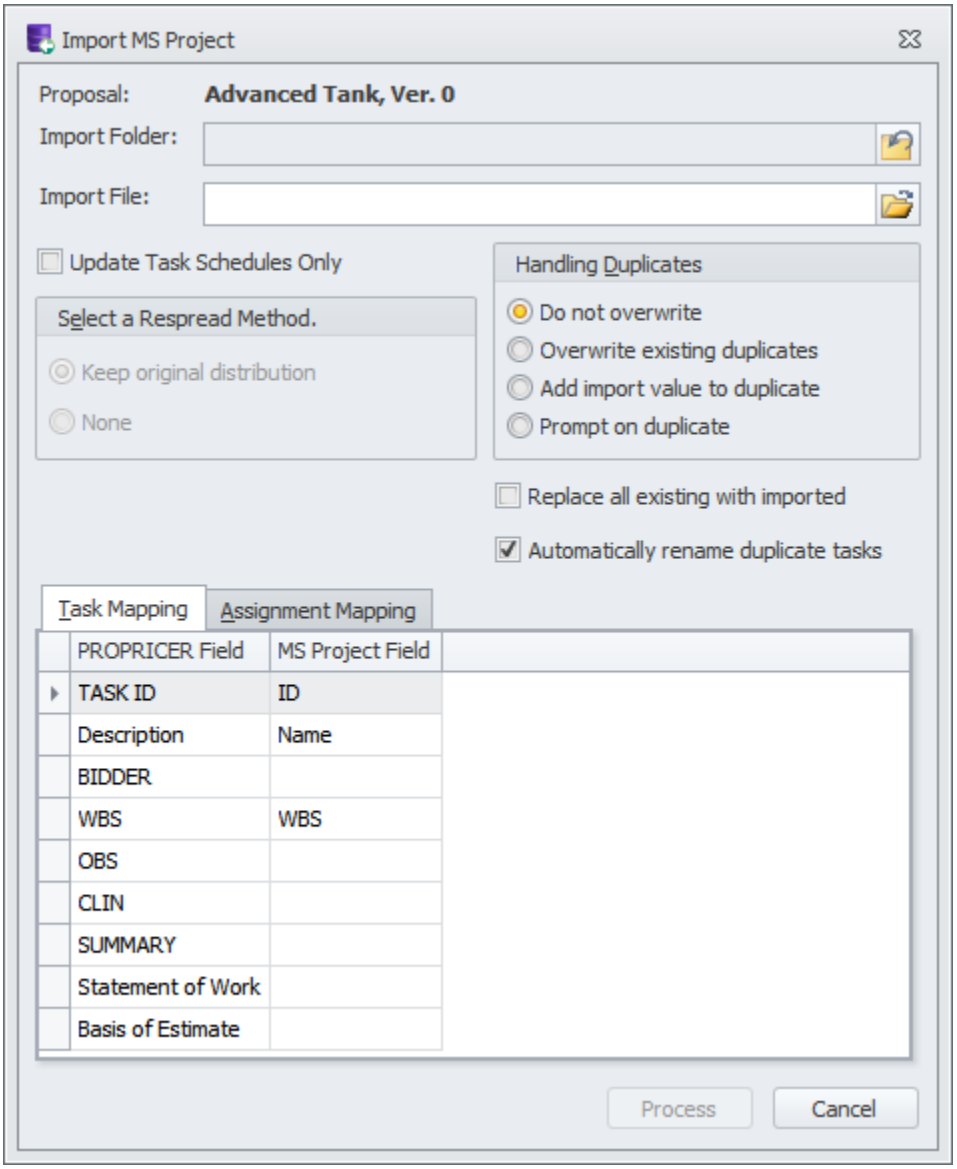
To import Microsoft Project data, you need a file that has an **.mpp** or **.mpx** file name extension.

1. On the **External Data** ribbon, in the **Import** group, click **MS Project**. The **Import MS Project** dialog box will open.
2. Select the target proposal for the imported data.
3. The **Import Folder** field shows the location of the last file you imported. Click to restore the default location.
4. In the **Import File** field, enter the name of the file to import, or click to browse for it.
5. Select the **Update Task Schedules Only** checkbox to limit the data import to just Task ID, Description, Summary Fields, Predecessors, Start Date, and End Date. Leave the checkbox cleared to include all other data.

6. If you selected **Update Task Schedules Only**, you must choose a **Select a Respread Method** option to account for any start and end date changes.
    - **Keep original distribution** - Use the same distribution curve to respread the existing resource hours/units/cost in the new time period.
    - **None** - Change the time period without respreading the resource hours/units/cost.
7. Select a **Handling Duplicates** option. These options are not available if you select the **Replace all existing with imported** checkbox instead.
8. Select the **Automatically rename duplicate tasks** checkbox to have ProPricer assign new names to duplicated incoming tasks. ProPricer will inform you of every duplicate task.
9. On the **Task Mapping** and **Assignment Mapping** tabs, in the **MS Project Field** column, select the appropriate match for the ProPricer field.
    - You can map MS project fields to existing or new ProPricer resource fields. If you map to a new resource field, ProPricer will create it automatically.
10. Click **Process**.

Import Microsoft Project Dialog Box

The **Import MS Project** dialog box is where you select the file you want to import and establish the correspondence between the fields in MS Project and ProPricer.



Proposal

Displays the name and version of the proposal.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Update Task Schedules Only

Select this checkbox to only import Task ID, Description, Summary Fields, Predecessors, Start Date, and End Date data from the file. Leave it cleared to include all other data.

Select a Respread Method

These options are enabled if you select the **Update Task Schedules Only** checkbox.

Keep original distribution

Select this option to respread the existing resource hours/units/cost in the new time period with the same distribution curve.

None

Select this option to change the time period without respreading the hours/units/cost.

Handling Duplicates

Choose what to do with imported data that already exists in ProPricer. These options apply to the data for direct rates, tasks, and resources. You can learn more about each option in the following topic: Import Microsoft Project - Handling Duplicates.

Replace all existing with imported

Select this checkbox to overwrite all the data in ProPricer with the data in the MS Project file.

Automatically rename duplicate tasks

Select this checkbox to have ProPricer assign new names to any duplicated tasks in the imported project. Leave it cleared to have ProPricer inform you of every duplicate task, in which case you can monitor the progress of the importing process, based on the duplicate tasks.

Task Mapping and Assignment Mapping

The Task Mapping and Assignment Mapping tabs allow you to establish correspondence between the fields in Microsoft Project and ProPricer. In the **MS Project Field** column, enter the appropriate match for the ProPricer field.

You can map Microsoft Project fields to existing or new ProPricer resource fields. If you map to a new resource field, ProPricer will create it automatically.

Process

Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Notes on Importing Microsoft Project

Some Useful Information

- Microsoft Project data is imported into the proposal selected in the Navigation Pane.
- The data that is imported into ProPricer include: tasks, predecessors, proposal summary fields, the resources used in the tasks, resource fields, the number of hours each resource is employed, the task's start and end date and task notes.
- The resources are imported with Source Type *Direct* and curve *None* because the resource hours/units/cost from the Microsoft Project file are imported as discrete values into ProPricer.
- The hours/units/cost of incoming resources are imported to task resources with the exact same identity. Since Microsoft Project does not contain resource field data, resource hours/units/cost are imported into resources without values in their resource fields. For example, you want to import 400 hours for resource ASSEM, ProPricer checks to see if your task contains a resource with this name without values in its resource fields. If a resource ASSEM exists in the specified task, the 400 hours are added to the hours of the existing resource. If resource ASSEM is not used in the task, ProPricer assigns a new resource ASSEM with empty resource fields and distributes 400 hours for it.
- If an incoming resource from the project task is duplicated in the proposal task, you will get a message informing you that the hours of the duplicate resource will be added to the existing one.
- ProPricer does not allow duplicate Task IDs. If the project you are importing has two or more tasks with the same name, you can select the **Automatically rename duplicate tasks** checkbox. If you do so, index numbers will be added to the duplicated tasks. If you leave the checkbox cleared, you will get a message for every duplicate task.

- The Task Mapping and Assignment Mapping compatibility between Microsoft Project and ProPricer allows you to import any text field or Task Note into ProPricer, even into the SOW and BOE fields. Please note that the incoming text will be imported as plain text and must conform to the maximum length of the selected field (example: 30,000 for SOW and BOE or 40 for Description); any remaining text will be truncated. All incoming text will replace the text in ProPricer. This also means that text may be lost in ProPricer if the incoming field is empty. Any SOW or BOE attachments you may have will not be erased. Microsoft Project Task Notes objects cannot be imported.
- When **Update Task Schedules Only** is selected, resources in the Microsoft Project file are not imported. For this reason, the Assignment Mapping tab is not available when using this option.
- After importing Predecessors from MS Project, be cautious when changing task start or end dates in ProPricer. Changing dates for tasks with Predecessors will cause the Predecessors to be deleted.

Before Importing from Microsoft Project

- All the resources should be in the Resource Library and in the appropriate Direct Rate Table.
- If the **Required** option is selected for the summary fields of the target proposal, the summary fields of the incoming proposal should contain data.

Open Plan

Import Open Plan

The Import Open Plan feature integrates Deltek Open Plan with ProPricer. You can import task and resource data directly from Open Plan without creating any intermediate files.

You must have valid licenses and logins for Open Plan and ProPricer to use this feature.

1. On the **External Data** ribbon, in the **Import** group, click **Open Plan**. The **Import Open Plan** dialog box will open.
2. Select the target proposal for the imported data.
3. Select the Open Plan project that contains the data to import.
4. Select the **Update Task Schedules Only** checkbox to limit the data import to just Task ID, Description, Summary Fields, Predecessors, Start Date, and End Date. Leave the checkbox cleared to include all other data.
5. If you selected **Update Task Schedules Only**, you must choose a **Select a Respread Method** option to account for any start and end date changes.
    - **Keep original distribution** - Use the same distribution curve to respread the existing resource hours/units/cost in the new time period.
    - **None** - Change the time period without respreading the resource hours/units/cost.
6. Select a **Handling Duplicates** option. These options are not available if you select the **Replace all existing with imported** checkbox instead.

7. Select the **Automatically rename duplicate tasks** checkbox to have ProPricer assign new names to duplicated incoming tasks. ProPricer will inform you of every duplicate task.

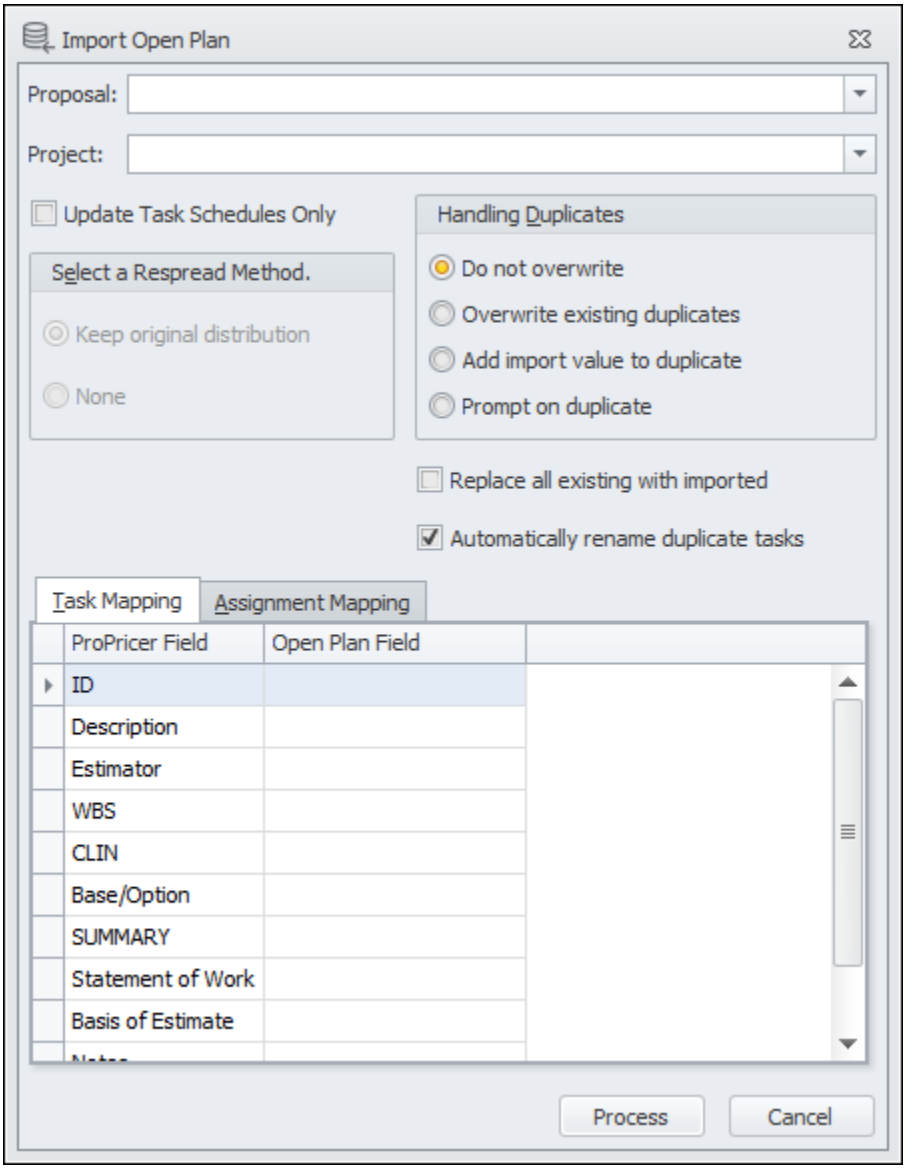
8. On the **Task Mapping** and **Assignment Mapping** tabs, in the **Open Plan Field** column, select the appropriate match for the ProPricer field.

    - You can map Open Plan fields to existing or new ProPricer resource fields. If you map to a new resource field, ProPricer will create it automatically.

9. Click **Process**.

Import Open Plan Dialog Box

The **Import Open Plan** dialog box is where you select the import options and establish the correspondence between the fields in Open Plan and ProPricer.



Proposal

Select the proposal that is the target for the imported data.

Project

Select the Open Plan project that contains the data to import.

Update Task Schedules Only

Select this checkbox to only import Task ID, Description, Summary Fields, Predecessors, Start Date, and End Date data from the project. Leave it cleared to include all other data.

Select a Respread Method

These options are enabled if you select the **Update Task Schedules Only** checkbox.

Keep original distribution

Select this option to respread the existing resource hours/units/cost in the new time period with the same distribution curve.

None

Select this option to change the time period without respreading the hours/units/cost.

Handling Duplicates

Choose what to do with imported data that already exists in ProPricer. These options apply to the data for direct rates, tasks, and resources.

Replace all existing with imported

Select this checkbox to overwrite all the data in ProPricer with the data in the Open Plan project.

Automatically rename duplicate tasks

Select this checkbox to have ProPricer assign new names to any duplicated tasks in the imported project. Leave it cleared to have ProPricer inform you of every duplicate task, in which case you can monitor the progress of the importing process based on the duplicate tasks.

Task Mapping and Assignment Mapping

The Task Mapping and Assignment Mapping tabs allow you to establish correspondence between the fields in Open Plan and ProPricer. In the **Open Plan Field** column, enter the appropriate match for the ProPricer field.

You can map Open Plan fields to existing or new ProPricer resource fields. If you map to a new resource field, ProPricer will create it automatically.

Process

Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Subcontractor Data

The Import Subcontractor option allows you to bring subcontractor data into ProPricer via an XML file. The data your XML file contains will be imported into the proposal selected in the Navigation Pane. The data includes the tasks and their start and end dates, the summary fields, the resources used in the tasks, and the distribution of hours for each resource.

You cannot import empty summary fields if the **Required** option is selected for the target summary fields.

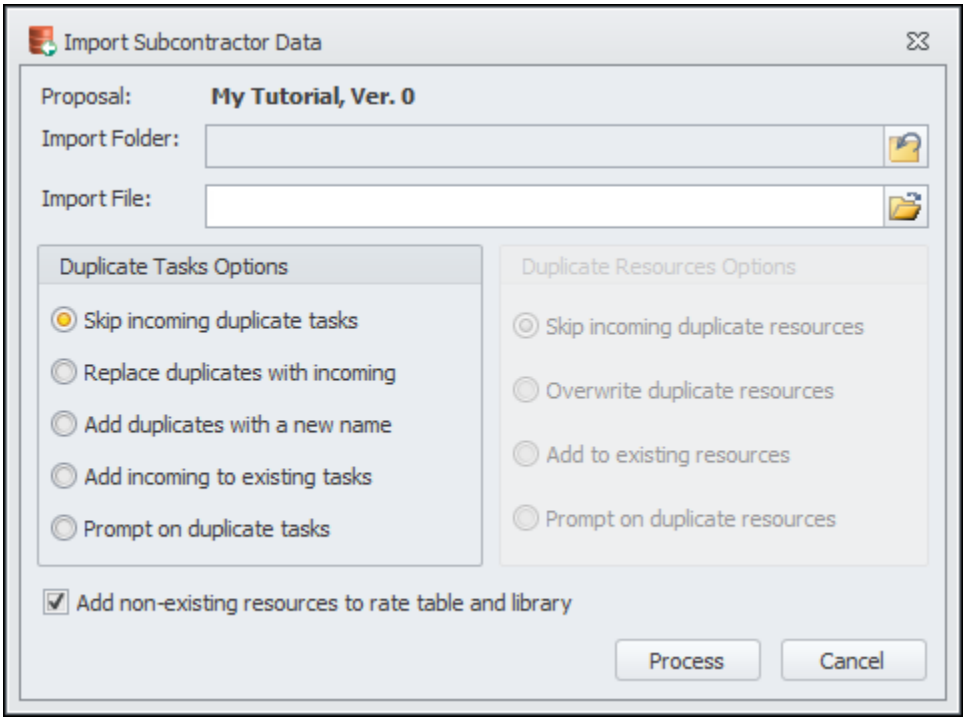
Imported values are rounded to the number of decimal places entered in the **Resource Decimal Precision** field in **Proposal Properties** > **Proposal** > **General**.

Follow these steps to import the data:

1. Click the **External Data** ribbon and then click **Subcontractor** in the **Import** group. The **Import Subcontractor data** dialog box will open.
2. The **Import Folder** field shows the location of the last file you imported.
3. In the **Import File** field, enter the name of the file you want to import, or click to browse for it.
4. Select how you want to handle duplicate tasks.
5. Select how you want to handle duplicate resources.
6. Click the **Add non-existing resources to rate table and library** checkbox if you want ProPricer to add any resources that do not exist in the target proposal to the proposal’s Direct Rate Table and Resource Library.
7. Click **Process**.

Import Subcontractor Data Dialog Box

The **Import Subcontractor Data** dialog box is where you select the file you want to import, as well as how you want to handle duplicate tasks and/or resources.



Proposal

Displays the name and version of the proposal.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Duplicate Tasks Options

Select how you want to handle duplicate tasks. The options are mutually exclusive - selecting one of them clears the rest.

Duplicate Resources Options

Select how you want to handle duplicate resources. The options are mutually exclusive - selecting one of them clears the rest.

*Note: These options are available only if the **Add incoming to existing tasks** or **Prompt on duplicate tasks** option is selected.*

Add non-existing resources to rate table and library

Select this checkbox if you want ProPricer to add resources that do not exist in the target proposal to the Resource Library and Direct Rate Table assigned to the proposal.

Note: This option is not available if you do not have Access Rights to add new items to the Direct Rate Table assigned to the proposal or to edit the data in the Resource Library.

Process

Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

XML Data

The XML Import feature allows you to bring global and proposal-specific data into ProPricer via an XML file. Global data refers to any information that pertains to a library or table. Your XML file can include data for all libraries and tables, or a select few. The proposal information your XML file contains will be imported into the proposal selected in the Navigation Pane. This information can include:

- Tasks: Task ID, description, duration, task-level profit/fee factor, summary fields, number of units represented by the task, and indirect pool.
- Resource assignments: Resource ID, resource field values, indirect pool and rate band assigned to the resource, distribution of resource hours/units/cost, and scheduled rates.
- Travel data: Information for each trip assigned to the task, trip distribution, and related travel expenses.
- SOW and BOE texts and attachments entered for each task.
- Materials: Task material assignments, material quantities, spread info, associated costs, and cost source data entered for the parts and assemblies.

Every time you import XML data into ProPricer, the program creates an ImpXML.log file that displays the results from the import session. It lists all the imported records and the corresponding option for handling duplicate records. It also stores all the records that were not imported and explains why they did not qualify for importing. This log file will exist only until you perform another XML import. Once you perform another import, the file will be replaced with a new one. If you want to save a log file to prevent it from being replaced, save it with a different name or file name extension.

An exception file will be created if ProPricer encounters data that did not qualify for importing. This file can include records that contain invalid data, records you chose to skip during the import process, etc. The exception file allows you to edit the excepted records and import the modified data. The exception file will have the same name as the imported file, but the file name extension will be **.exc**. For example:

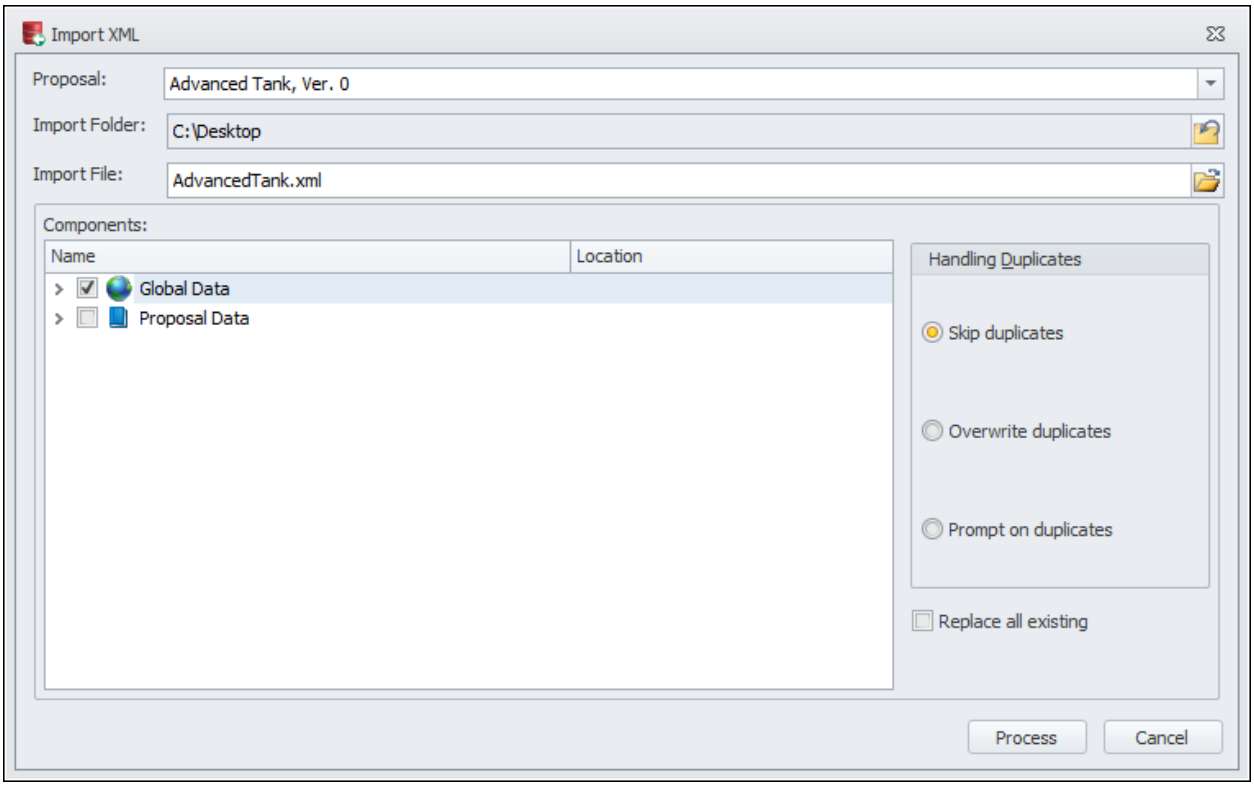
- Imported file: mytutorial.xml
- Exception file: mytutorial.exc

Follow these steps to import the data:

1. On the **External Data** ribbon, in the **Import** group, click **XML**. The **Import XML** dialog box will open.
2. The **Import Folder** field shows the location of the last file you imported.
3. In the **Import File** field, enter the name of the file you want to import, or click to browse for it.
4. Select the checkboxes of the elements to import.
5. Select how to handle duplicate entries.
6. Click **Process**.

Import XML Data Dialog Box

The **Import XML Data** dialog box is where you select the XML file and elements you want bring into the proposal selected in the Navigation Pane and/or your global database.



Proposal

Select a proposal. The data in the import file will go to this proposal.

Import Folder

Once you select the file you want to import, this field will show the location of the file. It may show the location of the last file you imported. Click to clear the field.

Import File

Enter the name of the file you want to import, or click to browse for it.

Components

This area lists the items contained in the import file, and allows you to select the ones you want to import. It is divided in two columns: **Name** and **Location**. The **Name** column shows the global and proposal-specific records. They are organized in two separate folders, each of which provides access to several subfolders. A plus sign in front of a folder indicates that the folder has subordinate items. Click the plus sign to expand the folder to see the items stored in it. Selecting the checkbox to the left of a top-level folder tells ProPricer to select the checkboxes of all the elements within it. If you only want to import specific data, expand the respective folder, and select the checkboxes of the individual elements. The **Location** column allows you to import a table or product to a specific folder. If you do not enter a specific folder, the item will be imported to the root folder.

Handling Duplicates

Select how you want to process duplicate records. You can learn more about each option in the following topic: Import XML - Handling Duplicates.

Replace all existing

If you select this option, the import will be implemented in two stages that differ for global and proposal imports.

Global

- All existing records used in a proposal are deleted.
- The remaining target records that are duplicated by incoming records are overwritten by the incoming duplicates.

Proposal

- All existing records in the affected tasks are deleted.
- The records from the incoming file are imported in their place.

Process

Click this button to start the import.

Cancel

Click this button to close the dialog box without importing data.

Notes on Importing XML Data

Some Useful Information

- If an incoming resource does not exist in the Direct Rate Table of the proposal, it will not be imported.
- If a currency has been assigned to an incoming resource that is different from the currency of the existing proposal, and the Exchange Rate Table assigned to the proposal does not contain an exchange rate for the incoming currency, the resource will not be imported.
- If no start and end dates are specified for the distribution of resource hours/units/cost, the data will be spread across the entire period of the task.
- If a scheduled rate has been assigned to an incoming resource and the proposal into which you are importing does not have a Scheduled Rate Table assigned to it, the resource will not be imported.
- If an incoming material is not assigned to a proposal task, its distribution is not imported.
- If the **Delivery/Ship Qty** input mode of an incoming material is *Direct* and the **Spread Amount** of the material is not equal to the **Total Mfg Start Qty**, its distribution is not imported.
- You cannot import empty summary fields if the **Required** option is selected for the target summary fields.

ProPricer Import/Export Tool

With the ProPricer Import/Export Tool, you can enter ProPricer data in a spreadsheet, then send the information back to your proposals, tables, libraries, and system. However, you cannot create new proposals or tables with the Import/Export Tool.

To quickly get started entering data in the tool, you can create templates that have empty ProPricer data fields.

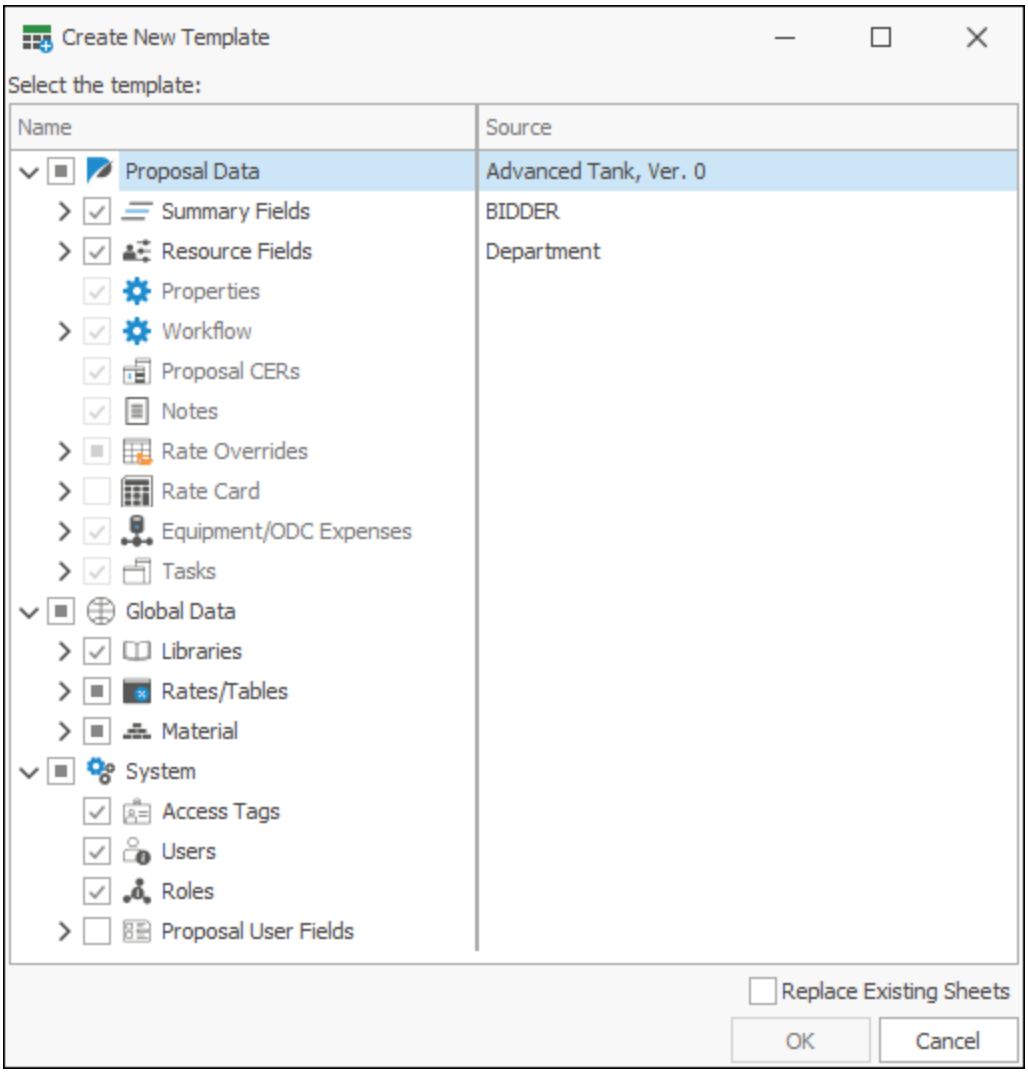
Editing data in the Import/Export Tool does not automatically update data in ProPricer. Updates only happen after you import data to ProPricer from the tool.

Create a New Import/Export Template

1. On the **External Data** ribbon, click **ProPricer Import/Export**.
2. Select the types of data to include in the template. A pre-formatted sheet is created for each one.
3. In the **Source** pane, click a row to select a specific source for the column names in a sheet. The ⚠ icon indicates a source is required.
4. *(Optional)* You can select **Replace Existing Sheets** to overwrite any existing sheets with the template sheets.
5. Click **OK**.

Create New Template Dialog Box

The **Create New Template** dialog box for the ProPricer Import/Export Tool is for creating pre-formatted sheets that you enter ProPricer data in. You can create multiple sheets for different kinds of data.



Name

Select the type of data to include in the template. A separate sheet is created for each one.

Source

If the selected type of data could be based on multiple sources, select a specific one. For example, to create a template for entering proposal data, you must also select a specific proposal.

Replace Existing Sheets

If the spreadsheet already contains sheets, you can select this option to replace them with new sheets for entering ProPricer data.

OK

Click this button to start the process.

Cancel

Click this button to close the dialog box without creating a template.

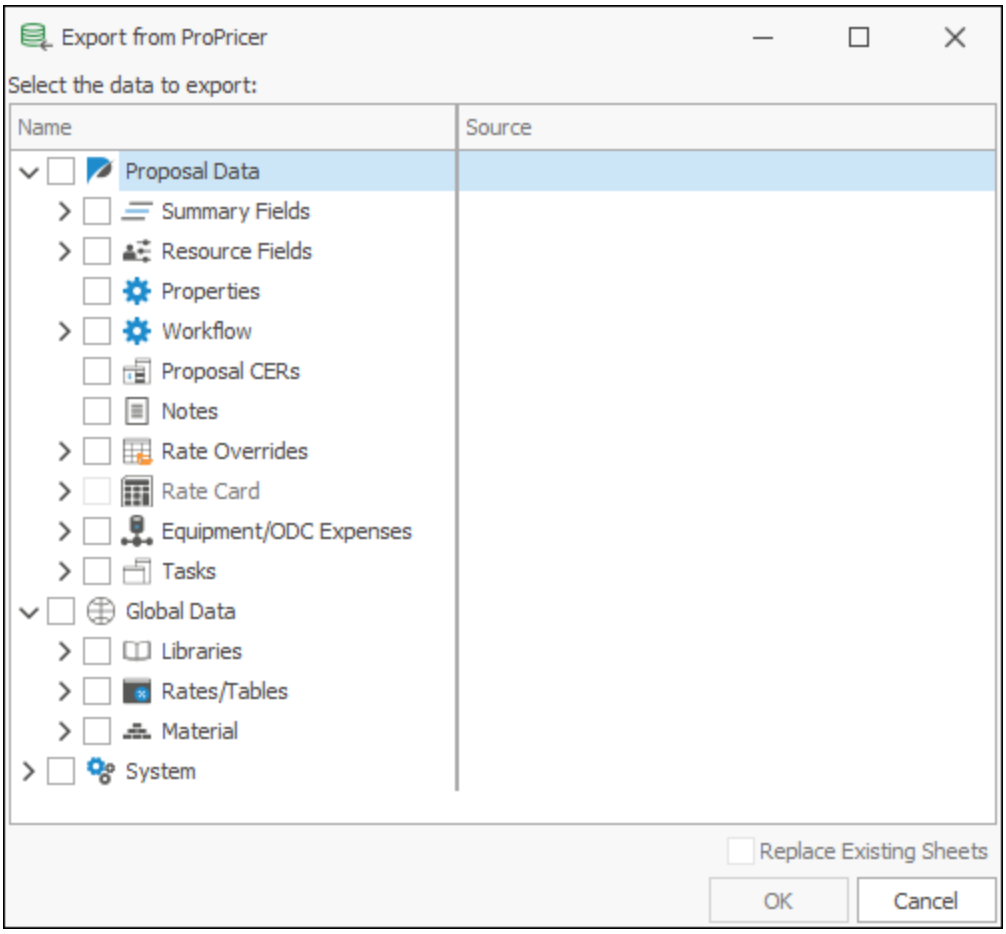
Export from ProPricer

You can export data from your ProPricer proposals, tables, libraries, and system into a spreadsheet. It contains sheets for each item you select to export.

1. On the **External Data** ribbon, click **ProPricer Import/Export**.
2. In the Import/Export Tool, on the **Import/Export** ribbon, click **From ProPricer**.
3. Select the data to export from ProPricer.
4. In the **Source** pane, double-click a row to select a specific source for the exported data. The ⚠ icon indicates a source is required.
5. (Optional) You can select **Replace Existing Sheets** to overwrite any existing sheets with the data from ProPricer.
6. Click **OK**.

Export from ProPricer Dialog Box

The **Export from ProPricer** dialog box for the ProPricer Import/Export Tool is for exporting data from ProPricer to a spreadsheet. You can export multiple types of proposal, global, and system data.



Name

Select the data to export from ProPricer.

Source

If the selected data could come from multiple sources, double-click the row and select a specific one. For example, to export proposal data, you must also select a specific proposal.

Replace Existing Sheets

If the spreadsheet already contains sheets, you can select this option to replace them with new sheets of ProPricer data.

OK

Click this button to start the process.

Cancel

Click this button to close the dialog box without exporting data.

Import to ProPricer

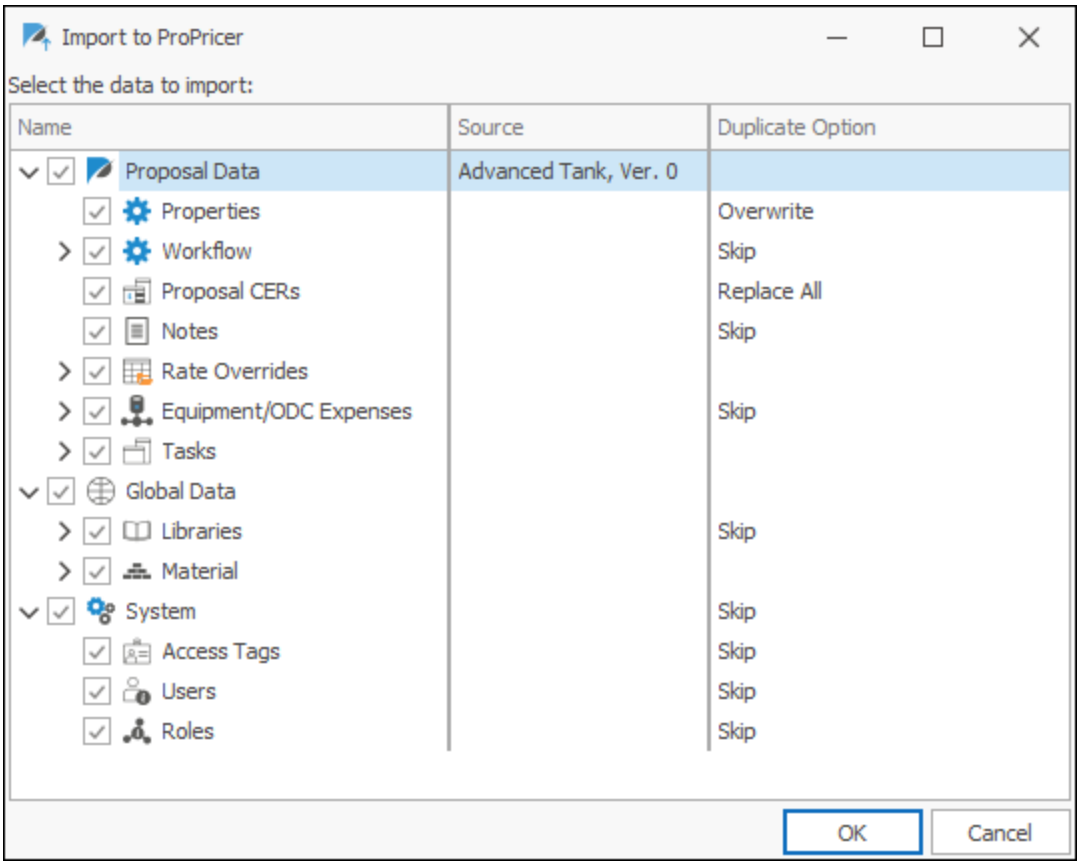
You can import spreadsheet data to your ProPricer proposals, tables, libraries, and system. If the place you import to already has information, you can choose what the Import/Export Tool does with duplicate data during the import process.

During the import process, ProPricer detects and logs errors that may have occurred. If the import process is still ongoing when errors are detected, you can immediately cancel it and review the error log.

1. On the **External Data** ribbon, click **ProPricer Import/Export**.
2. In the Import/Export Tool, on the **Import/Export** ribbon, click **To ProPricer**.
3. Select the data to import to ProPricer.
4. In the **Source** pane, double-click a row to select a specific source (or target) for the imported data. The ⚠ icon indicates a source is required.
5. In the **Duplicate Option** column, select what happens when ProPricer already contains the data being imported.
    - **Skip**: The import process skips the spreadsheet data.
    - **Overwrite**: The import process overwrites the data in ProPricer with the spreadsheet data.
    - **Prompt**: A window appears prompting you to select an action.
    - **Replace All**: The import process replaces all of the selected data in ProPricer with the spreadsheet data.
6. Click **OK**.

Import to ProPricer Dialog Box

The **Import to ProPricer** dialog box for the ProPricer Import/Export Tool is for importing spreadsheet data to ProPricer. You can import multiple types of proposal, global, and system data.



Name

Select the data to import to ProPricer.

Source

If the selected data could be imported to multiple sources, double-click the row and select a specific one. For example, to import proposal data, you must also select a specific proposal.

Duplicate Option

Select what happens when ProPricer already contains the type of data being imported.

Skip

The import process skips the spreadsheet data.

Overwrite

The import process overwrites the data in ProPricer with the spreadsheet data.

Prompt

A window appears prompting you to select an action.

Replace All

The import process replaces all of the selected data in ProPricer with the spreadsheet data.

OK

Click this button to start the process.

Cancel

Click this button to close the dialog box without importing data.

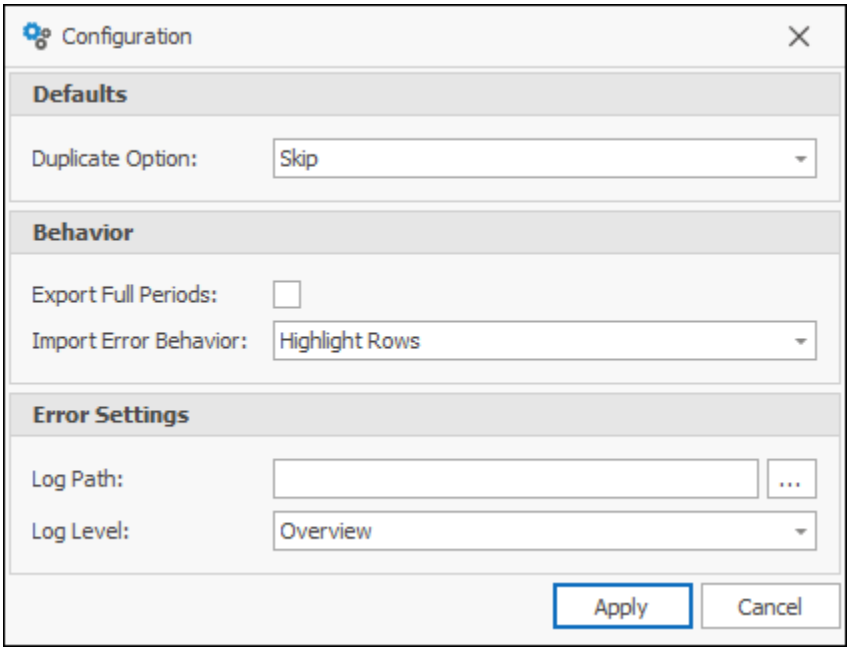
System Settings

The ProPricer Import/Export Tool has its own System Settings. These are separate from the System Options for the entire ProPricer application.

To view the Import/Export Tool settings in the Configuration dialog box, click the **Settings** tab > **System Settings**.

Configuration Dialog Box

The **Configuration** dialog box for the ProPricer Import/Export Tool is for viewing and changing its System Settings.



Defaults

Duplicate Option

Select an option to determine what happens when data being imported already exists ProPricer.

- **Skip**: The import process skips the spreadsheet data.
- **Overwrite**: The import process overwrites the data in ProPricer with the spreadsheet data.
- **Prompt**: A window appears prompting you to select an action.
- **Replace All**: The import process replaces all of the selected data in ProPricer with the spreadsheet data.

Behavior

Export Full Periods

Select this option to always export entire periods from ProPricer. If a proposal has no data within a period, the empty period still appears in the Import/Export Tool.

Import Error Behavior

Select an option to determine how the Import/Export Tool handles errors that may occur during the import process.

- **Ignore**: All errors are ignored.
- **Color Rows**: Errors are indicated with unique colors.
  - Orange: The data in the cell is incompatible with ProPricer.
  - Yellow: The cell is empty and requires a value.
  - Purple: The row (or record) already exists in ProPricer.
- **Clean Success**: When a row of data in a sheet is successfully imported to ProPricer, the row is deleted from the sheet.
- **Cancel All**: At the first occurrence of an error, the entire import process is canceled.

Error Settings

Log Path

Enter a save location for the automatically generated process log.

Log Level

Select the level of detail to include in the process log.

- **Overview**: Show which process was run, when it started and ended, and what it did. If an error occurred, a reason is given.
- **Process Time**: Show the length of time of each process that was run.
- **Detailed (Debug)**: Show detailed information required by ProPricer Technical Support to troubleshoot errors and bugs in the Import/Export Tool.

Import/Export Tool: Validate Data

In the Import/Export Tool, click the **Import/Export** tab > **Validate** to check for errors in the data before attempting to import it to ProPricer. Cells with errors are highlighted with one of the following colors:

- Orange: The data in the cell is incompatible with ProPricer.
- Yellow: The cell is empty and requires a value.
- Purple: The record (or row) already exists in ProPricer.

To successfully import data to ProPricer, all required columns must contain data. Required columns are indicated with purple headers.

When the top-right corner of a column header is red, you can hover over it for a quick tip about the column and its data. These tips help you enter valid data that is acceptable in ProPricer.

Fiscal Year

A fiscal year is a company's business year, which may or may not coincide with the calendar year. The table below shows all possible combinations of months for fiscal year 2009 or 2010, depending on the month that determines the fiscal year numbering (see the explanations below).

Calendar Year 2009												Calendar Year 2010											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1	2	3	4	5	6	7	8	9	10	11	12												
	1	2	3	4	5	6	7	8	9	10	11	12											
		1	2	3	4	5	6	7	8	9	10	11	12										
			1	2	3	4	5	6	7	8	9	10	11	12									
				1	2	3	4	5	6	7	8	9	10	11	12								
					1	2	3	4	5	6	7	8	9	10	11	12							
						1	2	3	4	5	6	7	8	9	10	11	12						
							1	2	3	4	5	6	7	8	9	10	11	12					
								1	2	3	4	5	6	7	8	9	10	11	12				
									1	2	3	4	5	6	7	8	9	10	11	12			
										1	2	3	4	5	6	7	8	9	10	11	12		
											1	2	3	4	5	6	7	8	9	10	11	12	

When the fiscal year starts in January, the fiscal year and the calendar year coincide completely (see the yellow row in the table). When it begins in any other month, it coincides only partially with the calendar year. The fiscal year extends into the next calendar year (see the blue rows in the table).

You set the default fiscal year period on the **Calendar** page of **System Defaults**. This period will appear on the **Calendar** page in the **Proposal** folder of **Proposal Properties** of every new proposal you create. If the fiscal year period does not coincide with the calendar year, you can also specify how it will be designated on reports. There are two options available:

- **Fiscal Year Is Determined By First Month** - The fiscal year depends on the starting month of the period. For example, from October 1, 2009 to September 30, 2010, the fiscal year would be 2009.

- **Fiscal Year Is Determined by Last Month** - The fiscal year depends on the ending month of the period. For example, from October 1, 2009 to September 30, 2010, the fiscal year would be 2010.

If your proposal's timescale is set to *Annual (Fiscal)* on the **General** page of **Proposal Properties**, then ProPricer will use your fiscal year settings from the **Calendar** page to price your inputs. With any other timescale, calendar year direct rates are applied to resources, regardless of the proposal's fiscal year settings.

Set the Fiscal Year Period

A fiscal year is a company's business year.

You can set the fiscal year at the system level and at the proposal level. The fiscal year entered at the system level will be the default for every new proposal you create.

Set the System Default

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **Calendar** page.
3. Enter the period you want to use in the **Fiscal Year Period** field.
4. If you entered a fiscal year that differs from the calendar year, select whether you want to base its date on the first or last month of the fiscal year.
5. Click **OK**.

ProPricer will assign the default fiscal year to every new proposal you create. However, you can change it.

Set the Fiscal Year Period for a Specific Proposal

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Calendar** page in the **Proposal** folder.
3. Enter the period you want to use in the **Fiscal Year Period** field.
4. If you entered a fiscal year that differs from the calendar year, select whether you want to base its date on the first or last month of the fiscal year.

5. Click **OK**.

The Effect of Fiscal Year on Indirect Costs

Depending on the timescale of the Indirect Rate Table of a proposal, the fiscal year may affect the calculation of indirect expenses and thus the total cost of the proposal. Annual indirect rates are applied for the months of the fiscal year, while quarterly and monthly rates are applied for the months of the calendar year.

Example

The following comparison of two proposals (P1 and P2) will illustrate how the fiscal year can affect pricing. Both proposals have the same period: October 2009 to March 2010, and use the same Direct Rate Table and Indirect Rate Table. The indirect rates for all the indirect elements are the same for 2009, 2010, and 2011, except for the indirect element *Overhead*. The *Overhead* rate is 1.0 for 2009 and 2010, and it is 2.0 for 2011.

The fiscal year of both proposals is determined by the month in which the fiscal year ends. The Fiscal Year Period for P1 is September through August, and for P2, February through January.

Each proposal has one task that uses one resource, and the start/end dates of the task and resource coincide with the proposal period. We spread 100 hours for the resource in each proposal. The Default Rate entered for the resource in the Direct Rate Table is 10.00.

We ran the Annual Cost Breakdown Report for P1 and P2, selecting the corresponding Fiscal Year Period for each report.

Proposal: P1, Ver.0
RFQ Ref.:
Proposal Manager:
Rate Tables: FY DIRECT | FY BURDEN

Period of Performance: 10/2009 - 03/2010
Fiscal Year = (Sep thru Aug)
TASK ID: TASK 1

Resource	2010	Totals
Labor		
ENG01	100	100
Rate	10.00	10.00
Total Labor Hours	100	100
Total Labor Cost	1,000	1,000
Escalation	1,000	1,000
Direct $ + Escal	2,000	2,000
Overhead	2,000	2,000
Subtotal	4,000	4,000
General & Admin	4,000	4,000
Total Cost	8,000	8,000
Profit/Fee	8,000	8,000
Selling Price	16,000	16,000
CAS 414	6,000	6,000
Grand Total Price	22,000	22,000

Proposal: P2, Ver.0
RFQ Ref.:
Proposal Manager:
Rate Tables: FY DIRECT | FY BURDEN

Period of Performance: 10/2009 - 03/2010
Fiscal Year = (Feb thru Jan)
TASK ID: TASK 1

Resource	2010	2011	Totals
Labor			
ENG01	67	33	100
Rate	10.00	10.00	10.00
Total Labor Hours	67	33	100
Total Labor Cost	670	330	1,000
Escalation	670	330	1,000
Direct $ + Escal	1,340	660	2,000
Overhead	1,340	1,320	2,660
Subtotal	2,680	1,980	4,660
General & Admin	2,680	1,980	4,660
Total Cost	5,360	3,960	9,320
Profit/Fee	5,360	3,960	9,320
Selling Price	10,720	7,920	18,640
CAS 414	4,020	2,640	6,660
Grand Total Price	14,740	10,560	25,300

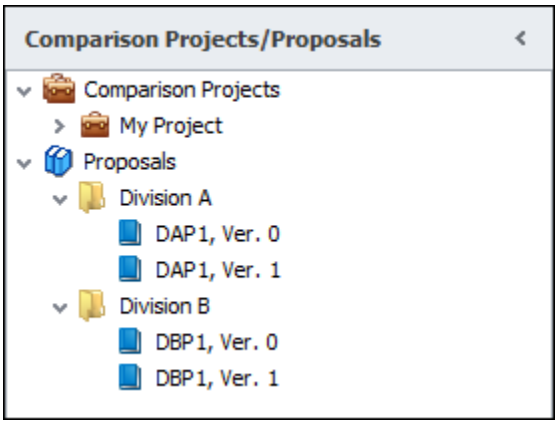
Here we can clearly see the effect of the fiscal year on pricing.

- Since the fiscal year of P1 starts in September, the proposal period falls within a single fiscal year: 2010. The *Overhead* rate of 1.0 is applied to the direct costs for all months.
- The fiscal year of P2, however, starts in February, so the proposal period falls in two fiscal years: 2010 and 2011. October, November, December, and January fall in fiscal year 2010, and the *Overhead* rate of 1.0 is applied to the direct costs for these months. February and March fall in fiscal year 2011, so the *Overhead* rate of 2.0 is applied to the direct costs for these months, which leads to a higher *Grand Total Price* for P2.

If the timescale of the Indirect Rate Table had been quarterly, or monthly, there would not have been any difference in the Grand Total Price. This is because the monthly indirect rate would have been applied, regardless of the fiscal year in which the respective month fell.

Folders

Create folders to organize proposals, tables, and products. To change where an item is stored, drag it to the desired folder and drop it.



Right-click a folder to assign access tags, set folder rights, and perform several other actions.

In the Navigation Pane, use the incremental search function to find a specific item. Place the cursor anywhere in the section, and start typing the name of the item you want to find. ProPricer will select the item that matches the text typed.

Create a Folder

1. Right-click the **Proposals** folder or a specific table folder and then click **New Folder** on the shortcut menu. ProPricer will insert a new folder in the folder selected.

2. Type a name for the folder, and then press **Enter**.

Delete a Folder

1. Do one of the following:
    - Select the folder and press **Delete.**
    - Right-click the folder and then click **Delete** on the shortcut menu.
2. Click **Yes** to confirm the deletion.

ProPricer will delete the folder and all of its contents.

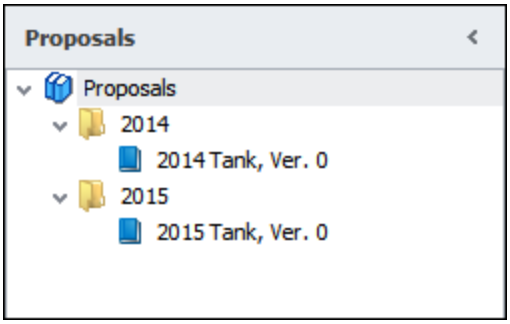
Folder Rights

Folder Rights allow you to grant or revoke access to the user-defined folders in the Navigation Pane to each user in the system; for example, a user will not be able to open a Direct Rate Table within a user-defined folder if he does not have access to the folder. Folder Rights are only applicable to user-defined folders. Folder Rights include:

- Access - the user can open the folder.
- Edit - the user can rename the folder.
- Add - the user can add new user-defined folders.
- Delete - the user can delete user-defined folders.

The default settings that appear in the **Folder Rights** dialog box are defined on the **Folders** page in the **System** folder of **Role Information**. The **Folder Rights** page in the same folder defines who can modify the default settings that appear in the **Folder Rights** dialog box.

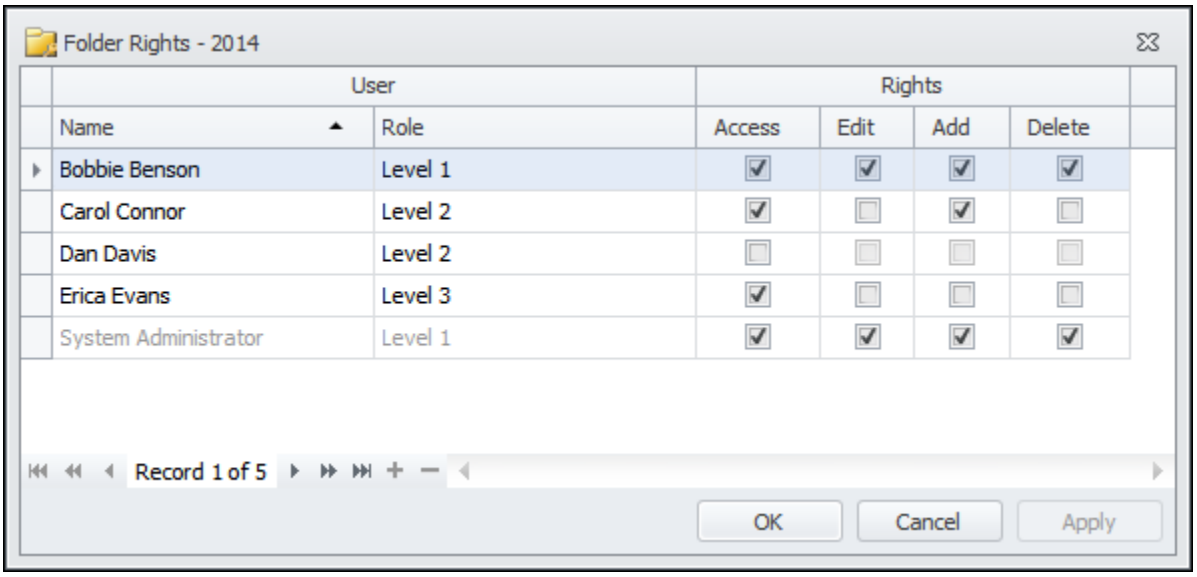
In the following example, the Proposals section of the Navigation Pane has two folders:



When we right-click the 2014 folder and click **Folder Rights**, the **Folder Rights** dialog box will open, showing the users, their assigned roles, and the rights. We selected and cleared the checkboxes so that:

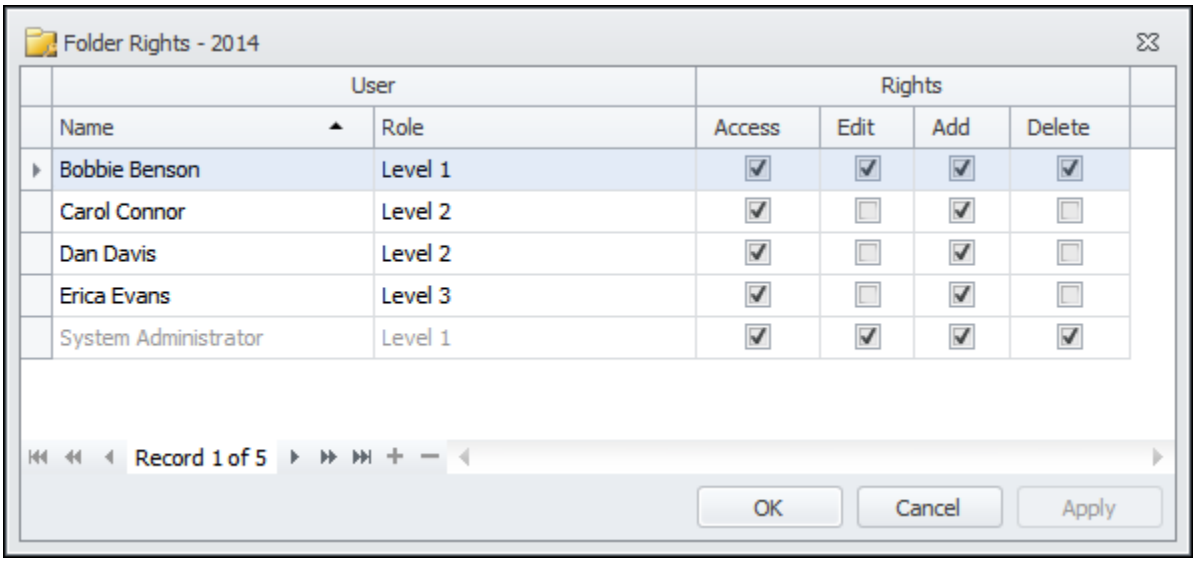
- Bobbie Benson has Access, Edit, Add, and Delete rights.
- Carol Connor can open the 2014 folder and add other folders.
- Dan Davis cannot open the 2014 folder.

- Erica Evans can only open the 2014 folder.



Folder Rights Dialog Box

This dialog box appears when you right-click a user-defined folder and then click **Folder Rights**. It shows a list of the users, their assigned role, and the rights.



Name

Shows the name of the user.

Role

Shows the role assigned to the user.

Rights

Select the checkbox of the right you want to grant.

Access

If selected, the user can open the folder.

Edit

If selected, the user can rename the folder.

Add

If selected, the user can add folders.

Delete

If selected, the user can delete folders.

Grant/Revoke Folder Rights

Folder Rights determine if a user can access a user-defined folder, edit the name of the folder, and add/delete folders in the Navigation Pane. They do not regulate top-level folders. The folder rights entered on the **Folders** page in the **System** folder of **Role Information** are the default settings that will appear in the **Folder Rights** dialog box when you right-click a user-defined folder.

1. Right-click the user-defined folder.
2. Select the user.
3. Select the checkboxes to grant the following rights:
    - Access - The user can open the folder.
    - Edit - The user can rename the folder.
    - Add - The user can add new folders.
    - Delete - The user can delete folders.
4. Click **OK**.

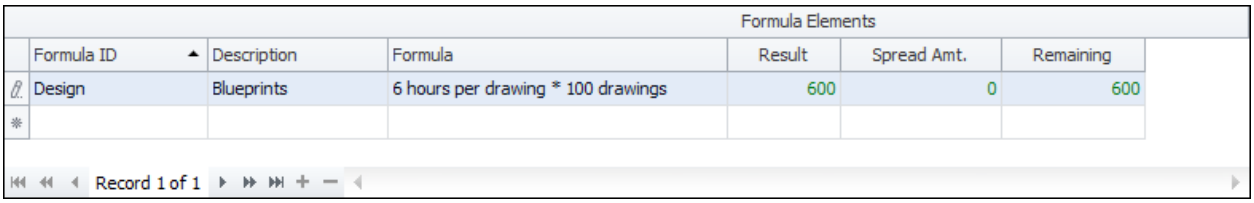
Rename a Folder

1. Right-click the folder and then click **Rename** on the shortcut menu.

2. Enter the new name of the folder, and press **Enter**.

Formulas

The **Formulas** tab of Task View allows you to enter equations to calculate the level of effort required and then spread the resulting hours/units/cost for resources in a task. This is a sample formula we created.


Formula Elements

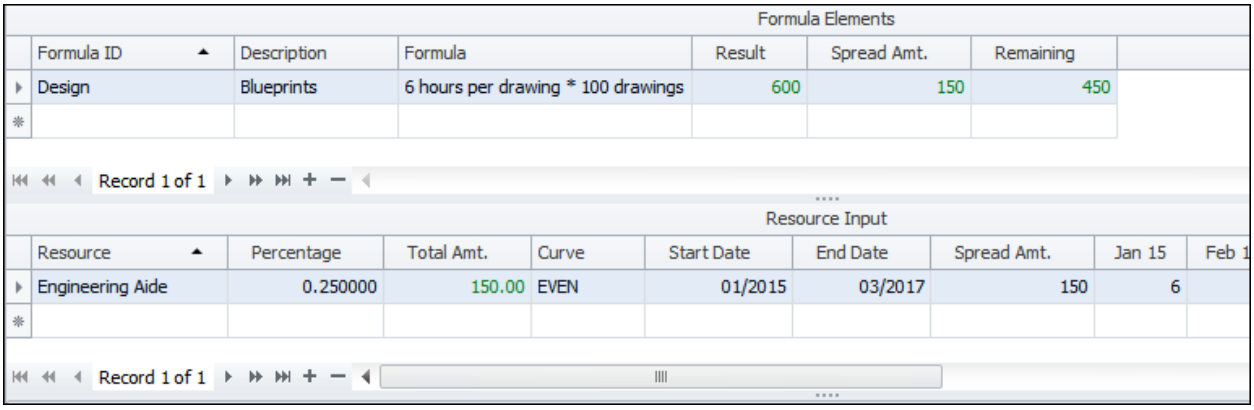
Formula ID	Description	Formula	Result	Spread Amt.	Remaining
Design	Blueprints	6 hours per drawing * 100 drawings	600	0	600

Record 1 of 1

The **Result** column shows the product of our formula *(6 * 100)*. The **Spread Amount** column shows zero because we have not spread any hours/units/cost for a resource yet. The **Remaining** column shows the difference between the result and spread amount.

You can use different methods to spread the hours/units/cost for a resource.

In the following example, we entered a value of *.25* in the **Percentage** column for resource *Engineering Aide*. ProPricer calculated the value in the **Total Amount** column in the **Resource Input** grid, as well as the values entered in the **Spread Amount** and **Remaining** columns in the **Formula Elements** grid.


Formula Elements

Formula ID	Description	Formula	Result	Spread Amt.	Remaining
Design	Blueprints	6 hours per drawing * 100 drawings	600	150	450

Record 1 of 1

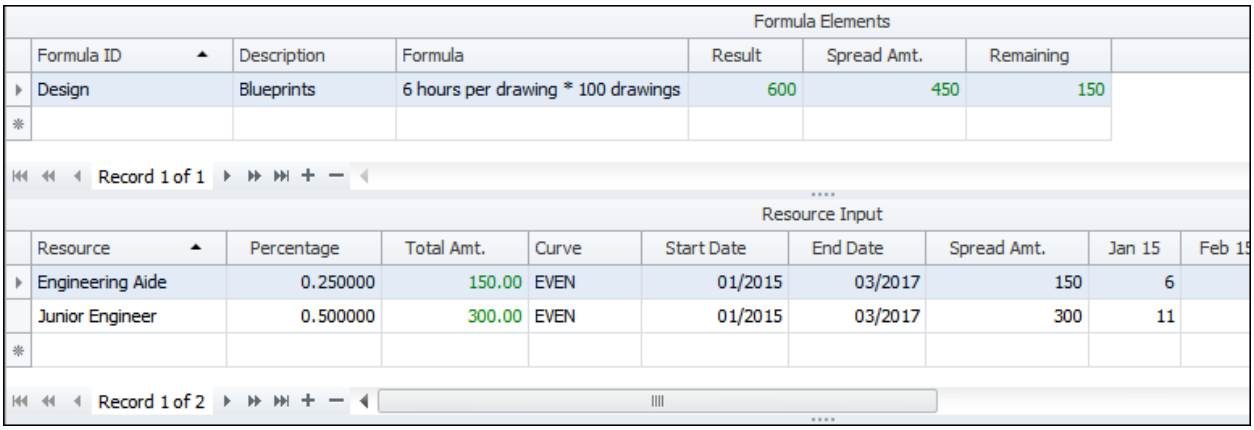
Resource Input

Resource	Percentage	Total Amt.	Curve	Start Date	End Date	Spread Amt.	Jan 15	Feb 1
Engineering Aide	0.250000	150.00	EVEN	01/2015	03/2017	150	6	

Record 1 of 1

In the following example, we entered a value of *300* in the **Spread Amount** column for resource *Junior Engineer*. ProPricer entered the corresponding value in the **Percentage**

column and entered *300* in the **Total Amount** column in the **Resource Input** grid. It also updated the values in the **Spread Amount** and **Remaining** columns in the **Formula Elements** grid.



Formula Elements

Formula ID	Description	Formula	Result	Spread Amt.	Remaining
Design	Blueprints	6 hours per drawing * 100 drawings	600	450	150

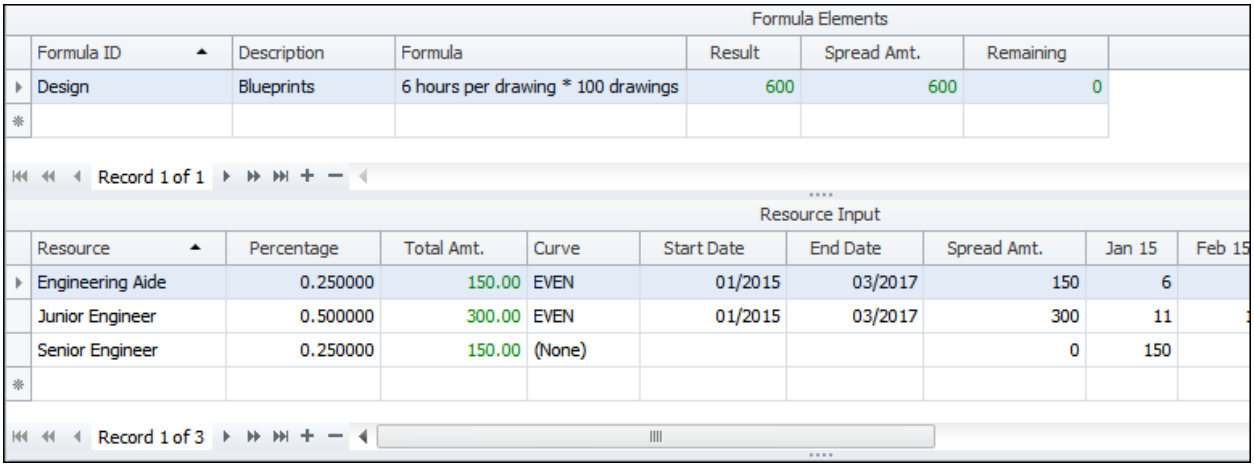
Record 1 of 1

Resource Input

Resource	Percentage	Total Amt.	Curve	Start Date	End Date	Spread Amt.	Jan 15	Feb 15
Engineering Aide	0.250000	150.00	EVEN	01/2015	03/2017	150	6	
Junior Engineer	0.500000	300.00	EVEN	01/2015	03/2017	300	11	

Record 1 of 2

In the following example, we entered a discrete value of *150* in January 2015 for resource *Senior Engineer*. ProPricer entered the corresponding value in the **Percentage** column and entered *150* in the **Total Amount** column in the **Resource Input** grid. It also updated the values in the **Spread Amount** and **Remaining** columns in the **Formula Elements** grid.



Formula Elements

Formula ID	Description	Formula	Result	Spread Amt.	Remaining
Design	Blueprints	6 hours per drawing * 100 drawings	600	600	0

Record 1 of 1

Resource Input

Resource	Percentage	Total Amt.	Curve	Start Date	End Date	Spread Amt.	Jan 15	Feb 15
Engineering Aide	0.250000	150.00	EVEN	01/2015	03/2017	150	6	
Junior Engineer	0.500000	300.00	EVEN	01/2015	03/2017	300	11	
Senior Engineer	0.250000	150.00	(None)			0	150	

Record 1 of 3

Depending on the **Formula Difference Validation** option selected in the Proposal Properties, you may or may not be able to leave the **Formulas** tab if there is a difference between the result and spread amount.

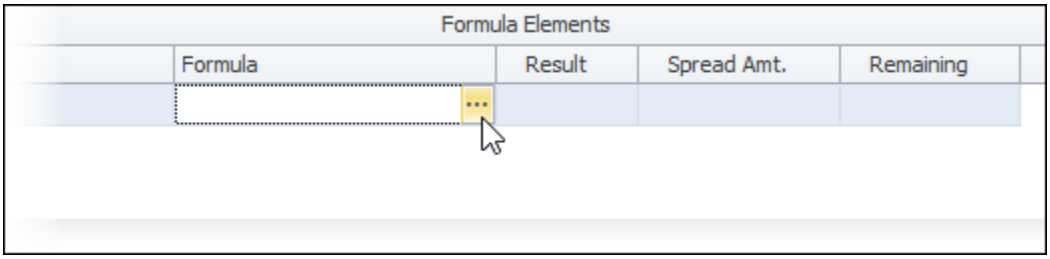
Delete a Formula

When a formula is deleted, the resources associated with the formula are also deleted from the task.

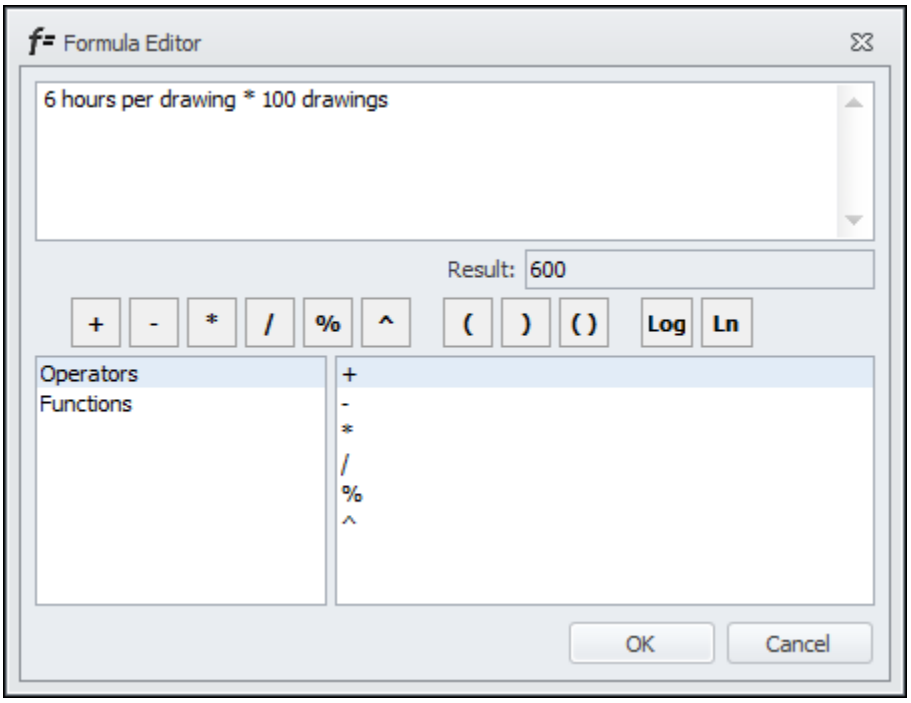
1. Select the task, and then click the **Formulas** tab.
2. Right-click the formula you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when prompted.

Formula Editor

To open the editor while working in Formula View or the **Formula** tab of Task View, click ... in the **Formula** column.



You can use the Formula Editor to create formulas. It contains operator and function buttons, and a box that shows the result.



Operator Buttons

+ addition

- subtraction

***** multiplication

/ division

% percent

^ exponent (for example 10^2 is 10²)

(open parenthesis

) closed parenthesis

( ) open and closed parentheses

Function Buttons

Log - Base 10 logarithm

Ln - Natural base logarithm

Result

Shows the result of the formula.

OK

Click this button to save the formula and close the dialog box.

Set the Formula Difference Validation

Formula Difference Validation determines if you can save a formula when there is a difference between the result and spread amount.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Proposal Input** page.
3. Select a **Formula Difference Validation** option:
   - **None** - ProPricer will ignore the difference and allow you to save the formula.
   - **Prohibit** - You will not be able to save the formula until there is no difference between the result and spread amount.
   - **Prompt** - ProPricer will inform you of the difference and ask if you want to take care of it before saving the formula.
4. Click **OK**.

Use a Formula to Add Resources to a Task

1. Select the task, and then click the **Formulas** tab.
2. In the **Formula Elements** grid:
    2.1. Enter name and description for the formula.
    2.2. Type the formula.
3. In the **Resource Input** grid:
    3.1. Enter the name of a resource.
    3.2. Enter a percentage.
    3.3. Enter a curve.
    3.4. Enter start and end dates if necessary.
    3.5. Enter any justifying data.
    3.6. Move to the next row and enter data for another resource.
4. Press **Ctrl**+**S** to save your work.

Indirect Costs

In ProPricer, Indirect Rate Tables contain indirect pools, and each indirect pool contains indirect rates for specific expenses.

Indirect rates are percentages applied to the direct costs based on the pricing formula defined in an Algorithm. For example, an indirect rate of 0.01 (1%) applied to a direct expense of $100 leads to an additional expense of $1. Indirect rates can vary at periodic intervals that may or may not match the periods associated with the direct rates.

Indirect pools correspond to types of activities or resources. They carry the indirect rates. When a resource is associated with an indirect pool, the resource will generate indirect costs in addition to its direct cost. Indirect pools can be assigned to resources in a Direct Rate Table, Rate Card, or in a task. An indirect pool can also be assigned to a task and applied to all its resources.

Indirect Rate Tables link the Algorithm to the resources. All indirect pools in a table share the same indirect elements that are preset in the Algorithm. Every Indirect Rate Table uses one Algorithm.

The Indirect Rate Table also defines the timescale of the indirect rates, which can be annual, quarterly, and monthly. In a monthly Indirect Rate Table, you define different indirect rates for every month in the year. In an annual table, you define indirect rates for the entire year.

The timescale of an Indirect Rate Table influences the calculation of indirect expenses, depending on the fiscal year of the respective proposal. Annual Indirect Rate Tables have fiscal indirect rates, and quarterly and monthly Indirect Rate Tables have calendar indirect rates. Consider two Indirect Rate Tables: *A* and *B*. Table *A* has an annual timescale, and Table *B* has a quarterly timescale. For simplicity, both tables have a single indirect pool with a single indirect element.

Table A

Period	2020	2021
Rate	1.50	2.00

Table B

Period	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021
Rate	1.50	1.50	1.50	1.50	2.00	2.00	2.00	2.00

The rates in the two tables are the same. The only difference between the tables is their timescale.

Suppose you have a proposal that has $100 direct cost for February 2021. The fiscal year of the proposal starts in March, and the fiscal year is determined by the first month. In this instance, February 2021 falls in fiscal year 2020.

If you attach Table *A* to the proposal, whose timescale is annual, ProPricer applies the rate defined for 2020, so the indirect cost is $150, and the total cost is $250.

If you attach Table *B* to the proposal, whose timescale is quarterly, there is no change in the total cost. The indirect rate for the last quarter of 2020 is applied, so the indirect cost is $150, and the total cost is $250.

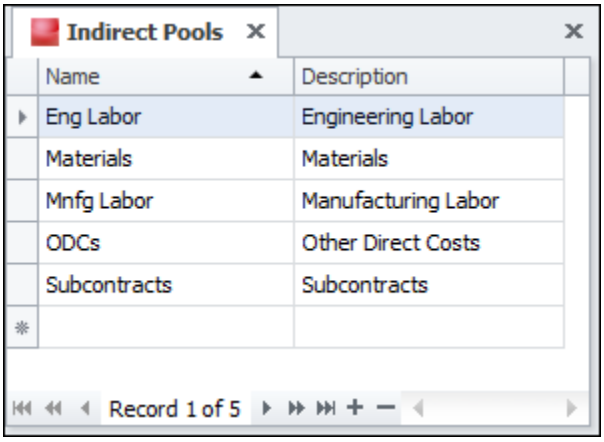
If we change how the fiscal year is determined to the last month, February 2021 now falls in fiscal year 2021. In this instance, the rate for the last quarter of 2021 is applied, so the indirect cost is $200, and the total cost is $300. The same would be true for the annual table.

Indirect Pools

The Indirect Pool Library is where you create and store indirect pools. Indirect pools allow you to group the indirect costs of a certain activity or resource. You use the indirect pools listed here in Indirect Rate Tables. Once an indirect pool is added to an Indirect Rate Table, you can then assign rates to the indirect elements in each indirect pool.

An indirect pool is empty while in the library, but it will contain indirect elements once it is added to an Indirect Rate Table. Since different Indirect Rate Tables can use different Algorithms, the same indirect pool could contain different indirect elements if it is added to multiple Indirect Rate Tables that use different Algorithms.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the indirect pool.

Description

Enter a description for the indirect pool.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Indirect Pool Library

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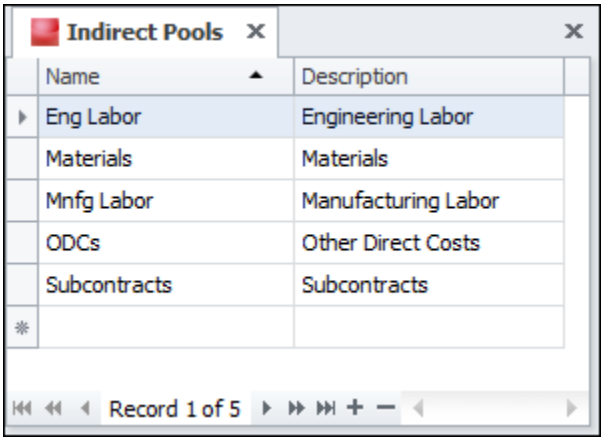


Name

Enter a name for the indirect pool.

Description

Enter a description for the indirect pool.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Copy an Indirect Pool within the Library

1. Right-click the indirect pool you want to copy, and then click **Copy** on the shortcut menu.

2. Enter a name for the new indirect pool, and then click **OK**.

Create an Indirect Pool

You can create as many indirect pools as you need in the Indirect Pool Library, which you can then use in your Indirect Rate Tables.

1. In the Navigation Pane, click the **Libraries** button, and then double-click **Indirect Pools**.
2. Enter a unique name for the indirect pool in the **Name** column.
3. Enter a short description for the indirect pool in the **Description** column.
4. Press **Ctrl**+**S** or move to another row to save your work.

Delete an Indirect Pool from the Library

You can delete any indirect pool you no longer need from the Indirect Pool Library.

1. Click the **Libraries** button and then double-click **Indirect Pools**.
2. Right-click the indirect pool you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

*Note: You can only delete indirect pools that are not used anywhere in the system. If the indirect pool is used, ProPricer will display the **Item Usage Info** box instead.*

Indirect Pools - Priorities

Applying indirect rates to direct cost is essential to the pricing process. Every resource needs to be associated with an indirect pool to ensure successful pricing.

ProPricer follows the criteria below to find the appropriate indirect pool. The criteria are arranged in order of priority. The first criteria to be met indicates the indirect pool ProPricer will use. The rates in the indirect pool will then be applied to the direct cost of the resource.

- **Resource**
  The first place ProPricer checks for an indirect pool is at the resource level. If there is an indirect pool assigned to the resource on the **Resources**, **Activities**, **Travel**, **Material**, **CERs**, **Resource Sets**, or **Formulas** tab, ProPricer will use this indirect pool during pricing. In Services proposals, ProPricer will use the indirect pool assigned at the resource level in the Rate Card.
- **Task**
  If no indirect pool has been assigned at the resource level, ProPricer will use the indirect pool specified for a task to price the resources in that task.
- **Direct Rate Table**
  If there is no indirect pool assigned at the task level, ProPricer will use the indirect pool in the Direct Rate Table.

If none of the criteria are met, ProPricer will not apply indirect rates to the resource during pricing.

Override the Default Indirect Pool of a Resource

If you want to assign a different indirect pool to a resource but do not want to modify the Direct Rate Table, you can assign the new indirect pool at the resource level.

1. Locate the resource in a proposal. In a Standard proposal, open Task View or Resource View. In a Services proposal, open the Rate Card.
2. In the **Indirect Pool** column, enter the indirect pool you want to use. The name of the overriding indirect pool will appear in blue text.
3. Press **Ctrl**+**S** or move to another row to save your work.

Indirect Rates

An indirect rate is the amount of change that a cost undergoes when it is influenced by some indirect factor, such as overhead, escalation, etc. You define indirect rates in an Indirect Rate Table, which contains collections of categories called indirect pools. Each indirect pool has a number of indirect elements for which you define rates.

The indirect elements are preset in the Algorithm, which is the backbone of ProPricer. The Algorithm defines the indirect elements to be applied to the direct expenses, as well as the subtotals and totals to be shown on reports. It also defines the logical and arithmetical rules and expressions that specify how indirect expenses are calculated and added to direct expenses.

You associate an Indirect Rate Table with a Direct Rate Table that is linked to a proposal. Then you can assign indirect pools to the resources in the Direct Rate Table. When you assign a resource to a proposal, this ensures that the resource is added with its complete direct and indirect rate information.

Indirect Rate Tables

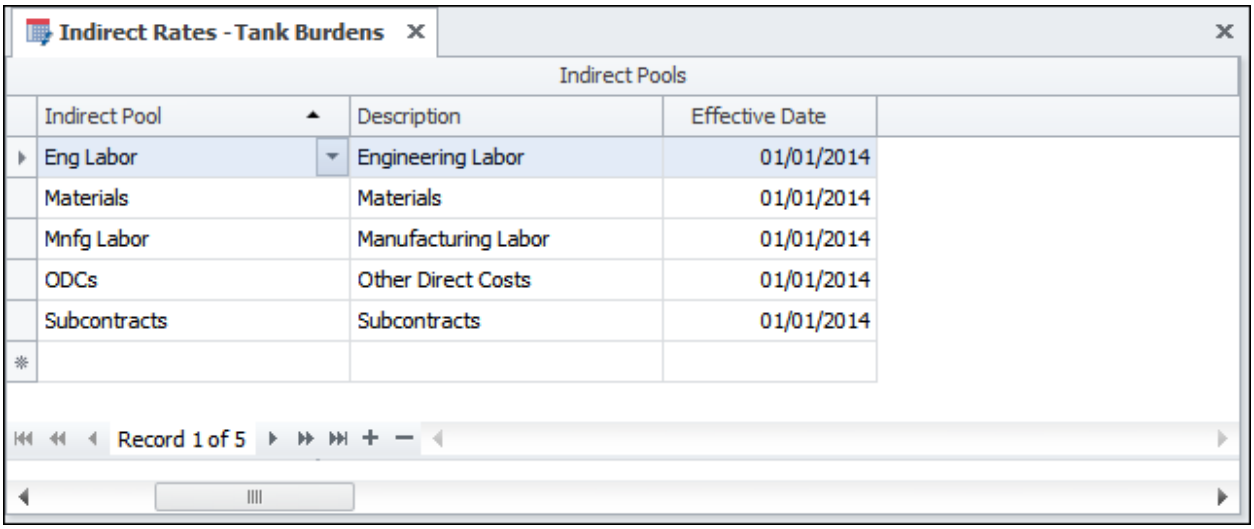
You need to set up pools of indirect rates in an Indirect Rate Table before you can price a proposal for additional costs such as overhead, G&A, profit, healthcare benefits, taxes, etc.

The table is divided into three grids: Indirect Pools, Rates, and Caps.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Indirect Pools

This grid shows all indirect pools currently assigned to the table. It is also where you add new pools and remove unnecessary ones.



Indirect Pool

Enter the name of the indirect pool. You can replace an indirect pool in the table with another one from the library if the first pool is not used in any task or rate

table. If you enter an indirect pool that does not exist in the Indirect Pool Library, ProPricer will ask if you want to add it to the library.

Description

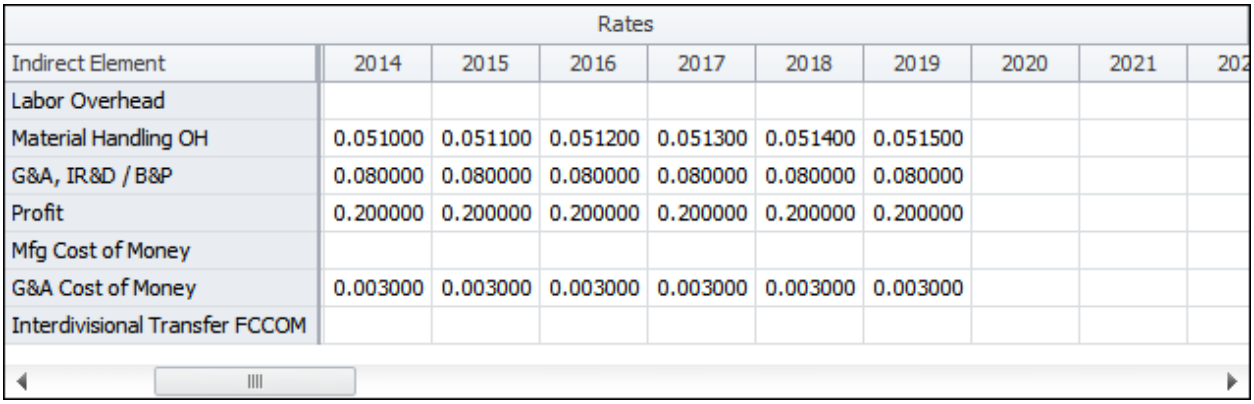
This column cannot be edited. It shows the description entered for the indirect pool in the Indirect Pool Library.

Effective Date

Enter the date the rates will take effect. This is for information only and does not affect how ProPricer applies the rates.

Rates

This grid displays the indirect rates by indirect element and period. The rates you see correspond to the indirect pool selected in the **Indirect Pools** grid.



Rates

Indirect Element	2014	2015	2016	2017	2018	2019	2020	2021	202
Labor Overhead									
Material Handling OH	0.051000	0.051100	0.051200	0.051300	0.051400	0.051500			
G&A, IR&D / B&P	0.080000	0.080000	0.080000	0.080000	0.080000	0.080000			
Profit	0.200000	0.200000	0.200000	0.200000	0.200000	0.200000			
Mfg Cost of Money									
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000			
Interdivisional Transfer FCCOM									

Indirect Element

These fields cannot be edited. They show the names of the indirect elements from the Algorithm assigned to the table.

Periods

The periods can be years, quarters, or months, depending on the timescale of the Indirect Rate Table. The grid shows all years in the system period. However, you only need to enter rates for the years you require.

Enter the rates in the fields. ProPricer shows indirect rates with six digits after the decimal point. If you enter rates with more than six digits after the decimal point, ProPricer will round it to the sixth decimal place when you leave the field.

To speed up your work, you can copy the rates entered for one period into the next period to the right. To do this, right-click the column of the period you want to copy, and then click **Copy/Fill** on the shortcut menu.

Caps

In this grid, you limit the maximum annual amount that can be calculated for specific indirect elements. Caps are based on the fiscal year, and they apply to each resource or labor category equivalent head whose indirect expenses include the capped elements. Once an element reaches its cap for a resource, its indirect rate is no longer applied to that resource for the remainder of the year.

Caps

Indirect Element	2014	2015	2016	2017	2018	2019	2020
Health and Welfare	4,500.00	4,500.00	4,500.00	4,500.00	4,900.00	4,900.00	
FICA	6,000.00	6,000.00	6,000.00	6,000.00	6,000.00	6,000.00	
FUTA							

Indirect Element

These fields cannot be edited. They show the names of the *Input (Capped)* type indirect elements in the Algorithm assigned to the table.

Periods

The periods displayed are always years, even if the Indirect Rate Table timescale is monthly or quarterly. This is because the caps only limit the indirect elements at the annual level.

Assign an Indirect Rate Table to a Proposal

To ensure that the indirect expenses of the resources used in your proposal are calculated properly, you need to assign an Indirect Rate Table to the Direct Rate Table. Then, you need to assign the Direct Rate Table to the proposal.

Assign an Indirect Rate Table to a Direct Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Expand the **Direct Rates** folder.
3. Right-click the appropriate Direct Rate Table.
4. Click **Properties** on the shortcut menu.
5. In the **Indirect Rate Table** field, enter the name of the Indirect Rate Table.
6. Click **OK**.

Assign an Indirect Rate Table to a Proposal

1. Open the properties of your proposal.
2. Click the **Pricing** page in the **Proposal** folder.
3. In the **Direct Rate Table** field, enter the name of the Direct Rate Table you want to use.
4. Click **OK**.

Copy an Indirect Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Indirect Rates** folder.
    - Double-click the **Indirect Rates** folder to open the list of Indirect Rate Tables.
3. Right-click the Indirect Rate Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy. Leave this field blank to store the copy in the root folder.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Copy Indirect Rates in an Indirect Rate Table

Once you have entered the rates for an indirect pool, you can copy them to another indirect pool in the table.

1. Right-click the indirect pool whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the indirect pool to which you want to copy the rates.
3. Click **OK**.

ProPricer will check to see if rates have been entered for the target indirect pool, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

*Note: If the target indirect pool does not exist in the Indirect Pool Library, ProPricer will offer you the option to add it to the library. Click **Yes** when prompted to add it to the library. ProPricer will create the indirect pool in the library and then copy the rates for it in the table. The description of the new indirect pool will be the same as that of the source indirect pool.*

Create an Indirect Rate Table

To be able to accumulate indirect expenses over the direct costs of resource usage, you must define indirect rates for all types of activities and resources used. You define these rates in an Indirect Rate Table, which ProPricer will then apply to the direct costs of the resources.

1. Do one of the following:
   - In the Main Menu, click **New Indirect Rate Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Indirect Rates** folder, then click **New Indirect Rate Table**.
2. Enter a name and description for the new table.
3. Select a timescale for the table.
4. *(Optional)* Select the Asset Table you want to associate with the Indirect Rate Table.
5. If your database contains more than one Algorithm, select the Algorithm you want to use.
6. Click **OK**. The Indirect Rate Table will open in the Workspace.

Define an Indirect Rate for an Indirect Pool

Before you can define indirect rates for the indirect elements in each indirect pool in an Indirect Rate Table, the indirect pools must exist in the Indirect Pool Library. First, you add the indirect pools to the Indirect Rate Table, and then you enter rates for the indirect elements.

1. Click the **Rates/Tables** button. Expand the **Indirect Rates** folder and then double-click the appropriate Indirect Rate Table.
2. In the **Indirect Pool** column, enter the name of the indirect pool. ProPricer will retrieve the description from the library and enter it in the **Description** column.
3. Enter the rates for the indirect elements in the **Rates** grid.
4. Press **Ctrl**+**S** or move to another row to save the indirect pool in the table.

Note: If the indirect pool you want to add does not exist in the Indirect Pool Library, ProPricer will offer you the option to add it to the library.

Delete a Pool from an Indirect Rate Table

1. Click the **Rates/Tables** button. Expand the **Indirect Rates** folder and then double-click the appropriate Indirect Rate Table.

2. Right-click the indirect pool you want to delete, and then click **Delete** on the shortcut menu.

3. Confirm the deletion when asked.

*Note: You can only delete indirect pools that are not used anywhere in the system. If the indirect pool is used, ProPricer will display the **Item Usage Info** box instead.*

Delete an Indirect Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Indirect Rates** folder.
    - Double-click the **Indirect Rates** folder to open the list of Indirect Rate Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete an Indirect Rate Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Fill Years/Quarters/Months with Indirect Rates in a Table

Fill Subsequent Years/Quarters/Months with Existing Rates

1. Right-click the column that has the rates you want to use.
2. Click **Fill** on the shortcut menu.
3. Enter the start year/quarter/month.
4. Use the spin button or type the end year/quarter/month.
5. Click **OK**.

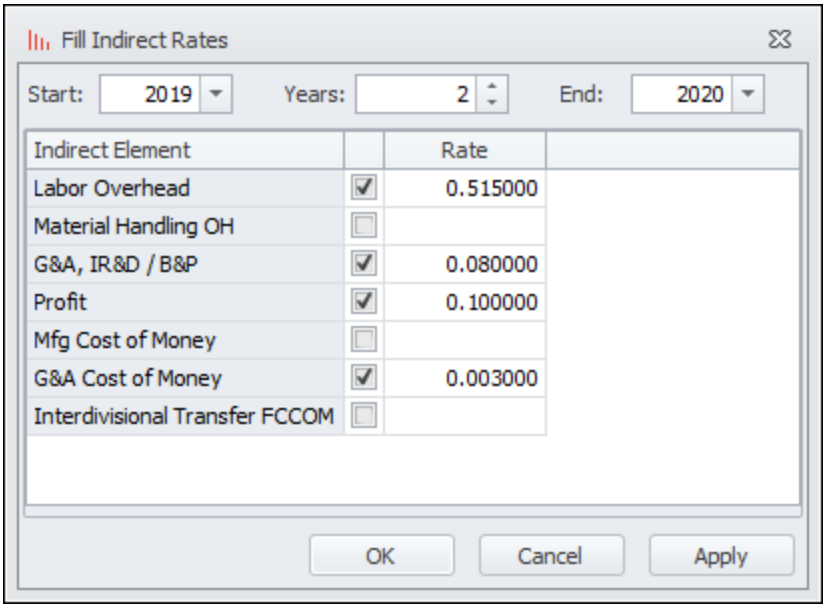
Note: *If the start year/quarter/month is the column you selected to copy and you make changes to any of the rates, you will overwrite the respective rate in the start year/quarter/month.*

Fill Years/Quarters/Months with New Rates

1. Right-click a column that does not have existing rates.
2. Click **Fill** on the shortcut menu.
3. Enter the start year/quarter/month.
4. Use the spin button or type the end year/quarter/month.
5. Enter the rates you want to use.
6. Click **OK**.

Fill Indirect Rates Dialog Box

The **Fill Indirect Rates** dialog box opens when you click **Fill** on the shortcut menu of a year/quarter/month in the **Rates** grid. It allows you to fill subsequent years/quarters/months with existing indirect rates, or fill years/quarters/months with new rates. You can also select the rates you want to include in the Fill process.



Start

This field shows the date of the year/quarter/month you selected for the Fill process. If you enter a subsequent year/quarter/month, ProPricer will begin to fill the rates entered as of that date. If you enter a previous year/quarter/month, ProPricer will overwrite any existing rates as of that date.

Years/Quarters/Months

The timescale of the table determines if you see Years, Quarters, or Months. Type a number or use the spin button to select the number of years/quarters/months you want to include in the Fill process. The default number is **2**, which will fill the start period and the following period with the rates entered. Entering **1** will only fill the start period with the rates entered.

End

If you used the spin button in the **Years/Quarters/Months** field, this field will show the last year/quarter/month that will be included in the Fill process. You can also type a date instead.

Indirect Element

This column shows the names of the indirect elements. The checkboxes to the right of the indirect elements allow you to select the rates you want to include in the Fill process. Select the respective checkboxes of the elements you want to include, or leave them clear to exclude them.

Rate

This column may or may not show rates, depending on the column you selected. If you selected a blank column, enter the rates you want to use. If you selected a column that has rates, you can use the same rates or modify them to fit your needs.

Indirect Rate Table Properties

The **Indirect Rate Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Timescale

Select an annual, quarterly, or monthly timescale. After you enter indirect rates, you will not be able to change the table's timescale. The default timescale for every new table is **Annual**.

Asset Table

(Optional) Enter the name of the Asset Table you want to associate with the Indirect Rate Table.

Algorithm

This box appears if your database contains more than one Algorithm. Select the Algorithm that will provide the indirect elements for the indirect pools in the table, as well as the pricing formula for your proposal.

Note: *You cannot change the Algorithm of an Indirect Rate Table if the new Algorithm is not equivalent to the existing one.*

Note: *The same Algorithm must be assigned to the proposal's Indirect Rate Table and Work Schedule Table.*

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

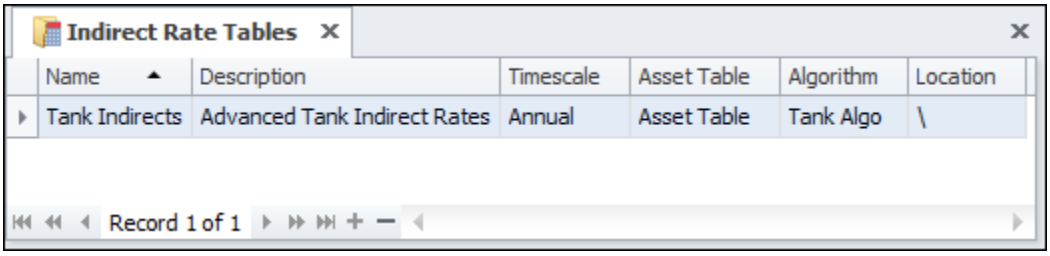
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Indirect Rate Tables List

The Indirect Rate Tables List shows all of your Indirect Rate Tables. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Timescale

This column shows the timescale of the table.

Asset Table

This column shows the Asset Table assigned to the table.

Algorithm

This column shows the Algorithm assigned to the table.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Indirect Rates** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Override the Indirect Rate Table of a Proposal

Indirect Rate Tables are assigned to Direct Rate Tables, so when you assign a Direct Rate Table to a proposal, the Indirect Rate Table is automatically specified as well. You can, however, override the Indirect Rate Table of a proposal.

To override the Indirect Rate Table of the proposal, the Indirect Rate Table must:

- Use the same Algorithm as the Indirect Rate Table assigned to the proposal's Direct Rate Table.
- Contain the same indirect pools as the Indirect Rate Table assigned to the proposal's Direct Rate Table.

The timescales of the Indirect Rate Tables can differ. However, if you entered proposal-specific rates on the **Indirect Rate Overrides** grid, the overriding rates will be deleted.

The name of the Indirect Rate Table will be blue in color, indicating an override. Even if you change the Direct Rate Table of the proposal, the overriding Indirect Rate Table will not change.

Follow these steps to override the table:

1. Do one of the following:

    - Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.

    - Select the appropriate proposal. Click the **Proposal** ribbon and then **Properties** in the **Proposal** group.

2. Click the **Pricing** page in the **Proposal** folder.

3. In the **Indirect Rate Table** field, enter the name of the Indirect Rate Table you want to use.

4. Click **OK**.

Remove the Overriding Indirect Rate Table from a Proposal

1. Do one of the following:

   - Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.

   - Select the appropriate proposal. Click the **Proposal** ribbon and then **Properties** in the **Proposal** group.

2. Click the **Pricing** page in the **Proposal** folder.

3. Delete the table entered in the **Indirect Rate Table** field. ProPricer will reenter the name of the Indirect Rate Table associated with the Direct Rate Table assigned to the proposal.

4. Click **OK**.

Replace an Indirect Pool in a Table

You can replace an indirect pool in an Indirect Rate Table with a different indirect pool from the Indirect Pool Library. The replacement affects only the name and description. Any rates entered for the indirect pool are preserved after the change.

1. Click the **Rates/Tables** button. Expand the **Indirect Rates** folder and then double-click the appropriate Indirect Rate Table.
2. Locate the indirect pool you want to replace in the **Indirect Pools** grid.
3. In the **Indirect Pool** column, enter the name of the replacement indirect pool.
4. Press **Ctrl**+**S** or move to another row to save your work.

*Note: You can only replace indirect pools that are not used anywhere in the system. If the indirect pool is used, ProPricer will display the **Item Usage Info** box instead.*

Set the Average Indirect Rate Decimal Display

The average indirect rate decimal display defines the number of decimal places after the decimal point that will be shown for the average indirect rate on reports.

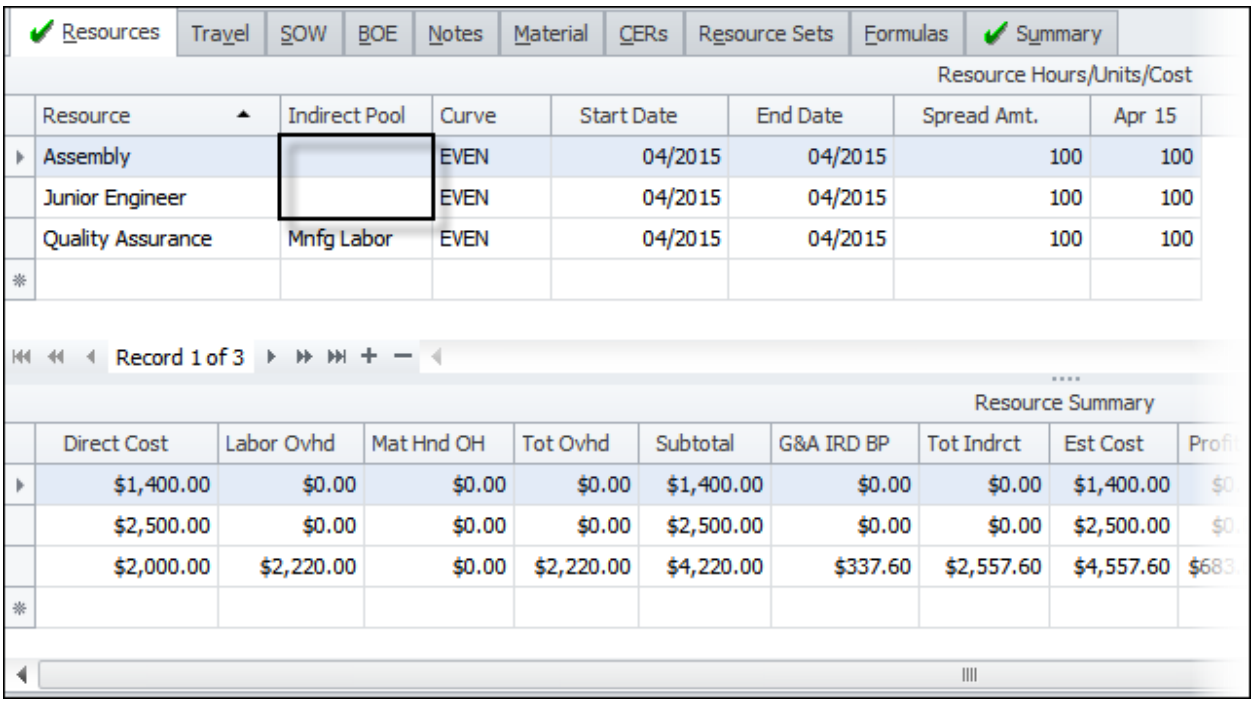
1. Click the **Setup** ribbon, and then **Report Defaults** in the **Preferences** group.
2. Click the **General** page.
3. In the **Average Indirect Rate Decimal Display** field, enter a number between 0 and 6, inclusive.
4. Click **OK**.

Resource-Level Indirect Costs

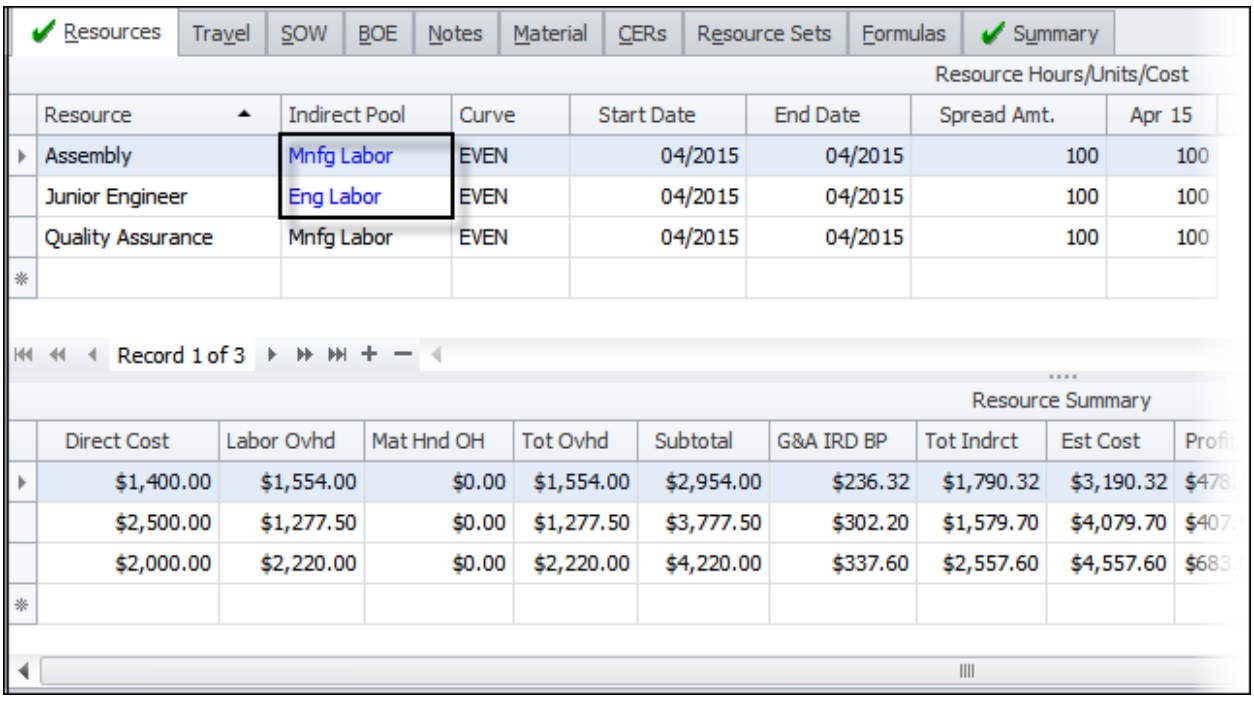
Resource-level indirect costs are generated when an indirect pool is assigned to a specific resource in a task. Normally, you would associate every resource with an indirect pool in a Direct Rate Table. When you assign the resource to a task on the **Resources** tab, for example, the indirect pool from the Direct Rate Table will automatically appear in the **Indirect Pool** column in the **Resource Input** grid. If an indirect pool does not appear, you can assign one to the resource. Probably the most common scenario for entering an indirect pool at the resource level is to override the default indirect pool from the Direct Rate Table.

We created a Direct Rate Table, added resources to it, but did not assign any indirect pools to the resources, except for one: *Quality Assurance* with indirect pool *Mnfg Labor*. We then created a proposal and assigned the Direct Rate Table to it. We created a task, added three resources to it, and spread 100 hours for each resource.

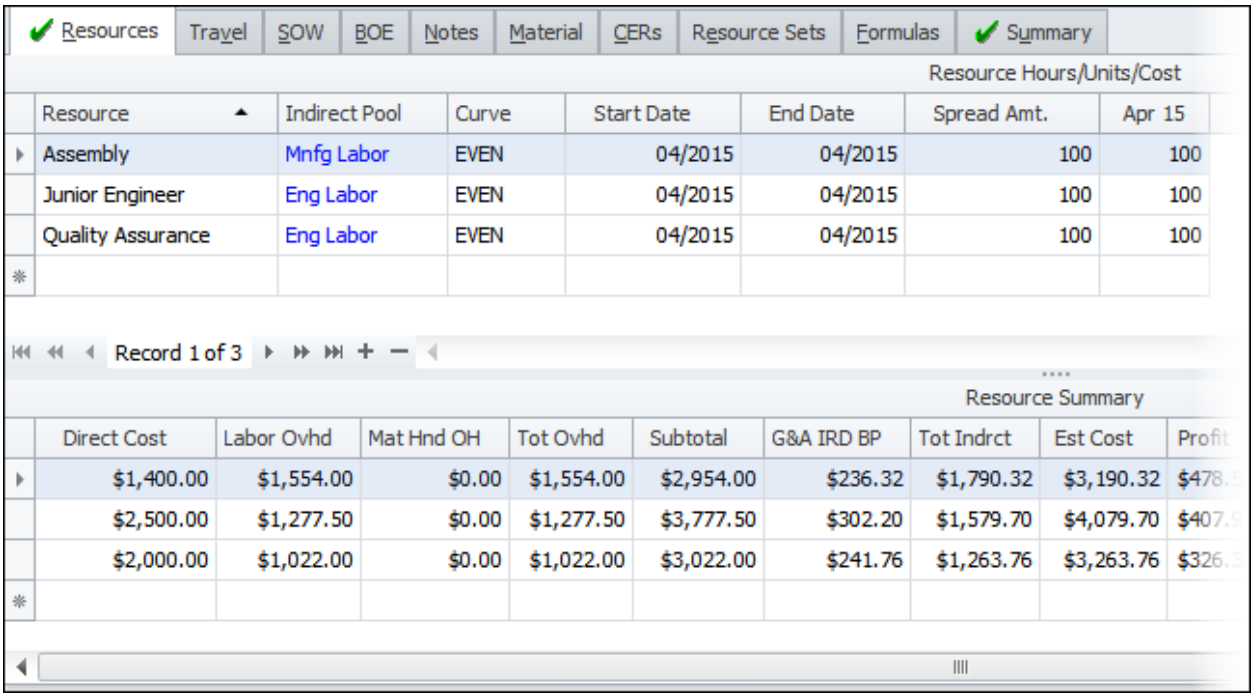
Notice the empty **Indirect Pool** column in the **Resource Input** grid and the *$0.00* in the indirect element columns in the **Resource Summary** grid for the resources *Assembly* and *Junior Engineer*. The **Indirect Pool** column for resource *Quality Assurance*, however, shows *Mnfg Labor*, as well as indirect costs in the **Resource Summary** grid. This is the indirect pool assigned to the resource in the proposal's Direct Rate Table.



We then went back and assigned indirect pools to the resources *Assembly* and *Junior Engineer*. Notice that the names of the indirect pools are blue. This is because we overrode the default indirect pool (none) from the Direct Rate Table.



The same would be true if we were to change the indirect pool of resource *Quality Assurance*. Again we would be overriding the default indirect pool *Mnfg Labor* from the Direct Rate Table.

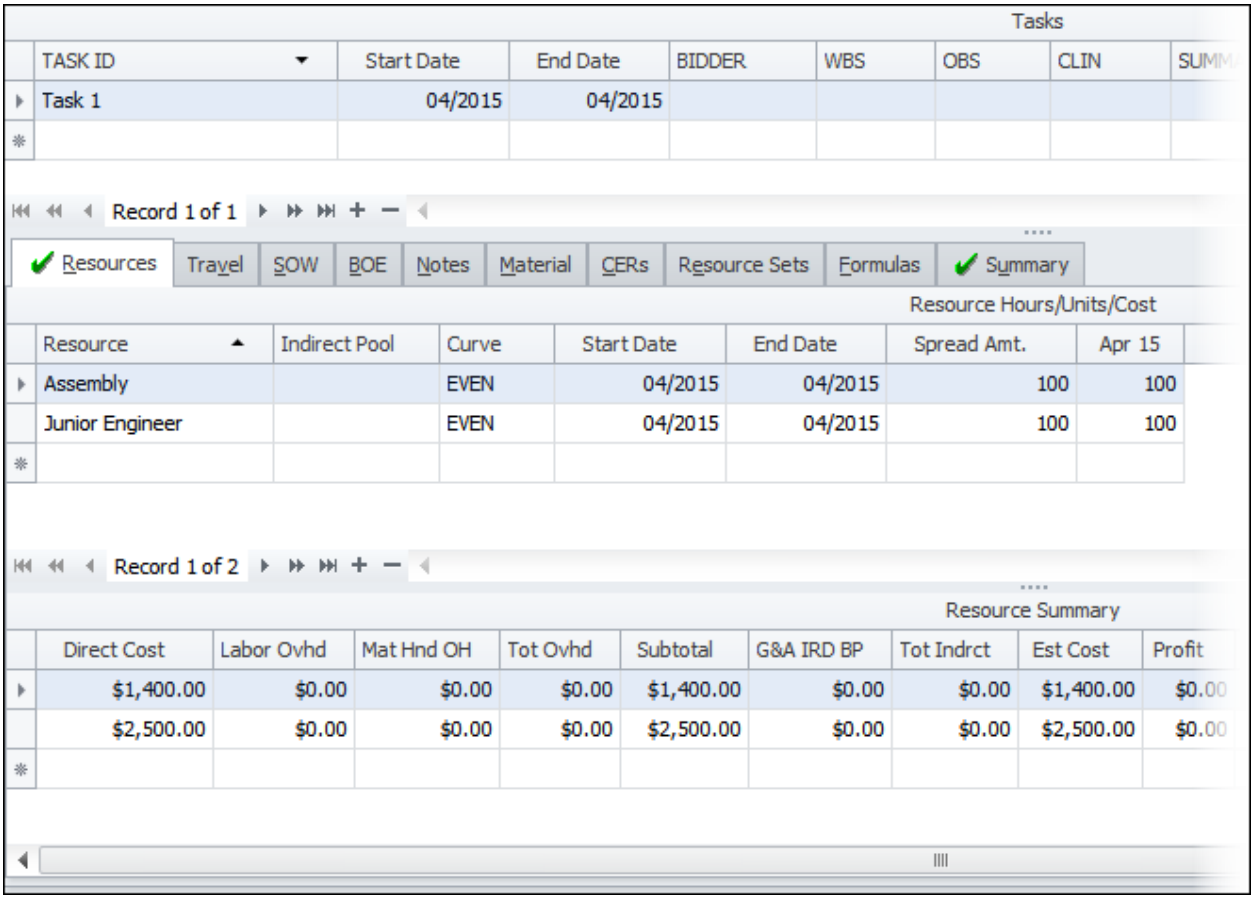


If we were to assign indirect pools to resources *Assembly* and *Junior Engineer* in the Direct Rate Table, the indirect pools assigned to those resources at the resource level would not change. This is because ProPricer prioritizes resource-level indirect pools over those assigned in the Direct Rate Table.

Task-Level Indirect Costs

The following example demonstrates how an indirect pool can be assigned to a specific task, thereby generating the indirect costs of the task's resources.

We created a Direct Rate Table and added resources to it, but did not assign any indirect pools to the resources. We then created a proposal and assigned the Direct Rate Table to it. We created a task, added two resources to it, and spread 100 hours for each resource.



Tasks

TASK ID	Start Date	End Date	BIDDER	WBS	OBS	CLIN	SUMM
Task 1	04/2015	04/2015					

Record 1 of 1

Resources | Travel | SOW | BOE | Notes | Material | CERs | Resource Sets | Formulas | Summary

Resource Hours/Units/Cost

Resource	Indirect Pool	Curve	Start Date	End Date	Spread Amt.	Apr 15
Assembly		EVEN	04/2015	04/2015	100	100
Junior Engineer		EVEN	04/2015	04/2015	100	100

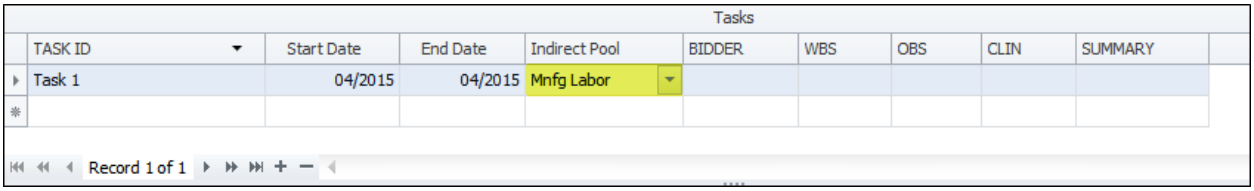
Record 1 of 2

Resource Summary

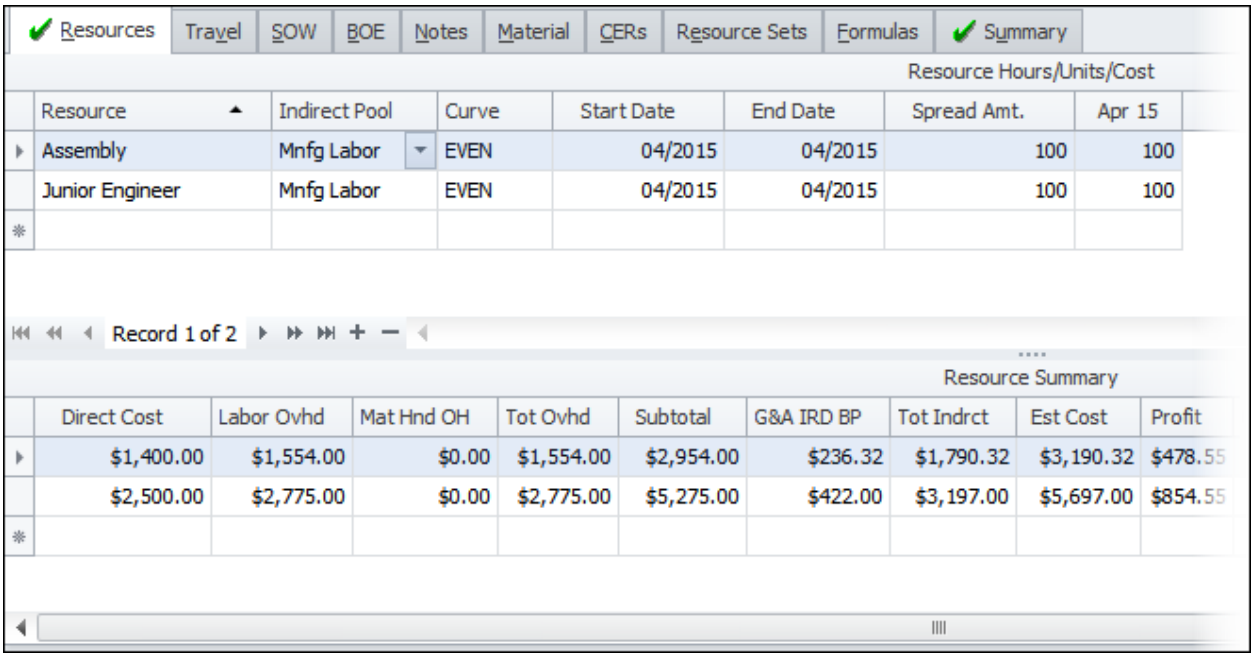
Direct Cost	Labor Ovhd	Mat Hnd OH	Tot Ovhd	Subtotal	G&A IRD BP	Tot Indrct	Est Cost	Profit
$1,400.00	$0.00	$0.00	$0.00	$1,400.00	$0.00	$0.00	$1,400.00	$0.00
$2,500.00	$0.00	$0.00	$0.00	$2,500.00	$0.00	$0.00	$2,500.00	$0.00

Notice the empty **Indirect Pool** column in the **Resource Input** grid and the $0.00 in the indirect element columns in the **Resource Summary** grid.

We then went back and added an indirect pool to the task.



The **Indirect Pool** column in the **Resource Input** grid now shows the indirect pool entered for the task, and the indirect element columns in the **Resource Summary** grid show indirect costs.



Define Task-Level Indirect Expenses

Normally, you associate every resource with an indirect pool in a Direct Rate Table. ProPricer then applies the rates from the specified indirect pool to the direct cost of every resource. If an indirect pool has not been assigned to resources in the Direct Rate Table, you can assign one to the task. ProPricer will use this indirect pool for any resource in the task that does not have a pool assigned to it in the Direct Rate Table.

1. Locate the appropriate task in the **Tasks** grid.
2. In the **Indirect Pool** column, enter the indirect pool you want to use.
3. Press **Ctrl**+**S** or move to another row to save your work.

Labor Categories

A labor category is a combination of resources in a proposal's Rate Card. When you add multiple resources to a labor category, the resources' rates are blended to generate the direct rate and indirect rates for the labor category. You can control how the rates are blended by specifying the weight of each resource you add.

A labor category can only contain resources with rate type *Hours* in the proposal's Direct Rate Table.

After you create a labor category, you can assign it to tasks in the same way that you assign resources. If you update a labor category in the Rate Card, it is automatically updated in the tasks.

Assign a Labor Category to a Task

You can assign a labor category to a task in Task View and in Resource View. To select a view for your proposal, go to the **Proposal** ribbon.

Assign in Task View

1. In the **Tasks** grid, click the task, and then click the **Resources** tab.
2. In the **Resource** column, select a labor category.
3. *(Optional)* Assign an accounting calendar to the labor category. If your proposal is using a Work Schedule Table, you can assign a work schedule to a labor category by selecting the accounting calendar that the schedule is based on.
4. *(Optional)* Apply a rate modifier to the labor category's direct rate.
5. *(Optional)* Enter a comment for the labor category.
6. Distribute the appropriate number of labor category hours.
7. Press **Ctrl**+**S** or move to another row to save your work.

Assign in Resource View

1. In the **Resource** column, select a labor category. When you start to enter the labor category, the **Select Task** dialog box will open.
2. Select the task to which you want to add the labor category, and then click **OK**.
3. *(Optional)* Assign an accounting calendar to the labor category. If your proposal is using a Work Schedule Table, you can assign a work schedule to a labor category by selecting the accounting calendar that the schedule is based on.

4. *(Optional)* Apply a rate modifier to the labor category's direct rate.
5. *(Optional)* Enter a comment for the labor category.
6. Distribute the appropriate number of labor category hours.
7. Press **Ctrl**+**S** or move to another row to save your work.

Copy a Labor Category

1. In the **Rate Card** grid, right-click the labor category, and then click **Copy** on the shortcut menu.

2. In the **Copy** dialog box, enter a new name to create a new labor category, or enter an existing name to overwrite that labor category, and then click **OK**.

3. When prompted, click **Yes** to confirm your action.

    - If you create a new labor category, you can review and change the labor category's name, description, comment, etc. in the **Labor Category** dialog box that appears. Click **OK** or **Apply** to finish creating the labor category.

Create a Labor Category

1. On the **Proposal** ribbon, click the **Rate Card** button. The Rate Card will open in a new Workspace tab.
2. In the **Rate Card** grid:
    2.1. Enter a labor category name in an empty row. The type automatically changes to Labor Category.
    2.2. *(Optional)* Enter a description.
    2.3. *(Optional)* Enter a comment.
    2.4. *(Optional)* Override the default profit/fee rate. The default entry is the profit/fee rate entered in the Proposal Properties. If there is no profit/fee rate for the proposal, then the column is blank and the default rate for the labor category is *0*.
    2.5. *(Optional)* Select an accounting calendar. If your proposal is using a Work Schedule Table, you can assign a work schedule to a labor category by selecting the accounting calendar that the schedule is based on.
    2.6. *(Optional)* Select a resource class.
    2.7. *(Optional)* Select an indirect pool.
3. In the **Detail Rate Buildup** grid, click a row to select a specific period.
4. In the **Bases** grid:
    4.1. Add a resource to the labor category for the selected period. After you enter a resource, the remaining fields in the grid are automatically populated.
    4.2. *(Optional)* Override the resource's default indirect pool.

4.3. *(Optional)* Enter the weight of the resource. This percentage determines how much of the resource's rates is included in the labor category's blended rates. The default weight is *1* (or 100%).

4.4. *(Optional)* Override the resource's direct rate and indirect rates.

4.5. Move to a new row and enter another resource.

5. Press **Ctrl**+**S** to save your work.

*Note: After you create a labor category, you can override its blended rates in the **Detail Rate Buildup** grid.*

Delete a Labor Category

1. In the **Rate Card** grid, right-click the labor category, and then click **Delete** on the shortcut menu.

2. When prompted, click **Yes** to confirm the deletion.

Note: You can only delete a labor category if:

- *The labor category is not assigned to a task in the proposal.*
- *There is no data for the labor category in the **Detail Rate Buildup** grid or **Bases** grid of the Rate Card.*

Learning Curves

According to Learning Curve Theory, the time required to complete a process decreases as a person gains experience from repetitive performance of the task. With each iteration of doubled output, the time required decreases at a constant rate. In short, more experience equals less effort.

In ProPricer, learning curves allow you to accurately estimate the reduction of labor hours and other direct costs needed to produce an increased number of units. There are two types of learning curves available: Unit and Cumulative Average. You can set either of these as a default curve type throughout your proposals and libraries by reconfiguring the General Page of System Options.

If you want to estimate the reduced labor cost of manufacturing more units of a specific material, you can apply a learning curve to the associated costs of parts and assemblies.

Since a single unit of work can be defined through a resource set, you can also apply learning curves to your resource sets.

Apply Learning Curves to Associated Costs

The learning curve feature can be applied to materials when you define associated costs for a part or assembly. To enable learning curves while entering associated costs in the Parts Library, Assemblies Library, the Material tab, or Material View, you must select the **Link Quantity** checkbox in the **Associated Costs** grid. You will then be able to select a curve type and enter values in the **Slope**, **Start Ref. Unit**, and **End Ref. Unit** fields.

In the **Associated Costs** grid of the Parts Library, Assemblies Library, Material tab, or Material View:

1. Define your associated costs.
2. Ensure that the **Link Quantity** checkbox is selected. This box must be selected to enable the learning curve feature.
3. Choose a learning curve type from the **LCurve** drop-down menu. Select either **Unit** or **CumAvg**.
4. Type a percentage value in the **Slope** field.
5. Type a value in the **Start Ref. Unit** field.
6. Type a value in the **End Ref. Unit** field.

Apply Learning Curves to Resource Sets

The learning curve feature can be applied to a resource set through the Resource Set Library. Simply add a curve type to the **LCurve** field in the **Elements** grid. You will then be able to enter values in the **Slope**, **Start Ref. Unit**, and **End Ref. Unit** fields.

In the **Resource Sets** tab of your proposal, the learning curve values you entered will populate in the **Resource Set Input** grid when you select the resource set. Only the values for **Start Ref. Unit** and **End Ref. Unit** can be changed in this grid. All other desired changes must be made in the Resource Set Library.

In the Resource Set Library:

1. Create your resource set in the **Resource Sets** grid.
2. Add resources to the set in the **Elements** grid.
3. Choose a learning curve type from the **LCurve** field. Select either **Unit** or **CumAvg**.
4. Type a percentage value in the **Slope** field.
5. Type a value in the **Start Ref. Unit** field.
6. Type a value in the **End Ref. Unit** field.

Learning Curve Types

When you apply learning curves to associated costs or resource sets, you can choose between two types of curve models: Unit or Cumulative Average.

This table explains the fields and variables used in the following formulas for both models.

Slope	The rate of learning measured in percentage.
Start Ref Unit	The beginning unit number of the lot to be estimated.
End Ref Unit	The ending unit number of the lot to be estimated.
Ref Value	The total amount of time/effort to produce the lot. • If the curve is applied to resource sets, **Ref Value** is the number entered in the **Factor** column for each resource set element. • If the curve is applied to associated costs, **Ref Value** is the number entered in the **Hours/Units/Cost** column for each associated cost.
Total Quantity	The total amount of units that need to be produced.
Starting Unit #	The first unit of the lot to be estimated.
b	The natural slope of the learning curve = Log2(**[Slope]**).
B	1 + **b**
First Unit H/C	The amount of hours or cost required to produce the first unit. • When **[Start Ref Unit]** = **[End Ref Unit]** = 1, it is equal to **[Ref Value]**.

	• Otherwise (since **[Start Ref Unit]**, **[End Ref Unit]**, and **[Ref Value]** represent one lot), it is reverse calculated from the respective method formula.
Total H/C	The total amount of hours or cost to be spread.

Unit Curve

A unit curve is used to estimate how learning affects production time on a unit-by-unit basis. As workers learn and become more efficient through repetition, each unit of work they complete will require fewer hours than the previous unit. Every time output doubles, the amount of effort to complete one unit decreases by a fixed percentage.

The spread amount is calculated as: **[Total H/C]** = **[First Unit H/C]** * ((**[Starting Unit #]** - 0.5 + **[Total Quantity]**) ^ **B** - (**[Starting Unit #]** - 0.5) ^ **B**) / **B**

When needed, the first unit amount is calculated as: **[First Unit H/C]** = **[Ref Value]** * **B** / ((**[End Ref Unit]** + 0.5) ^ **B** - (**[Start Ref Unit]** - 0.5) ^ **B**)

CumAvg (Cumulative Average) Curve

A cumulative average curve is used to estimate how learning affects the total production time of a group of units. Increasing the number of units in a group decreases the average number of hours needed to produce one group. Every time output doubles, the average amount of effort to complete one group of units decreases by a fixed percentage.

When **[Starting Unit #]** = 1, the spread amount is calculated as: **[Total H/C]** = **[First Unit H/C]** * **[Total Quantity]** ^ **B**

When **[Starting Unit #]** > 1, the spread amount is calculated as: **[Total H/C]** = **[First Unit H/C]** * ((**[Starting Unit #]** - 1 + **[Total Quantity]**) ^ **B** - (**[Starting Unit #]** - 1) ^ **B**)

When needed, the first unit amount is calculated as: **[First Unit H/C]** = **[Ref Value]** / (**[End Ref Unit]** ^ **B** - (**[Start Ref Unit] -** 1) ^ **B**)

Materials

You can assign materials to a proposal by adding material resources to the Resources tab or Resource View, adding parts/assemblies to the Material tab or Material View, or adding products to the Products page of the Proposal Properties. If your company uses the latter method, the Materials folder in the Proposal Properties provides access to the items you will need. The items include:

- Parts Library (Common and Product) is where you store the parts and enter their cost data.
- Assemblies Library (Common and Product) is where you create assemblies and enter their cost data.
- Vendor Library (Common and Product) is where you enter information about the companies that will sell you the parts.
- Custom material fields where you can enter additional information about an assembly/part, cost, or vendor.
- Small Business Codes that you can associate with vendors in the Vendor Library.
- Material selections that you can use to group parts and/or assemblies that meet specific criteria.
- Escalation Tables that you can use to project material costs.

You can assign parts and assemblies to tasks on the Material tab of Task View. You can also use Material View to assign parts and assemblies to tasks. To select a view for your proposal, go to the **Proposal** ribbon.

Due to the two-way functionality of material assignments, any part/assembly you assign to a task on the Material tab will appear in Material View, and vice versa.

Assign Materials to Tasks on the Material Tab

1. In the **Tasks** grid, select the task, and then click the **Material** tab.
2. In the **Material Input** grid, go to the **Material ID** column and enter an ID.
3. Do one of the following:
    - In the **Source Material** column, select a part or assembly from your material libraries.
    - In the **Source Library** column, select **(None)** to create a proposal-specific part or assembly. Then in the **Part Number** and **Assembly/Part** columns, enter a number and name.
4. In the **Resource** column, select a resource for the part or assembly.
5. In the **Material Distribution** grid, enter the spread information for the material. You can enter spread parameters or discrete values in the months.
6. Press **Ctrl**+**S** or move to another row to save your work.

Assign Materials to Tasks in Material View

1. At the top of Material View, click the **Miscellaneous** tab.
2. In the **Material Input** grid, go to the **Material ID** column and enter an ID.

3. Do one of the following:

    - In the **Source Material** column, select a part or assembly from your material libraries.

    - In the **Source Library** column, select **(None)** to create a proposal-specific part or assembly. Then in the **Part Number** and **Assembly/Part** columns, enter a number and name.

4. In the **Resource** column, select a resource for the part or assembly.

5. In the **Task** column, enter the name of the task.

6. In the **Material Distribution** grid, enter the spread information for the material. You can enter spread parameters or discrete values in the months.

7. Press **Ctrl**+**S** or move to another row to save your work.

Associated Costs

The use of materials may be connected to certain activities, such as shipping, warranty, inspection, etc., which reoccur with every part or assembly that you assign to a task. You can enter these activities or expenses as associated costs.

Associated costs can be entered in the Parts Library, Assemblies Library, Material tab of Task View, or Material View. The associated costs entered in a library are automatically entered in the Associated Costs grid of the Material tab and Material View. The associated costs entered on the Material tab or in Material View are specific to that task.

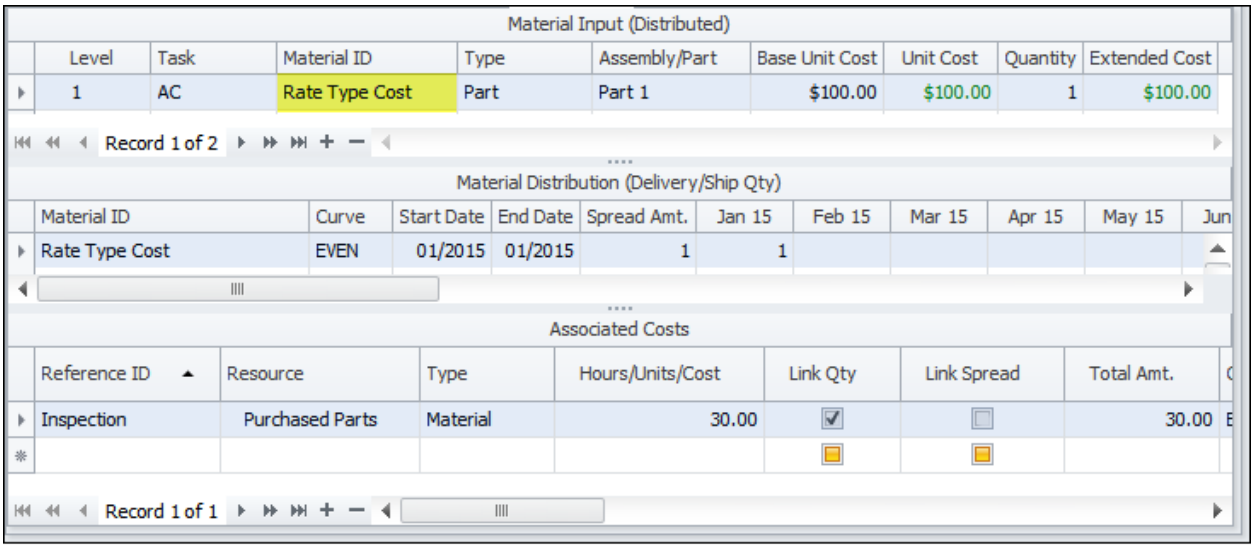
In the Parts Library and Assemblies Library, you can enter associated costs for a material item on the Associated Costs tab. If the item's cost sources have different associated costs, you can enter them on the Quotes tab, Purchase Orders tab, or Misc tab along with the rest of the cost source information. When a cost source with associated costs is selected for a part or assembly in a proposal, those associated costs are applied to it.

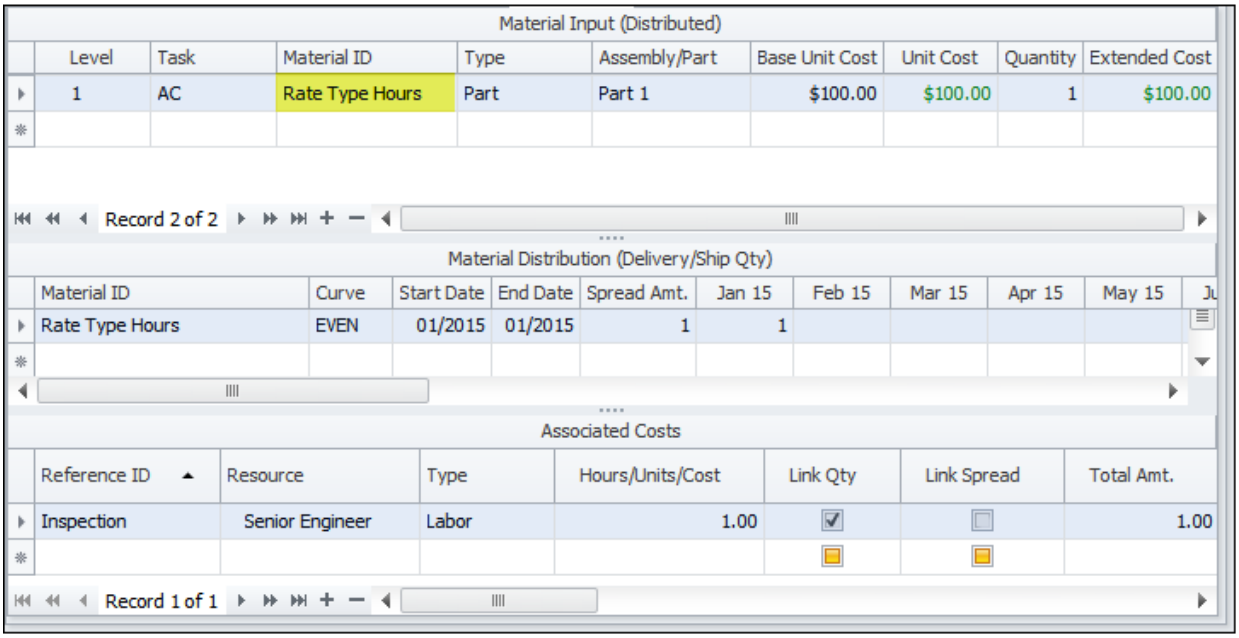
Example

An engineer needs one hour to inspect a piece of equipment, and you have to pay $30 for the inspection. There are two ways you can define the inspection cost:

- You can use a resource with rate type *Cost* (for example, Purchased Parts) and enter **30** in the **Hour/Units/Cost** column.
- You can use a resource with rate type *Hours* (for example, Senior Engineer) whose direct rate is $30, and enter **1** in the **Hours/Units/Cost** column.

The following images show two material assignments in Task View on the **Material** tab that illustrate both methods.





On the **Summary** tab, the direct cost for both parts is $130.00.

Source

Source Type	Source	Source Item	Resource	Type	Hours	Units	Cost	Direct Cost
Source: Rate Type Cost								
Material	Rate Type Cost		Purchased Parts	Material			100	$100.00
Material	Rate Type Cost	Inspection	Purchased Parts	Material			30	$30.00
							130	$130.00
Source: Rate Type Hours								
Material	Rate Type Hours		Purchased Parts	Material			100	$100.00
Material	Rate Type Hours	Inspection	Senior Engineer	Labor	1			$30.00
					1		100	$130.00

The total price, however, is different. This is because the indirect expenses are different for Purchased Parts and Senior Engineer.

Source

Source Type	Source	Source Item	Resource	Type	Hours	Units	Cost	Direct Cost	Labor O	+ Fee	Total COM	Tot Price
Source: Rate Type Cost												
Material	Rate Type Cost		Purchased Parts	Material			100	$100.00		$136.22	$0.32	$136.54
Material	Rate Type Cost	Inspection	Purchased Parts	Material			30	$30.00		$40.87	$0.09	$40.96
							130	$130.00		$177.09	$0.41	$177.50
Source: Rate Type Hours												
Material	Rate Type Hours		Purchased Parts	Material			100	$100.00		$136.22	$0.32	$136.54
Material	Rate Type Hours	Inspection	Senior Engineer	Labor	1			$30.00	$1	$53.85	$0.14	$53.99
					1		100	$130.00	$1	$190.07	$0.45	$190.53

Define Associated Costs for a Part

Entering associated costs for a part allows you to keep track of all costs involved with using it. You can enter associated costs in the Parts Library, the Material tab of Task View, and Material View. The associated costs entered in a library will automatically be entered in the Associated Costs grid of the Material tab and Material View. The associated costs entered in the Material tab or Material View are specific to that task.

Define Associated Costs for a Part in the Library

1. In the Navigation Pane, expand the **Material** folder, and then expand the **Common** or a **Product** library folder.
2. Double-click **Parts**.
3. In the **Parts** grid, locate the part you want to edit.
4. Do one of the following:
   - Click the **Associated Costs** tab to enter information at the material level.
   - Click a cost source tab, such as the **Quotes** tab, then click the **Cost Source Details** tab to enter information at the cost source level.
5. In the **Reference ID** column, enter a unique identifier for the associated cost.
6. In the **Resource** column, enter the resource to associate with the part.
7. In the **Hours/Units/Cost** column, enter the amount of resource hours, units, or cost that will be needed each time the part is used in a task.
8. Select the **Link Quantity** checkbox if you want to link the hours/units you entered for the associated resource to the total manufacturing start quantity of the part, so that when the quantity changes, the hours/units change accordingly.

9. Select the **Link Spread** checkbox to spread the hours/units of the associated resource, using the same curve that the part uses.

Define Associated Costs for a Part in Material View or the Material tab of Task View

1. Locate the part for which you want to enter associated costs.
2. Go to the **Associated Costs** grid.
3. In the **Reference ID** column, enter a unique identifier for the associated cost.
4. In the **Resource** column, enter the resource to associate with the part.
5. In the **Hours/Units/Cost** column, enter the amount of resource hours, units, or cost that will be needed while the part is being used in the task.
6. Select the **Link Quantity** checkbox if you want to link the hours/units you entered for the associated resource to the total manufacturing start quantity of the part, so that when the quantity changes, the hours/units change accordingly.
7. Select the **Link Spread** checkbox to spread the hours/units of the associated resource, using the same curve that the part uses.

Apply a Learning Curve

After defining your associated costs in the Parts Library, Material tab, or Material View, you can apply a learning curve in the Associated Costs grid of either area. This optional feature is not required to fully define associated costs.

1. Ensure that the **Link Quantity** checkbox is selected. This box must be selected to enable the learning curve feature.

2. Choose a learning curve type from the **LCurve** drop-down menu. Select either **Unit** or **CumAvg**.

3. Type a percentage value in the **Slope** field.

4. Type a value in the **Start Ref. Unit** field.

5. Type a value in the **End Ref. Unit** field.

Define Associated Costs for an Assembly

Entering associated costs for an assembly allows you to keep track of all costs involved with using it. You can enter associated costs in the Assemblies Library, the Material tab of Task View, and Material View. The associated costs entered in a library will automatically be entered in the Associated Costs grid of the Material tab and Material View. The associated costs entered in the Material tab or Material View are specific to that task.

Define Associated Costs for an Assembly in the Library

1. In the Navigation Pane, expand the **Material** folder, and then expand the **Common** or a **Product** library folder.
2. Double-click **Assemblies**.
3. In the **Assemblies** grid, locate the assembly you want to edit.
4. Do one of the following:
   - Click the **Associated Costs** tab to enter information at the material level.
   - Click a cost source tab, such as the **Quotes** tab, then click the **Cost Source Details** tab to enter information at the cost source level.
5. In the **Reference ID** column, enter a unique identifier for the associated cost.
6. In the **Resource** column, enter the resource to associate with the assembly.
7. In the **Hours/Units/Cost** column, enter the amount of resource hours, units, or cost that will be needed each time the assembly is used in a task.
8. Select the **Link Quantity** checkbox if you want to link the hours/units you entered for the associated resource to the total manufacturing start quantity of the assembly, so that when the quantity changes, the hours/units change accordingly.

9. Select the **Link Spread** checkbox to spread the hours/units of the associated resource, using the same curve that the assembly uses.

Define Associated Costs for an Assembly in Material View or the Material tab of Task View

1. Locate the assembly for which you want to enter associated costs.
2. Go to the **Associated Costs** grid.
3. In the **Reference ID** column, enter a unique identifier for the associated cost.
4. In the **Resource** column, enter the resource to associate with the assembly.
5. In the **Hours/Units/Cost** column, enter the amount of resource hours, units, or cost that will be needed while the assembly is being used in the task.
6. Select the **Link Quantity** checkbox if you want to link the hours/units you entered for the associated resource to the total manufacturing start quantity of the assembly, so that when the quantity changes, the hours/units change accordingly.
7. Select the **Link Spread** checkbox to spread the hours/units of the associated resource, using the same curve that the assembly uses.

Apply a Learning Curve

After defining your associated costs in the Assemblies Library, Material tab, or Material View, you can apply a learning curve in the Associated Costs grid of either area. This optional feature is not required to fully define associated costs.

1. Ensure that the **Link Quantity** checkbox is selected. This box must be selected to enable the learning curve feature.

2. Choose a learning curve type from the **LCurve** drop-down menu. Select either **Unit** or **CumAvg**.
3. Type a percentage value in the **Slope** field.
4. Type a value in the **Start Ref. Unit** field.
5. Type a value in the **End Ref. Unit** field.

Set the Associated Costs Decimal Display

Associated Costs Decimal Display allows you to set the number of places after the decimal point that will be shown for associated costs in the material libraries, Task View and Material View, and material reports.

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **Material** page.
3. In the **Associated Costs Decimal Display** field, type a number between 0 and 6. The default number is 0.
4. Click **OK**.

Common and Product Libraries

The Common Library is often used to store parts, assemblies, vendors, and costs that are common to many different products.

A Product Library is used to store parts, assemblies, vendors, and costs for a specific product and keep them separate from other products.

Since all the material libraries are integrated, you can draw from any library, common or product, thus avoiding the need to enter the same part for each product multiple times.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Material Input (Distributed)

Level	Task	Material ID	Library	Type	Assembly/Part
1	TANK 001 MT	0001.002	Tracks	Assembly	0001.002
1	TANK 001 MT	0001	(Common)	Assembly	0001
2	TANK 001 MT	0001.0021	Tracks	Assembly	0001.002
3	TANK 001 MT	116694-501	Tracks	Part	116694-50
3	TANK 001 MT	21766-8B1	Tracks	Part	21766-8B
3	TANK 001 MT	122967-151	Tracks	Part	122967-15
3	TANK 001 MT	122970-291	Tracks	Part	122970-29
3	TANK 001 MT	122983-001	Tracks	Part	122983-00
3	TANK 001 MT	123287-251	Tracks	Part	123287-25
3	TANK 001 MT	123287-261	Tracks	Part	123287-26
3	TANK 001 MT	123509-411	Tracks	Part	123509-41
3	TANK 001 MT	123588-581	Tracks	Part	123588-58
3	TANK 001 MT	622969-261	Tracks	Part	622969-26
2	TANK 001 MT	0001.001	(Common)	Assembly	0001.001
3	TANK 001 MT	21702-80	(Common)	Part	21702-80
3	TANK 001 MT	0001.001.001	(Common)	Assembly	0001.001.001
4	TANK 001 MT	MS16555-63	(Common)	Part	MS16555-63
4	TANK 001 MT	1229554-23	(Common)	Part	1229554-23
4	TANK 001 MT	1091017-43	(Common)	Part	1091017-43
4	TANK 001 MT	86753-09	(Common)	Part	86753-09
4	TANK 001 MT	1229555-45	(Common)	Part	1229555-45
4	TANK 001 MT	1229692-43	(Common)	Part	1229692-43

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Assemblies Library

The Assemblies Library is where you create assemblies using parts from the Parts Library.

Assemblies allow you to assign complex systems as a whole, rather than as individual parts.

There is a Common Assemblies Library and an Assemblies Library for each product. You can use common parts or other product parts in your assemblies, as well as other assemblies from any library as sub-assemblies. It is up to you how you want to organize your materials. The grids are the same for both, with one exception. The Product Assemblies Library will show the top-level assembly entered for the product. This assembly cannot be deleted. You can only add parts and sub-assemblies to it.

The library includes the Assemblies grid, and a section of tabs for more information about a selected assembly.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

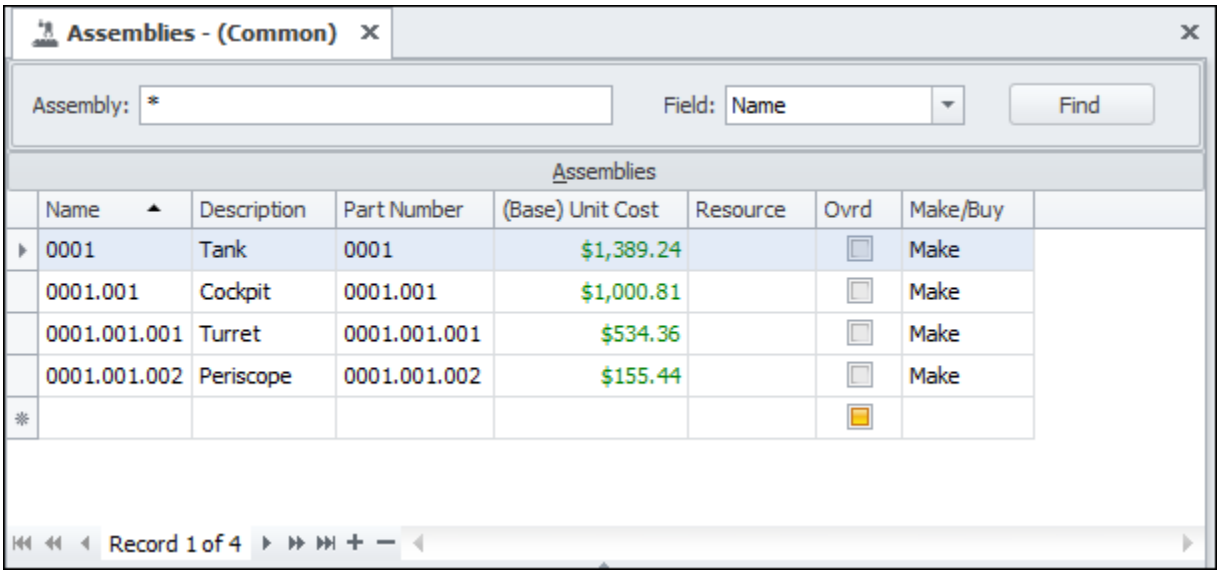
Assemblies

This grid is for creating and defining individual assemblies in the library.

In proposals, you can change information that comes from the library by entering proposal-specific information for an assembly instead. If you update material in a proposal, or consolidate material unit costs in a proposal, the changes will revert to the library information.

Because material libraries typically contain large amounts of data, The Assemblies grid does not automatically show everything it contains. To find an assembly in the library,

use the search bar above the grid. To view all assemblies in the library, search for an asterisk * as a wildcard value.



Search Bar

Assembly

Enter the name or part number of an assembly that you want to find in the library. This should correspond with the **Field** option you select.

You can view all assemblies by searching for an asterisk * as a wildcard value.

Field

Select the field, or column, in the library to search. You can search the **Name** field or the **Part Number** field.

Find

Click this button to search the library.

Name

Enter a name for the assembly. The maximum number of characters allowed is 255.

If the Assembly/Part Name Template system setting uses the *[Part Number]* variable, the material name is automatically created after entering the part number. When the template also combines material fields with the *[Part Number]* variable, you can have multiple material items with the same part number.

Description

Enter a description of the assembly. The maximum number of characters allowed is 255.

Part Number

Enter any applicable number for the assembly. The maximum number of characters allowed is 255.

If the Assembly/Part Name Template system setting uses the *[Part Number]* variable, the material name is automatically created after entering the part number. When the template also combines material fields with the *[Part Number]* variable, you can have multiple material items with the same part number.

(Base) Unit Cost

The cost of the complete assembly will appear here.

Currency

This column appears only if the **Enable Material Multi-Currency Functions** checkbox is selected on the Currency page of the System Options. It shows the system currency by default. Select the **Ovrd** checkbox to change the currency.

Cost Source

Type the name of the cost source you want to associate with the assembly. This column is hidden by default. The maximum number of characters allowed is 255.

Resource

You do not need to enter a resource for the assembly. ProPricer uses the resources entered for the child elements and associated costs. The only time you

need to enter a resource is when you want to override the Unit Cost by modifying the Base Unit Cost or Material Factors once the elements have been added.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter the resource field value you want to use. You can hide any resource field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

Comment

Enter any applicable comment. If you need more room, click the down arrow to open a text box. This column is hidden by default.

Ovrd

This checkbox allows you to override the Base Unit Cost of the assembly. If you select the checkbox, you can manually enter a new Base Unit Cost that will not change when you modify the Base Unit Cost of a child element. In essence, the assembly becomes a part, because if the checkbox clear, the Base Unit Cost of the assembly will be updated each time the Base Unit Cost of a child element is modified.

Make/Buy

Specify if the assembly will be made or bought.

Escalation ID

This column will appear if there is an Escalation Table assigned to the library. It allows you to enter an Escalation ID for your *Buy* assemblies. You cannot enter an Escalation ID for your *Make* assemblies.

Inventory Qty

Enter the number of assemblies you have in stock. This column is hidden by default.

Mfg Yield Factor

Enter a manufacturing yield factor (in decimal format) you want to apply to the assembly. This is the amount of raw materials or purchased parts in the delivered end item divided by the total amount of raw materials or purchased parts consumed during manufacturing. This column is hidden by default.

Destr Eval Qty

Enter a destructive evaluation quantity. This is the number of parts lost during the evaluation process. This column is hidden by default.

Material Fields

These columns appear if assembly/part material fields have been defined. Enter the appropriate text or number. You can hide any material field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

If the Assembly/Part Name Template system setting uses the *[Part Number]* variable, the material name is automatically created after entering the part number. When the template also combines material fields with the *[Part Number]* variable, you can have multiple material items with the same part number.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Tabs

More information about an assembly can be entered on the following tabs. Click a tab name in this list to open the Help topic for it.

- Elements
- Associated Costs
- Quotes

- Purchase Orders
- Misc

Cost Source

This grid is available on the **Quotes**, **Purchase Orders**, and **Misc** tabs. Some columns in the grid are different depending on the tab selected. In the preceding Tabs section, click a tab name in the list to open the Help topic for it.

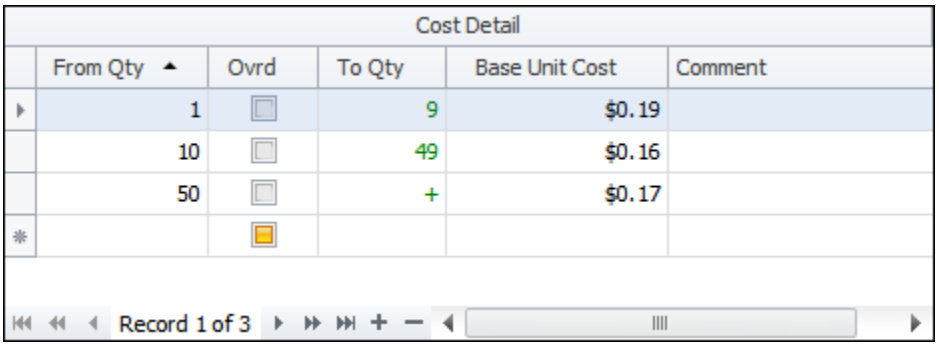
When you select a row in the **Cost Source** grid, the **Cost Source Details** and **Cost Source Notes** tabs below it correspond to the selected quote, P.O., or miscellaneous cost source.

Cost Source Details

This tab contains the **Cost Detail**, **Timephased Base Unit Cost**, and **Associated Costs** grids for the selected cost source.

Cost Detail

This grid allows you to enter costs according to quantity ranges. You do not need to enter a range. You can enter the cost of a single item. If you do enter more than one value in the **From Qty** column, ProPricer will calculate the value of the **To Qty** column.



From Qty

Enter the *from* values in the range. For example, if your quote provides a separate cost for 1 to 50 parts, 50 to 100 parts, 100-500 parts, and more than 500 parts, you would enter 1, 50, 100, and 500 in this column.

Ovrd

Select this checkbox if you need to override the value in the **To Qty** column. If the vendor provided costs for fixed amounts (50, 100, 500), for example, you can select this checkbox and enter 50, 100, and 500 in the **To Qty** column. If the checkbox is clear, the **To Qty** column is read-only. This column is hidden by default.

To Qty

The *to* values will appear here. Select the **Ovrd** checkbox if you need to change the values. This column is hidden by default.

Base Unit Cost

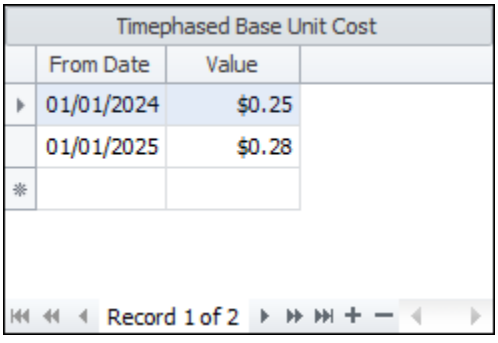
Enter the cost per single unit of the part or assembly.

Comment

Enter any applicable comment. If you need more room, click the down arrow to open a text box. This column is hidden by default.

Timephased Base Unit Cost

This grid allows you to enter a base unit cost for an assembly in specific periods. Each value should be different than the base unit cost in the **Assemblies** grid.



From Date

Select the date that the base unit cost changes.

Value

Enter the base unit cost that begins on the selected date.

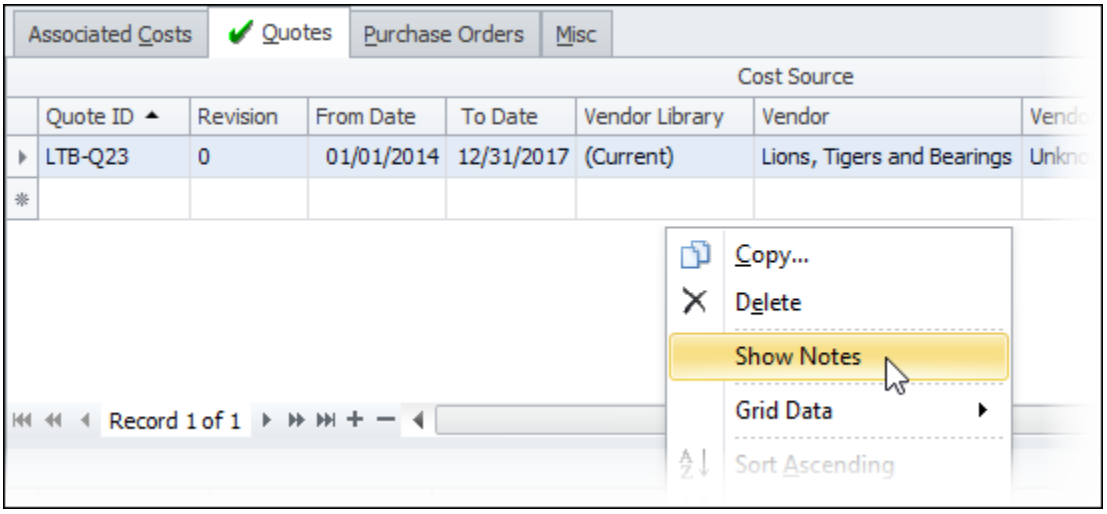
Associated Costs

This grid allows you to enter an assembly's associated costs at the cost source level. It is identical to the grid on the **Associated Costs** tab, but it has a different purpose. If cost sources have varying associated costs, enter them here. Otherwise, if the associated costs are the same regardless of the cost source, enter them at the material level on the **Associated Costs** tab.

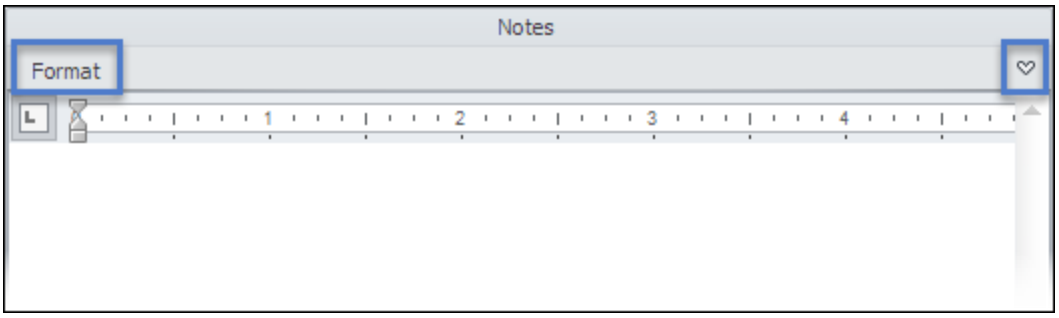
Cost Source Notes

If you need to type or attach any other cost source information, go to the **Cost Source Notes** tab. For each quote, purchase order, and miscellaneous cost source, you can enter notes and attach files.

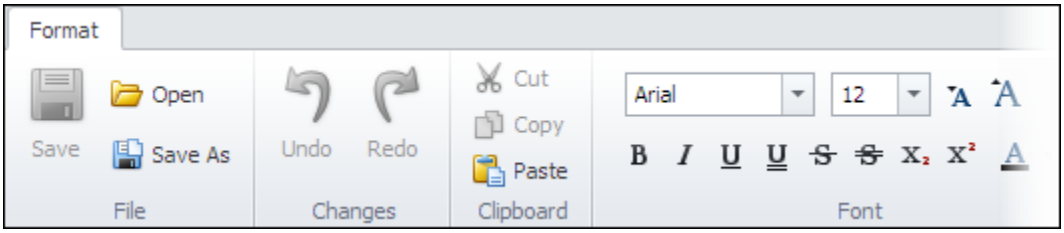
Notes are hidden by default. To view and enter notes, right-click anywhere in the **Cost Source** grid, and then click **Show Notes**.



Double-click the **Format** tab in the **Notes** section to permanently display the ribbon. You can also click the down arrow.



The ribbon contains commands for opening, saving, attaching, and editing your notes.



Copy an Assembly

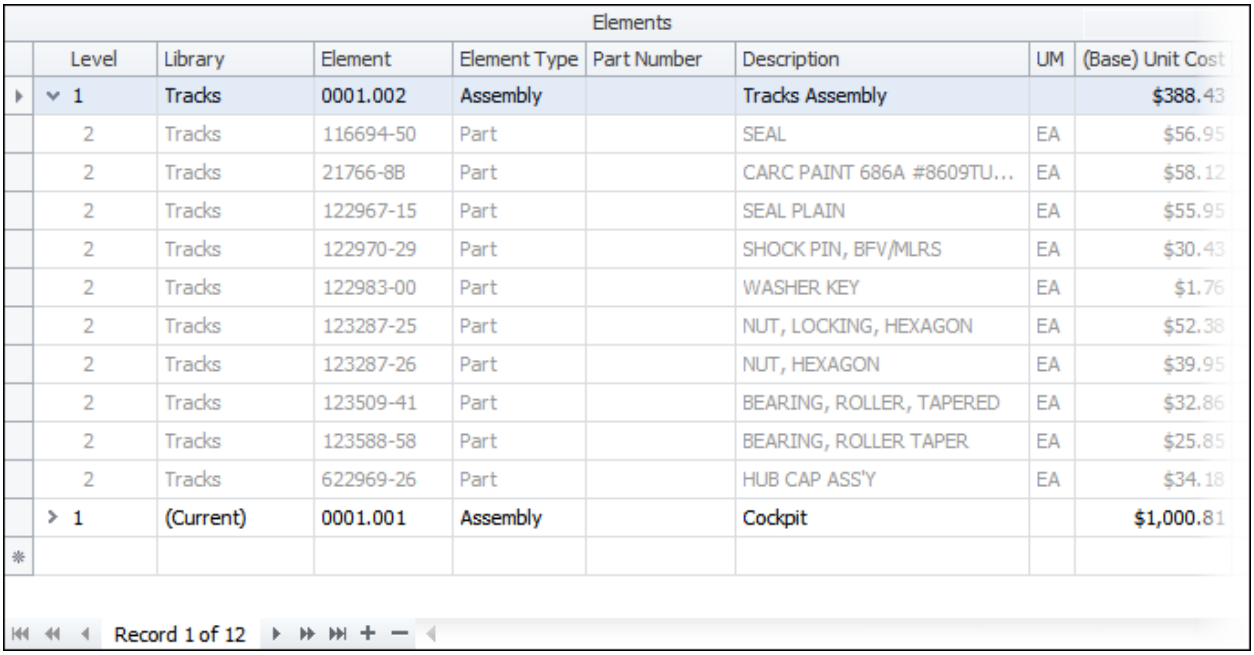
1. In the Common Assemblies Library or in the Assemblies Library of a product, right-click an assembly, and then click **Copy** on the shortcut menu.
2. Enter the name of the library to which you want to copy the assembly.
3. Enter a name for the assembly.
4. Click **OK**.

Add an Assembly to the Assemblies Library

1. In the Navigation Pane, click the **Material** button, and then expand the **Common Libraries** or **Product Libraries**.
2. Double-click **Assemblies**.
3. Enter a name and part number for the assembly.
    - If the **Assembly/Part Name Template** system setting uses the *[Part Number]* variable, the name will be created automatically after you enter the part number.
4. Specify if the assembly will be bought or made.
5. In the **Elements** grid, select the library that contains the part/assembly.
6. Enter the part/assembly you want to add to the assembly.
7. Specify the number of parts/assemblies you need for the assembly.
8. *(Optional)* Define additional costs for the assembly in the **Associated Costs** grid. You can enter associated costs at the assembly level or the cost source level.
9. Press **Ctrl**+**S** or move to another row to save the assembly.

Assemblies Library - Elements Tab

On this tab, you define the parts that make up the assembly and specify the quantity needed.



Elements

Level	Library	Element	Element Type	Part Number	Description	UM	(Base) Unit Cost
1	Tracks	0001.002	Assembly		Tracks Assembly		$388.43
2	Tracks	116694-50	Part		SEAL	EA	$56.95
2	Tracks	21766-8B	Part		CARC PAINT 686A #8609TU...	EA	$58.12
2	Tracks	122967-15	Part		SEAL PLAIN	EA	$55.95
2	Tracks	122970-29	Part		SHOCK PIN, BFV/MLRS	EA	$30.43
2	Tracks	122983-00	Part		WASHER KEY	EA	$1.76
2	Tracks	123287-25	Part		NUT, LOCKING, HEXAGON	EA	$52.38
2	Tracks	123287-26	Part		NUT, HEXAGON	EA	$39.95
2	Tracks	123509-41	Part		BEARING, ROLLER, TAPERED	EA	$32.86
2	Tracks	123588-58	Part		BEARING, ROLLER TAPER	EA	$25.85
2	Tracks	622969-26	Part		HUB CAP ASS'Y	EA	$34.18
1	(Current)	0001.001	Assembly		Cockpit		$1,000.81

Record 1 of 12

Level

This column shows the position of the child element in the assembly. The plus or minus sign, displayed in a small square box to the left of the level number, allows you to expand or collapse the assembly. You can also use the **Expand** and **Collapse** options available on the shortcut menu, which allow you to expand/collapse the current assembly, the entire subtree, or all the assemblies in the grid.

Library

Enter the library that contains the part or assembly you want to include in the assembly.

Element

Enter the part or assembly.

Element Type

This column shows if the element is a part or assembly.

Part Number

This column shows the part number entered in the library. This column is hidden by default.

Description

This column shows the description of the part/assembly entered in the library. This column is hidden by default.

UM

This column shows the unit of measurement (for example, EA for each, SF for square feet, etc.) entered in the library.

(Base) Unit Cost

This column shows the Base Unit Cost of the part/assembly entered in the library.

Currency

This column appears only if the **Enable Material Multi-Currency Functions** checkbox has been selected on the **General** page in the **Currency** folder of **System Options**. This column shows the currency assigned to the part in the respective library. It cannot be edited.

Cost Source

This column shows the name and the revision of the cost source entered for the part/assembly in the library. This column is hidden by default.

Resource

This column shows the resource entered for the part/assembly in the library. It cannot be edited.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. They will show the value entered for the part/assembly in the library. It cannot be edited. You can hide any resource field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

Comment

This column shows any comment entered for the part/assembly in the library. It cannot be edited. This column is hidden by default.

Make/Buy

This column shows how the part/assembly will be provided. It cannot be edited.

Escalation ID

This column will appear if there is an Escalation Table assigned to the library. It will show the Escalation ID entered for the part in the library. It cannot be edited.

Quantity

Type the number of units required for the assembly.

Inventory Qty

This column shows the inventory entered for the part/assembly in the library. You can change it. Any manually-entered value will be displayed in blue. This column is hidden by default.

Mfg Yield Factor

This column shows the factor entered for the part/assembly in the library. You can change it. Any manually-entered value will be displayed in blue. This column is hidden by default.

Destr Eval Qty

This column shows the destructive evaluation quantity entered for the part/assembly in the library. You can change it. Any manually-entered value will be displayed in blue. This column is hidden by default.

Material Fields

If you create material fields for assemblies and parts, the Assemblies Library will display a separate column for each field. Using the shortcut menu, you can hide the unnecessary fields and display only the ones that are applicable to the selected material.

For any part that is an element of an assembly, you can enter values in material fields. However, you cannot edit material fields at the assembly level.

Enter Cost Data in the Parts or Assemblies Libraries

1. In the Navigation Pane, click the **Material** button, and then expand the **Common Libraries** or **Product Libraries**.
2. Double-click **Parts** or **Assemblies**.
3. In the library, select the part or assembly for which you want to enter cost source details.
4. Depending on the cost source for the part or assembly, click the **Quotes**, **Purchase Orders**, or **Misc** tab to open the respective grid. You can also associate the costs of other resources with the part or assembly on the **Associated Costs** tab.
5. Enter a name and revision for the cost source.
6. In the **From Date** column, enter the date from which the prices are valid.
7. *(Optional)* Enter the expiration date of the cost source.
8. Enter the library that contains the vendor.
9. Enter the name of the vendor.
10. *(Optional)* Enter the number of months needed to order the part/assembly in advance (only for quotes).
11. *(Optional)* Specify the minimum number of assemblies/parts that must be purchased to receive the quoted price.
12. *(Optional)* Enter the date that the part or assembly's cost will begin to escalate.
13. *(Optional)* Override the part/assembly-level **Escalation ID** for a specific cost source.

14. *(Optional)* Clear the **Enable Deescalation** checkbox to prevent the part or assembly's cost from de-escalating before the **Escalation Base Date**.

15. In the **Cost Detail** grid, enter the cost of a single part/assembly, or enter additional **From Qty** values and costs if the costs change when you buy more parts. ProPricer will calculate the **To Qty** values.

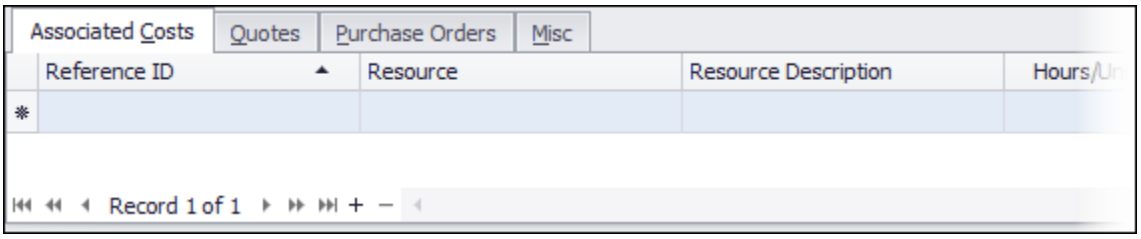
16. *(Optional)* In the **Timephased Base Unit Cost** grid, enter different base unit costs in specific periods. Select the start date in the **From Date** column, and enter the cost in the **Value** column.

17. Press **Ctrl**+**S** or move to another row to save the part.

*Note: To view and add notes for each source, right-click anywhere in the **Cost Source** grid, and then click **Show Notes**.*

Parts and Assemblies Libraries - Associated Costs Tab

On the **Associated Costs** tab, enter the costs of any additional activities associated with the part/assembly, such as shipping, warranty, inspection, etc. The information entered on this tab is at the material level, so these associated costs are the same for any quote, purchase order, or miscellaneous cost source. If cost sources have different associated costs, enter them on the **Cost Source Details** tab instead.



Reference ID

Enter a name for the associated cost.

Resource

Select a resource if you want to use its rates to calculate the associated cost.

Resource Description

This column shows the resource description entered in the Resource Library.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter the resource field value you want to use. You can hide any resource field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

Hours/Units/Cost

Enter the hours/units/cost needed. For example, you know that an engineer needs one hour to inspect a part. You could create a Reference ID called Inspection and

then enter 1 in the Hours/Units/Cost column. If the direct rate of the engineer is $30, ProPricer will multiply 30 by 1 and add the result (30) to the Unit Cost.

Link Qty

None

The associated cost is not linked to any material quantity. It is applied as a one-time charge when a part/assembly is added to a task.

Total Qty

The associated cost is linked to the total manufacturing start quantity of the material. It is applied each time the part/assembly is added to a task.

Period

The associated cost is linked to periods that have a quantity of one or more for the material. It is applied for each month, quarter, or year that has any quantity of the part/assembly.

Period Qty

The associated cost is linked to the value entered in the **Link Qty Amount** column. It is applied to each set of the specified amount.

For example, if **Link Qty Amount** is 50, then the associated cost is applied to every 50 units.

Link Qty Amount

To enter a quantity amount, **Period Qty** must be selected in the **Link Qty** column. This links associated costs of the part/assembly to the quantity amount you enter.

Link Spread

Select this checkbox to spread the hours/units/cost using the same spread information that the part/assembly uses. The checkbox is clear by default.

LCurve

Select a learning curve type to apply to the hours/units/cost amount.

Slope

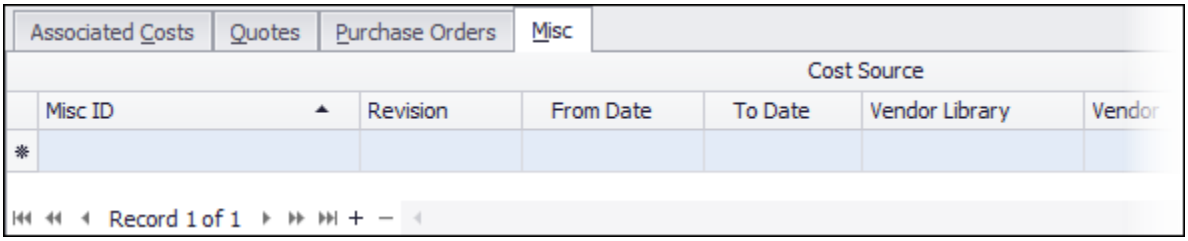
Enter the slope percentage of the learning curve. The default value is 100, indicating that no learning will occur. The value entered in this field must be greater than 50, and less than or equal to 100.

Start Ref. Unit and End Ref. Unit

When a learning curve is used, the reference units determine the lot size for the total hours, units, or cost. Based on the starting unit, which is entered in tasks, ProPricer will calculate how much of the amount remains for that original lot. It also calculates what the new amount of hours, units, or cost would be, based on the slope and how many units have already been completed.

Parts and Assemblies Libraries - Miscellaneous Tab

The **Miscellaneous** tab allows you to enter cost data for a part/assembly that does not come from a specific quote or purchase order.



*Note: To view and add notes for each source, right-click anywhere in the **Cost Source** grid, and then click **Show Notes**.*

Misc ID

Enter the name of the miscellaneous cost source.

Revision

Enter a short, descriptive text or number for the cost source. The maximum number of characters allowed is 255.

*Note: **Miscellaneous ID** and **Revision** identify the cost source record. You can enter two cost sources with the same name, but their revisions must be different.*

From Date

Enter the first date that the assembly/part costs are valid.

To Date

Enter the last date that the assembly/part costs are valid.

Vendor Library

Select the library that the vendor information is in.

Vendor

Enter the name of the vendor.

UM

Enter the unit of measurement for a part.

Vendor Status

Shows the status of the vendor entered in the library. This column is hidden by default.

Lead Time

Enter the number of months you need to order the part/assembly in advance. A lead time of 0 means that the material will be ordered in the same month it will be assigned to a task. A lead time of 1 means that the material must be ordered one month before it will be assigned to the task, etc. This column is hidden by default.

Minimum Buy Qty

Enter the minimum number of parts/assemblies you must purchase to receive the miscellaneous cost source price. This column is hidden by default.

Currency

This column appears if the **Enable Material Multi-Currency Functions** checkbox is selected on the **Currency** page of the **System Options**. It shows the system currency by default.

Comment

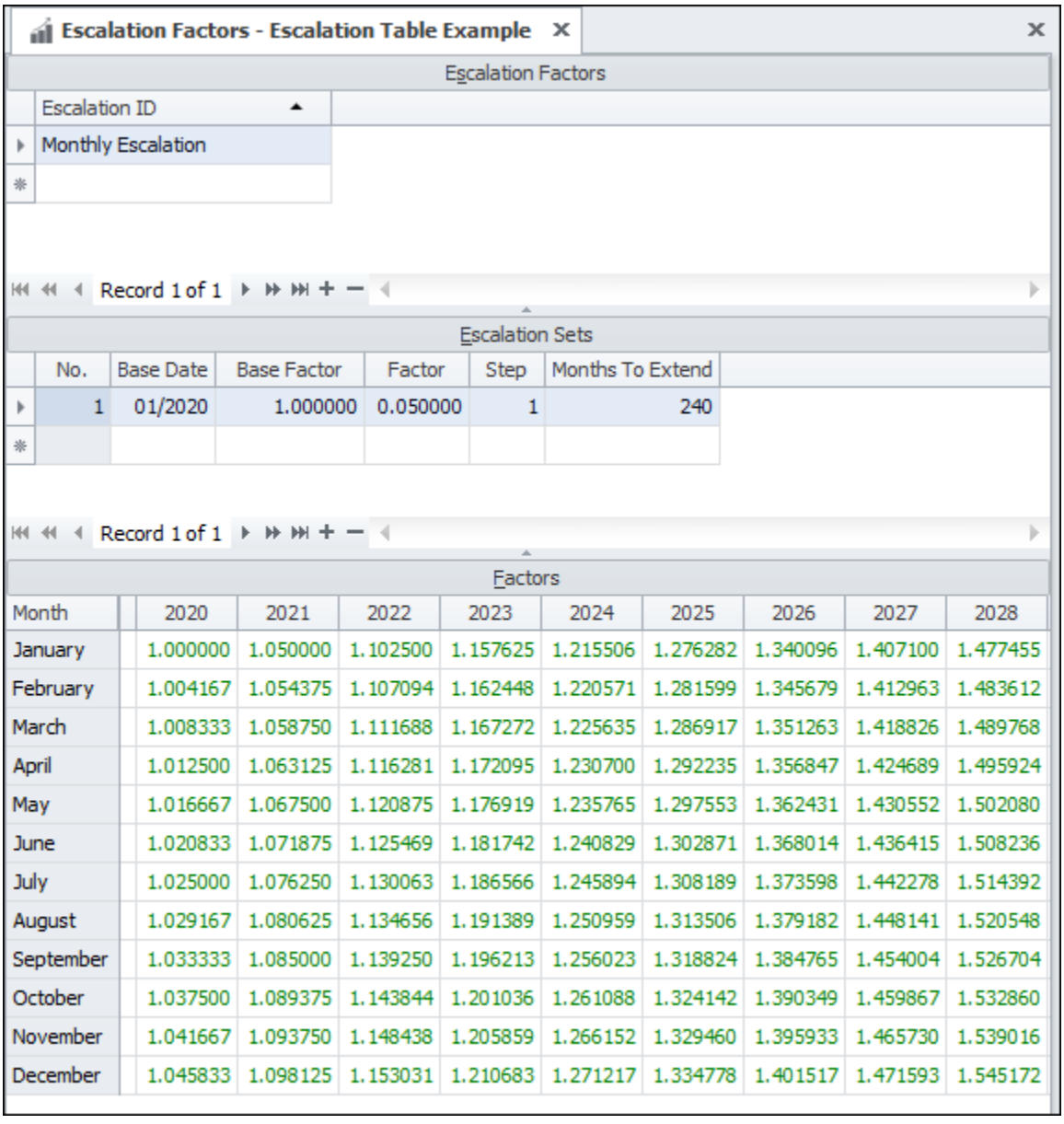
Enter any applicable comment. If you need more room, click the down arrow to open a text box. This column is hidden by default.

Escalation Base Date

If a part/assembly is linked to an escalation set with an escalation ID, you can escalate its base unit cost by entering an escalation base date. The same factors and step entered for the set in the escalation table are still applicable, but the base date in the table is not. Instead the escalation base date you enter in the library determines when escalation begins. After the escalation base date, the escalation set's factor is applied to the base unit cost as frequently as the step indicates.

For example:

The following shows an escalation table containing an escalation ID named *Monthly Escalation*. According to the escalation set factor and step, it escalates by a factor of 0.05 every month. The base date of the set is January 2020, so no escalation occurs in that month.



Escalation Factors - Escalation Table Example

Escalation Factors

Escalation ID
Monthly Escalation

Record 1 of 1

Escalation Sets

No.	Base Date	Base Factor	Factor	Step	Months To Extend
1	01/2020	1.000000	0.050000	1	240

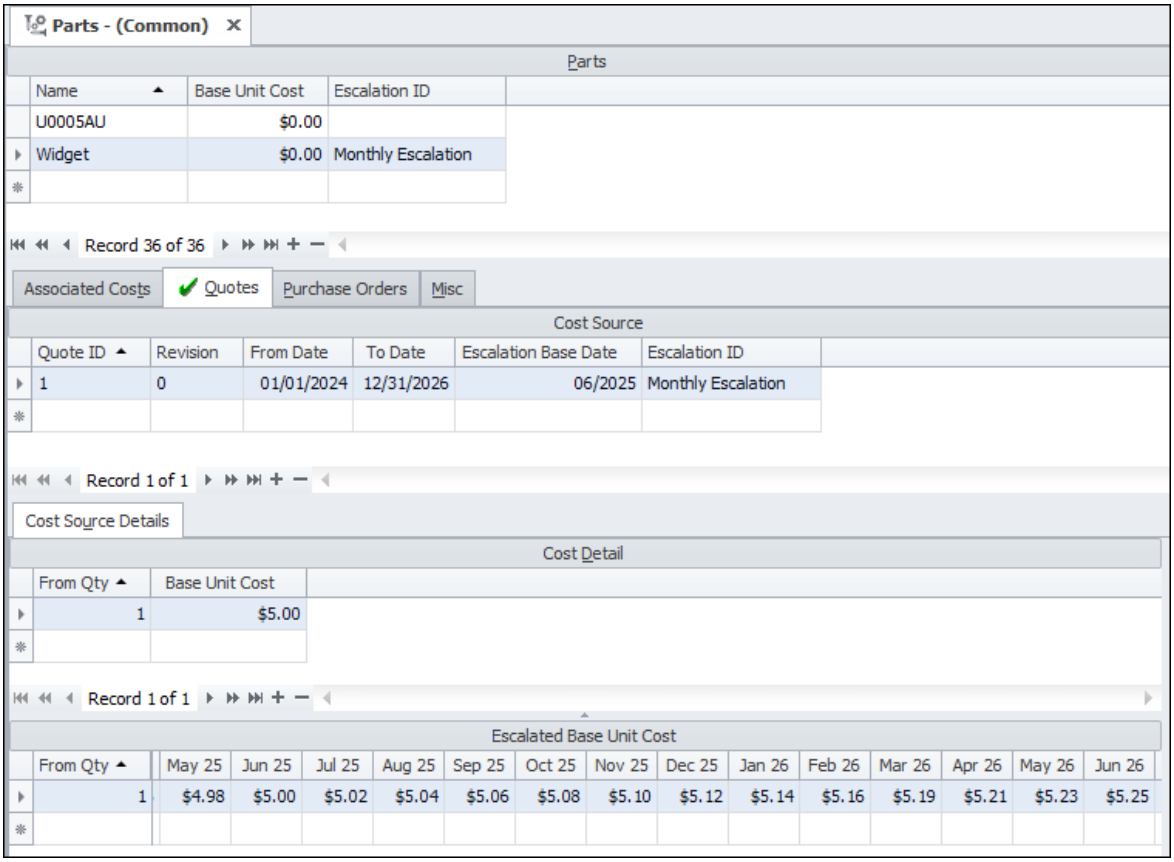
Record 1 of 1

Factors

Month	2020	2021	2022	2023	2024	2025	2026	2027	2028
January	1.000000	1.050000	1.102500	1.157625	1.215506	1.276282	1.340096	1.407100	1.477455
February	1.004167	1.054375	1.107094	1.162448	1.220571	1.281599	1.345679	1.412963	1.483612
March	1.008333	1.058750	1.111688	1.167272	1.225635	1.286917	1.351263	1.418826	1.489768
April	1.012500	1.063125	1.116281	1.172095	1.230700	1.292235	1.356847	1.424689	1.495924
May	1.016667	1.067500	1.120875	1.176919	1.235765	1.297553	1.362431	1.430552	1.502080
June	1.020833	1.071875	1.125469	1.181742	1.240829	1.302871	1.368014	1.436415	1.508236
July	1.025000	1.076250	1.130063	1.186566	1.245894	1.308189	1.373598	1.442278	1.514392
August	1.029167	1.080625	1.134656	1.191389	1.250959	1.313506	1.379182	1.448141	1.520548
September	1.033333	1.085000	1.139250	1.196213	1.256023	1.318824	1.384765	1.454004	1.526704
October	1.037500	1.089375	1.143844	1.201036	1.261088	1.324142	1.390349	1.459867	1.532860
November	1.041667	1.093750	1.148438	1.205859	1.266152	1.329460	1.395933	1.465730	1.539016
December	1.045833	1.098125	1.153031	1.210683	1.271217	1.334778	1.401517	1.471593	1.545172

In the Parts Library, the escalation ID *Monthly Escalation* is selected for a part named *Widget*. The escalation base date is June 2025, so the base unit cost

begins in that month and escalation has not occurred yet. The escalation set factor 0.05 is applied to the base unit cost every month after June 2025.



Escalation ID

Override the escalation ID for a cost source. This column is hidden by default.

Enable Deescalation

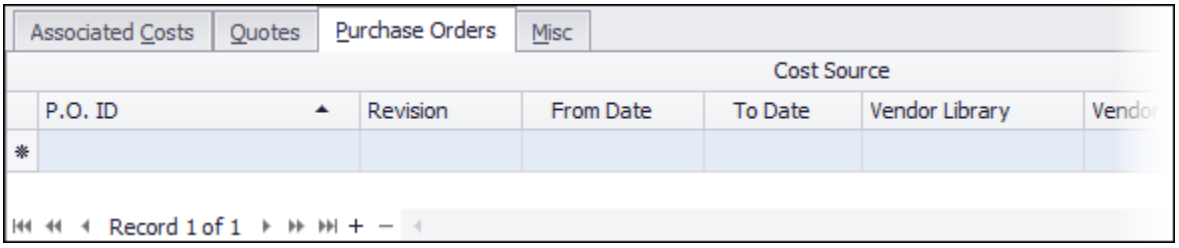
Select the checkbox to de-escalate the cost before the escalation base date, or clear it to disable de-escalation. The checkbox is selected and hidden by default.

Material Fields - Cost

These columns appear if you created cost material fields. They allow you to enter additional information about the miscellaneous cost source.

Parts and Assemblies Libraries - Purchase Orders Tab

The **Purchase Orders** tab is where you enter purchase order information for a selected part/assembly.



*Note: To view and add notes for each source, right-click anywhere in the **Cost Source** grid, and then click **Show Notes**.*

P.O. ID

Enter the name of the purchase order.

Revision

Enter a short, descriptive text or number for the purchase order. The maximum number of characters allowed is 255.

*Note: **P.O. ID** and **Revision** identify the cost source record. You can enter two purchase orders with the same name, but their revisions must be different.*

From Date

Enter the date the purchase order was written.

To Date

Enter the expiration date of the purchase order.

Vendor Library

Select the library that the vendor information is in.

Vendor

Enter the name of the vendor.

Vendor Status

Shows the status of the vendor entered in the library. This column is hidden by default.

Lead Time

Enter the number of months you need to order the part/assembly in advance. A lead time of 0 means that the material will be ordered in the same month it will be assigned to a task. A lead time of 1 means that the material must be ordered one month before it will be assigned to the task, etc. This column is hidden by default.

UM

Enter the unit of measurement for a part.

Minimum Buy Qty

Enter the minimum number of parts/assemblies you must purchase to receive the purchase order price. This column is hidden by default.

Currency

This column appears if the **Enable Material Multi-Currency Functions** checkbox is selected on the **Currency** page of the **System Options**. It shows the system currency by default.

Comment

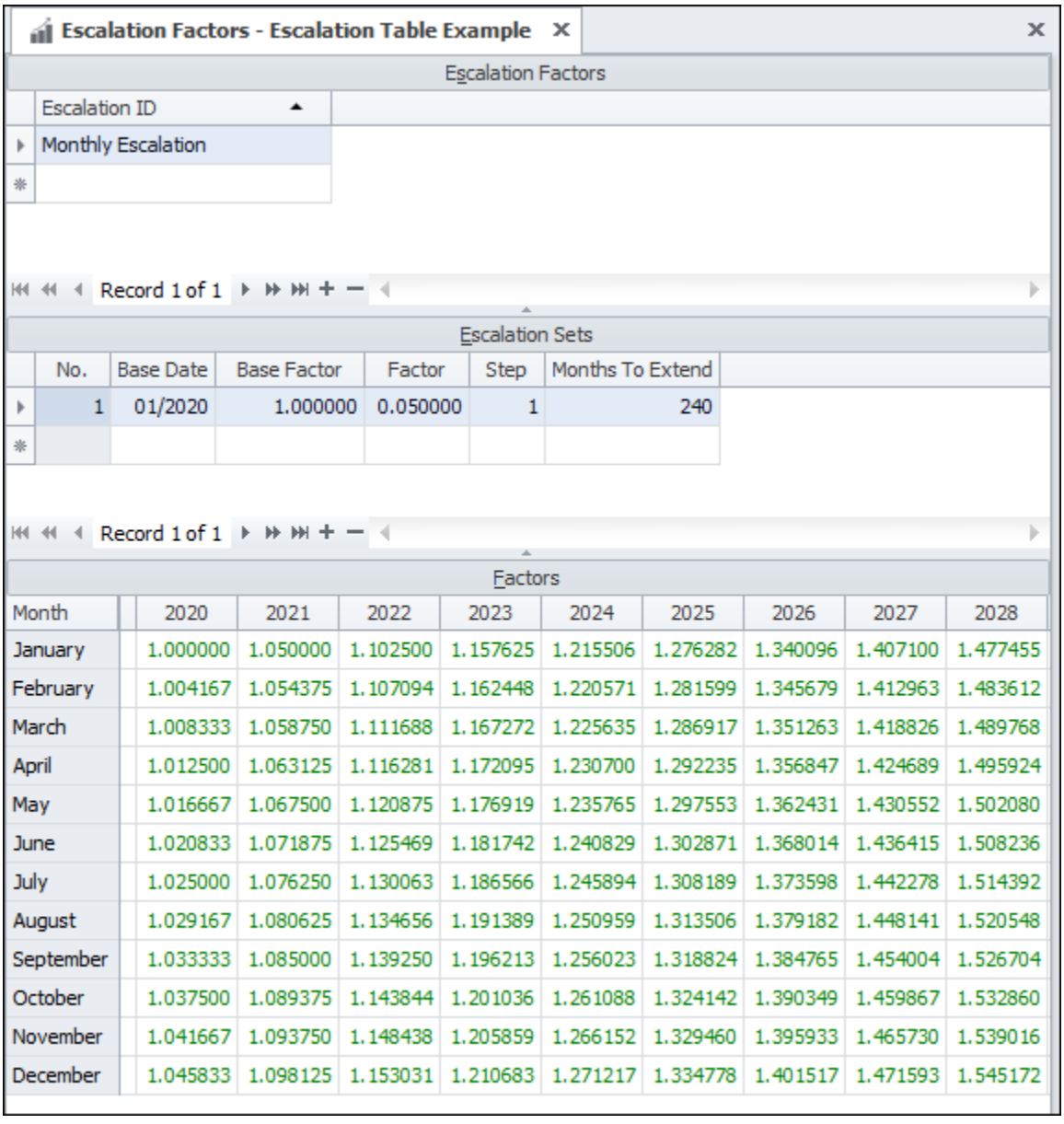
Enter any applicable comment. If you need more room, click the down arrow to open a text box. This column is hidden by default.

Escalation Base Date

If a part/assembly is linked to an escalation set with an escalation ID, you can escalate its base unit cost by entering an escalation base date. The same factors and step entered for the set in the escalation table are still applicable, but the base date in the table is not. Instead the escalation base date you enter in the library determines when escalation begins. After the escalation base date, the escalation set's factor is applied to the base unit cost as frequently as the step indicates.

For example:

The following shows an escalation table containing an escalation ID named *Monthly Escalation*. According to the escalation set factor and step, it escalates by a factor of 0.05 every month. The base date of the set is January 2020, so no escalation occurs in that month.



Escalation Factors - Escalation Table Example

Escalation Factors

Escalation ID
Monthly Escalation

Record 1 of 1

Escalation Sets

No.	Base Date	Base Factor	Factor	Step	Months To Extend
1	01/2020	1.000000	0.050000	1	240

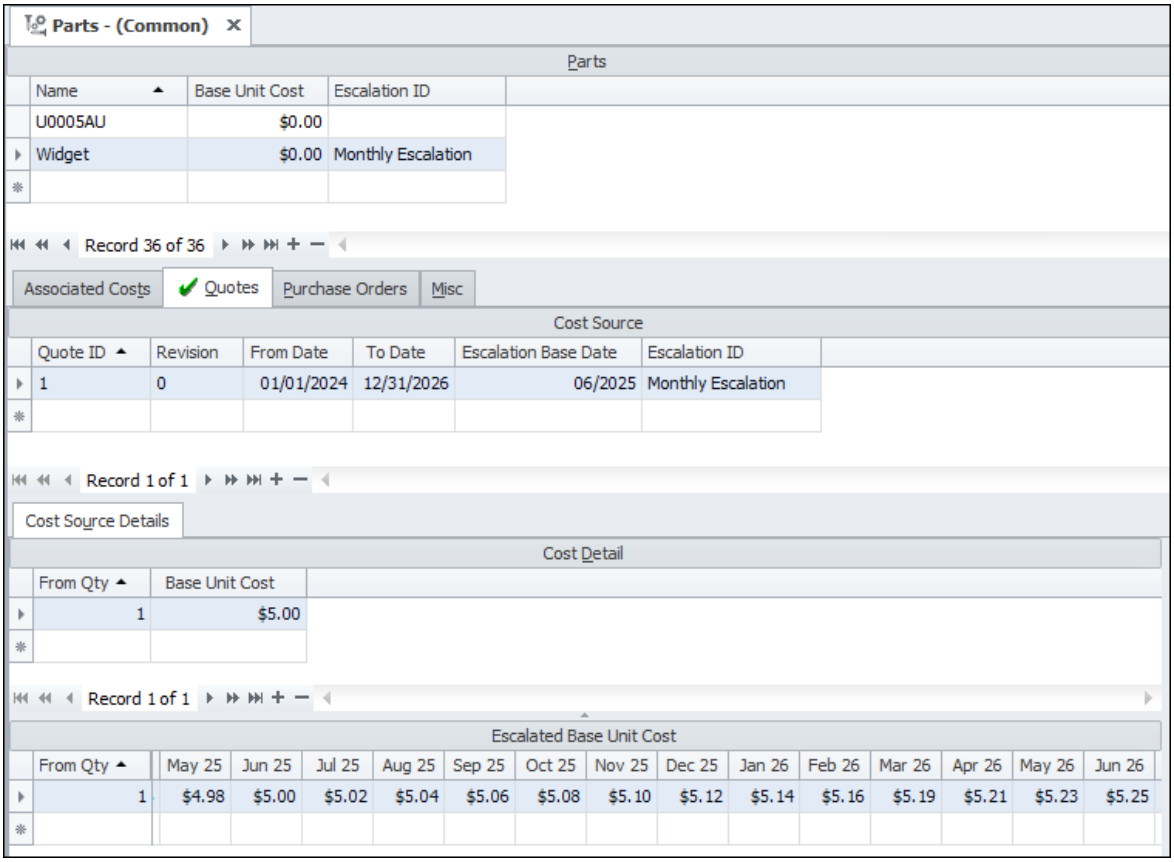
Record 1 of 1

Factors

Month	2020	2021	2022	2023	2024	2025	2026	2027	2028
January	1.000000	1.050000	1.102500	1.157625	1.215506	1.276282	1.340096	1.407100	1.477455
February	1.004167	1.054375	1.107094	1.162448	1.220571	1.281599	1.345679	1.412963	1.483612
March	1.008333	1.058750	1.111688	1.167272	1.225635	1.286917	1.351263	1.418826	1.489768
April	1.012500	1.063125	1.116281	1.172095	1.230700	1.292235	1.356847	1.424689	1.495924
May	1.016667	1.067500	1.120875	1.176919	1.235765	1.297553	1.362431	1.430552	1.502080
June	1.020833	1.071875	1.125469	1.181742	1.240829	1.302871	1.368014	1.436415	1.508236
July	1.025000	1.076250	1.130063	1.186566	1.245894	1.308189	1.373598	1.442278	1.514392
August	1.029167	1.080625	1.134656	1.191389	1.250959	1.313506	1.379182	1.448141	1.520548
September	1.033333	1.085000	1.139250	1.196213	1.256023	1.318824	1.384765	1.454004	1.526704
October	1.037500	1.089375	1.143844	1.201036	1.261088	1.324142	1.390349	1.459867	1.532860
November	1.041667	1.093750	1.148438	1.205859	1.266152	1.329460	1.395933	1.465730	1.539016
December	1.045833	1.098125	1.153031	1.210683	1.271217	1.334778	1.401517	1.471593	1.545172

In the Parts Library, the escalation ID *Monthly Escalation* is selected for a part named *Widget*. The escalation base date is June 2025, so the base unit cost

begins in that month and escalation has not occurred yet. The escalation set factor 0.05 is applied to the base unit cost every month after June 2025.



Escalation ID

Override the escalation ID for a cost source. This column is hidden by default.

Enable Deescalation

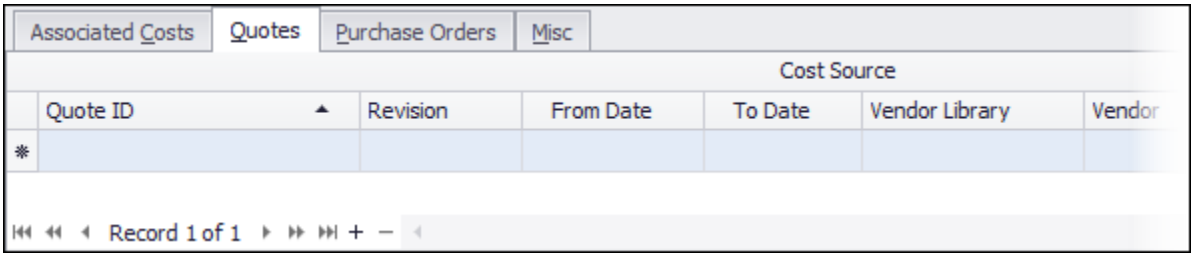
Select the checkbox to de-escalate the cost before the escalation base date, or clear it to disable de-escalation. The checkbox is selected and hidden by default.

Material Fields - Cost

These columns appear if you created cost material fields. They allow you to enter additional information about the purchase order.

Parts and Assemblies Libraries - Quotes Tab

The **Quotes** tab is where you enter quote information for a selected part/assembly.



*Note: To view and add notes for each source, right-click anywhere in the **Cost Source** grid, and then click **Show Notes**.*

Quote ID

Enter the name of the quote.

Revision

Enter a short, descriptive text or number for the quote. The maximum number of characters allowed is 255.

*Note: **Quote ID** and **Revision** identify the cost source record. You can enter two quotes with the same name, but their revisions must be different.*

From Date

Enter the first date that the quoted prices are valid.

To Date

Enter the expiration date of the quote. ProPricer will automatically enter the date corresponding to 30 days from the date entered for **From Date**, but you can change it.

Vendor Library

Select the library that the vendor information is in.

Vendor

Enter the name of the vendor.

Vendor Status

Shows the status of the vendor entered in the library. This column is hidden by default.

Lead Time

Enter the number of months you need to order the part/assembly in advance. A lead time of 0 means that the material will be ordered in the same month it will be assigned to a task. A lead time of 1 means that the material must be ordered one month before it will be assigned to the task, etc. This column is hidden by default.

UM

Enter the unit of measurement for a part.

Minimum Buy Quantity

Enter the minimum number of parts/assemblies you must purchase to receive the quoted price. This column is hidden by default.

Currency

This column appears if the **Enable Material Multi-Currency Functions** checkbox is selected on the **Currency** page of the **System Options**. It shows the system currency by default.

Comment

Enter any relevant comment, such as availability of parts, the timeliness of delivery, and accuracy of quote. If you need more room, click the down arrow to open a text box. This column is hidden by default.

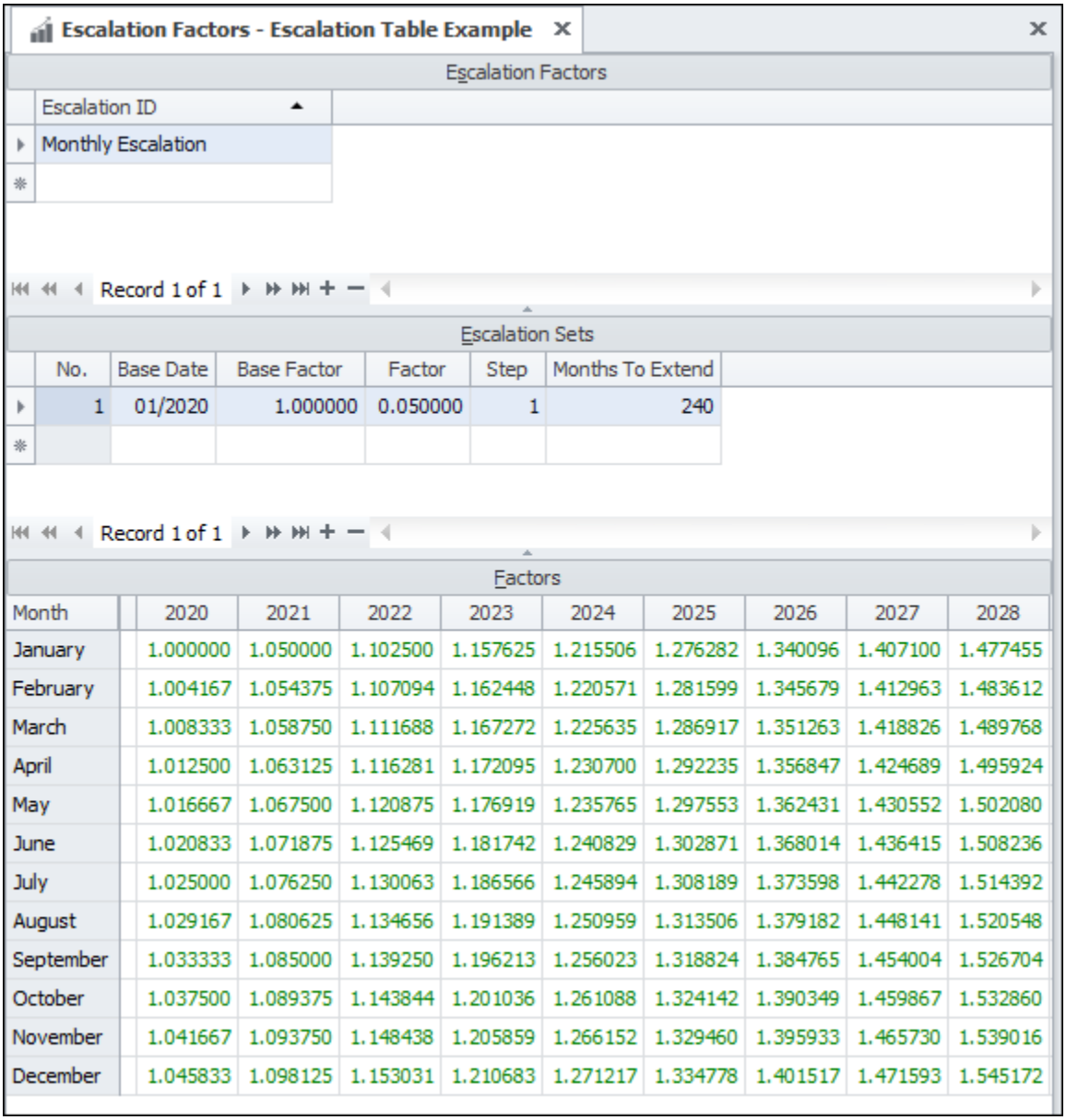
Escalation Base Date

If a part/assembly is linked to an escalation set with an escalation ID, you can escalate its base unit cost by entering an escalation base date. The same factors and step entered for the set in the escalation table are still applicable, but the base

date in the table is not. Instead the escalation base date you enter in the library determines when escalation begins. After the escalation base date, the escalation set's factor is applied to the base unit cost as frequently as the step indicates.

For example:

The following shows an escalation table containing an escalation ID named *Monthly Escalation*. According to the escalation set factor and step, it escalates by a factor of 0.05 every month. The base date of the set is January 2020, so no escalation occurs in that month.



Escalation Factors - Escalation Table Example

Escalation Factors

Escalation ID
Monthly Escalation

Record 1 of 1

Escalation Sets

No.	Base Date	Base Factor	Factor	Step	Months To Extend
1	01/2020	1.000000	0.050000	1	240

Record 1 of 1

Factors

Month	2020	2021	2022	2023	2024	2025	2026	2027	2028
January	1.000000	1.050000	1.102500	1.157625	1.215506	1.276282	1.340096	1.407100	1.477455
February	1.004167	1.054375	1.107094	1.162448	1.220571	1.281599	1.345679	1.412963	1.483612
March	1.008333	1.058750	1.111688	1.167272	1.225635	1.286917	1.351263	1.418826	1.489768
April	1.012500	1.063125	1.116281	1.172095	1.230700	1.292235	1.356847	1.424689	1.495924
May	1.016667	1.067500	1.120875	1.176919	1.235765	1.297553	1.362431	1.430552	1.502080
June	1.020833	1.071875	1.125469	1.181742	1.240829	1.302871	1.368014	1.436415	1.508236
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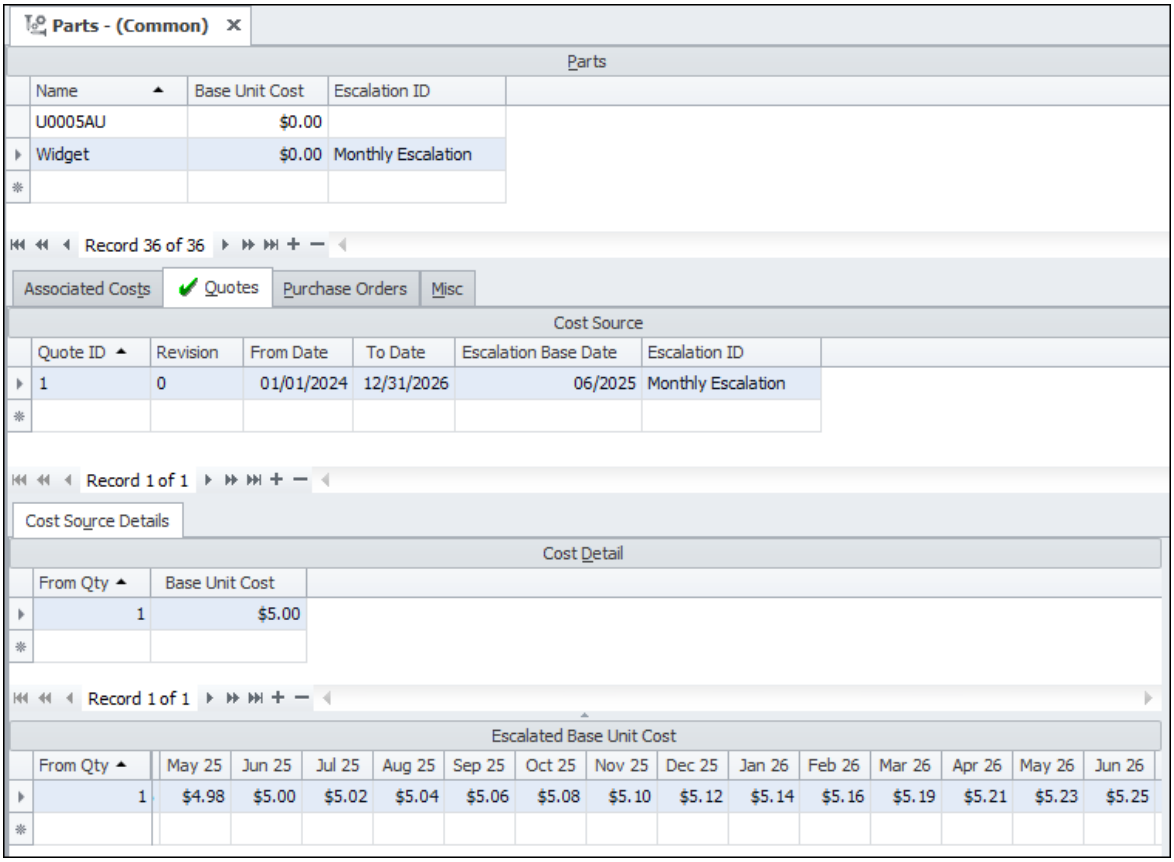
October	1.037500	1.089375	1.143844	1.201036	1.261088	1.324142	1.390349	1.459867	1.532860
November	1.041667	1.093750	1.148438	1.205859	1.266152	1.329460	1.395933	1.465730	1.539016
December	1.045833	1.098125	1.153031	1.210683	1.271217	1.334778	1.401517	1.471593	1.545172

In the Parts Library, the escalation ID *Monthly Escalation* is selected for a part named *Widget*. The escalation base date is June 2025, so the base unit cost begins in that month and escalation has not occurred yet. The escalation set factor 0.05 is applied to the base unit cost every month after June 2025.



Escalation ID

Override the escalation ID for a cost source. This column is hidden by default.

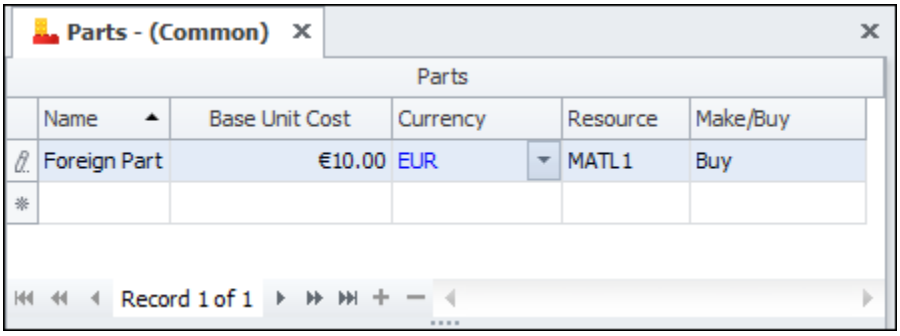
Enable Deescalation

Select the checkbox to de-escalate the cost before the escalation base date, or clear it to disable de-escalation. The checkbox is selected and hidden by default.

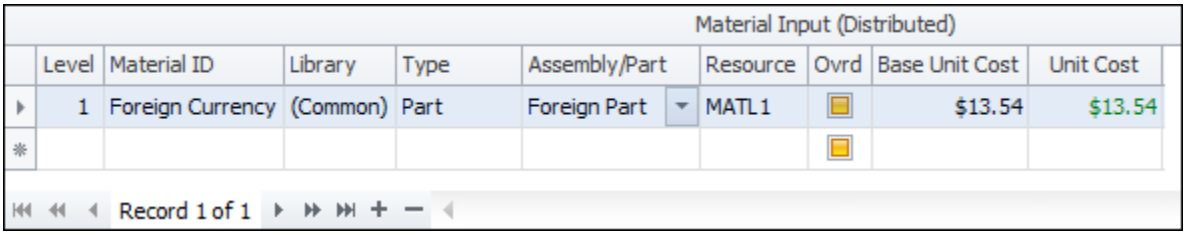
Material Fields - Cost

These columns appear if you created cost material fields. They allow you to enter additional information about the quote.

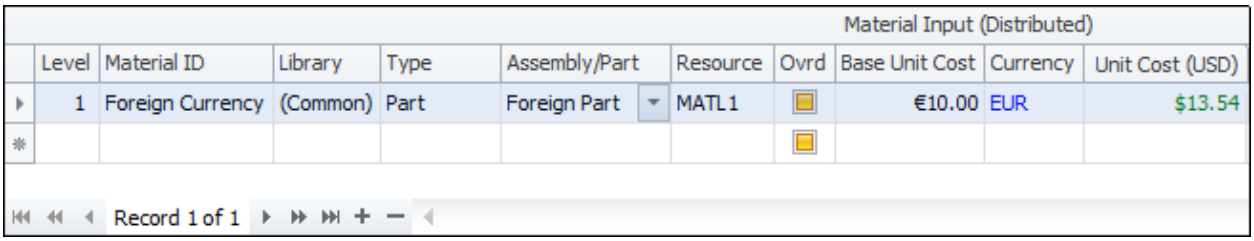
The Material Multi-Currency functions allow you to enter currencies that differ from the system currency for parts and assemblies in the Parts and Assemblies Libraries. In the examples that follow, we used a system currency of USD. We created a part and entered Euros for the Base Unit Cost.



Before assigning the part to a task, we assigned an Exchange Rate Table to the proposal. In this example, the currency of the proposal is also USD. ProPricer will convert the Base Unit Cost and show it in the proposal currency.



If the **Multi-Currency** checkbox is selected for the proposal, the Base Unit Cost will appear in the currency entered in the library. ProPricer will convert it to calculate the Unit Cost, which appears in the proposal currency.



Parts Library

The Parts Library is where you store and maintain the parts you will assign to tasks or use in assemblies.

There is a Common Parts Library, as well as a Parts Library for each product. You can store parts in either library and use common parts in a product assembly, or products parts in a common assembly. It is up to you how you want to organize your materials.

The library includes the Parts grid, and a section of tabs for more information about a selected part.

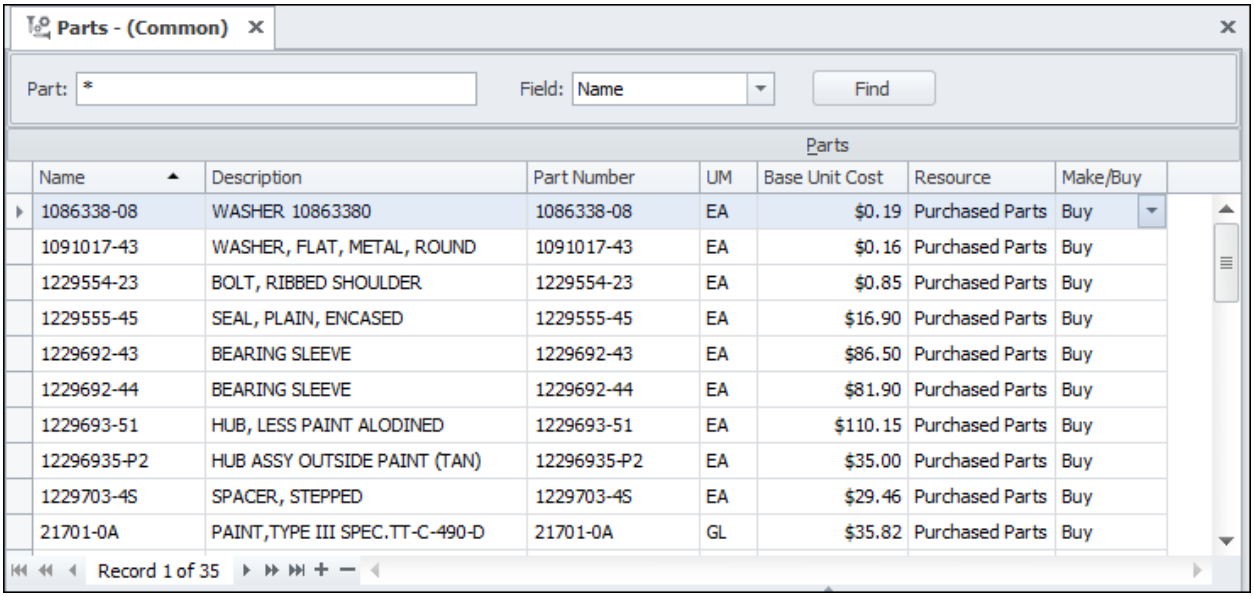
*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Parts

This grid is for creating and defining individual parts in the library.

In proposals, you can change information that comes from the library by entering proposal-specific information for a part instead. If you update material in a proposal, or consolidate material unit costs in a proposal, the overrides will revert to the library information.

Because material libraries typically contain large amounts of data, The Parts grid does not automatically show everything it contains. To find a part in the library, use the search bar above the grid. To view all parts in the library, search for an asterisk * as a wildcard value.



Search Bar

Part

Enter the name or part number of a part that you want to find in the library. This should correspond with the **Field** option you select.

You can view all parts by searching for an asterisk * as a wildcard value.

Field

Select the field, or column, in the library to search. You can search the **Name** field or the **Part Number** field.

Find

Click this button to search the library.

Name

Enter a name for the part. The maximum number of characters allowed is 255.

If the Assembly/Part Name Template system setting uses the *[Part Number]* variable, the material name is automatically created after entering the part number. When the template also combines material fields with the *[Part Number]* variable, you can have multiple material items with the same part number.

Description

Enter a description of the part. The maximum number of characters allowed is 255.

Part Number

Enter any applicable number for the part. The maximum number of characters allowed is 255.

If the Assembly/Part Name Template system setting uses the *[Part Number]* variable, the material name is automatically created after entering the part number. When the template also combines material fields with the *[Part Number]* variable, you can have multiple material items with the same part number.

UM

Enter the unit of measurement (EA for each, SF for square feet, etc.) of the part. The maximum number of characters allowed is 10. This is a text field for reporting purposes only.

Base Unit Cost

Enter the cost per single unit of the part.

Currency

This column appears only if the **Enable Material Multi-Currency Functions** checkbox is selected on the Currency page of the System Options. It shows the system currency by default. You can change it.

Cost Source

Type the name of the cost source you want to associate with the part. This column is hidden by default. The maximum number of characters allowed is 255.

Resource

Enter the resource you want to associate with the part. Once the unit cost has been calculated, this resource tells ProPricer which rates to apply to the unit cost.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter the resource field value you want to use. You can hide any resource field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

Comment

Enter any applicable comment. If you need more room, click the down arrow to open a text box. This column is hidden by default.

Make/Buy

Specify if the part will be made or bought.

Escalation ID

This column will appear if there is an Escalation Table assigned to the library. Enter the Escalation ID you want to use to escalate the costs.

Inventory Qty

Enter the number of parts you have in stock. This column is hidden by default.

Mfg Yield Factor

Enter a manufacturing yield factor (in decimal format) you want to apply to the part. This is the amount of raw materials or purchased parts in the delivered end item divided by the total amount of raw materials or purchased parts consumed during manufacturing. This column is hidden by default.

If the Assembly/Part Name Template system setting uses the *[Part Number]* variable, the material name is automatically created after entering the part number. When the template also combines material fields with the *[Part Number]* variable, you can have multiple material items with the same part number.

Destr Eval Qty

Enter a destructive evaluation quantity. This is the number of parts lost during the evaluation process. This column is hidden by default.

Material Fields

These columns appear if assembly/part material fields have been defined. Enter the appropriate text or number. You can hide any material field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

In the Elements tab of the Assemblies Library, you can edit material fields for the parts that make up the assembly.

If the Assembly/Part Name Template system setting uses the *[Part Number]* variable, the material name is automatically created after entering the part number. When the template also combines material fields with the *[Part Number]* variable, you can have multiple material items with the same part number.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Tabs

More information about a part can be entered on the following tabs. Click a tab name in this list to open the Help topic for it.

- Associated Costs
- Quotes
- Purchase Orders
- Misc

Cost Source

This grid is available on the **Quotes**, **Purchase Orders**, and **Misc** tabs. Some columns in the grid are different depending on the tab selected. In the preceding Tabs section, click a tab name in the list to open the Help topic for it.

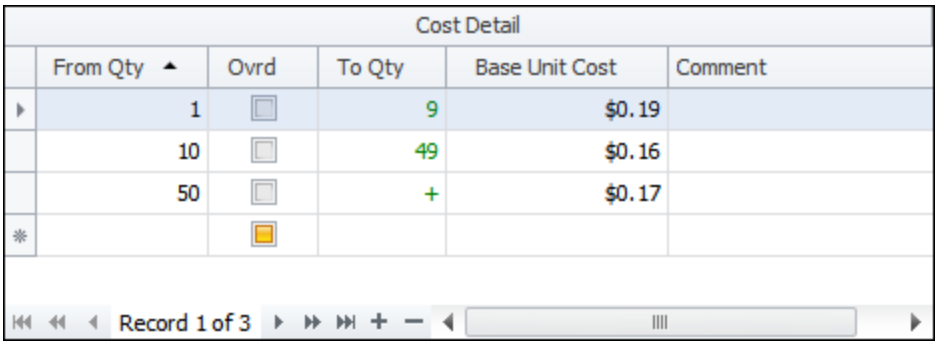
When you select a row in the **Cost Source** grid, the **Cost Source Details** and **Cost Source Notes** tabs below it correspond to the selected quote, P.O., or miscellaneous cost source.

Cost Source Details

This tab contains the **Cost Detail**, **Timephased Base Unit Cost**, and **Associated Costs** grids for the selected cost source.

Cost Detail

This grid allows you to enter costs according to quantity ranges. You do not need to enter a range. You can enter the cost of a single item. If you do enter more than one value in the **From Qty** column, ProPricer will calculate the value of the **To Qty** column.



From Qty

Enter the *from* values in the range. For example, if your quote provides a separate cost for 1 to 50 parts, 50 to 100 parts, 100-500 parts, and more than 500 parts, you would enter 1, 50, 100, and 500 in this column.

Ovrd

Select this checkbox if you need to override the value in the **To Qty** column. If the vendor provided costs for fixed amounts (50, 100, 500), for example,

you can select this checkbox and enter 50, 100, and 500 in the **To Qty** column. If the checkbox is clear, the **To Qty** column is read-only. This column is hidden by default.

To Qty

The *to* values will appear here. Select the **Ovrd** checkbox if you need to change the values. This column is hidden by default.

Base Unit Cost

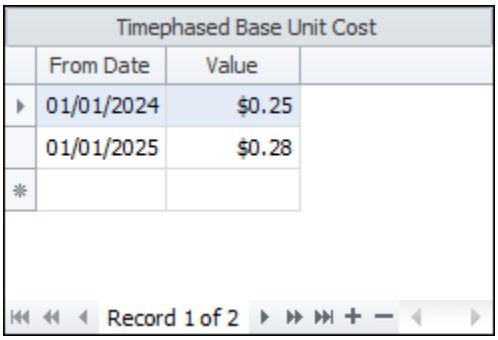
Enter the cost per single unit of the part or assembly.

Comment

Enter any applicable comment. If you need more room, click the down arrow to open a text box. This column is hidden by default.

Timephased Base Unit Cost

This grid allows you to enter a base unit cost for a part in specific periods. Each value should be different than the base unit cost in the **Parts** grid.



From Date

Select the date that the base unit cost changes.

Value

Enter the base unit cost that begins on the selected date.

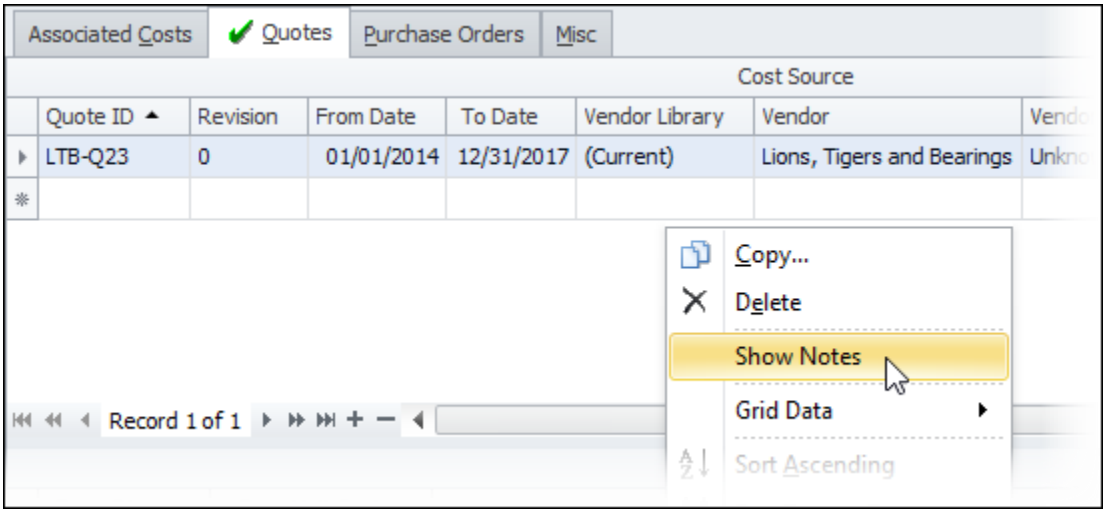
Associated Costs

This grid allows you to enter a part's associated costs at the cost source level. It is identical to the grid on the **Associated Costs** tab, but it has a different purpose. If cost sources have varying associated costs, enter them here. Otherwise, if the associated costs are the same regardless of the cost source, enter them at the material level on the **Associated Costs** tab.

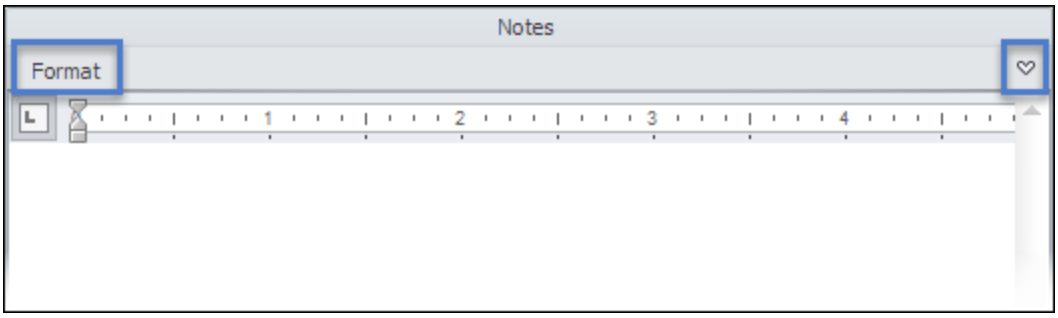
Cost Source Notes

If you need to type or attach any other cost source information, go to the **Cost Source Notes** tab. For each quote, purchase order, and miscellaneous cost source, you can enter notes and attach files.

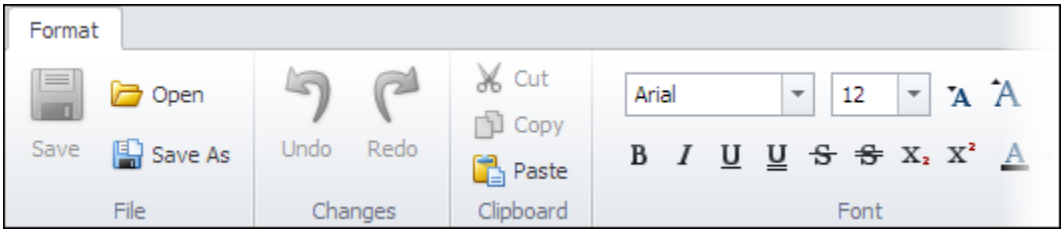
Notes are hidden by default. To view and enter notes, right-click anywhere in the **Cost Source** grid, and then click **Show Notes**.



Double-click the **Format** tab in the **Notes** section to permanently display the ribbon. You can also click the down arrow.



The ribbon contains commands for opening, saving, attaching, and editing your notes.



Add a Part to the Parts Library

1. In the Navigation Pane, click the **Material** button, and then expand the **Common Libraries** or **Product Libraries**.
2. Double-click **Parts**.
3. Enter a name and part number for the part.
    - If the **Assembly/Part Name Template** system setting uses the *[Part Number]* variable, the name will be created automatically after you enter the part number.
4. Enter the base unit cost.
5. Select a resource for the part.
6. Specify if the part will be bought or made.
7. *(Optional)* Define additional costs for the part in the **Associated Costs** grid. You can enter associated costs at the assembly level or the cost source level.
8. Press **Ctrl**+**S** or move to another row to save the part.

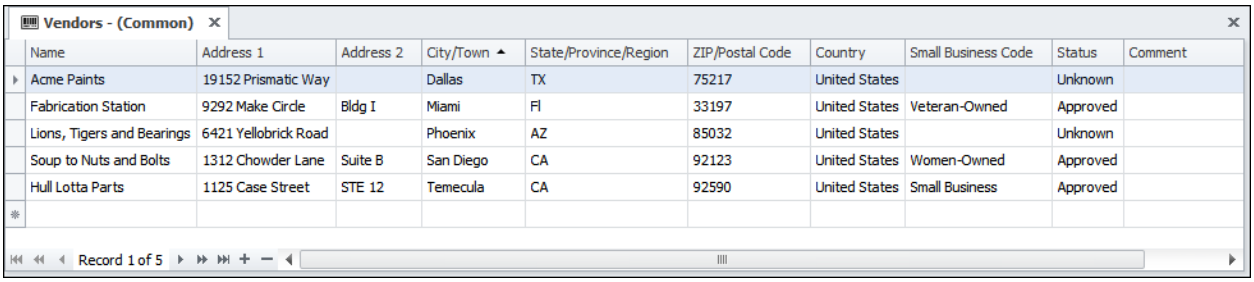
Copy a Part

1. In the Common Parts Library or in the Parts Library of a product, right-click a part, and then click **Copy** on the shortcut menu.
2. Enter the name of the library to which you want to copy the part.
3. Enter a name for the part.
4. Click **OK**.

Vendor Library

The Vendor Library is where you create and maintain vendor information for parts ordering. There is a Common Vendor Library, as well as a Vendor Library for each product. You can keep the information separated for common parts and product parts, or use the data from one library for all parts. It is up to you.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter the name of the vendor. You can enter up to 255 characters.

Address 1 and 2

Enter the vendor's address. Include any additional address information, such as Post Office Box Number, Suite, etc. if applicable.

City/Town

Enter the city or town where the vendor is located.

State/Province/Region

Enter the two-character state code, or province/region where the vendor is located.

ZIP/Postal Code

Enter the vendor's ZIP/postal code

Country

Enter the country where the vendor is located.

Small Business Code

Enter a small business code for the vendor, if applicable.

Status

Enter the vendor's status. Valid entries are **Approved**, **Disapproved**, and **Unknown**.

Comment

Enter any comment relevant to the vendor. If you need more room, click the down arrow to open a text box.

Vendor Fields

Depending on what material fields you have entered for vendors in the **Material Fields - Vendor** grid, the Vendor library will display a separate column for each user field. Using the shortcut menu, you can hide the unnecessary fields and display only the ones that are applicable to the selected vendor.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Enter Vendor Information in the Library

1. In the Navigation Pane, click the **Material** button, and then expand the **Common Libraries** or **Product Libraries**.
2. Double-click **Vendors**.
3. Enter the name of the vendor.
4. Enter the vendor’s address.
5. Enter the vendor’s city/town.
6. Enter the vendor's state, province, or region.
7. Enter the zip/postal code of the vendor’s city.
8. Enter the country where the vendor is located.
9. Enter a small business code for the vendor, if applicable.
10. Specify the vendor’s status.
11. Press **Ctrl**+**S** or move to another row to save the information.

Define a Protected Material Expense

After you have assigned a material to a task, you can mark the costs and resources associated with the Material ID as protected. You can also tell ProPricer to automatically protect edited parts and assemblies.

A protected material will not change when you update from the Material Library, consolidate material unit costs, or import material details into the respective Material ID. You can protect the unit cost and resource of the Material ID, as well as the costs and resources of the associated costs. If you are working with assemblies, you can protect the assembly as a whole or the individual components. If protected, a padlock will appear next to the resource, resource fields (if defined), base unit cost, unit cost, cost source, currency (if enabled), and material factors.

Mark a Single Cost-Resource Pair as Protected

1. Select the appropriate task, and then click the **Material** tab.
2. In the **Material Input** grid, right-click the row of the Material ID, and then select **Protect**.

You can also use this method:

1. In the **Material Input** grid of Material View, locate the Material ID.
2. Right-click the row, and then select **Protect**.

*Note: You can use the **Shift** key to select consecutive rows or the **Ctrl** key to select nonconsecutive rows if you want to protect several Cost-Resource pairs at the same time. Right-click the rows selected, and then click **Protect**.*

Mark All the Cost-Resource Pairs of an Assembly

1. Select the appropriate task, and then click the **Material** tab.
2. Right-click the row of the parent Material ID, and then select **Protect**.

You can also use this method:

1. Open the proposal in Material View.
2. Right-click the row of the parent Material ID, and then select **Protect**.

Protect the Cost-Resource Pair of an Associated Cost

- In the **Associated Costs** grid, right-click the **Resource** or **Hours/Units/Cost** column, and then click **Protected**.

Unprotect a Cost-Resource Pair or All the Pairs of an Assembly

- Right-click the respective Material ID, and then select **Unprotect**.

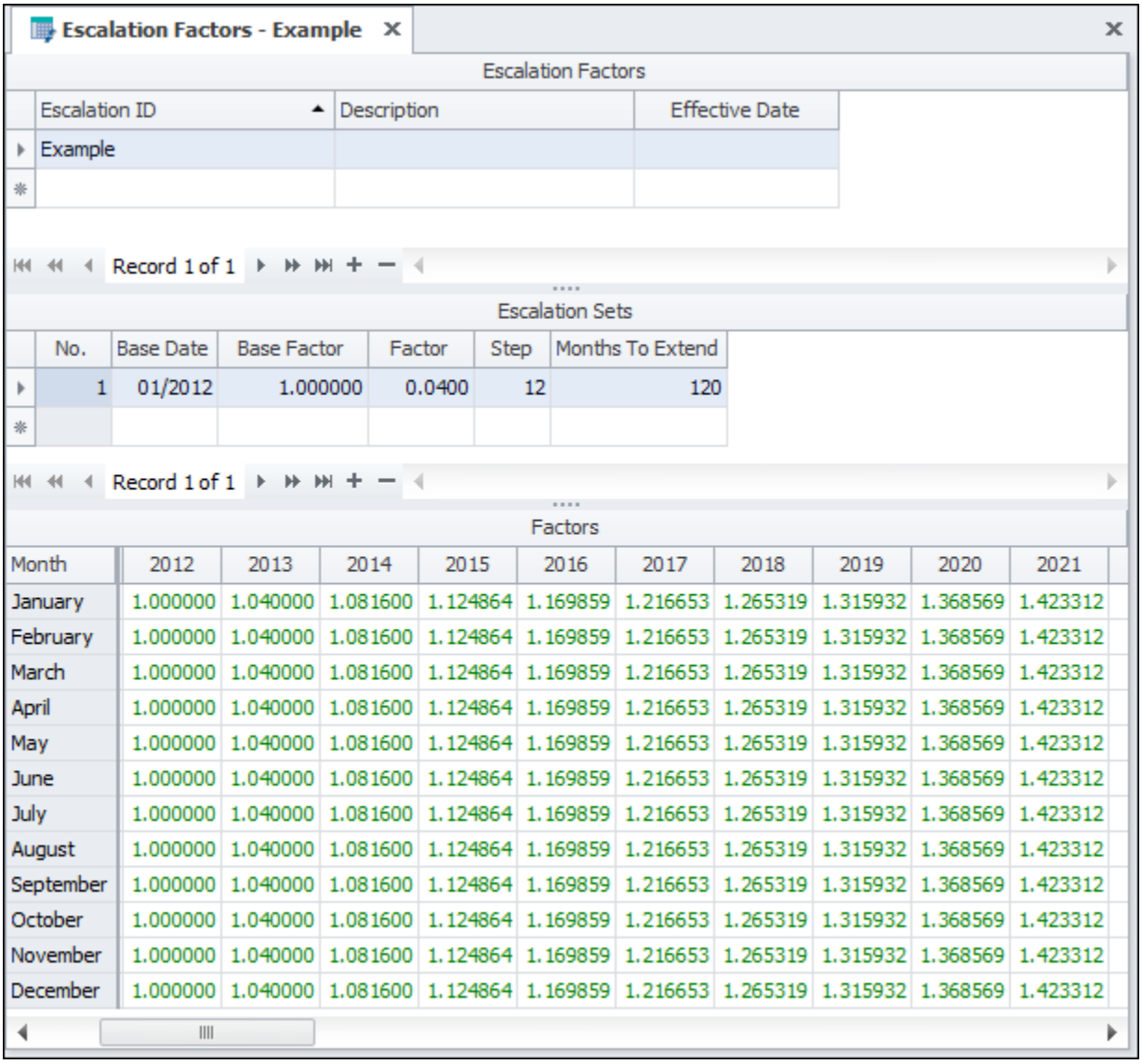
Escalation Factors

Escalation factors allow you to project material costs. These factors are stored in Escalation Tables.

Your *Buy* parts and assemblies use vendor quotes, purchase orders, and miscellaneous cost sources in the consolidation process. By assigning an Escalation ID to the *Buy* part or assembly, you can escalate its costs under different scenarios. You can also stop the escalation in a proposal on a specific date (with the **Material Escalation Freeze Date** setting in the Proposal Properties) to determine the total estimated costs.

Example

We have two vendor quotes for part *123*. We will purchase one part in 6/2017 and another in 8/2018. We created an Escalation Table with an Escalation ID called *Example*. The Escalation ID has a Base Date of 1/2012, Base Factor of 1.00, Factor of 0.04, Step of 12, and extends for 120 months. It looks like this:



Escalation Factors - Example

Escalation Factors

Escalation ID	Description	Effective Date
Example		

Record 1 of 1

Escalation Sets

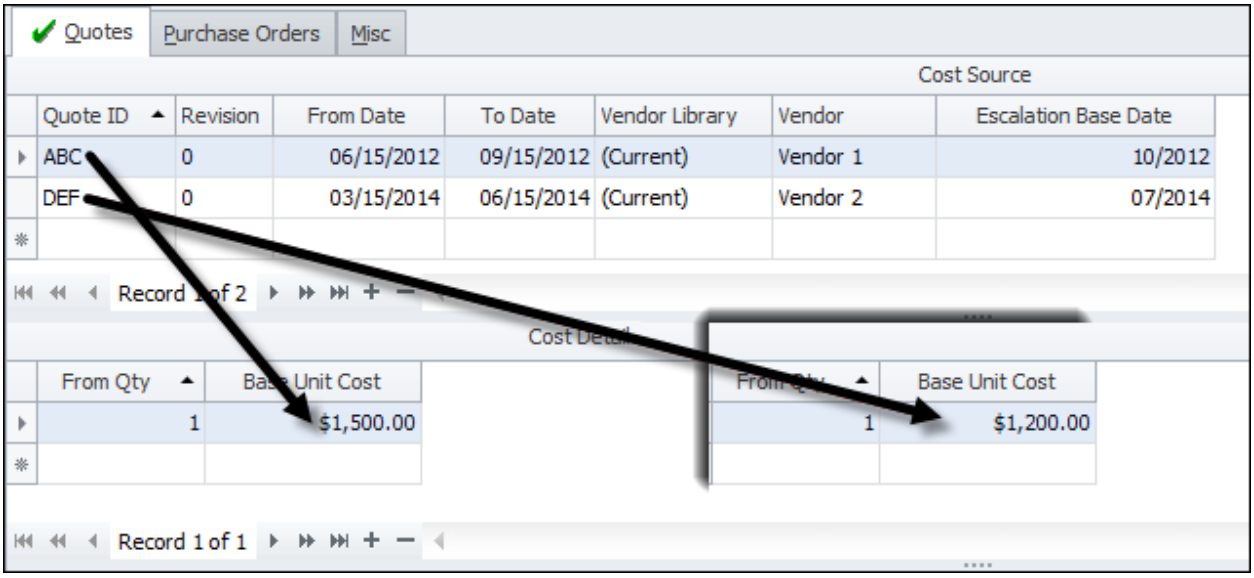
No.	Base Date	Base Factor	Factor	Step	Months To Extend
1	01/2012	1.000000	0.0400	12	120

Record 1 of 1

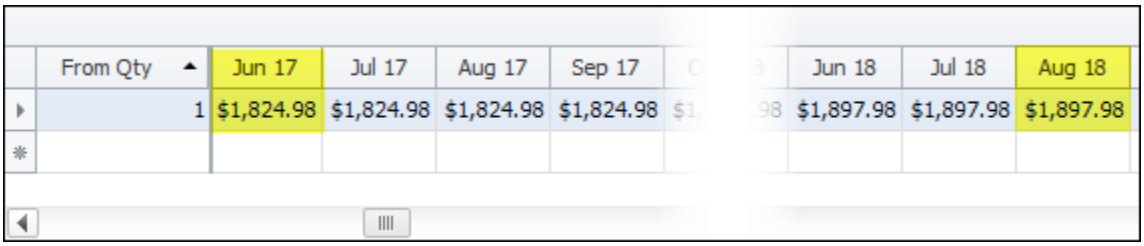
Factors

Month	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
January	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
February	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
March	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
April	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
May	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
June	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
July	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
August	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
September	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
October	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
November	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312
December	1.000000	1.040000	1.081600	1.124864	1.169859	1.216653	1.265319	1.315932	1.368569	1.423312

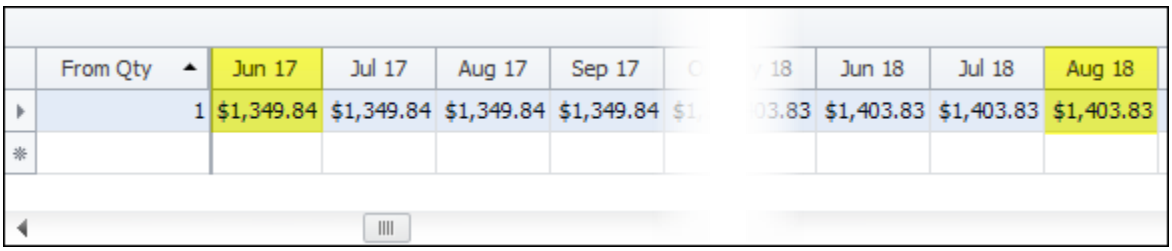
We assigned the Escalation ID *Example* to part *123* in the Parts Library. On the Quotes tab, we added two quotes for part *123*: quote *ABC* and quote *DEF*. Quote *ABC* is from *Vendor 1* and has a Unit Cost of $1,500 and an Escalation Base Date of 10/2012. Quote *DEF* is from *Vendor 2* and has a Unit Cost of $1,200 and an Escalation Base Date of 7/2014:



Here is a screenshot of the Escalated Unit Cost of the part from *Vendor 1*. It shows the escalated cost of the part that would be used for any given Material Escalation Freeze Date. Since we did not define a Material Escalation Freeze Date for the proposal, we will treat the purchase dates of 6/2017 and 8/2018 as two examples of Material Escalation Freeze Dates.



Here is a screenshot of the Escalated Unit Cost of the part from *Vendor 2*. Again, we used the purchases dates of 6/2017 and 8/2018 as two examples of Material Escalation Freeze Dates.



Notes:

- *Only Buy parts and assemblies can use an Escalation ID.*
- *You must assign an Escalation Table to the common material libraries or a specific product library to be able to assign an Escalation ID to a part and/or assembly.*

Escalated Cost Equation

The equation that ProPricer uses to calculate the escalated cost is: Unit Cost x (Escalation factor for a specific month / Escalation factor for the Base Date).

Entering the values from the preceding Escalation ID example, we get these results:

Vendor	Purchase Date	Calculation	Escalated Cost
Vendor 1	6/2017	1,500 x (1.216653 / 1)	1,824.98
	8/2018	1,500 x (1.265319 / 1)	1,897.98
Vendor 2	6/2017	1,200 x (1.216653 / 1.0816)	1,349.84
	8/2018	1,200 x (1.265319 / 1.0816)	1,403.83

Material Escalation Freeze Dates stop the escalation of the costs. For example, entering a Material Escalation Freeze Date of 2/2013 in the Proposal Properties tells ProPricer to use the factor for that date, which is 1.04, in all calculations. Remember to consolidate your materials for the change to take effect. We now get these results:

Vendor	Purchase Date	Calculation	Escalated Cost
Vendor 1	6/2017	1,500 x (1.04 / 1)	1,560.00

	8/2018		
Vendor 2	6/2017	1,200 x (1.04 / 1.0816)	1,153.85
	8/2018		

Assign an Escalation ID to a Part or Assembly

In the Common and Product Parts and Assemblies Libraries, you can assign an Escalation ID at the part/assembly level. At this level, the ID applies to all cost sources for the part/assembly. To escalate a part or assembly's cost differently for a specific quote, purchase order, etc., you can override the Escalation ID at the cost source level.

Note: You must assign an Escalation Table to the library before you can assign an Escalation ID to a part or assembly.

Assign an Escalation ID at the Part/Assembly Level

1. In the Navigation Pane, click the **Material** button.
2. If you want to assign an Escalation ID to a part, open the Parts Library. If you want to assign an Escalation ID to an assembly, open the Assemblies Library. You can only assign an Escalation ID to a *Buy* part or assembly.
3. In the **Escalation ID** column of the appropriate part or assembly, enter the Escalation ID.
4. Press **Ctrl**+**S** or move to another row to save the information.

Override an Escalation ID at the Cost Source Level

1. In the Parts Library or Assemblies Library, click a part or assembly that has cost source information.
2. Click the appropriate cost source tab (**Quotes**, **Purchase Orders**, or **Misc**).
3. In the **Escalation ID** column (of the **Cost Source** grid), enter an ID. The value you enter appears blue to indicate an override of the part/assembly-level Escalation ID.

4. Press **Ctrl**+**S** or move to another row to save the information.

Assign an Escalation Table to a Specific Product Library

1. In the Navigation Pane, click the **Material** button.
2. Expand the **Product Libraries** folder.
3. Right-click the appropriate product library, and then click **Properties**.
4. In the **Escalation Table** field, enter the name of the Escalation Table to use.

Assign an Escalation Table to the Common Libraries

1. In the Navigation Pane, click the **Material** button.
2. Right-click **Common Libraries**, and then click **Properties**.
3. Enter the name of the Escalation Table to use.

Copy an Escalation ID within a Table

Once you have entered factors for an Escalation ID in an Escalation Table, you can copy them to another Escalation ID in the table.

1. Right-click the Escalation ID whose factors you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the Escalation ID to which you want to copy the rates.
3. Click **OK**.

ProPricer will check to see whether there are factors in the target Escalation ID and will:

- Copy the factors if there are none.
- Prompt you to replace the existing factors with the new ones.

Copy an Escalation Table

1. Do one of the following:
   - Click the **Material** button and expand the **Escalation Tables** folder.
   - Double-click the **Escalation Tables** folder to open the list of Escalation Tables.
2. Right-click the Escalation Table you want to copy, and then click **Copy** on the shortcut menu.
3. Enter where you want to store the copy.
4. Enter a name and description for the copy that will be created.
5. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
6. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Create an Escalation Table

1. In the Navigation Pane, click the **Material** button.
2. Right-click the **Escalation Tables** folder, and then click **New Escalation Table** on the shortcut menu.
3. Enter a name and description for the new Escalation Table.
4. Click **OK**. The **Escalation Table** grid will open in a tab in the Workspace.

Delete an Escalation Table

1. In the Navigation Pane, click the **Material** button.
2. Do one of the following:
    - Expand the **Escalation Tables** folder.
    - Double-click the **Escalation Tables** folder to open the list of Escalation Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete an Escalation Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Escalation Table Properties

The **Escalation Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Escalation Tables

In an Escalation Table, you can create Escalation IDs and set up their escalation factors. The table is divided into three grids: Escalation Factors, Escalation Sets, and Factors.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Escalation Factors

In this grid, you create and describe Escalation IDs.

Escalation ID

Enter a unique name for the escalation.

Description

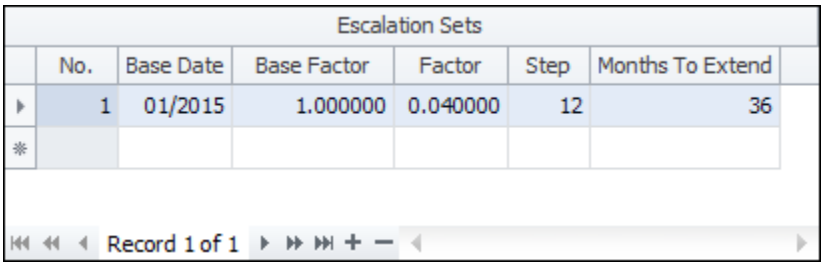
Enter a longer name or short description of the escalation.

Effective Date

Enter the date the escalation will take effect. This is for information only and does not affect how the factors will be applied.

Escalation Sets

In this grid, you define one or more escalation sets for the escalation IDs in the table. This information will be used to calculate the escalated cost of the material.



No.

The cells of this column cannot be edited. ProPricer assigns numbers to the escalation sets, based on their start dates. The set with the earliest date receives number 1.

Base Date

Enter when the escalation set begins.

Base Factor

Enter the factor for the first month.

Factor

Enter the percent of escalation for the base factor. For example, express 1% as 0.01.

Step

Enter the number of months the base rate will remain constant before the factor is applied. The default is 12 months.

Months To Extend

Enter the number of months that the escalation set should last.

Factors

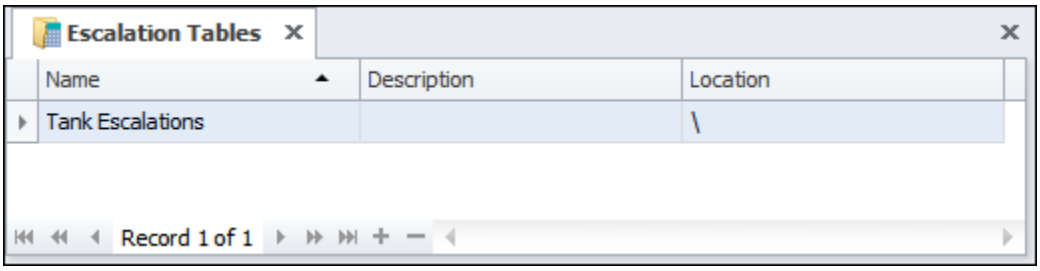
This grid shows the factor values obtained from the information entered in the **Escalation Sets** grid, as well as any factors entered manually. These are the factors that will be used to escalate the material costs. The screenshot shows the rates calculated from the escalation set (green) and rates entered manually (black).

Factors

Month	2015	2016	2017	2018	2019
January	1.000000	1.040000	1.060000		
February	1.000000	1.040000	1.060000		
March	1.000000	1.040000	1.060000		
April	1.000000	1.040000	1.081600		
May	1.000000	1.040000	1.081600		
June	1.000000	1.040000	1.081600		
July	1.000000	1.040000	1.081600		
August	1.000000	1.040000	1.081600		
September	1.000000	1.040000	1.081600		
October	1.000000	1.040000	1.081600		
November	1.000000	1.040000	1.081600		
December	1.000000	1.040000	1.081600		

Escalation Tables List

The Escalation Tables List shows all the Escalation Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Escalation Tables** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Field Editing (material)

The Field Editing (material) what-if allows you to replace existing values in material fields with new ones. You can apply the Field Editing (material) what-if to all the tasks and materials in the proposal, or to only those included in a task selection or material selection. Instead of searching for the materials and modifying them one-by-one, you can use this what-if to make all changes at the same time.

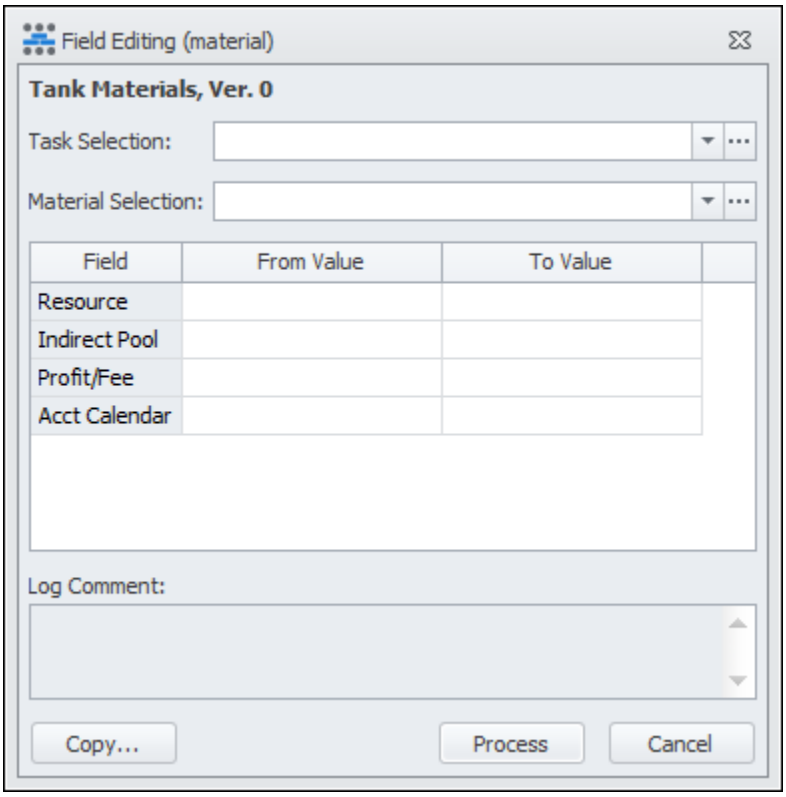
All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

Run the Field Editing (material) What-If

1. Open the proposal.
2. Do one of the following to open the what-if:
   - On the **Proposal** ribbon, in the **Material** group, click **Field Editing (material)**.
   - In **Task View**, on the **Material** tab, right-click a material in the **Material Input** grid, and then click **Field Editing** to run it with a task and material selection.
   - In **Material View**, right-click a material in the **Material Input** grid, point to **What-Ifs**, and then click **Field Editing (material)** to run it with a task and material selection.
3. *(Optional)* Make a copy of the proposal before performing the what-if.
4. Enter a **Task Selection**, or leave this field blank to process all the tasks.
5. Enter a **Material Selection**, or leave this field blank to process all the materials.

6. In **From Value**, enter the current value you want to change.
7. In **To Value**, enter the new value.
8. Click **Process**.

Field Editing (material) Dialog Box



Proposal

Displays the name and version of the proposal selected in the Navigation Pane.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

Material Selection

Enter a material selection to limit the what-if to those materials. Leave this field blank to process all the materials in the proposal. If no material selection exists, or the appropriate materials are not included in an existing one, click ... to open the **Material Selections** grid to create or modify an existing one.

Field

This column displays the names of the fields you can edit. These are the same fields that appear in Material View and the Material tab of Task View.

From Value

Enter the current value of each field you want to edit. You can type an asterisk * for a wildcard and include more values. All values that meet the criterion will be changed to the new value.

To Value

Enter the new value for the field.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Field Editing (material) what-if modifies the current proposal. Copying the proposal before performing this what-if is recommended.

Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will edit the fields of the copy. If you want to edit the fields of the original proposal, close the **Field Editing (material)** dialog box, select the proposal in the Navigation Pane, and start the what-if again.

*Note: The **Copy** button is not available if you accessed the **Field Editing (material)** dialog box from the **Tasks** grid.*

Process

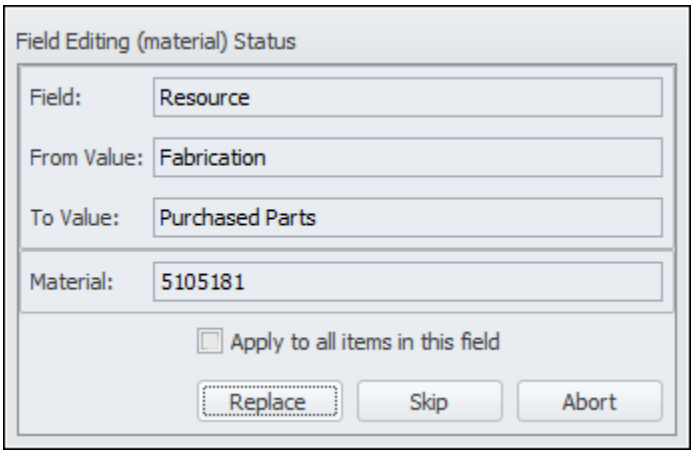
Click this button to process the what-if and edit the fields. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

Field Editing (material) Status Dialog Box

The **Field Editing (material) Status** dialog box appears during the editing process. It allows you to double-check the changes before they are made.



Field

The name of the field that is currently being processed.

From Value

The current value in the specified field.

To Value

The new value the specified field will have after the change.

Material

The name of the material that will be changed.

Apply to all items in this field

This checkbox allows you to replace or skip all items that have not been processed. If it is selected and you click **Replace**, all remaining items will be changed without further confirmation. Likewise, if you click **Skip**, all remaining items will retain their current value.

Replace

Click this button to change the old value (**From Value**) to the new value (**To Value**).

Skip

Click this button to skip the item without changing its value.

Abort

Click this button to stop the Field Editing (material) what-if. Any changes made before the abort command will not change back to their original values.

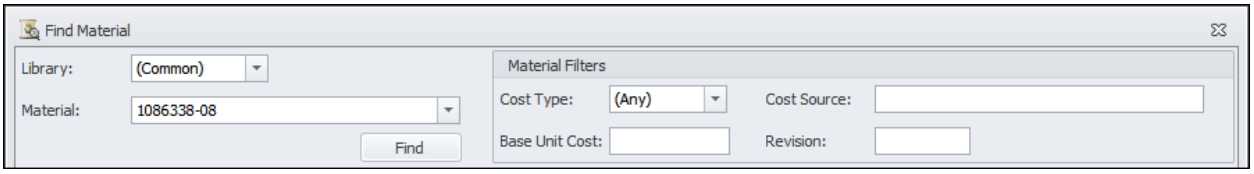
Find Material

1. Click the **Find Material** icon in the Quick Access Toolbar.
2. *(Optional)* Enter the name of a specific library to activate the lookup box in the **Material** field. If you use **(Any)**, you must type the name of the assembly or part.
3. Enter the name of the part or assembly (wildcards can be used).
4. *(Optional)* Enter any of the Material Filters to limit the search.
5. Click **Find**.

The results displayed include the library where the part is stored, the part/assembly ID, the proposal name and description, and the start/end dates. To see the consolidation details of a part, highlight it and click **Details**.

Find Material Dialog Box

The **Find Material** dialog box allows you to find the proposal or proposals to which a part or assembly has been assigned. Entering only a Part/Assembly ID will search all proposals in the database. You can use the filters provided to limit the search to a specific proposal or library.



Library

Enter the name of a Material Library to activate the lookup button in the **Material** field. If you use (Any), you will have to type the name of the assembly or part.

Material

Enter the name of the assembly or part you want to search for. You can use the lookup if you entered a library above. You can also type the name and use the wildcards: * and ?.

Material Filters

This section allows you to select criteria that will limit your search. It contains the following options:

Cost Type

This option will limit the search to a specific type of cost (Quote, P.O. or Misc.). Select (Any) to search all Cost Types.

Base Unit Cost

This option will find only the parts that match the Base Unit Cost entered.

Cost Source

This option will limit the search to a specific Cost Source. It refers to the quote, purchase order, miscellaneous data entered after consolidation, or to

a manually-entered Cost Source. You can enter the name of quote, purchase order, etc., or part of it and use the wildcards * or ?.

Revision

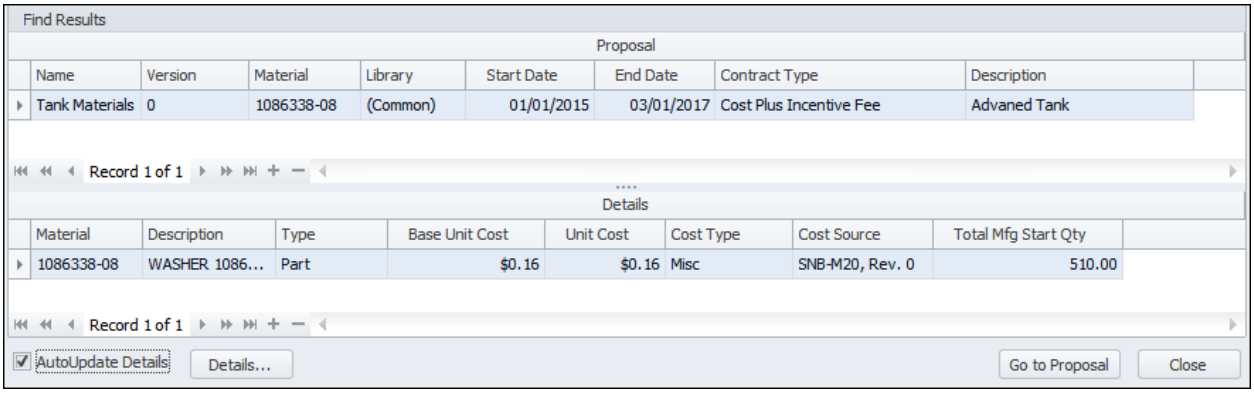
This option will limit the search to a Cost Source with a specific revision.

Find

Click to perform the search.

After you click **Find**, the search results will appear. The results are divided into two sections: Proposal and Details. The Proposal section shows the Name and Version of the proposal, the name of the part/assembly, the library to which it belongs, the Start/End Dates, the Contract Type, and the Description of the proposal.

To see the consolidation details of a part, highlight it and click **Details**. Select the **AutoUpdate Details** checkbox if you want the details to appear automatically. The Details include the name of the part/assembly, the description and type, the Base Unit Cost, Unit Cost, Cost Type, Cost Source, and Total Manufacturing Start Quantity.



Material Costs Consolidation

In ProPricer, a specific part can be used in an unlimited number of assemblies, which can then be assigned to an unlimited number of proposal tasks. The Consolidate Material feature of ProPricer helps you keep track of the total quantity and unit cost of a single part that is used throughout a proposal. It also determines which cost source is selected when there are multiple cost sources for a single part or assembly.

Before you consolidate unit costs, do the following:

- Enter information about the cost sources for parts and assemblies in your material libraries.
- Set up consolidation rule sets in your system, and select a rule set for the proposal.
- Go to the **Assembly/Part Name Template** system setting to determine how parts are named. If you use the *[Part Number]* variable with material field variables in the template, your material libraries can have multiple items with the same part number.
- Go to the **Consolidate Material By** system setting and verify that the option selected is appropriate for your proposal. If not, choose a proposal-specific option in the **Consolidate Material** dialog box.

During the consolidation process, ProPricer:

- Summarizes the total quantity of a part used in the proposal from all material libraries or a specific product library. If the quantity is specified in tasks, which can be done with a numeric summary field, then the consolidation is based on those summary field values instead of the total quantity in the proposal.
- Applies a cost consolidation rule to the quantity to calculate the unit cost of the part or assembly.

Note: Cost consolidation does not affect parts, assemblies, and sub-assemblies that are marked as protected. If an assembly is marked as protected, its sub-elements are also

protected. A sub-element of a protected assembly can be unprotected to include it in the consolidation process.

Note: Parts and assemblies added to the Products page of the Proposal Properties will be included in the consolidation process, even if they have not been assigned in a task.

Note: Information in the Cost Type and Cost Source columns of a proposal's material details will be changed by the consolidation process.

Note: If any materials have proposal-specific information that replaced the information from your Parts Library or Assemblies Library, the consolidation process will change it to match the library.

Examples

The following examples show the **Material Input** grid of the **Material** tab. To better illustrate how consolidation works in ProPricer, the images show the grid before and after a consolidation of the material unit costs was performed.

Before the consolidation:

Material Input (Distributed)

Level	Task	Material ID	Type	Assembly/Part	Base Unit Cost	Unit Cost	Cost Type	Cost Source	Total Mfg Start Qty	Extended Cost
1	TANK 001 MT	0001.002	Assembly	0001.002		$388.43			500	$194,215.00
2	TANK 001 MT	116694-50	Part	116694-50	$56.95	$56.95			500	$28,475.00
2	TANK 001 MT	21766-8B	Part	21766-8B	$58.12	$58.12			500	$29,060.00
2	TANK 001 MT	122967-15	Part	122967-15	$55.95	$55.95			500	$27,975.00
2	TANK 001 MT	122970-29	Part	122970-29	$30.43	$30.43			500	$15,215.00
2	TANK 001 MT	122983-00	Part	122983-00	$1.76	$1.76			500	$880.00
2	TANK 001 MT	123287-25	Part	123287-25	$52.38	$52.38			500	$26,190.00
2	TANK 001 MT	123287-26	Part	123287-26	$39.95	$39.95			500	$19,975.00
2	TANK 001 MT	123509-41	Part	123509-41	$32.86	$32.86			500	$16,430.00
2	TANK 001 MT	123588-58	Part	123588-58	$25.85	$25.85			500	$12,925.00
2	TANK 001 MT	622969-26	Part	622969-26	$34.18	$34.18			500	$17,090.00

Record 1 of 11

After the consolidation:

Material Input (Distributed)

Level	Task	Material ID	Type	Assembly/Part	Base Unit Cost	Unit Cost	Cost Type	Cost Source	Total Mfg Start Qty	Extended Cost
1	TANK 001 MT	0001.002	Assembly	0001.002		$317.27			500	$158,633.45
2	TANK 001 MT	116694-50	Part	116694-50	$46.70	$46.70	Quote	LTB-Q10, R...	500	$23,349.50
2	TANK 001 MT	21766-8B	Part	21766-8B	$43.59	$43.59	Quote	AP-Q7, Rev. 0	500	$21,795.00
2	TANK 001 MT	122967-15	Part	122967-15	$45.88	$45.88	Quote	LTB-Q11, R...	500	$22,939.50
2	TANK 001 MT	122970-29	Part	122970-29	$24.95	$24.95	Quote	HL-Q13, Re...	500	$12,476.30
2	TANK 001 MT	122983-00	Part	122983-00	$1.50	$1.50	Misc	SNB-M14, R...	500	$748.00
2	TANK 001 MT	123287-25	Part	123287-25	$44.52	$44.52	Misc	SNB-M15, R...	500	$22,261.50
2	TANK 001 MT	123287-26	Part	123287-26	$33.96	$33.96	Misc	SNB-M16, R...	500	$16,978.75
2	TANK 001 MT	123509-41	Part	123509-41	$26.95	$26.95	Quote	LTB-Q17, R...	500	$13,472.60
2	TANK 001 MT	123588-58	Part	123588-58	$21.20	$21.20	Quote	LTB-Q18, R...	500	$10,598.50
2	TANK 001 MT	622969-26	Part	622969-26	$28.03	$28.03	Quote	LTB-Q12, R...	500	$14,013.80

Record 1 of 11

The log file that is created gives you the results of the consolidation. It shows summarized quantity data for all parts assigned to the proposal. The *Buy* assemblies and the parts belonging to *Buy* assemblies are not included in the count because the base unit cost is at the assembly level. If the base unit cost of the assembly is overridden, however, the assembly is included in the consolidation.

Consolidate_Material_20150911092547.log - Notepad

File Edit Format View Help

```
Proposal: Tank Materials, Ver. 0

Library              Material                      Total Qty       Base Unit Cost  Currency  Cost Source
-------------------  ----------------------------  --------------  --------------  --------  ------------------------------
(Common)             Part: 1086338-08                        510           $0.16  USD       Misc: SNB-M20, Rev. 0
(Common)             Part: 1091017-43                      2,040           $0.14  USD       Misc: SNB-M21, Rev. 0
(Common)             Part: 1229554-23                      5,100           $0.72  USD       Misc: SNB-M22, Rev. 0
(Common)             Part: 1229555-45                        510          $13.86  USD       Quote: LTB-Q23, Rev. 0
(Common)             Part: 1229692-43                        510          $70.93  USD       Quote: LTB-Q24, Rev. 0
(Common)             Part: 1229692-44                        510          $67.16  USD       Quote: LTB-Q25, Rev. 0
(Common)             Part: 1229693-51                        510          $90.32  USD       Quote: HL-Q26, Rev. 0
(Common)             Part: 12296935-P2                       510          $28.70  USD       Quote: HL-Q27, Rev. 0
(Common)             Part: 1229703-4S                        510          $24.16  USD       Quote: LTB-Q28, Rev. 0
(Common)             Part: 21701-0A                          510          $26.87  USD       Quote: AP-Q1, Rev. 0
(Common)             Part: 21701-0B                          510          $26.87  USD       Quote: AP-Q2, Rev. 0
(Common)             Part: 21702-2A                          510          $44.19  USD       Quote: AP-Q4, Rev. 0
(Common)             Part: 21702-2B                          510          $44.19  USD       Quote: AP-Q5, Rev. 0
(Common)             Part: 21702-60                          510           $8.54  USD       Quote: HL-Q3, Rev. 0
(Common)             Part: 21702-80                          510           $8.20  USD       Quote: HL-Q4, Rev. 0
(Common)             Part: 21702-90                          510          $32.25  USD       Quote: AP-Q3, Rev. 0
(Common)             Part: 21766-8A                          510          $43.59  USD       Quote: AP-Q6, Rev. 0
(Common)             Part: 4142H001                        8,670           $0.34  USD       Quote: FS-Q42, Rev. 0
(Common)             Part: 4142H001-S                      8,670           $0.16  USD       Quote: FS-Q43, Rev. 0
(Common)             Part: 510518                         39,270           $0.34  USD       P.O.: FS-P38, Rev. 0
(Common)             Part: 510518-S                       39,270           $0.16  USD       P.O.: FS-P39, Rev. 0
(Common)             Part: 510826                         36,720           $0.34  USD       P.O.: FS-P40, Rev. 0
(Common)             Part: 510826-S                       36,720           $0.16  USD       P.O.: FS-P41, Rev. 0
(Common)             Part: 86753-09                          510           $8.29  USD       Misc: SNB-M19, Rev. 0
(Common)             Part: B1821BH038C150N                 2,040           $0.16  USD       P.O.: HL-P29, Rev. 0
(Common)             Part: M8686010                          510          $42.08  USD       Quote: FS-Q44, Rev. 0
(Common)             Part: M8686010-S                        510           $6.99  USD       Quote: FS-Q45, Rev. 0
(Common)             Part: MS16555-63                        510           $0.74  USD       P.O.: HL-P30, Rev. 0
(Common)             Part: MS24665-497S                      510           $0.08  USD       P.O.: HL-P31, Rev. 0
(Common)             Part: MS27769-3                       1,020           $2.05  USD       P.O.: HL-P32, Rev. 0
(Common)             Part: MS28775-043                       510           $0.62  USD       P.O.: HL-P33, Rev. 0
(Common)             Part: MS28775-236                       510           $0.57  USD       P.O.: HL-P34, Rev. 0
(Common)             Part: MS90725-58                      1,020           $0.11  USD       P.O.: HL-P35, Rev. 0
(Common)             Part: U0005A                            510          $120.41  USD       Misc: HL-M36, Rev. 0
(Common)             Part: U0005AU                           510           $0.00  USD       Misc: HL-M37, Rev. 0
Tracks               Part: 116694-50                       1,000          $46.70  USD       Quote: LTB-Q10, Rev. 0
Tracks               Part: 122967-15                       1,000          $45.88  USD       Quote: LTB-Q11, Rev. 0
Tracks               Part: 122970-29                       1,000          $24.95  USD       Quote: HL-Q13, Rev. 0
Tracks               Part: 122983-00                       1,000           $1.50  USD       Misc: SNB-M14, Rev. 0
Tracks               Part: 123287-25                       1,000          $44.52  USD       Misc: SNB-M15, Rev. 0
Tracks               Part: 123287-26                       1,000          $33.96  USD       Misc: SNB-M16, Rev. 0
Tracks               Part: 123509-41                       1,000          $26.95  USD       Quote: LTB-Q17, Rev. 0
Tracks               Part: 123588-58                       1,000          $21.20  USD       Quote: LTB-Q18, Rev. 0
Tracks               Part: 21766-8B                        1,000          $43.59  USD       Quote: AP-Q7, Rev. 0
Tracks               Part: 622969-26                       1,000          $28.03  USD       Quote: LTB-Q12, Rev. 0
```

Consolidate Material Unit Costs

Consolidate the Unit Costs of All Materials in the Proposal

1. On the **Proposal** ribbon, in the **Material** group, click **Consolidate Material**.
2. *(Optional)* Enter a task selection to consolidate the parts and assemblies of those tasks.
3. *(Optional)* Enter a material selection to consolidate the parts and assemblies that match the criteria of the selection.
4. Select a product to consolidate its parts and assemblies only, or include any product in the consolidation.
5. Select a consolidation method. You can consolidate by the name or part number of materials.
   - The **Consolidate Material By** options are related to your **Assembly/Part Name Template** system setting. If the template is set up to allow multiple material items with the same part number, then consolidating by part number is recommended.
6. *(Optional)* If you have multiple libraries for your material data, you can select **Consolidate Libraries** to only use cost sources from the library of the consolidated materials. For proposal-specific materials, which are not in a library, cost sources from all libraries are still applicable.
7. *(Optional)* If your proposal has a summary field for specifying the lot quantity in tasks, select that summary field. If not, ProPricer will consolidate the materials based on the total quantity used in the proposal.
8. Select a consolidation rule set. The set from the Proposal Properties will be selected by default, but you can change it.

- To select from a list of rule set names, expand the drop-down menu.
- To select from a detailed grid, click next to the drop-down menu.

9. *(Optional)* The default target date for the cost consolidation process is the current date. You can change the target date to consolidate based on future cost sources for the materials instead.
10. *(Optional)* If materials have spread dates in proposal tasks, you can select **Use First Spread Date When Available** to align the consolidation process with the first spread date of a part or an assembly. The consolidation process will only include cost sources that are relevant to the material spread period.
11. *(Optional)* Enter a log comment about the material consolidation process to explain your changes in the proposal.
12. *(Optional)* Copy the proposal to keep the original proposal unchanged.
13. Click **Process**.

Consolidate the Unit Costs of Materials in Material View

1. Open the proposal in Material View, and then select the appropriate tab.
2. Right-click anywhere in the **Material Input** grid, point to **Consolidate**, and then click **Selected Materials**, **Selected Assemblies/Parts**, or **All Materials**.
3. Set up the consolidation process. If you are not consolidating all materials, then you cannot change some of the options.
4. Click **Process**.

The consolidation process in Material View only affects the parts and assemblies on the tab selected, and it offers three different options:

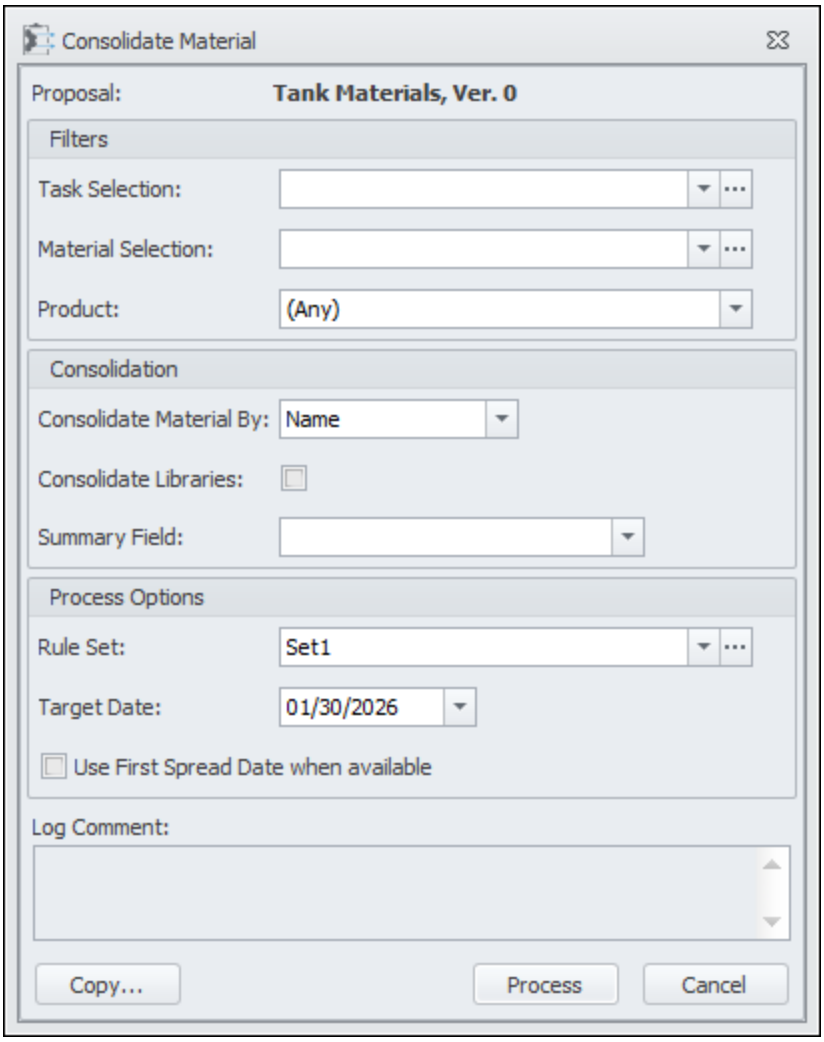
- **Selected Materials** consolidates the unit cost of a specific part/assembly in a specific task on the tab.
- **Selected Assemblies/Parts** uses every instance of a specific part/assembly in the tasks on the tab in the consolidation process.
- **All Materials** consolidates all parts/assemblies on the tab.

Consolidate the Unit Costs of Materials in a Task

1. Open the proposal in Task View, and then click the **Material** tab.
2. In the **Material Input** grid, right-click the name of a task, point to **Consolidate**, and then click **Selected Materials**.
3. Set up the consolidation process. Since you are not consolidating all materials, you cannot change some of the options.
4. Click **Process**.

Consolidate Material Dialog Box

The **Consolidate Material** dialog box allows you to consolidate all materials or only those from a task or material selection. To consolidate all materials, leave the **Task Selection** and **Material Selection** fields empty.



Proposal

The proposal selected in the Navigation Pane.

Filters

Task Selection

Enter the selection of tasks for which you want to consolidate materials. Leave this field blank to consolidate the material from all the tasks. If no task selection exists, or the appropriate tasks are not included in an existing one, click the ellipsis to create a new task selection.

*Note: If you chose **Selected Materials** from the right-click menu in Material View, you will see **(Selected)**. This is because you are only consolidating the part/assembly highlighted in this specific task.*

Material Selection

Enter the selection of materials you want to consolidate. Leave this field blank to consolidate all materials. If no material selection exists, or the appropriate materials are not included in an existing one, click the ellipsis to create a new material selection.

*Note: If you chose **Selected Materials** or **Selected Parts/Assemblies** from the right-click menu in Material View, you will see the name of the part or assembly. This is because you are only consolidating the part/assembly highlighted.*

Product

Enter the Product ID you want to consolidate.

Consolidation

Consolidate Material By

This setting determines how materials are uniquely identified during the cost consolidation process. If you consolidate by name, then every material is unique because each one has a different name. If you consolidate by part number, then every material with the same number is considered a single, unique item.

Consolidating by part number is useful and recommended when your **Assembly/Part Name Template** system setting includes the *[Part Number]*

variable and material field variables. In this case, the template allows you to enter the same part number for multiple items in your material libraries.

The **Consolidate Material By** system setting applies to all proposals. If the system-level option is not appropriate for your proposal, you can select a proposal-specific option in the **Consolidate Material** dialog box.

Consolidate Libraries

If you have multiple libraries for your material data, you can select this checkbox to only use cost sources from the library of the consolidated materials. For proposal-specific materials, which are not in a library, cost sources from all libraries are still applicable.

Summary Field

If a numeric summary field like *Lot* or *Lot Quantity* has been created in a proposal, select it to calculate the unit cost with greater accuracy. ProPricer will use the quantity entered in the summary field for each task instead of the total quantity in the proposal.

Process Options

Rule Set

Enter the consolidation rule set you want to use. If a rule set is already selected in the Proposal Properties, it will be entered here automatically. Click the ellipsis to create a new rule set.

*Note: If you run the consolidation process from Material View, you will see the name of the product or **(Miscellaneous)**. This is because you are only consolidating the parts/assemblies on that tab.*

Target Date

The default target date for the cost consolidation process is the current date. You can change the target date to consolidate based on future cost sources for the materials instead.

Use First Spread Date When Available

If materials have spread dates in proposal tasks, you can select this checkbox to align the consolidation process with the first spread date of a part or an assembly. ProPricer will only include cost sources that are relevant to the material spread period. If some materials have no spread date in the proposal, ProPricer will use the **Target Date** instead.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Material consolidation modifies the proposal. You may want to make a copy of the proposal prior to consolidating the material costs. Click this button to copy the selected proposal and create a new one. When you copy the proposal, ProPricer consolidates the material of the copy, not the original proposal. To consolidate the material of the original proposal, close the **Consolidate Material** dialog box, select the proposal from the Navigation Pane, and choose **Consolidate Material** again. This option is not available if you run the consolidation process from the Material View.

Process

Click this button to consolidate the material costs.

Cancel

Click this button to close the dialog box without consolidating the material costs.

Cost Consolidation Rules

A proposal's cost consolidation rules determine which quote, purchase order, or miscellaneous cost source to use for a part or assembly when multiple sources are available.

Consolidation rules help you select cost sources based on lowest cost, shortest lead time, vendor status, and more. For example, if several vendors sell a part, but you only want domestic materials, set up a consolidation rule for just the vendors in your country.

Setting Up Consolidation Rules

Consolidation Rule Sets

A group of cost consolidation rules is called a consolidation rule set. To create a rule set, go to the Material section of the Navigation Pane.

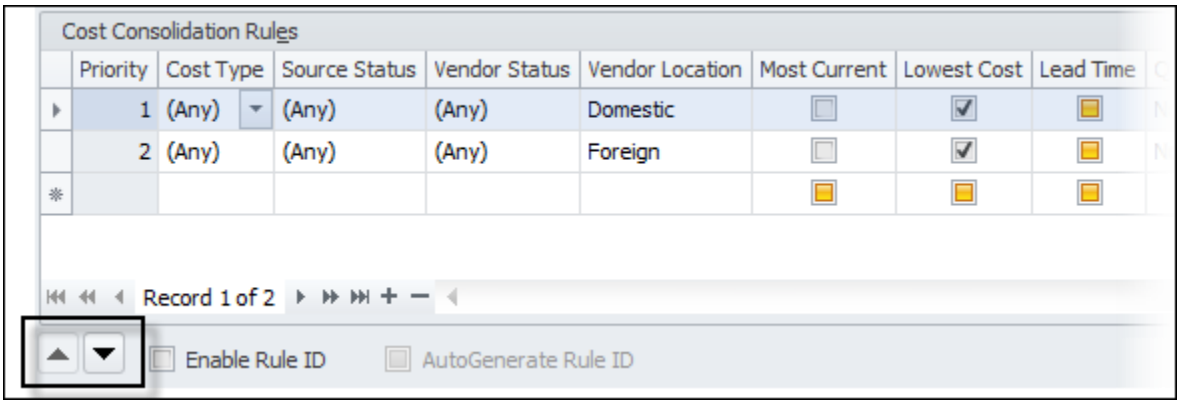
Consolidation rule sets are global data that you can apply to proposals in the Proposal Properties.

Consolidation Rule Priorities

When a consolidation rule set has more than one rule, you must prioritize them. The priority order tells ProPricer which rule to follow first during the consolidation process.

For example, the first rule could be for a domestic vendor with the lowest cost, and the second rule could be for a foreign vendor with the lowest cost. If no domestic vendors are found for the material, then ProPricer would use the second rule to find a foreign vendor with the lowest cost.

To change the priority order of consolidation rules, select a rule, and then click the up or down arrow button below the grid.

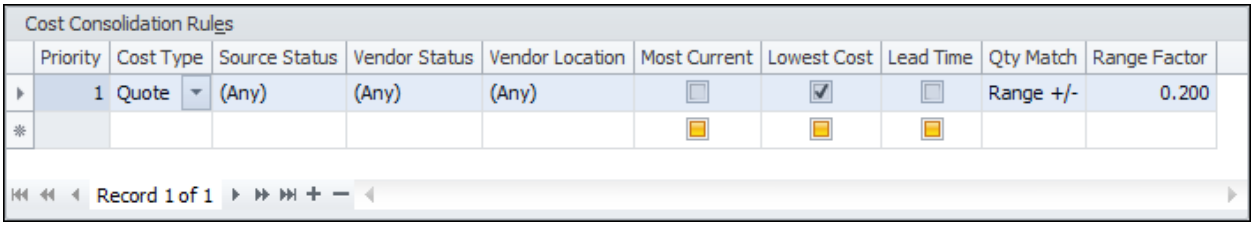


Using Consolidation Rules

Select a consolidation rule set when you run the consolidation process. In the Consolidate Materials dialog box, the rule set from the Proposal Properties will be selected by default.

Cost Consolidation Rules - Range Factor Example

A proposal has a cost consolidation rule with **Cost Type** set to *Quote*, **Qty Match** set to *Range +/-*, and **Range Factor** set to *0.2*.

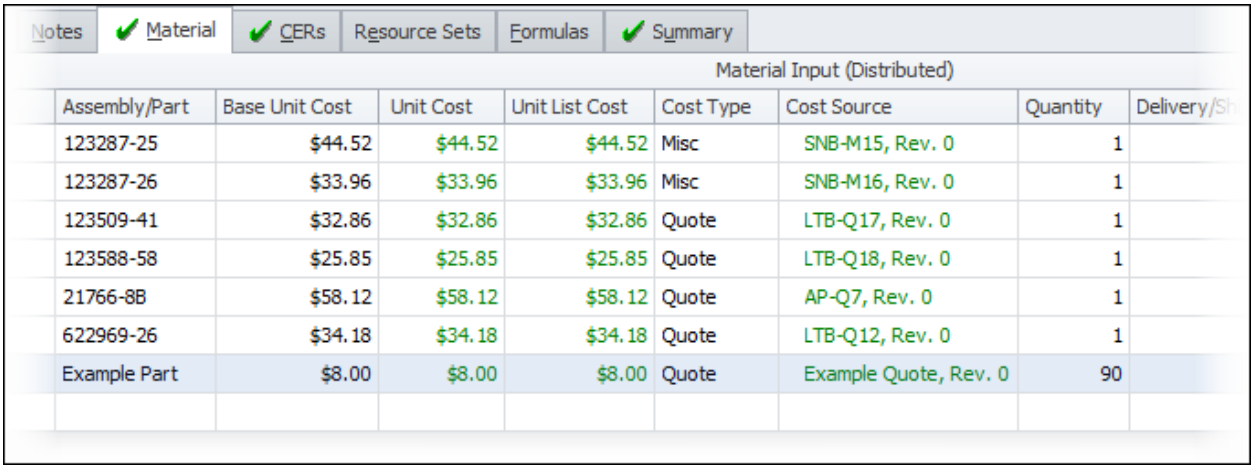


Cost Consolidation Rules

Priority	Cost Type	Source Status	Vendor Status	Vendor Location	Most Current	Lowest Cost	Lead Time	Qty Match	Range Factor
1	Quote	(Any)	(Any)	(Any)	☐	☑	☐	Range +/-	0.200
*					☐	☐	☐		

Record 1 of 1

In a task, the **Quantity** of *Example Part* is *90*.

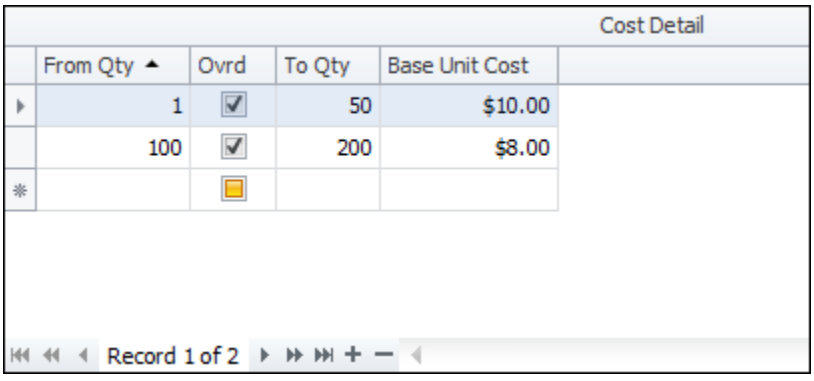


Notes | ✔ Material | ✔ CERs | Resource Sets | Formulas | ✔ Summary

Material Input (Distributed)

Assembly/Part	Base Unit Cost	Unit Cost	Unit List Cost	Cost Type	Cost Source	Quantity	Delivery/Sh
123287-25	$44.52	$44.52	$44.52	Misc	SNB-M15, Rev. 0	1	
123287-26	$33.96	$33.96	$33.96	Misc	SNB-M16, Rev. 0	1	
123509-41	$32.86	$32.86	$32.86	Quote	LTB-Q17, Rev. 0	1	
123588-58	$25.85	$25.85	$25.85	Quote	LTB-Q18, Rev. 0	1	
21766-8B	$58.12	$58.12	$58.12	Quote	AP-Q7, Rev. 0	1	
622969-26	$34.18	$34.18	$34.18	Quote	LTB-Q12, Rev. 0	1	
Example Part	$8.00	$8.00	$8.00	Quote	Example Quote, Rev. 0	90	

In the Parts Library, there is a quote for *Example Part* where the cost is determined by quantity ranges. Notice that there is no cost for a quantity of *90*.



Cost Detail

From Qty ▲	Ovrd	To Qty	Base Unit Cost
1	☑	50	$10.00
100	☑	200	$8.00
*	☐		

Record 1 of 2

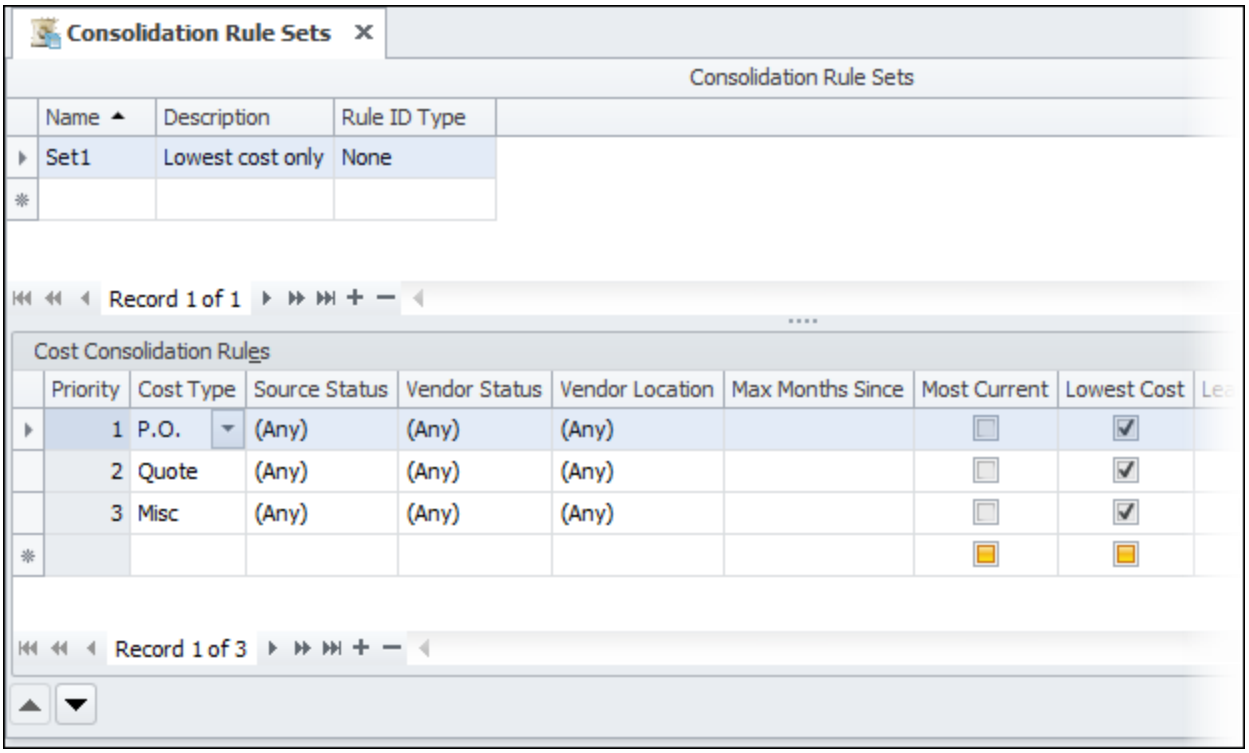
During the material consolidation process, ProPricer used the cost consolidation rule to find the cost of *90* parts:

- The quantity *90* was multiplied by the range factor *0.2*, equaling *18* parts. This created a quantity range from *72* to *108* parts.
- Since the quantity falls within the calculated range, and there is a quote of *$8.00* for *100* to *200* parts. Therefore, the cost of *90* parts is *$8.00*.

> Note: *If multiple quantity costs are applicable to the calculated quantity range, then ProPricer uses the cost of the first matching quantity.*

Consolidation Rule Sets

You can create sets of rules for ProPricer to use during the material cost consolidation process in proposals. Each set can contain an unlimited number of cost consolidation rules.



Name

The name of the consolidation rule set.

Description

An optional description of the consolidation rule set.

Rule ID Type

If a rule ID type is selected, then the **Rule ID** column appears in the **Cost Consolidation Rules** grid.

None

A unique ID is not given to each rule.

AutoGenerate

In the **Rule ID** column, ProPricer automatically enters a unique ID when a rule is created.

If **Linear Interpolation** is selected for the rule, the generated rule ID ends with the letter *L*.

Manual

Type text in the **Rule ID** column to give each rule a unique ID.

Cost Consolidation Rules

Priority

This column cannot be edited. It shows the order of precedence that will be used to consolidate the material costs if there are records from more than one source for a specific part or assembly.

Rule ID

If a rule ID type is selected, then this column will appear. The rule ID uniquely identifies each cost consolidation rule so you can see which consolidation rule was used to cost a part.

Cost Type

Select the cost source type (**Quote**, **P.O.** for purchase order, or **Misc** for miscellaneous) for the consolidation rule. Select **(Any)** if you do not want ProPricer to take the cost source type into consideration.

Source Status

Select the status of the cost source to only include sources with that status in the consolidation process. Select **(Any)** if you do not want to take the cost source status into consideration.

The status options for a purchase order are different than the options for a quote or miscellaneous source. If the cost type is **P.O.**, you can select **Current** or **Expired**. If the cost type is **Quote** or **Misc**, you can select **Open** or **Closed**.

Vendor Status

Select the status of the vendor (**Unknown**, **Disapproved**, or **Approved**) to only include vendors with that status in the consolidation process. Select **(Any)** if you do not want ProPricer to take the status of the vendor into consideration.

Vendor Location

This option adds an additional filter to the vendor selection sequence. Selecting a value in this column limits the choice of a cost source to the sources provided by vendors of a certain location. If you select **Domestic** or **Foreign**, then ProPricer will check the country entered for the vendor on the **Maintain Vendors** grid, and it will check the country for your company in the **Company Data** dialog box. If the countries coincide, the vendor location is identified as domestic. If they differ, the vendor location is considered to be foreign. Select **(Any)** if you do not want ProPricer to take the vendor location into consideration.

Max Months Since

Set an age limit for cost sources. This allows you to exclude old purchase orders, quotes, etc. from the consolidation process. For example, enter *12* if you only want to include cost sources that are a year old or newer.

Material Fields - Cost

These columns appear if you created cost material fields. They also appear in the parts and assemblies libraries so that additional information, like the buyers' names, can be entered there for purchase orders, quotes, and miscellaneous cost sources.

If you want a consolidation rule to only include cost sources that have specific material field information, such as a particular buyer name, enter the information in the appropriate field.

In numeric or date material fields, you can use a comparison operator to base the consolidation on a time frame before or after a specified date, or on a number less than or greater than a specified value. For example, *> 10/1/2024* would mean after October 1, 2024. Following are the acceptable operators and their meanings:

- <> Not equal to
- < Less than/Before
- <= Less than/Before or Equal to
- > Greater than/After
- >= Greater than/After or Equal to

Note: In a material field, you can use an asterisk or a question mark as a wildcard character. Wildcards are helpful when the material field information does not need to be exact. To learn more, see the Wildcards help topic.

Most Current

This option allows you to set the most current cost as a cost consolidation criterion. If the checkbox is selected, the consolidation process will use the source whose From Date is closest to the actual date.

Lowest Cost

This option allows you to set the lowest cost as a cost consolidation criterion. If the checkbox is selected, the consolidation process will use the source that has the lowest cost for a specific part or assembly. For example, a particular part may be offered at various prices in several different quotes. If you enter **Quote** in the **Cost Type** column, and select the **Lowest Cost** checkbox, ProPricer will use the quote that offers the lowest price for the part.

Lead Time

This option is available only if the cost source is **Quote**. If the checkbox is selected, the consolidation process will use the source with the shortest lead time.

*Note: The **Most Current**, **Lowest Cost**, and **Lead Time** options are mutually exclusive. You can only select one option per cost source.*

Min Buy Qty

This option allows you to include or exclude cost sources that require a minimum buy quantity for a part or assembly. If the checkbox is selected, the consolidation process will include those sources.

Qty Match

ProPricer will match the quantity of the consolidated parts and assemblies with the cost source quantity ranges.

None

ProPricer will ignore the consolidation rule.

Exact

ProPricer will use a cost source only if the part/assembly quantity falls within the cost source's quantity range.

Exact/Less Than

ProPricer will use a cost source if the cost source quantity is exactly the same or less than the quantity entered in the proposal for the part/assembly.

Exact/Greater Than

ProPricer will use a cost source if the cost source quantity is exactly the same or greater than the quantity entered in the proposal for the part/assembly.

Range +/-

ProPricer will use a cost source if the part/assembly quantity falls within a specific range, either greater than or less than the required amount. If selected, enter the factor to use in the **Range Factor** column. Example

Closest

ProPricer will use the cost source that has the closest quantity range for the part/assembly, either greater than or less than the required amount.

Range Factor

If you selected **Range +/-** in the **Qty Match** column, enter the factor you want to use. Valid factors are greater than zero and less than or equal to two.

Linear Interpolation

This option is for calculating the unit cost of a part/assembly when the quantity is between two known quantity ranges from a cost source. ProPricer uses linear interpolation based on those ranges to accurately calculate the unit cost.

For example, the cost source details for a part/assembly could have a gap between a quantity of 10 that costs $2.00 and a quantity of 40 that costs $1.00. If the required quantity in the proposal is 20, then ProPricer calculates the unit cost as $1.67.

The **Qty Match** option selected affects the linear interpolation calculation. For the best results, use linear interpolation with **Exact/Less Than**, **Exact/Greater Than**, **Range +/-**, or **Closest**.

If the **Rule ID Type** is **AutoGenerate**, then the generated rule ID ends with the letter *L*. The letter indicates that **Linear Interpolation** is selected for the rule.

Create a Consolidation Rule Set

1. In the Navigation Pane, click the **Material** button, and then double-click **Consolidation Rule Sets**.
2. Enter a name for the rule set.
3. *(Optional)* Enter a description of the rule set.
4. To identify which rule was used in the consolidation process, select **AutoGenerate** or **Manual** for the rule ID type. Otherwise, select **None**.
5. Set up the cost consolidation rules.
6. Click **OK** or **Apply**.

Show the Quantity Range in Cost Source Field

ProPricer allows you to display the quantity range used in the consolidation process. This range will be displayed after the Revision Number in the Cost Source column in the Material tab, the Material Input grid of Material View, and in the log file once the materials have been consolidated. This information will also appear in the Bill of Materials Report and Material Ad Hoc Report.

1. On the **Setup** ribbon, click **System Options**.
2. Click the **Material** page.
3. Select **Show Quantity Range In Cost Source Field**.
4. Click **OK**.

Material Fields

Material fields are custom fields in which you can enter additional information about an assembly/part, cost, or vendor. You can use the fields in material selections and some reports for sorting and analytical purposes when reporting material data to meet company-specific reporting requirements. There are three types of material fields:

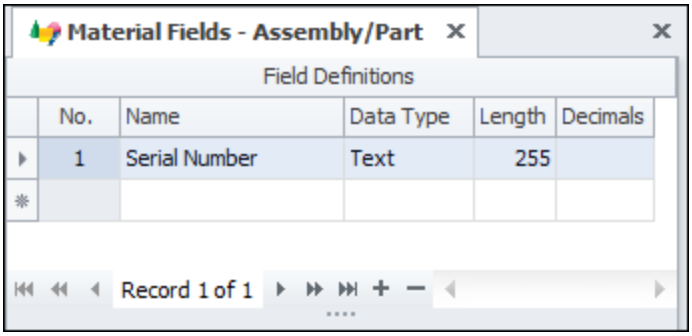
- Assembly/Part
- Vendor
- Cost

Assembly/Part Material Fields

Assembly/Part material fields are for entering additional information about assemblies and parts in libraries and proposals. For example, if you want to include the serial number of the part, you can create a material field called *Serial Number*. This field will appear as another column in your Assemblies Library, Parts Library, and proposals.

You can use these fields for sorting and analytical purposes in material reports. You can also use them as variables in the **Assembly/Part Name Template** system setting.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



No.

Shows the order of the material fields.

Name

Enter a name for the material field.

Data Type

Select the type of data that can be entered in a material field.

Date

A calendar date must be entered.

List

A value from the field's value list must be entered.

Number

A number must be entered.

Text

Text must be entered. This is the default setting.

After a text material field has been created and used in a proposal, you can convert its text entries into a value list. Just change the field's data type from *Text* to *List*.

Length

If the data type of the material field is *Text*, enter the maximum number of characters the material field will accept. The default value is 255, which is also the maximum allowed for the field.

Decimals

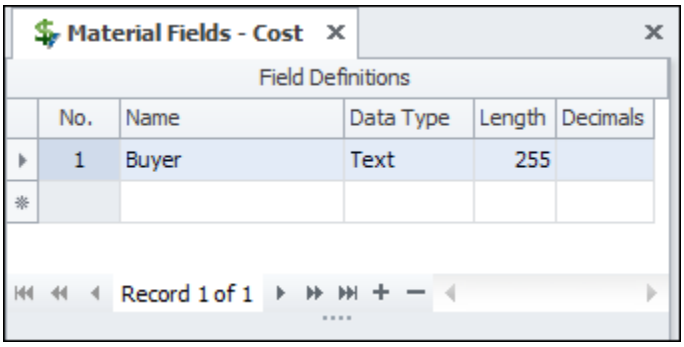
If the data type of the material field is *Number*, enter the number of digits you want displayed after the decimal point. The maximum number of decimal places you can enter for a material field is 6. The default is 0.

Cost Material Fields

These material fields are for entering additional information about a purchase order, quote, or miscellaneous cost source. For example, if you want to include the name of the person who obtained a quote, create a material field called *Buyer*.

You can use these fields for sorting and analytical purposes in material reports. You can also set up cost consolidation rules based on the information entered in the fields.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



No.

Shows the order of the material fields.

Name

Enter a name for the material field.

Data Type

Select the type of data that can be entered in a material field.

Date

A calendar date must be entered.

List

A value from the field's value list must be entered.

Number

A number must be entered.

Text

Text must be entered. This is the default setting.

After a text material field has been created and used in a proposal, you can convert its text entries into a value list. Just change the field's data type from *Text* to *List*.

Length

If the data type of the material field is **Text**, enter the maximum number of characters the material field will accept. The default value is 255, which is also the maximum allowed for the field.

Decimals

If the data type of the material field is **Number**, enter the number of digits you want displayed after the decimal point. The maximum number of decimal places you can enter for a material field is 6. The default is 0.

Create a Material Field

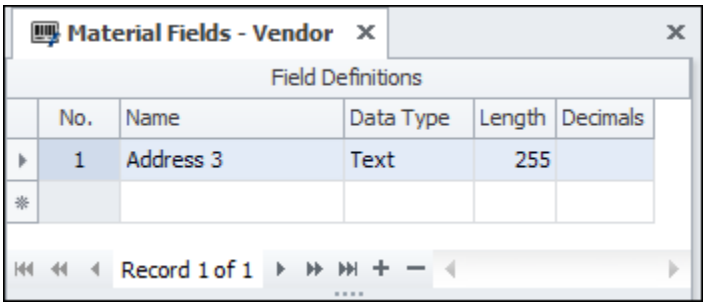
1. In the Navigation Pane, click the **Material** button.
2. Expand the **Material Fields** folder and double-click **Assembly/Part**, **Vendor**, or **Cost**, depending on the type of field you want to create.
3. Enter a name for the material field.
4. Select the type of data that can be entered.
5. Specify the length or decimal values. If the data type of the field is *Text*, enter the maximum number of characters that can be entered in the **Length** column. If the Data Type of the field is *Number*, enter the number of digits you want to appear after the decimal point in the **Decimals** column.
6. Press **Ctrl**+**S** or move to another row to save the material field.

Vendor Material Fields

These material fields are for entering additional information about a vendor. For example, if you need more room for the address, you can create a material field called *Address 3*, which will create another column in the Vendor Library.

You can use these fields for sorting and analytical purposes in material reports.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



No.

Shows the order of the material fields.

Name

Enter a name for the material field.

Data Type

Select the type of data that can be entered in a material field.

Date

A calendar date must be entered.

List

A value from the field's value list must be entered.

Number

A number must be entered.

Text

Text must be entered. This is the default setting.

After a text material field has been created and used in a proposal, you can convert its text entries into a value list. Just change the field's data type from *Text* to *List*.

Length

If the data type of the material field is **Text**, enter the maximum number of characters the material field will accept. The default value is 255, which is also the maximum allowed for the field.

Decimals

If the data type of the material field is **Number**, enter the number of digits you want displayed after the decimal point. The maximum number of decimal places you can enter for a material field is 6. The default is 0.

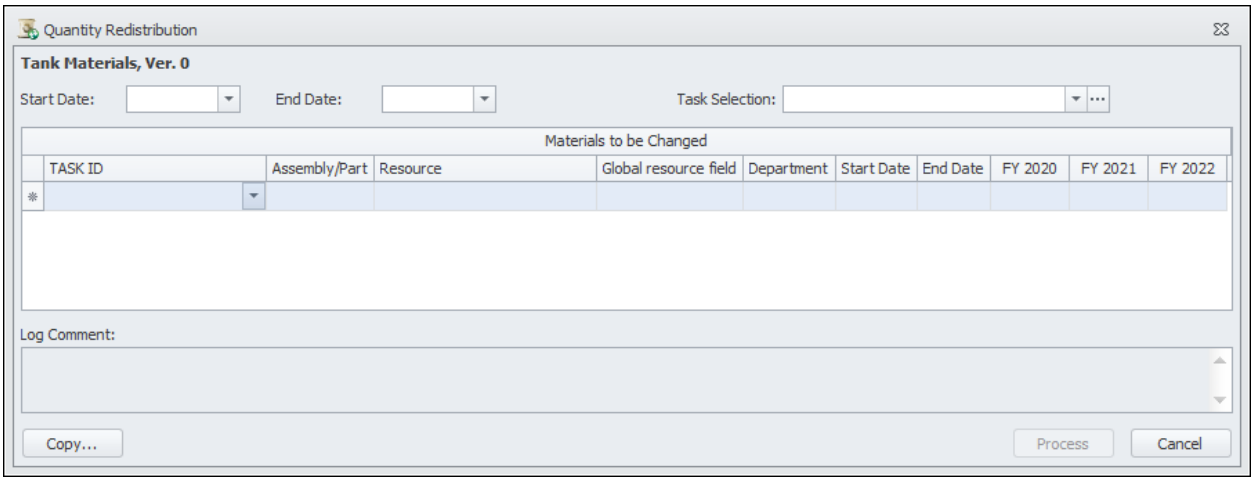
Material Quantity Redistribution

The Material Quantity Redistribution feature allows you to change the spread amount of a material by entering new Fiscal Year Factors. The change can affect all instances the material is used in the proposal, or only specific tasks. Depending upon the resource selected, you can also modify the associated costs of the material. The Fiscal Year Factor should be expressed in decimal format and the sum of the factors must equal zero or one.

1. Click the **Proposal** ribbon and then **Quantity Redistribution** in the **Material** group.
2. *(Optional)* Make a copy of the proposal before starting the process.
3. Enter the start and end dates of the period for which you want the changes made, or leave them blank to process the entire proposal period.
4. Enter a task selection, or leave the field blank to process all the tasks.
5. Enter the task ID that contains the material you want to change.
6. Enter the name of the assembly/part of the material you want to change.
7. Enter the name of the resource.
8. Enter the resource field value.
9. *(Optional)* Select a currency to change only the materials assigned that currency.
10. *(Optional)* Enter resource-specific start/end dates.
11. Enter the new fiscal year factors you want to apply. Please note that the sum of the factors must equal zero or one.
12. Click **Process**.

Quantity Redistribution Dialog Box

The **Quantity Redistribution** dialog box is where you specify the materials whose fiscal year factors you want to modify, as well as identify the period for which you want changes made.



Proposal

Displays the name and version of the current proposal.

Start Date and End Date

Enter the dates that define the period for which you want the changes made. Leave the fields blank to process the entire proposal period.

Task Selection

Enter a task selection to limit the redistribution to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click the plus sign to create a new one, or the pencil to modify an existing one.

Materials to be Changed

Task ID

Enter the task ID that contains the materials you want to change. Select **Any** to change all assemblies or parts in the entire proposal. If you entered a task selection, the value in this field will be **Selection**.

Assembly/Part

Enter the name of the assembly or part you want to change. Select **Any** to change all assemblies or parts in the task or selection.

Resource

Enter the name of the resource. Select **Any** to change the assemblies or parts for all resources in the task or selection.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. If you enter a value in the resource field, ProPricer will only change the spread amount of the resources that have that value entered as well. Select **(Any)** to change the spread amount of all the resources, regardless of the value entered in the resource field. If you leave the resource field empty, ProPricer will only change the spread amount of the resources that do not have a value entered in that resource field.

Currency

This column acts as a filter. If you select a currency, ProPricer will only change the input of the materials assigned that currency. The value **(Any)** allows you to change the input of all materials, regardless of the currency assigned to them.

Start Date

Enter the date you want the change to begin for a specific resource.

End Date

Enter the date you want the change to end for a specific resource.

Fiscal Year

Enter the fiscal year factor you want to apply to the material or associated costs. The sum of the factors must equal zero or one.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Material Quantity Redistribution process will modify the current proposal. It is recommended that you make a copy of the proposal first. Click this button to copy the proposal and create a new one. When you copy the proposal, the copy becomes the active proposal, and ProPricer changes the materials of the copy. To change the material in the original proposal, close the **Material Quantity Redistribution** dialog box, select the proposal from the Navigation Pane, and choose the Material Quantity Redistribution again.

Process

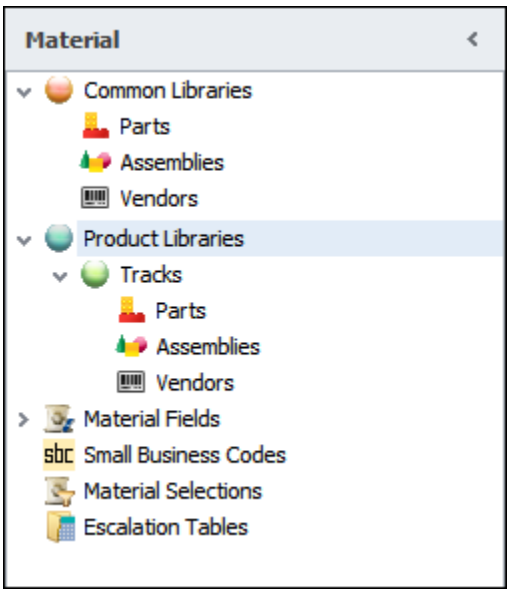
Click this button to start. The dialog box will remain open during the process.

Cancel

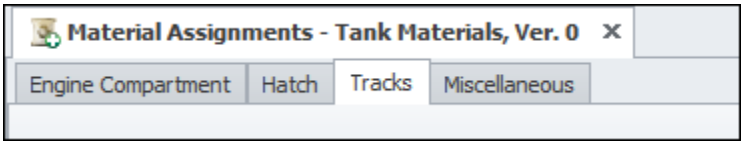
Click this button to cancel the process.

Products

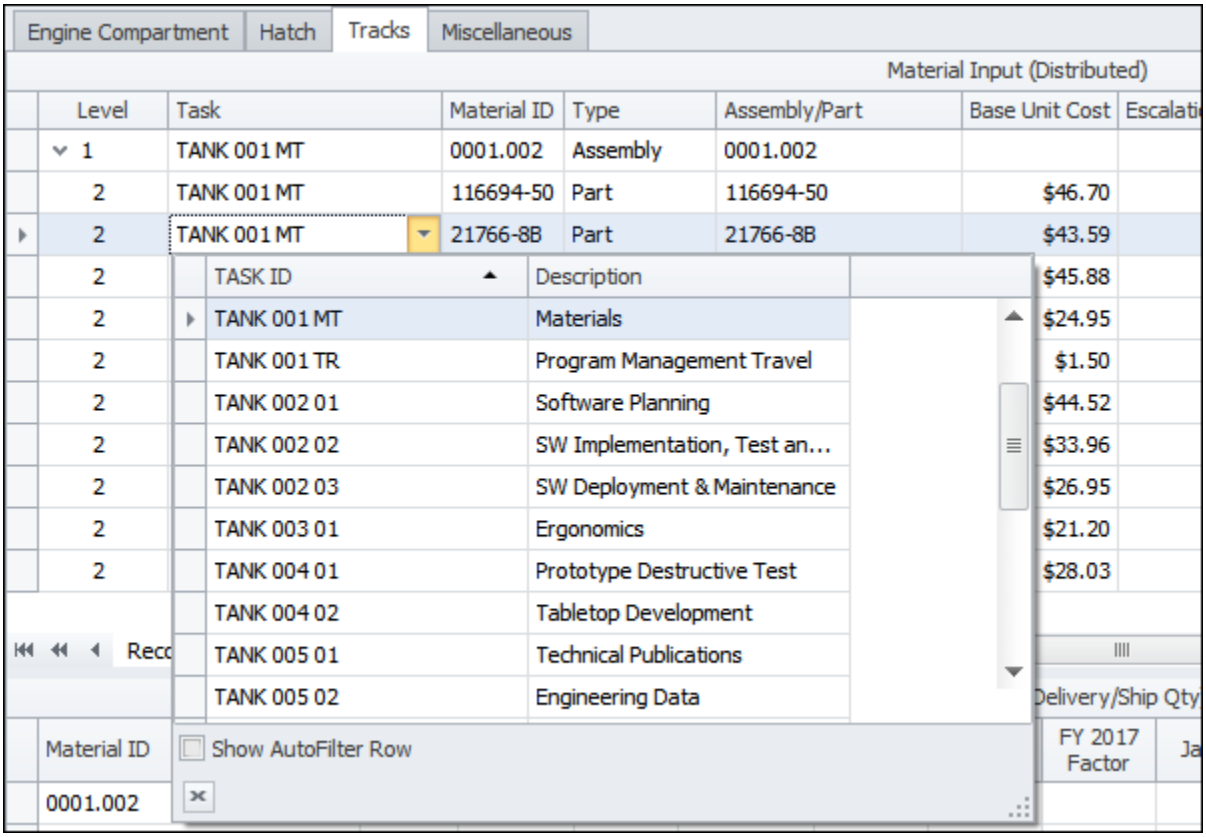
Products are unique assemblies that have their own Parts, Assemblies, and Vendors Libraries where you store the individual parts and any sub-assemblies of the product, define the structure of the top-level assembly, enter vendor information, and associate material cost data with a vendor.



You assign products to proposals in the Proposal Properties. After you assign a product to a proposal, ProPricer will create a separate tab for it in Material View. The product's tab is where you add the parts and sub-assemblies that make up the main assembly of the product. The example below shows three products we assigned to our proposal: *Engine Compartment*, *Hatch*, and *Tracks*.



Another unique feature of products is that you can assign the individual parts or assemblies to different tasks in Material View.


Engine Compartment
Hatch
Tracks
Miscellaneous
Material Input (Distributed)
Level
Task
Material ID
Type
Assembly/Part
Base Unit Cost
1 TANK 001 MT 0001.002 Assembly 0001.002
2 TANK 001 MT 116694-50 Part 116694-50 $46.70
2 TANK 001 MT 21766-8B Part 21766-8B $43.59
2 $45.88
2 $24.95
2 $1.50
2 $44.52
2 $33.96
2 $26.95
2 $21.20
2 $28.03
TASK ID
Description
TANK 001 MT Materials
TANK 001 TR Program Management Travel
TANK 002 01 Software Planning
TANK 002 02 SW Implementation, Test an...
TANK 002 03 SW Deployment & Maintenance
TANK 003 01 Ergonomics
TANK 004 01 Prototype Destructive Test
TANK 004 02 Tabletop Development
TANK 005 01 Technical Publications
TANK 005 02 Engineering Data
Show AutoFilter Row
Material ID
0001.002
FY 2017 Factor

Assign a Product to a Proposal

You can assign an indefinite number of products to a proposal. ProPricer creates a separate tab for each product in Material View. Open the tabs to assign tasks to the products and enter spread information.

1. Do one of the following:
    - In the Navigation Pane, right-click the appropriate proposal, and then click **Properties**.
    - In the Navigation Pane, select the appropriate proposal. On the **Proposal** ribbon, in the **Proposal** group, click **Properties**.
2. In the **Material** folder, click the **Products** page.
3. Enter the product you want to assign to the proposal.
4. Click **OK**.

Assign a Task to a Product

Once you assign a product to a proposal, you need to tell ProPricer which task to assign it to. You can assign the entire product to the same task, or you can assign the individual parts and sub-assemblies to different ones.

Assign to a Product

1. On the **Proposal** ribbon, click **Material View**.
2. Click the appropriate product tab.
3. In the **Task** column of the top-most assembly (Level 1), enter a task.
4. Press **Ctrl**+**S** or move to another row to save your work.

Assign to Individual Parts or Assemblies

1. Locate the part or assembly.
2. In the **Task** column, enter a task.
3. Press **Ctrl**+**S** or move to another row to save your work.

Copy a Product

When you copy a product from one Product Library to another, all the parts, assemblies, vendors, and cost sources are included.

1. Right-click the product you want to copy, and then click **Copy** on the shortcut menu.
2. Enter a name for the new product.
3. Click **OK**.

Notes:

- *If the target product already exists, ProPricer will ask you to confirm that you want to replace the data in the target library with the data from the source library. You will not be able to replace the data in the target library if it is used in a proposal*.
- *The target product library will have the same parts, assemblies, vendors, and cost sources as the source product library. If an assembly from the source library contains elements from other product libraries, these elements will not be copied into the target library. They will retain their original location in the respective Part or Assembly library*.

Create a Product

1. In the Navigation Pane, click the **Material** button.
2. Right-click **Product Libraries**, and then click **New Product** on the shortcut menu. The **Product Properties** dialog box will open.
3. Enter a name and description for the product.
4. Enter a name for the top-level assembly.
5. *(Optional)* Enter the name of Escalation Table you want to use escalate the costs.
6. Click **OK**.

Product Properties

The **Product Properties** dialog box is where you define the product and its main assembly.

Name

Enter a name for the product.

Description

Enter a description for the product.

Main Assembly

Enter a name for the top-level assembly.

Escalation Table

Enter the name of the Escalation Table you use.

OK

Save the changes and closes the dialog box.

Cancel

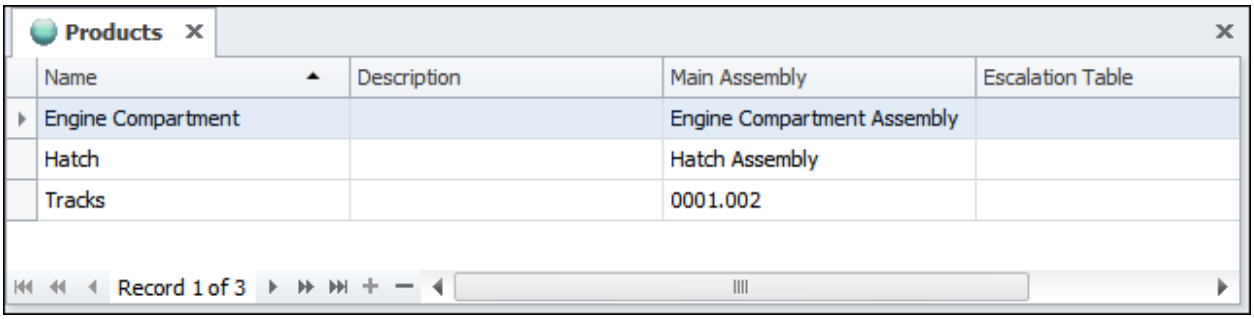
Ignore the changes and closes the dialog box.

Apply

Save the changes without closing the dialog box.

Products List

The Products List shows all the products that exist. You can customize the grid to show only the columns you need, as well as sort the products in the order that works best for you. It is also a convenient place to copy and delete products.



Name

This column shows the name of the product.

Description

This column shows the description of the product.

Main Assembly

This column shows the name of the top-level assembly.

Escalation Table

This column shows the Escalation Table assigned to the product.

Location

This column shows where the product is located. If there is no folder name after the backslash, the product is stored in the root **Product Libraries** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Reconcile Material Quantities

You can update the material quantities of a part or assembly assigned to a task to reflect the latest changes made in the Parts or Assemblies Libraries, or to simply restore the default values. When you reconcile quantities, the entries in the **Quantity**, **Inventory Quantity**, **Destructive Evaluation Quantity**, and **Manufacturing Yield Factor** columns will be replaced with the respective values from the Parts/Assemblies Libraries.

1. In Material View or the **Material** tab of Task View, go to the **Material Input** grid and place the cursor anywhere in the row of the part/assembly whose quantities you want to reconcile.

2. Right-click, and from the shortcut menu, select **Reconcile Quantities**.

Replicate Material Changes

When you edit a part or an assembly in a task, you can quickly replicate the changes for matching materials in the same proposal or a different one. This includes changes to material fields, cost sources, quantities, base unit cost, etc. It also includes changes to an assembly's structure, such as the deletion of a part.

1. In Material View or the **Material** tab, right-click a part or an assembly, and then click **Replicate Material Changes**.
2. In the **To Proposal** field, select the proposal to change. You can select the same proposal, or a different proposal with the same materials.
3. In the **Update Materials with** field, select **Name** or **Part Number** as the identifier. Changes will be replicated for all materials with the same name or number shown to the right in bold.
4. In the **Options** area, select the changed data that you want to replicate.
5. Click **Process**.

Set the Material Quantity Decimal Display

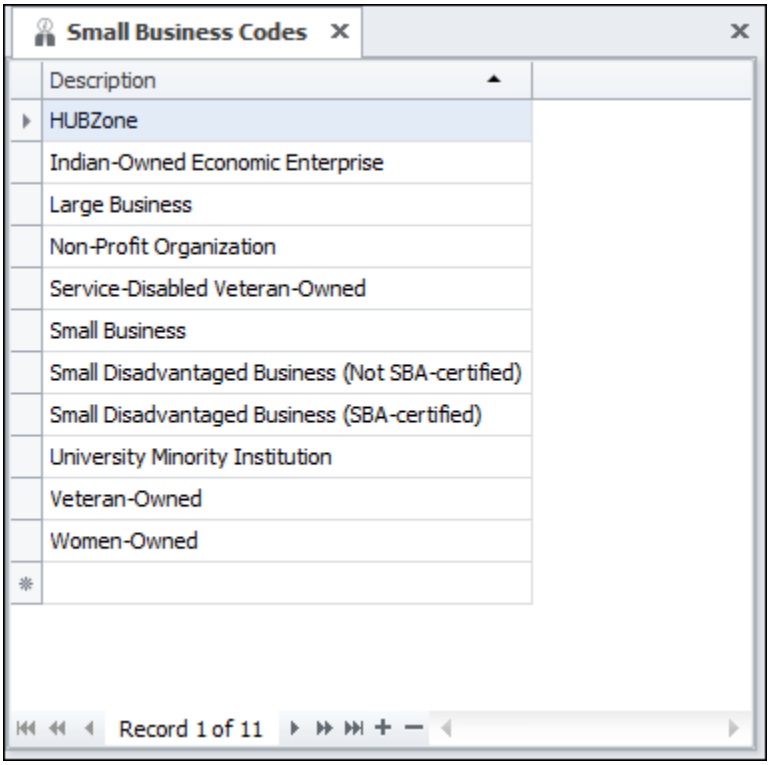
Material Quantity Decimal Display allows you to set the number of places after the decimal point that will be shown in the Assemblies Library, the Material tab of Task View, the Material Input grid of Material View, and in material reports.

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **Material** page.
3. In the **Material Qty Decimal Display** field, type a number between 0 and 6. The default number is 2.
4. Click **OK**.

Small Business Codes

The small business codes you create can later be associated with vendors in the Vendor Library. They help summarize material data on the Material Ad Hoc Report. The grid contains eleven default items. However, you can modify and delete the entries, or add new ones to suit your needs.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Description

Enter the name of the small business code.

Assign a Small Business Code to a Vendor

1. In the Navigation Pane, click the **Material** button, and then expand the **Common** or a **Product** library folder.
2. Double-click **Vendors**.
3. In the **Small Business Code** column of the appropriate vendor, enter the code.
4. Press **Ctrl**+**S** or move to another row to save the information.

Define a Small Business Code

1. In the Navigation Pane, click the **Material** button.
2. Double-click **Small Business Codes**.
3. Enter the code.
4. Press **Ctrl**+**S** or move to another row to save your work.

Target Factor

A target factor is part of the equation used to calculate the unit cost of a part or assembly: Unit Cost = Base Unit Cost x Escalation Factor x Target Factor x Volume Factor. You can enter a target factor if you need to meet a target unit cost . ProPricer will apply the factor (1 = 100%) to the base unit cost and calculate the new unit cost . Target factors can be used with any part or overridden assembly. It does not apply to protected parts/assemblies.

You can adjust the factor with the **Target Factor** option in the **Material** group on the **Proposal** ribbon. You can also adjust it in Material View and the **Material** tab of Task View.

Adjust the Target Factor

Entering a target factor allows you to meet a target Unit Cost of a part or assembly. It does not apply to protected parts/assemblies.

Adjust the Target Factor of All Materials

1. Click the **Proposal** ribbon.
2. Click **Target Pricing** in the **What-Ifs** group.
3. *(Optional)* Make a copy of the proposal before applying the what-if.
4. Click **Get Current Pricing**.
5. In the **Detail Material** category, enter the factor in the **Factor** column.
6. Click **Process**.

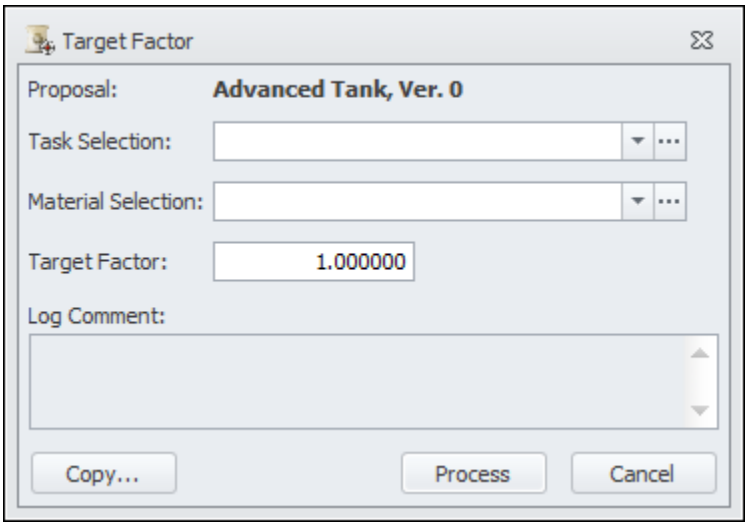
Run Target Factor from the Material Tab or Material View

1. Select the part whose target factor you want to adjust. You can also use the **Shift** or **Ctrl** keys to select multiple parts.
2. Right-click, and from the shortcut menu, select **Target Factor**.
3. Enter the factor.
4. Click **Process**.

You can also enter target factors for individual parts in the **Target Factor** column of the **Material** tab or **Material View**.

Target Factor Dialog Box

The **Target Factor** dialog box allows you to adjust the target factor of a part or overridden assembly in order to meet a target cost. It does not apply to protected parts/assemblies.



Task Selection

Enter a task selection to adjust the target factor of the parts/assemblies of just those tasks. Leave the field blank to adjust the parts/assemblies of all tasks. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one. This field cannot be edited if Target Factor is run from Material View or the **Material** tab of Task View.

Material Selection

Enter a material selection to adjust the target factor of those materials. Leave the field blank to adjust all parts/assemblies. If no material selection exists, or the appropriate materials are not included in an existing one, click ... to open the **Material Selections** grid to create or modify an existing one. This field cannot be edited if Target Factor is run from Material View or the **Material** tab of Task View.

Target Factor

Enter a number between 0 and 100 you want to apply to the Base Unit Cost.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Process

Click this button to adjust the target factor of the part/assembly.

Cancel

Click this button to close the dialog box without adjusting the target factor.

Update Material

If changes are made to a part or assembly in the Parts Library or Assemblies Library, and the part/assembly is used in a proposal, the changes are not reflected in the tasks until you explicitly request it.

Similarly, when part or assembly information is changed in a proposal, the libraries are not affected. If you update material in a proposal, or consolidate material costs in a proposal, the changes will revert to the library information.

If you made changes to a part/assembly in Material View or the Material tab of Task View that you do not want to be replaced, you can apply the update on a task-by-task basis.

Update All the Materials in the Proposal

1. Select the appropriate proposal in the Navigation Pane.
2. On the **Proposal** ribbon, click **Update Current Proposal**.
3. *(Optional)* Make a copy of the proposal before updating the materials.
4. Select the **Update Material** checkbox.
5. Select the checkboxes of the items from the **Parts**, **Assemblies**, and **Associated Costs** tabs.
6. Click **Process**.

Update a Specific Part/Assembly of a Task

1. Do one of the following:
    - Select the task, and then click the **Material** tab.

- Select the task in Material View.

2. Right-click the part/assembly in the **Material Input** grid you want to update, click **Update from Material Library**, and then click **Current Material**.
3. Select the checkboxes of the items from the **Parts**, **Assemblies**, and **Associated Costs** tabs.
4. Click **Process**.

*Note: You can use the **Shift** or **Ctrl** keys to select multiple parts. The option on the shortcut menu will change to **Selected Materials**.*

Update All the Parts/Assemblies of a Task

1. Do one of the following:
   - Select the task, and then click the **Material** tab.
   - Select the task in Material View.
2. Right-click anywhere in the **Material Input** grid, click **Update from Material Library**, and then click **All Materials**.
3. Select the checkboxes of the items from the **Parts**, **Assemblies**, and **Associated Costs** tabs.
4. Click **Process**.

Note: Protected materials are not updated.

Volume Adjustment

Volume Adjustment allows you to account for a decrease in the unit cost, based on an increase in the number of parts used (Total Manufacturing Quantity).

For example, suppose you need to estimate the cost for 300 units of a particular part, but you only have a historical purchase order for 100 of the parts. You could manually calculate the volume factor and enter it, or have ProPricer calculate it for you. A cost reduction curve will be used to estimate the new unit cost of the 300 units, based on the slope percentage you enter. The steeper the slope of the cost reduction curve, the larger the estimated reduction.

The following equation is used, with the Cost Source Qty being the mean of the From and To range:

- *Slope of Curve* ^ (Log (*Total Mfg Qty*/*Cost Source Qty*)/Log (2)) = *Volume Factor*

Volume Adjustment can only be used for consolidated parts. The parts must be in a library and cannot be protected. Volume Adjustment can also be used on any overridden *Buy* assembly.

If you run the Volume Adjustment option from the ribbon, you can enter a task selection and/or material selection. If you enter a task selection, ProPricer will only adjust the parts used in those tasks. If you enter a material selection, ProPricer will only adjust the parts indicated. If you run Volume Adjustment from Material View or the Material tab of Task View, ProPricer will only adjust the part selected in that particular task.

To set the slope percentage that is used by default in all proposals, go to the System Options.

Adjust the Volume Factor

Volume Adjustment allows you to account for a decrease in the Unit Cost, based on an increase in the number of parts used. It uses historical data from the Parts and Assemblies Libraries and the Total Manufacturing Quantity to calculate a Volume Factor, which will be used to estimate the Unit Cost of the part.

Run Volume Adjustment

1. Click the **Proposal** ribbon.
2. Click **Volume Adjustment** in the **Material** group.
3. *(Optional)* Enter a task selection to adjust the parts in the tasks selected.
4. *(Optional)* Enter a material selection to adjust the parts included in the selection.
5. *(Optional)* Click **Copy** to copy the proposal and create a new one. The copy becomes the active proposal and ProPricer will adjust the Volume Factors for the copy. If you want to adjust the Volume Factors for the original proposal, you need to close the dialog box, select the proposal from the Navigation Pane, and click **Volume Adjustment** again.
6. Enter the Slope Percentage.
7. Click **Process**.

Run Volume Adjustment from the Material Tab or Material View

1. Select the part whose Volume Factor you want to adjust. You can also use the **Shift** or **Ctrl** keys to select multiple parts.
2. Right-click, and from the shortcut menu, select **Volume Adjustment**.

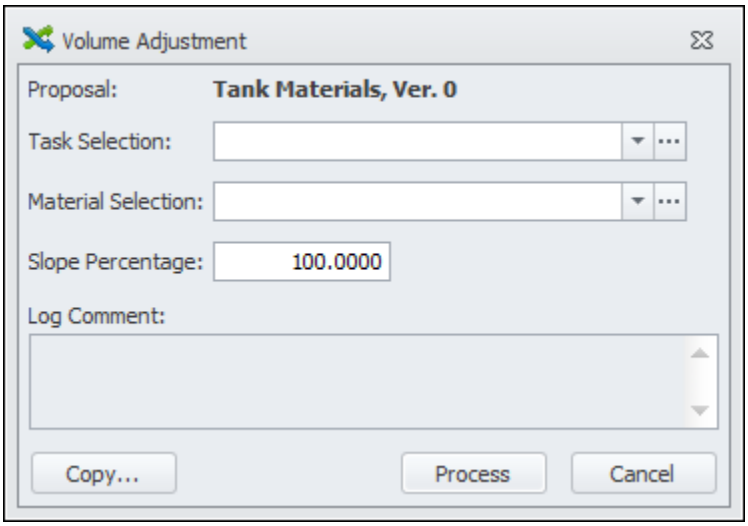
3. Enter the Slope Percentage.

4. Click **Process**.

You can also enter Volume Factors for individual parts in the **Volume Factor** column of the **Material** tab or **Material View**.

Volume Adjustment Dialog Box

The **Volume Adjustment** dialog box contains the following elements:



Task Selection

Enter a task selection to adjust the Volume Factor of the parts contained in the selection. Leave this field blank to adjust all parts in all tasks. If no task selection exists, or the appropriate tasks are not included in an existing one, click the plus sign to create a new one, or the pencil to modify an existing one.

*Note: This field cannot be edited if you accessed the **Volume Adjustment** dialog box from Material View or the **Material** tab of Task View.*

Material Selection

Enter a material selection to adjust the Volume Factor of the parts contained in the selection. Leave this field blank to adjust all parts. If no material selection exists, or the appropriate materials are not included in an existing one, click the plus sign to create a new one, or the pencil to modify an existing one.

*Note: This field cannot be edited if you accessed the **Volume Adjustment** dialog box from Material View or the **Material** tab of Task View.*

Slope Percentage

Enter the percentage you want to use for the cost reduction curve. The acceptable range of values is from 0 to 100.

To set the slope percentage that is used by default in all proposals, go to the System Options.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Volume Adjustment will modify the current proposal. We recommend you make a copy of the proposal prior to adjusting the Volume Factors of the parts. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will adjust Volume Factors of the copy. If you want to adjust the Volume Factors in the original proposal, close the **Volume Adjustment** dialog box, select the proposal from the Navigation Pane, and click **Volume Adjustment** again.

Process

Click this button to adjust the Volume Factors of the parts.

Cancel

Click this button to close the dialog box without adjusting the Volume Factors of the parts.

Merge Proposals

This feature allows you to make various combinations of proposal data. You can blend entire proposals, add any selection of tasks from one proposal to another proposal, and extract tasks from existing proposals to create a new proposal. You can even treat the data that is added as negative, thus reducing the costs in the receiving proposal.

You can also address duplicate task and material data during the merge process, either globally or on a task-by-task or product-by-product basis. The merge feature provides a variety of options to treat duplicate records. Attention is paid to resource actuals, as well. You can select to preserve existing actuals, keep the extracted actuals, or convert all actuals to estimates.

When the process has finished, the **Merge Completed** message box will be displayed. It presents the results of the merge in six categories:

- Total Tasks Added
- Total Tasks Merged
- Total Tasks Skipped
- Total Products Added
- Total Products Merged
- Total Products Skipped

Follow these steps to merge proposals:

1. Click the **Proposal** ribbon and then **Merge Proposals** in the **Proposal** group.
2. Enter the name of the proposal that will receive the tasks in the **Merge Into** field.
3. Enter the name of the proposal that will provide the incoming tasks in the **Merge From** field.
4. *(Optional)* Enter a selection of tasks from the incoming proposal.

5. Select a Task Processing Option.
6. Select a Material Product Processing Option.
7. Select how you want to handle actuals.
8. Click **Process**.

View the following topics for details on the merge options:

- Task Processing Options
- Material Products Processing Options
- Handling Actuals

Handling Actuals

Since resource actuals are definite, known expenses, they are important for pricing. When proposals are merged, however, pieces of data replace other pieces of data. The case gets complicated when there are duplicate records and there are actuals in these records; the information carried in them might be lost during the process. Merging has the Handling Actuals feature, which serves to prevent undesirable loss of actuals data when records are duplicated.

The feature allows you to choose a strategy for dealing with actuals both in the extracted and the receiving proposals. Actuals can be handled on two levels:

- Task level - You can replace the entire task that has actuals with a duplicate task.
- Resource level - You can treat actuals for duplicate resources within duplicate tasks.

The Handling Actuals section has three options. These options depend on the option selected in the Processing Options group.

Skip incoming duplicate tasks

The Handling Actuals section is unavailable. It is not needed because all duplicate tasks will be skipped anyway; therefore, the actuals in the existing proposal will not be affected.

Replace duplicates with incoming

Prompt on actuals

You will be prompted when there are actuals in the receiving duplicate task and will be asked to select a Skip or Replace option for the extracted task. Skip - the existing task will remain; Replace - the extracted task will replace the existing one.

Skip tasks with actuals

If the receiving task has actuals, the entire incoming duplicate task will be skipped.

Replace tasks with actuals

The incoming duplicate task will replace the existing task even when the existing task has actuals.

Add incoming to existing tasks

Prompt on actuals

You will be prompted if actuals exist in the receiving proposal and will be asked to select a Skip or Convert action. Skip - the existing actuals will be preserved; Convert - the existing actuals will be converted to estimates.

Skip actuals

The incoming actuals will be skipped if actuals exist for the same month. The existing actuals will be preserved. If there are actuals in the extracted task and respectively estimates for the same month of the receiving task, the actuals will replace the estimates.

The following table presents the four possible cases of extracted and receiving data for the skip option. *Est* represents *Estimate*, *Act* represents *Actuals*, *I* represents *INTO* (existing data) and *F* represents *FROM* (extracted/incoming data).

INTO		FROM		Result	Explanation
Est I	+	Est F	=	Est + Est	Merged incoming and existing estimates
Act I	+	Act F	=	Act I	Skipped incoming actuals, preserved existing actuals
Act I	+	Est F	=	Act I	Skipped incoming estimates, preserved existing actuals
Est I	+	Act F	=	Act F	Existing estimates overwritten with actuals

Convert actuals

In case of duplicate resources in the duplicate tasks, both the existing and the incoming actuals will be converted to estimates. Actuals in non-duplicate resources will not be changed.

Prompt on duplicate task or Prompt on each task

You will be prompted for every duplicate task or every task, respectively. Actuals will be processed as set in the Handling actuals section. The **Handling Actuals** options are the same as with the **Add incoming to existing tasks** options. The only difference is that when you select **Replace** after you have been prompted, the proposals will be merged at the task level as it is with the **Replace duplicate with incoming** option. That is, the **Convert actuals** option acts as a **Replace tasks with actuals** option, and the **Skip actuals** option acts as a **Skip tasks with actuals** option.

*Note: If you selected the **Prompt on actuals** option, you will be prompted first for actuals and after that for duplicate or new tasks.*

Material Products Processing Options

Skip incoming duplicate products

With this option, all material information for the duplicate incoming products will be ignored.

Replace duplicates with incoming

With this option, the duplicate products in the receiving proposal will be replaced with the extracted products.

Prompt on duplicate product

You will be prompted to select an option in the **Duplicate Product Name** dialog box that will open. The options include:

Skip

The extracted product will not be merged into the receiving proposal.

Replace

The extracted product will replace the duplicate product in the receiving proposal.

Cancel

The process will be canceled.

Prompt on each product

With this option, you will be prompted not only for duplicate products but for every product that is to be merged. You will be expected to choose between Merge and Skip for each product that is not found in the receiving proposal. If the extracted product is a duplicate, you will see the **Duplicate Product Name** dialog box described above. If the extracted product does not exist in the receiving proposal, you will see the **New Product** dialog box. The options include:

Merge

The product will be added to the receiving proposal.

Skip

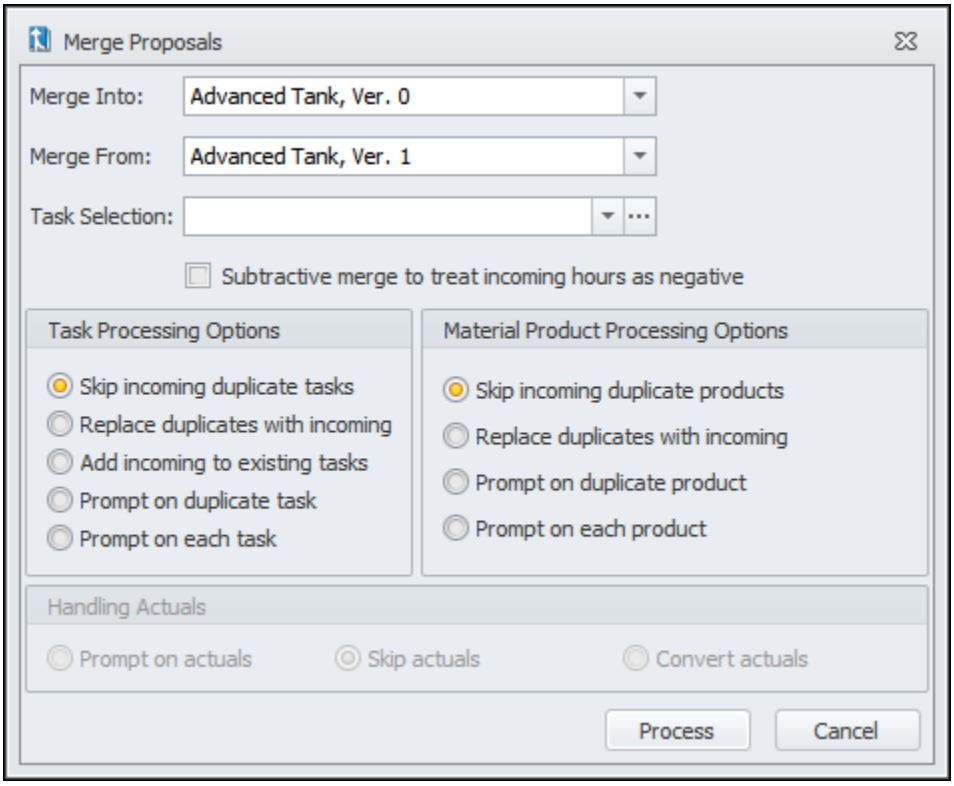
The product will be skipped.

Cancel

The process will be canceled.

Merge Proposals Dialog Box

The **Merge Proposals** dialog box contains the following:



Merge Into

Enter the name of the proposal that will receive the data.

Merge From

Enter the name of the proposal whose data you want to merge.

Notes:

- *The names of the proposals entered in the **Merge Into** and **Merge From** fields must be different.*
- *Both proposals must use the same Algorithm.*
- *The Direct Rate Table of the proposal in the **Merge Into** field must contain all the resources used in the proposal in the **Merge From** field.*

- *The Indirect Rate Table of the proposal in the **Merge Into** field must contain all the indirect pools used in the proposal in the **Merge From** field.*

Task Selection

Enter a task selection to merge only a selection of tasks from the source proposal with the target proposal.

Subtractive merge to treat incoming hours as negative

Select this checkbox to change the sign of the resource values of the proposal in the **Merge From** field. If the extracted resource is negative, the target resource will be increased by the amount of the negative resource. If the extracted resource is positive, the target resource will be reduced by the amount of the source resource.

Task Processing Options

Here you select the option that determines how the tasks, especially duplicate tasks, will be processed during the merge. See Task Processing Options

Material Product Processing Options

Here you select the option that determines how the products, especially duplicate products, will be processed during the merge. See Material Product Processing Options

Handling Actuals

Here you select the option that determines how actuals in duplicate tasks and duplicate resources within the tasks will be processed during the merge. The handling actuals options depend on the processing option selected. See Handling Actuals

Process

Click this button to start the merge process.

Cancel

Click this button to cancel the merge process.

Task Processing Options

Skip incoming duplicate tasks

The duplicate incoming (extracted) tasks will be skipped. They will not enter the receiving proposal.

Replace duplicates with incoming

The duplicate tasks in the receiving proposal will be replaced with the extracted tasks.

Add incoming to existing tasks

The incoming data for resources, travel, etc. will be added to the corresponding months/quarters/years of the task in the receiving proposal. SOW and BOE texts will remain unaffected.

Prompt on duplicate task

You will be prompted to select an option in the **Duplicate Tasks** dialog box that will open. The options include:

Skip

The extracted task will not be merged into the receiving proposal.

Replace

The extracted task will replace the duplicate task in the receiving proposal.

New Name

The **Change Task Name** dialog box will be displayed where you can type a new name for the duplicated task. If you click OK, merging will continue with the task renamed and if you click Cancel, you will return to the Duplicate Task Names dialog box where you will have to select an option to proceed.

Add To

The incoming data for resources, travel, etc. will be added to the corresponding months/quarters/years of the task in the receiving proposal. SOW and BOE texts will remain unaffected.

Overwrite

The incoming data for resources, travel, etc. will replace the data in the duplicate task of the receiving proposal. The remaining data will be merged without being changed; the existing will not be affected, and the extracted will be added. The existing SOW and BOE texts will be replaced by the texts from the extracted task.

Cancel

The process will be canceled.

Prompt on each task

This option expands the action of the previous option. Now you will be prompted not only for duplicate tasks but also for every task that is to be merged. If the task is a duplicate, you will see the **Duplicate Tasks** dialog box described above. If the extracted task does not exist in the receiving proposal, you will see the **New Task** dialog box. The options include:

Merge

The task will be added to the receiving proposal.

Skip

The task will be skipped.

Cancel

The process will be canceled.

Multi-Currency

The Multi-Currency features facilitate working in multinational environments. They allow you to:

- Create proposals in currencies that are different from the system default.
- Enter currencies for resources with rate type *Hours* and *Units* in Direct Rate, Rate Band, and Composite Rate Tables that differ from the system currency.
- Enter a currency on a tab in Task View for a resource with rate type *Cost* that is different from the proposal currency.
- Enter a currency for a cost of a part or assembly in a Material Library that is different from the system currency.
- Enter a currency for a destination or travel expense in the Travel Library that is different from the system currency.
- Show the costs of your proposal in a bid currency.

System Currency

The currency defined at the system level is the default currency of the rates entered for resources with rate type *Hours* or *Units* in a rate table. However, you can enter rates in other currencies by selecting the **Multi-Currency** checkbox on table's **Properties** dialog box. It is also the default currency of the destinations and travel expenses in the Travel Library and of parts/assemblies and costs in the Material Libraries. You can change the currency of a destination, travel expense, part/assembly, or cost in the library by enabling the multi-currency functions for travel and material on the **Currency** page of **System Options**. You will need to assign an Exchange Rate Table to the proposal so that when you add the destination or part/assembly to a task, ProPricer will be able to convert the cost to the proposal currency. The system currency is also the default Base Currency of every Exchange Rate Table.

Proposal Currency

The system currency is the default currency of every new proposal you create. It indicates the currency in which the costs of the proposal will be shown. You can change it to any currency that is enabled on the **Currency** page of **System Options**.

Multi-Currency

The **Multi-Currency** checkbox on the **Currency** page in the **Proposal** folder of **Proposal Properties** enables additional features in the proposal. If you select it, a **Currency** column will appear on the **Resources**, **Travel**, **Material**, **CERs**, **Resource Sets**, and **Summary** tabs in Task View, Resource View, and What-Ifs. This column allows you to:

- Enter a currency for a resource whose rate type is *Cost*.
- Change the currency entered for a destination or travel expense in the Travel Library.
- Change the currency entered for a part/assembly in the Material Libraries.

The **Multi-Currency** checkbox also enables the Bid Currency options, which allow you to show the costs of the proposal in a currency other than the proposal currency.

Bid Currency

Bid Currency eliminates the need for multiple versions of the same proposal when you bid in different currencies. This means that you do not need to create the Yen version of Proposal A, the Euro version of Proposal A, the Pound version of Proposal A, etc. Instead, you can create one proposal that shows costs in the currency of your choice.

You can convert the proposal costs at two levels:

- Direct Cost - All cost values from Direct Cost onward are displayed in the bid currency.
- Total Price - A **Tot Price (Bid)** column appears after the **Tot Price** column that shows the total price in the bid currency.

The following screenshots illustrate bid level. The first screenshot is of the Resource Summary grid of a task from a proposal that does not use a Bid Currency. The proposal currency is USD.

Resource Summary

Resource	Direct Cost	Labor Ovhd	Mat Hnd OH	Tot Ovhd	Subtotal	G&A IRD BP	Tot Indrct	Est Cost	Profit	Cst + Fee	Mfg COM	G&A COM	IntDiv Xfr COM	Total COM	Tot Price
Program Manager	$4,200.00	$2,146.20	$0.00	$2,146.20	$6,346.20	$507.70	$2,653.90	$6,853.90	$685.39	$7,539.29	$0.00	$19.04	$0.00	$19.04	$7,558.32
Senior Engineer	$3,150.00	$1,609.65	$0.00	$1,609.65	$4,759.65	$380.77	$1,990.42	$5,140.42	$514.04	$5,654.46	$0.00	$14.28	$0.00	$14.28	$5,668.74

This screenshot shows the same task using a Bid Currency of Euros at the Direct Cost level. ProPricer converted the values from **Direct Cost** to **Tot Price** into Euros with the rates from the Exchange Rate Table assigned to the proposal.

Resource Summary

Resource	Direct Cost	Labor Ovhd	Mat Hnd OH	Tot Ovhd	Subtotal	G&A IRD BP	Tot Indrct	Est Cost	Profit	Cst + Fee	Mfg COM	G&A COM	IntDiv Xfr COM	Total COM	Tot Price
Program Manager	€3,089.92	€1,578.95	€0.00	€1,578.95	€4,668.86	€373.51	€1,952.46	€5,042.37	€504.24	€5,546.61	€0.00	€14.01	€0.00	€14.01	€5,560.62
Senior Engineer	€2,317.44	€1,184.21	€0.00	€1,184.21	€3,501.65	€280.13	€1,464.34	€3,781.78	€378.18	€4,159.96	€0.00	€10.50	€0.00	€10.50	€4,170.46

This screenshot shows the same task, but this time we changed the level to Total Price. Values from **Direct Cost** to **Tot Price** appear in the proposal currency, and a new column **Tot Price (Bid)** shows the total price in the bid currency.

Resource Summary

Resource	Direct Cost	Labor Ovhd	Mat Hnd OH	Tot Ovhd	Subtotal	G&A IRD BP	Tot Indrct	Est Cost	Profit	Cst + Fee	Mfg COM	G&A COM	IntDiv Xfr COM	Total COM	Tot Price	Tot Price (Bid)
Program Manager	$4,200.00	$2,146.20	$0.00	$2,146.20	$6,346.20	$507.70	$2,653.90	$6,853.90	$685.39	$7,539.29	$0.00	$19.04	$0.00	$19.04	$7,558.32	€5,560.62
Senior Engineer	$3,150.00	$1,609.65	$0.00	$1,609.65	$4,759.65	$380.77	$1,990.42	$5,140.42	$514.04	$5,654.46	$0.00	$14.28	$0.00	$14.28	$5,668.74	€4,170.46

Enabling Bid Currency for the proposal adds the Bid Currency options to the applicable reports. The following screenshots show the Annual Cost Breakdown Report for a proposal with USD as the proposal currency and Euro as the Bid Currency.

This screenshot shows the report without the Bid Currency.

TASK ID: Bid Currency

Resource	2015	Totals
Labor		
Program Manager	100	100
Senior Engineer	100	100
Total Labor Hours	200	200
Total Labor Cost	$7,350	$7,350
Labor Overhead	$3,756	$3,756
Total Overhead	$3,756	$3,756
Subtotal	$11,106	$11,106
G&A, IR&D / B&P	$888	$888
Total Indirect	$4,644	$4,644
Estimated Cost	$11,994	$11,994
Profit	$1,199	$1,199
Total Cost + Fee	$13,194	$13,194
G&A Cost of Money	$33	$33
Total COM	$33	$33
Total Price	$13,227	$13,227

This screenshot shows the report with the Bid Currency *Euro* and Bid Level *Direct Cost*. All the costs are shown in Euros.

TASK ID: Bid Currency

Resource	2015	Totals
Labor		
Program Manager	100	100
Senior Engineer	100	100
Total Labor Hours	200	200
Total Labor Cost	€5,407	€5,407
Labor Overhead	€2,763	€2,763
Total Overhead	€2,763	€2,763
Subtotal	€8,171	€8,171
G&A, IR&D / B&P	€654	€654
Total Indirect	€3,417	€3,417
Estimated Cost	€8,824	€8,824
Profit	€882	€882
Total Cost + Fee	€9,707	€9,707
G&A Cost of Money	€25	€25
Total COM	€25	€25
Total Price	€9,731	€9,731

This screenshot shows the report with the Bid Currency *Euro* and Bid Level *Total Price*. The costs are shown in USD and there is an additional Total Price in the Bid Currency.

TASK ID: Bid Currency

Resource	2015	Totals
Labor		
Program Manager	100	100
Senior Engineer	100	100
Total Labor Hours	200	200
Total Labor Cost	$7,350	$7,350
Labor Overhead	$3,756	$3,756
Total Overhead	$3,756	$3,756
Subtotal	$11,106	$11,106
G&A, IR&D / B&P	$888	$888
Total Indirect	$4,644	$4,644
Estimated Cost	$11,994	$11,994
Profit	$1,199	$1,199
Total Cost + Fee	$13,194	$13,194
G&A Cost of Money	$33	$33
Total COM	$33	$33
Total Price (USD)	$13,227	$13,227
Total Price (EUR)	€9,731	€9,731

Enable Bid Currency Options

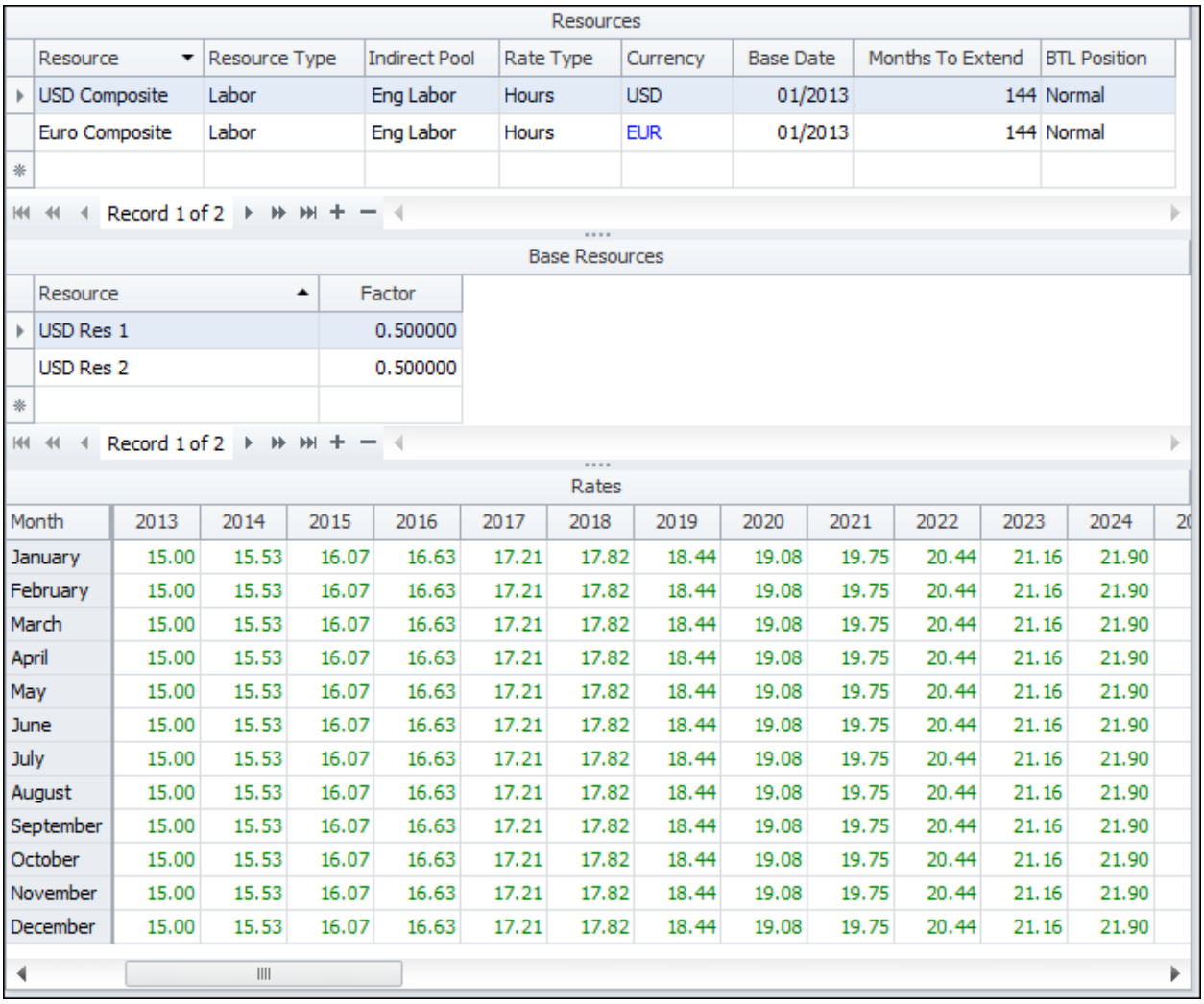
You can use Bid Currency Options to show the costs of a proposal in a different currency.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Currency** page in the **Proposal** folder of **Proposal Properties**.
3. Under the **Proposal Currency Options**, enter an Exchange Rate Table. This will provide the exchange rates needed to convert the costs.
4. Select the **Multi-Currency** checkbox to enable the Bid Currency Options.
5. Under the **Bid Currency Options**, select the **Enable** checkbox.
6. Enter the currency in which you want to show the costs.
7. Enter the level at which you want to convert the proposal costs.
8. Click **OK**.

Composite Rate Tables and Multi-Currency

If the **Multi-Currency** checkbox is selected for the Base Rate Table assigned to the Composite Rate Table, a currency column appears that shows the default currency of the composite rate, which is the system currency. You can enter a different currency for the composite rate if the rate type is *Hours* or *Units*. Please note that the currency of the composite rate must match the currency of the base resources. You cannot enter Euro for the composite rate and then add a base resource with a currency other than Euro.

For example: Our system and proposal currency are USD. We created two composite resources, *Euro Composite* and *USD Composite*, and added them to a Composite Rate Table. The base resources and corresponding factors and rates were the same for both composite rates. The only difference is the currency.



Resources

Resource	Resource Type	Indirect Pool	Rate Type	Currency	Base Date	Months To Extend	BTL Position
USD Composite	Labor	Eng Labor	Hours	USD	01/2013	144	Normal
Euro Composite	Labor	Eng Labor	Hours	EUR	01/2013	144	Normal

Record 1 of 2

Base Resources

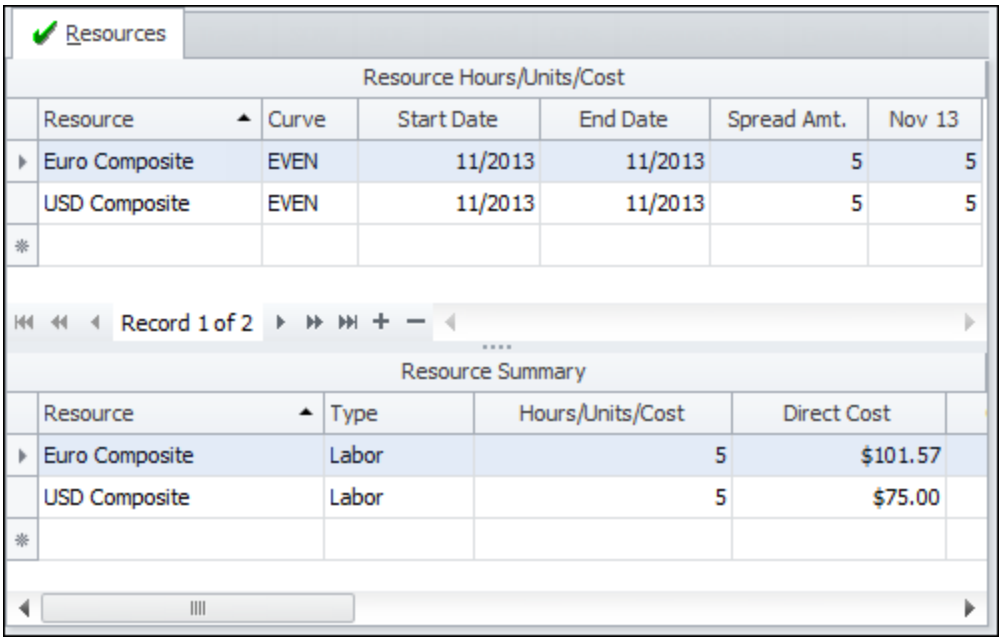
Resource	Factor
USD Res 1	0.500000
USD Res 2	0.500000

Record 1 of 2

Rates

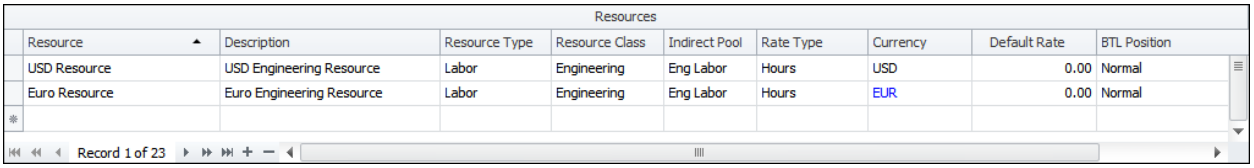
Month	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	20
January	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
February	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
March	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
April	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
May	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
June	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
July	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
August	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
September	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
October	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
November	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	
December	15.00	15.53	16.07	16.63	17.21	17.82	18.44	19.08	19.75	20.44	21.16	21.90	

We added both resources to a task and spread five hours for them. The **Resources** tab shows $75.00 US dollars for the USD Composite and $101.57 US dollars for the Euro Composite. ProPricer used the rate from the Exchange Rate Table to convert the Euros to US dollars (the proposal currency).


Resources
Resource Hours/Units/Cost
Resource
Curve
Start Date
End Date
Spread Amt.
Nov 13
Euro Composite
EVEN
11/2013
11/2013
5
5
USD Composite
EVEN
11/2013
11/2013
5
5
Record 1 of 2
Resource Summary
Resource
Type
Hours/Units/Cost
Direct Cost
Euro Composite
Labor
5
$101.57
USD Composite
Labor
5
$75.00

Direct Rate Tables and Multi-Currency

Selecting the **Multi-Currency** checkbox for a Direct Rate Table allows you to enter rates in different currencies. When you add the resource to a task, ProPricer will use the rate from the Exchange Rate Table assigned to the proposal to convert the cost to the proposal currency. For example: our system and proposal currency are USD. We added two resources to the Direct Rate Table: USD Resource and Euro Resource. We entered a Base Rate of 10.00 for both resources. The only difference is the currency.

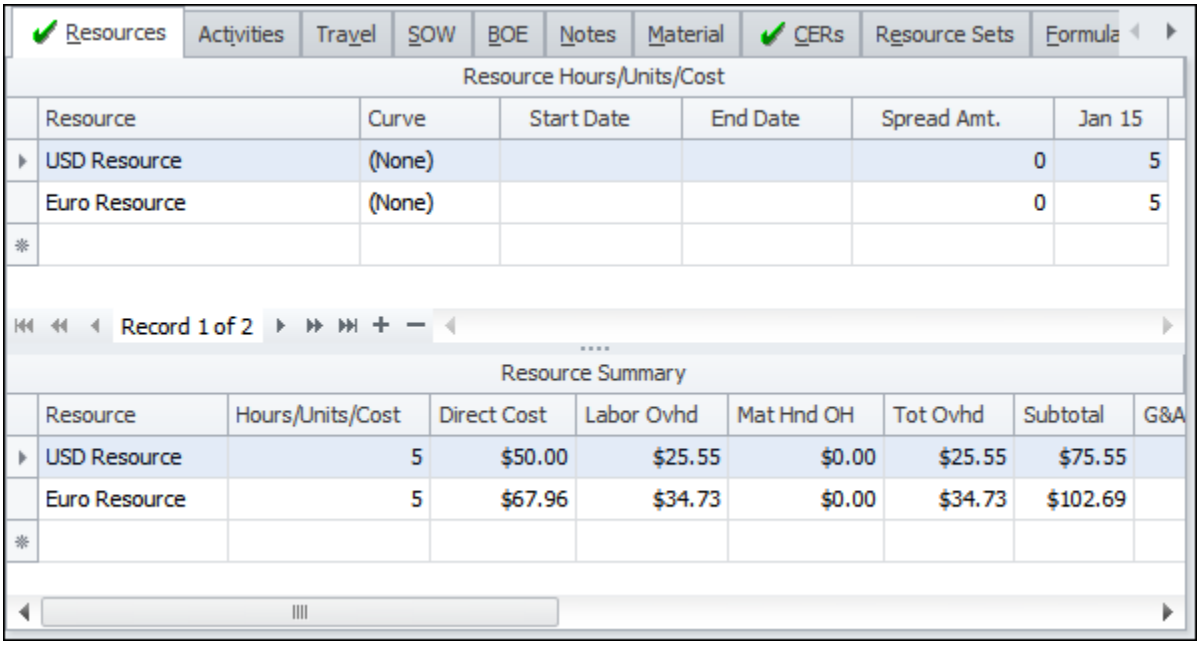


Resources

Resource	Description	Resource Type	Resource Class	Indirect Pool	Rate Type	Currency	Default Rate	BTL Position
USD Resource	USD Engineering Resource	Labor	Engineering	Eng Labor	Hours	USD	0.00	Normal
Euro Resource	Euro Engineering Resource	Labor	Engineering	Eng Labor	Hours	EUR	0.00	Normal

Record 1 of 23

We added both resources to a task and spread 5 hours for them. The Resource Summary grid shows a Direct Cost of $50.00 US dollars for the USD Resource and $67.96 US dollars for the Euro Resource. ProPricer used the rate from the Exchange Rate Table to convert the Euros to US dollars (the proposal currency).



Resources | Activities | Travel | SOW | BOE | Notes | Material | CERs | Resource Sets | Formula

Resource Hours/Units/Cost

Resource	Curve	Start Date	End Date	Spread Amt.	Jan 15
USD Resource	(None)			0	5
Euro Resource	(None)			0	5

Record 1 of 2

Resource Summary

Resource	Hours/Units/Cost	Direct Cost	Labor Ovhd	Mat Hnd OH	Tot Ovhd	Subtotal	G&A
USD Resource	5	$50.00	$25.55	$0.00	$25.55	$75.55	
Euro Resource	5	$67.96	$34.73	$0.00	$34.73	$102.69	

Enable Multi-Currency in a Direct Rate Table

1. Right-click the appropriate Direct Rate Table, and then click **Properties** on the shortcut menu.
2. Select the **Multi-Currency** checkbox.
3. Click **OK**.

Enable Multi-Currency for a Proposal

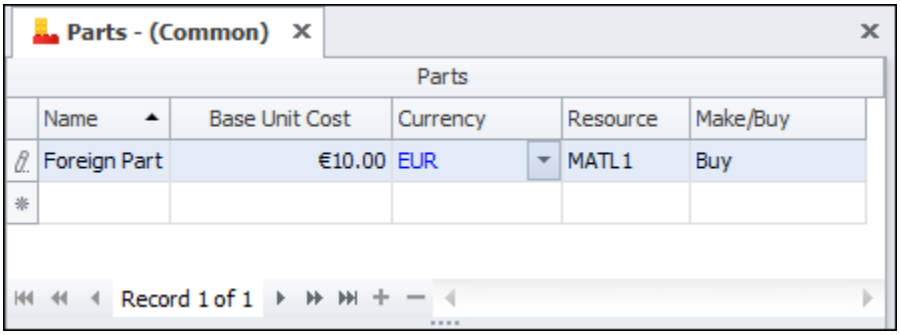
Enabling Multi-Currency for a proposal will add a **Currency** column to the Resources, Travel, Material, CERs, Resource Sets, Formulas and Summary tabs, which will allow you to change the currency of resources whose rate type is *Cost*. ProPricer will use the appropriate exchange rate to convert the costs to the proposal currency.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Currency** page in the **Proposal** folder of **Proposal Properties**.
3. Under the **Proposal Currency Options**, enter an **Exchange Rate Table**. This will provide the exchange rates needed to convert the costs.
4. Select the **Multi-Currency** checkbox.
5. Click **OK**.

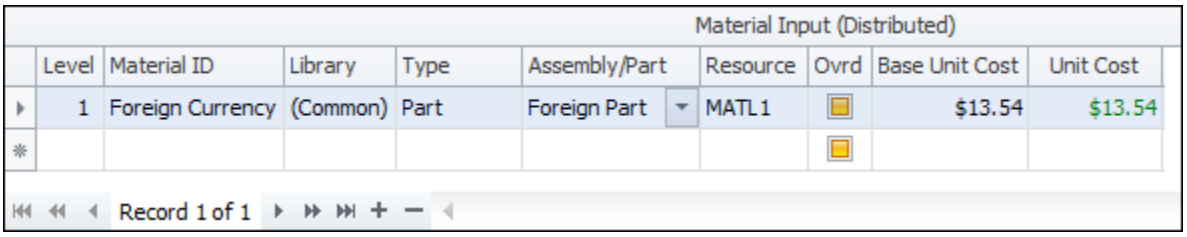
*Note: Selecting the **Multi-Currency** checkbox enables the Bid Currency Options, which allow you to show the costs of the proposal in a currency that differs from the proposal currency.*

Material Multi-Currency Functions

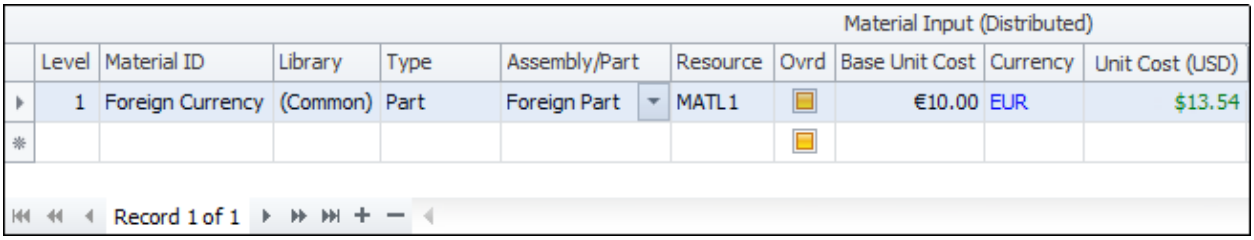
The Material Multi-Currency functions allow you to enter currencies that differ from the system currency for parts and assemblies in the Parts and Assemblies Libraries. In the examples that follow, we used a system currency of USD. We created a part and entered Euros for the Base Unit Cost.



Before assigning the part to a task, we assigned an Exchange Rate Table to the proposal. In this example, the currency of the proposal is also USD. ProPricer will convert the Base Unit Cost and show it in the proposal currency.



If the **Multi-Currency** checkbox is selected for the proposal, the Base Unit Cost will appear in the currency entered in the library. ProPricer will convert it to calculate the Unit Cost, which appears in the proposal currency.



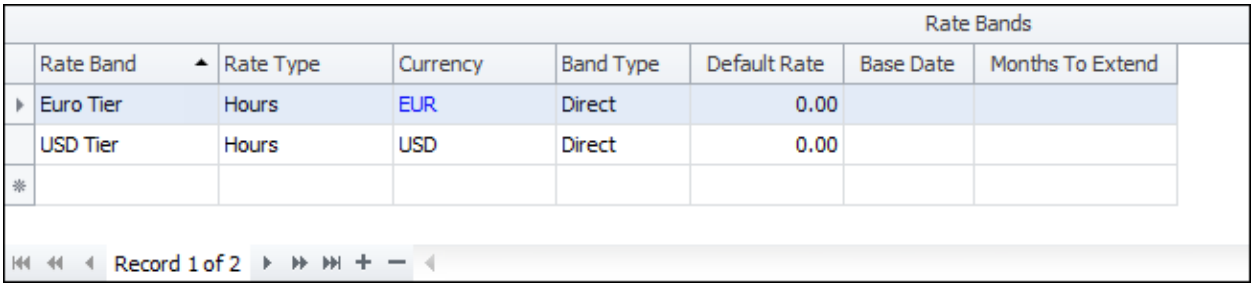
Enable Multi-Currency Functions for Material Costs

You can enter different currencies for parts, assemblies, and cost data and ProPricer will calculate the costs in the proposal currency. To be able to use different currencies, you must enable the multi-currency functions first.

1. Click the **Setup** ribbon, and then click **System Options** in the **Preferences** group.
2. Click the **Currency** page.
3. Select the **Enable Material Multi-Currency Functions** checkbox.
4. Click **OK**.

Rate Band Tables and Multi-Currency

Selecting the **Multi-Currency** checkbox for a Rate Band Table allows you to enter rates in different currencies. When you assign the rate band to the resource, ProPricer will use the rate from the Exchange Rate Table assigned to the proposal to convert the cost to the proposal currency. For example: our system and proposal currency are USD. We created two rate bands: Euro Tier and USD Tier and then added them to a Rate Band Table. We entered a Base Rate of 10.00 for both rate bands. The only difference is the currency.

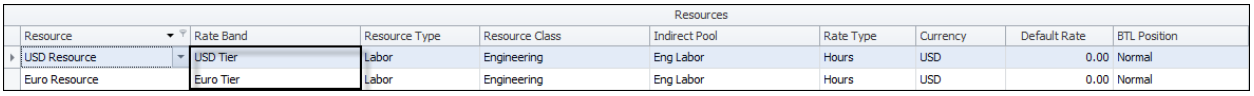


Rate Bands

Rate Band	Rate Type	Currency	Band Type	Default Rate	Base Date	Months To Extend
Euro Tier	Hours	EUR	Direct	0.00		
USD Tier	Hours	USD	Direct	0.00		

Record 1 of 2

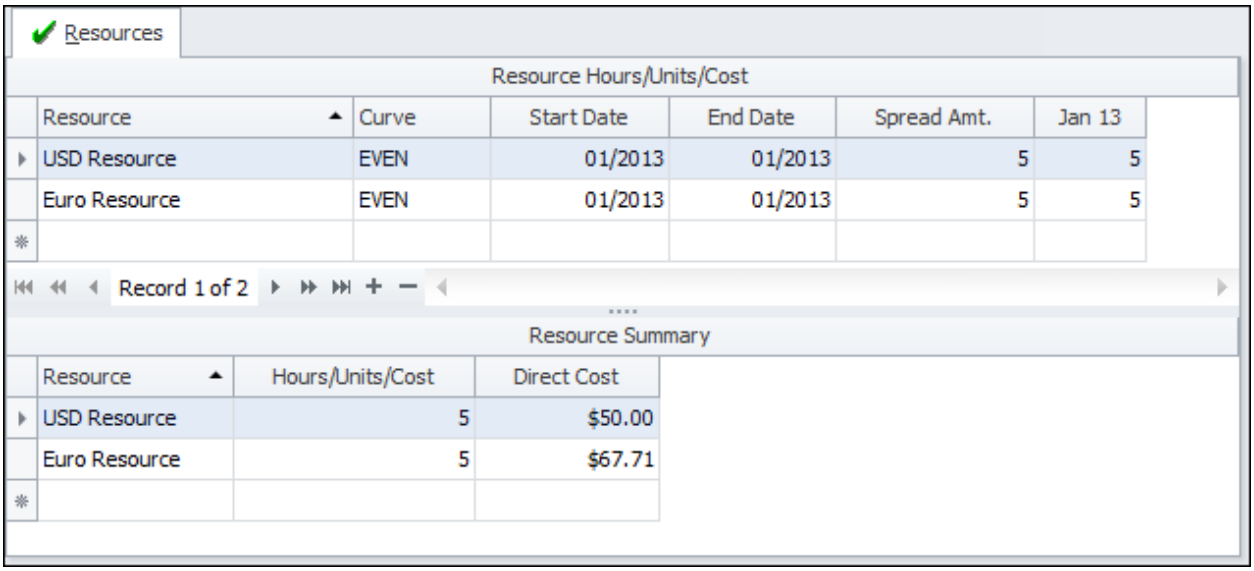
We assigned the Rate Band Table to the proposal's Direct Rate Table and assigned the rate bands to two resources: Euro Resource and USD Resource.



Resources

Resource	Rate Band	Resource Type	Resource Class	Indirect Pool	Rate Type	Currency	Default Rate	BTL Position
USD Resource	USD Tier	Labor	Engineering	Eng Labor	Hours	USD	0.00	Normal
Euro Resource	Euro Tier	Labor	Engineering	Eng Labor	Hours	USD	0.00	Normal

We added both resources to a task and spread 5 hours for them. The **Resources** tab shows $50.00 US dollars for the USD Resource and $67.71 US dollars for the Euro Resource. ProPricer used the rate from the Exchange Rate Table to convert the 50.00 Euros to US dollars (the proposal currency).



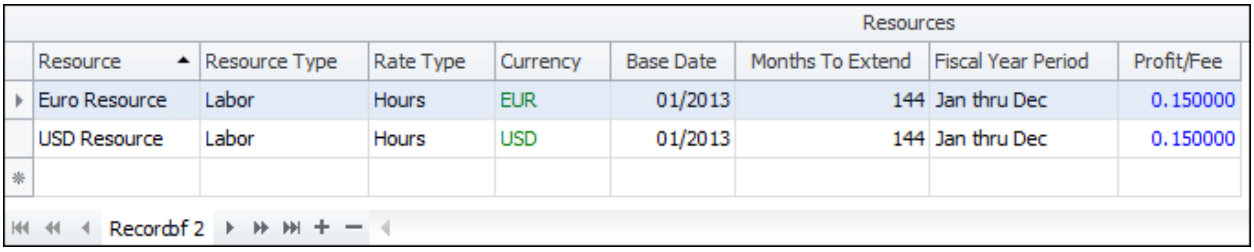
Enable Multi-Currency in a Rate Band Table

1. Right-click the appropriate Rate Band Table, and then click **Properties** on the shortcut menu.
2. Select the **Multi-Currency** checkbox.
3. Click **OK**.

T&M Rate Tables and Multi-Currency

If the **Multi-Currency** checkbox is selected for the Base Rate Table assigned to the T&M Rate Table, a currency column will appear that will show the currency entered for the rate in the Base Rate Table.

Our system and proposal currency are USD. We added two resources to the T&M Rate Table: USD Resource and Euro Resource. The rate for January 2013 is 11.50 for both resources.

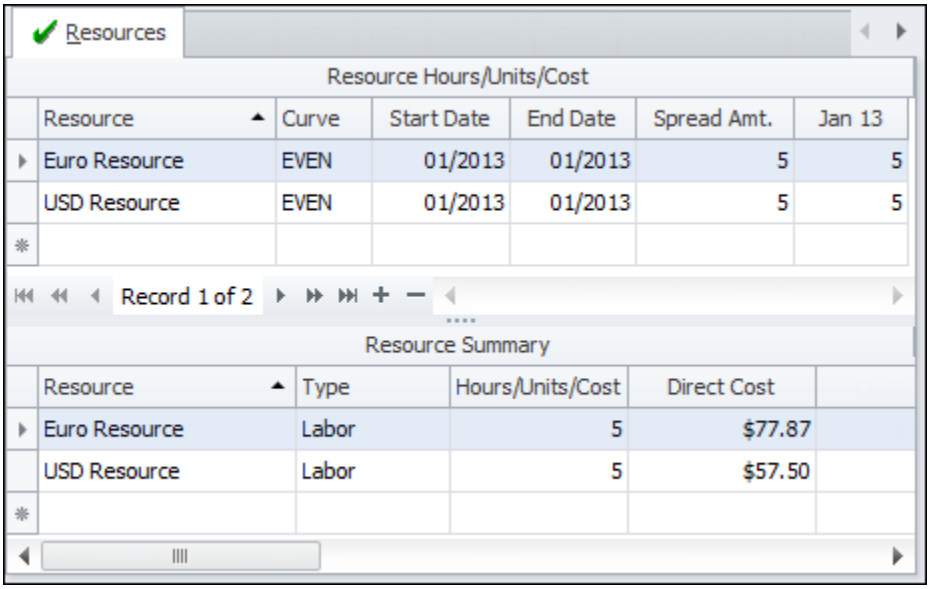


Resources

Resource	Resource Type	Rate Type	Currency	Base Date	Months To Extend	Fiscal Year Period	Profit/Fee
Euro Resource	Labor	Hours	EUR	01/2013	144	Jan thru Dec	0.150000
USD Resource	Labor	Hours	USD	01/2013	144	Jan thru Dec	0.150000

Record 1 of 2

We added both resources to a task and spread 5 hours for them. The **Resources** tab shows $57.50 US dollars for the USD Resource and $77.87 US dollars for the Euro Resource. ProPricer used the rate from the Exchange Rate Table to convert the Euros to US dollars (the proposal currency).



Resources

Resource Hours/Units/Cost

Resource	Curve	Start Date	End Date	Spread Amt.	Jan 13
Euro Resource	EVEN	01/2013	01/2013	5	5
USD Resource	EVEN	01/2013	01/2013	5	5

Record 1 of 2

Resource Summary

Resource	Type	Hours/Units/Cost	Direct Cost
Euro Resource	Labor	5	$77.87
USD Resource	Labor	5	$57.50

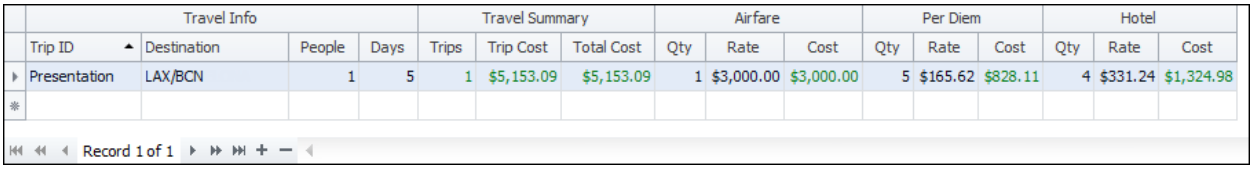
Travel Rate Tables and Multi-Currency

Enabling Multi-Currency functionality for a Travel Rate Table allows you to enter currencies that differ from the system currency for the destination and travel expenses: airfare, per diem, rental car, mileage, hotel and miscellaneous. In the examples that follow, we used a system currency of USD. We created a destination LAX/BCN and entered Euros for the Per Diem and Hotel travel expenses.

Travel Rates - MultiCurrency

Travel Information				Airfare		Per Diem		Hotel	
Destination	Description	Currency	Resource	Rate	Currency	Rate	Currency	Rate	Currency
LAX/BCN	Los Angeles - Barcelona	USD	TRAVEL	$3,000.00	USD	€100.00	EUR	€200.00	EUR

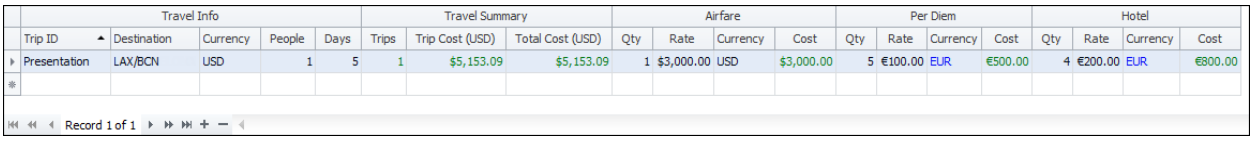
Before adding this destination to a task, we assigned an Exchange Rate Table to the proposal. In this example, the currency of the proposal is also USD. ProPricer will convert the rates and show them in the proposal currency.



Travel Info				Travel Summary			Airfare			Per Diem			Hotel		
Trip ID	Destination	People	Days	Trips	Trip Cost	Total Cost	Qty	Rate	Cost	Qty	Rate	Cost	Qty	Rate	Cost
Presentation	LAX/BCN	1	5	1	$5,153.09	$5,153.09	1	$3,000.00	$3,000.00	5	$165.62	$828.11	4	$331.24	$1,324.98

Record 1 of 1

If the **Multi-Currency** checkbox is selected for the proposal, the rates will appear in the currency entered in the table. ProPricer will convert the rates to calculate the Trip Cost, which appears in the proposal currency.



Travel Info					Travel Summary			Airfare				Per Diem				Hotel			
Trip ID	Destination	Currency	People	Days	Trips	Trip Cost (USD)	Total Cost (USD)	Qty	Rate	Currency	Cost	Qty	Rate	Currency	Cost	Qty	Rate	Currency	Cost
Presentation	LAX/BCN	USD	1	5	1	$5,153.09	$5,153.09	1	$3,000.00	USD	$3,000.00	5	€100.00	EUR	€500.00	4	€200.00	EUR	€800.00

Record 1 of 1

Enable Travel Multi-Currency Functions

1. Click the **Rates/Tables** button. Expand the **Travel Rates** folder.

2. Right-click the appropriate Travel Rate Table, and then click **Properties** on the shortcut menu.
3. Select the **Multi-Currency** checkbox.
4. Click **OK**.

Overrides
CER Factor

CER factor overrides allow you to define proposal-specific factors that override the factor from the CER Factor Table assigned to the proposal. If you use the same CER Factor Table with other proposals, but need to change the factors for a specific proposal, you do not have to create a new CER Factor Table for that proposal. You can simply enter overriding factors. In essence, you are creating a proposal-specific CER Factor Table.

You enter the overriding factors on the **CER Factor Overrides** grid. The tab will show *CER Factor Overrides*, followed by the name of the proposal for which you want to enter the overriding factors. The grid will show the factors from the CER Factor Table assigned to the proposal.

Notes:

- *The overrides are saved to the proposal-specific table, not the global table.*
- *Factors from the CER Factor Table are shown in black. Overridden rates are shown in blue.*
- *You can only change the description of the CER factor and the rates.*
- *You cannot add new CER factors, nor delete existing ones.*

During pricing, ProPricer will use any overriding factors first. If there are no overriding factors, it will use the factors from the CER Factor Table assigned to the proposal.

If you change the CER Factor Table of a proposal for which you entered overriding factors, the overriding factors will be conserved. However, there are two exceptions:

- If the new CER Factor Table has a different timescale, all overriding factors will be deleted.

- If the new CER Factor Table is missing some of the CER factors that have overriding rates, the overriding factors for the missing CER factors will be deleted.

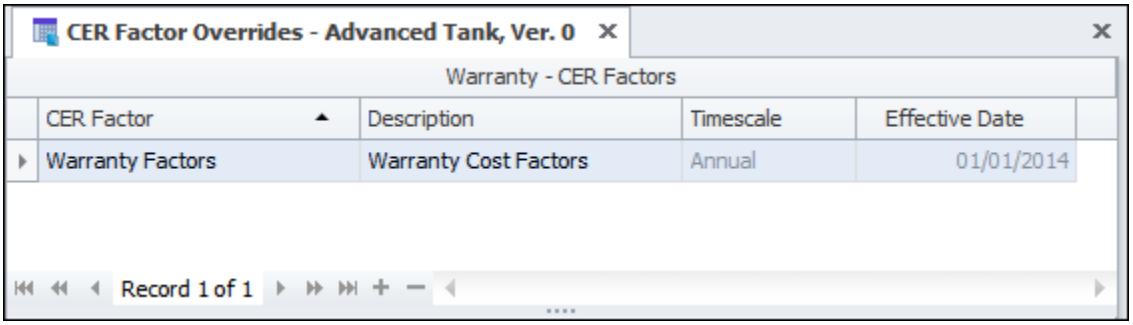
CER Factor Overrides Grid

This is where you enter proposal-specific CER factors. The tab that opens in the Workspace shows *CER Factor Overrides*, followed by the name of the proposal. The top grid shows the name of the CER Factor Table assigned to the proposal, followed by *CER Factors*. The bottom grid is Factor Overrides.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

CER Factors

This grid shows all the CER factors in the table.



CER Factor

Shows the name of the CER factor.

Description

Shows the description of the CER factor.

Timescale

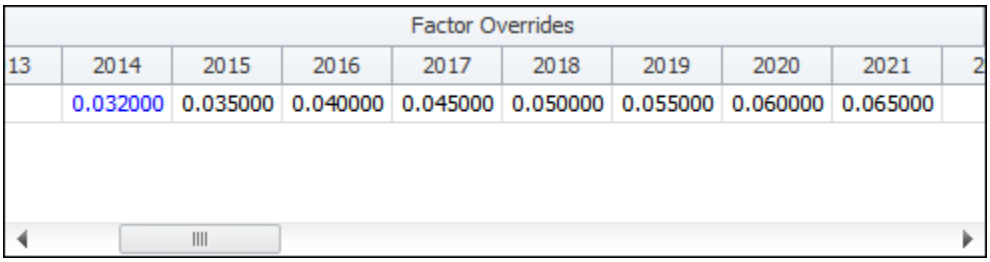
Shows the timescale of the table.

Effective Date

Shows the date the factor will take effect. This is for information only.

Factor Overrides

This grid shows the factors of the CER factor selected above. You can change as many factors as needed.



Copy Overriding CER Factors to Another Proposal

1. Select the proposal whose overriding factors you want to copy.
2. On the **Proposal** ribbon, in the **Overrides** group, click the down arrow next to the **CER Factor** icon, and then click **Copy**. The **Select Proposals** dialog box will open.
3. Select the target proposal(s), and then click **OK**. ProPricer will delete any existing overriding factors in the target proposal and replace them with the factors from the source proposal.

Note: To ensure that the overriding factors are copied successfully:

- *A CER Factor Table must be assigned to the target proposal*.
- *The target CER Factor Table must contain all the factors in the source table*.

Copy Overriding CER Factors within a Table

1. Right-click a CER factor, and then click **Copy** on the shortcut menu.
2. Enter the name of the target CER factor.
3. Click **OK**.

ProPricer will check to see if overriding factors have been entered for the target CER factor, and will:

- Copy them if there are none.
- Prompt you to replace the existing factors with the new ones.

Delete Overriding CER Factors

You can delete any overriding factor or description you no longer need, and have ProPricer use the factors/descriptions entered in the CER Factor Table assigned to the proposal.

Delete an Overriding Description

1. Right-click the CER factor, and then click **Delete Description Overrides**.
2. Click **Yes** when prompted.

Delete a Single Overriding Factor

- Select the factor, and then click **Delete**.

Delete All the Overriding Factors for a Specific CER Factor

1. Select the CER factor.
2. Right-click anywhere in the **Factor Overrides** grid, and then click **Delete Discrete Overrides**.
3. Click **Yes** when prompted.

Delete All the Overrides (Description and Rates) Entered for a Specific CER Factor

1. Right-click the CER factor, and then click **Delete All Overrides**.
2. Click **Yes** when prompted.

Delete All Overriding Factors for a Proposal

- Click the down arrow next to the **CER Factor** icon in the **Overrides** group on the ribbon, and then click **Delete**.

Override the CER Factors of a Proposal

There may be times when you need to change the CER factors for a specific proposal, but you do not want to change the factors in the CER Factor Table because you use that table with other proposals. ProPricer allows you to enter CER factor overrides that are specific to that proposal, thus eliminating the need to create a new CER Factor Table. The overriding factors do not affect the factors in the CER Factor Table.

1. Select the appropriate proposal.
2. On the **Proposal** ribbon, in the **Overrides** group, click **CER Factor**. The grid that opens will be a copy of the CER Factor Table assigned to the proposal, but the name of the tab will show *CER Factor Overrides* followed by the name of the proposal.
3. *(Optional)* Change the description of the CER factor.
4. Enter the overriding factors. The color of the rates will change from black to blue, indicating an override.
5. Press **Ctrl**+**S** or move to another row to save your work.

Direct Rate

Direct rate overrides allow you to define proposal-specific direct rates that override the rates from the Direct Rate Table assigned to the proposal. If you use the same Direct Rate Table with other proposals, but need to change the direct rates for a specific one, you do not have to create a new Direct Rate Table for that proposal. You can simply enter overriding rates. In essence, you are creating a proposal-specific Direct Rate Table.

Composite and T&M Rate Tables can also be overridden, but only as direct rates. For example, you cannot enter different base resources for a composite resource, but you can simply change the overall rate for that resource.

You enter the overriding rates on the **Direct Rate Overrides** grid. The tab will show *Direct Rate Overrides*, followed by the name of the proposal for which you want to enter the overriding rates. The grid will show the rates from the Direct Rate Table assigned to the proposal.

Notes:

- *The overrides are saved to the proposal-specific table, not the global table.*
- *Rates from the Direct Rate Table are shown in black. Overridden rates are shown in blue. Calculated rates are shown in green.*
- *You can only change the description of the resource and the rates.*
- *You cannot add resources, nor delete existing ones.*

During pricing, ProPricer will use any overriding rates first. If there are no overriding rates, it will use the rates from the Direct Rate Table assigned to the proposal.

If you change the Direct Rate Table of a proposal for which you entered overriding rates, the overriding rates will be conserved. However, if the new Direct Rate Table is

missing some of the resources that have overriding rates, the overriding rates for the missing resources will be deleted.

You cannot delete a resource from a global Direct, Composite, or T&M Rate Table that has an overriding rate defined for it.

Copy Overriding Direct Rates to Another Proposal

1. Select the proposal whose overriding rates you want to copy.
2. On the **Proposal** ribbon, in the **Overrides** group, click the down arrow next to the **Direct Rate** icon, and then click **Copy**. The **Select Proposals** dialog box will open.
3. Select the target proposal(s), and then click **OK**. ProPricer will delete any existing overriding rates in the target proposal and replace them with the rates from the source proposal.

Note: To ensure that the overriding rates are copied successfully:

- *A Direct Rate Table (or equivalent) must be assigned to the target proposal*.
- *The target Direct Rate Table must contain all the resources in the source table*.

Copy Overriding Direct Rates within a Table

1. Right-click the resource whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the target resource.
3. Click **OK**.

ProPricer will check to see if overriding rates have been entered for the target resource, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Delete Overriding Direct Rates

You can delete any overriding rate or description you no longer need, and have ProPricer use the rates/descriptions entered in the Direct Rate Table assigned to the proposal.

Delete an Overriding Description

1. Right-click the resource, and then click **Delete Description Overrides**.
2. Click **Yes** when prompted.

Delete a Single Overriding Rate that was Entered Manually

- Select the rate, and then click **Delete**.

Delete All the Overriding Rates that were Entered Manually for a Specific Resource

1. Select the resource.
2. Right-click anywhere in the **Rate Overrides** grid, and then click **Delete Discrete Overrides**.
3. Click **Yes** when prompted.

Delete Overriding Rates Entered for a Specific Resource with an Escalation Set

1. Select the resource.
2. Right-click the escalation set, and then click **Delete**.

3. Click **Yes** when prompted.

Delete All the Overrides (Description and Rates) Entered for a Specific Resource

1. Right-click the resource, and then click **Delete All Overrides**.
2. Click **Yes** when prompted.

Delete All Overriding Rates for a Proposal

- Click the down arrow next to the **Direct Rate** icon in the **Overrides** group on the ribbon, and then click **Delete**.

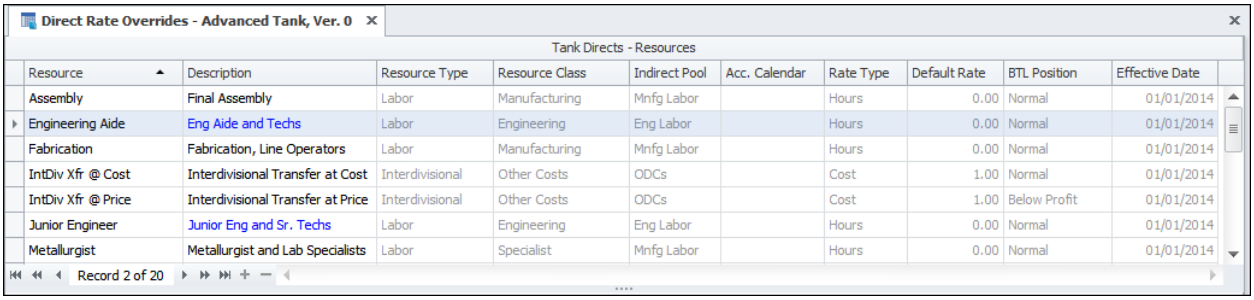
Direct Rate Overrides Grid

This is where you enter proposal-specific rates for resources. The tab that opens in the Workspace shows *Direct Rate Overrides*, followed by the name of the proposal. The top grid shows the name of the Direct Rate Table assigned to the proposal, followed by *Resources*.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resources

This grid shows all the resources in the table.



Resource

Shows the name of the resource.

Description

Shows the description entered for resource in the Resource Library.

Rate Band

This column appears only if there is a Rate Band Table associated with the Direct Rate Table. It shows the name of the rate band assigned to the resource.

Resource Type

Shows the resource type from the Resource Library.

Resource Class

Shows the resource class from the Direct Rate Table.

Indirect Pool

Shows the indirect pool from the Direct Rate Table.

Accounting Calendar

Shows the accounting calendar from the Resource Library.

Rate Type

Shows the rate type from the Direct Rate Table.

Currency

Shows the currency if the **Multi-Currency** checkbox is selected for the table.

Default Rate

Shows the default rate from the Direct Rate Table.

BTL Position

Shows the below the line (BTL) position from the Direct Rate Table.

Effective Date

Shows the date the rate will take effect. This is for information only.

Escalation Sets

Here you can create one or more overriding escalation sets to enter rates for the resources in the table. The escalation set appears blue in color, indicating an override. This grid is empty until you enter an escalation set, even if escalation sets were defined in the original table.

No.

ProPricer assigns numbers to the escalation sets based on their start dates. The set with the earliest date receives number 1.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the beginning rate for the escalation set.

Factor

Enter the factor that is applied to the base rate to escalate it. For example, express 1% as *0.01*.

Step

Enter the number of months the base rate remains constant before the factor is applied.

Months to Extend

Enter the number of months that the escalation set should last.

Rate Overrides

This grid shows the original rates from the Direct Rate Table assigned to the proposal for the resource selected in the **Resources** grid.

You can use an escalation set to enter overriding rates or enter them manually. If you enter overriding rates manually and then create an escalation set, ProPricer deletes the rates entered manually and then enters the new calculated rates in the cells. Likewise, if you use an escalation set to enter overriding rates, you can still enter rates manually if needed.

The **Rate Overrides** grid shows the original rates, the rates calculated from the escalation set, and the rates entered manually. The rates calculated from the escalation set are green, and overriding rates entered manually are blue.

Rate Overrides

Month	2014	2015	2016	2017	2018	2019	202
January	22.00	25.00	25.00	25.00	28.00	28.62	
February	22.00	25.00	25.00	25.00	28.00	28.62	
March	22.00	25.00	25.00	25.00	28.00	28.62	
April	22.00	25.00	25.00	25.00	28.00	28.62	
May	22.00	25.00	25.00	25.00	28.00	28.62	
June	22.00	25.00	25.00	25.00	28.00	28.62	
July	22.00	25.00	25.00	25.00	28.00	28.62	
August	22.00	25.00	25.00	25.00	28.00	28.62	
September	22.00	25.00	25.00	25.00	28.00	28.62	
October	22.00	25.00	25.00	25.00	28.00	28.62	
November	22.00	25.00	25.00	25.00	28.00	28.62	
December	22.00	25.00	25.00	25.00	28.00	28.62	

Override the Direct Rates of a Proposal

There may be times when you need to change the direct rates for a specific proposal, but you do not want to change the rates in the Direct Rate Table because you use that table with other proposals. ProPricer allows you to enter direct rate overrides that are specific to that proposal, thus eliminating the need to create a new Direct Rate Table. The overriding rates do not affect the rates in the Direct Rate Table.

1. Select the appropriate proposal.
2. Click the **Direct Rate** icon in the **Overrides** group on the **Proposal** ribbon. The grid that opens will be a copy of the Direct Rate Table assigned to the proposal, but the name of the tab will show *Direct Rate Overrides* followed by the name of the proposal.
3. *(Optional)* Change the description of the resource.
4. Enter the overriding rates. The color of the rates will change from black to blue, indicating an override. If you use an escalation set to enter rates, the color of the rates will be green.
5. Press **Ctrl**+**S** or move to another row to save your work.

Exchange Rate

Exchange rate overrides allow you to define proposal-specific exchange rates that override the rates from the Exchange Rate Table assigned to the proposal. If you use the same Exchange Rate Table with other proposals, but need to change the exchange rates for a specific one, you do not have to create a new Exchange Rate Table for that proposal. You can simply enter overriding rates. In essence, you are creating a proposal-specific Exchange Rate Table.

You enter the overriding rates on the **Exchange Rate Overrides** grid. The tab will show *Exchange Rate Overrides*, followed by the name of the proposal for which you want to enter the overriding rates. The grid will show the rates from the Exchange Rate Table assigned to the proposal.

Notes:

- *The overrides are saved to the proposal-specific table, not the global table.*
- *Rates from the Exchange Rate Table are shown in black. Overridden rates are shown in blue.*
- *You cannot add new currencies, nor delete existing ones.*

During pricing, ProPricer will use the overriding rates first. If there are no overriding rates, it will use the rates from the Exchange Rate Table assigned to the proposal.

If you change the Exchange Rate Table of a proposal for which you entered overriding rates, the overriding rates will be conserved with two exceptions:

- If the new Exchange Rate Table has a different timescale, all overriding rates will be deleted.
- If the new Exchange Rate Table is missing some of the currencies that have overriding rates, the overriding rates for the missing currencies will be deleted.

Copy Overriding Exchange Rates to Another Proposal

1. Select the proposal whose overriding rates you want to copy.
2. On the **Proposal** ribbon, in the **Overrides** group, click the down arrow next to the **Exchange Rate** icon, and then click **Copy**. The **Select Proposals** dialog box will open.
3. Select the target proposal(s) and click **OK**. ProPricer will delete any existing overriding rates in the target proposal and replace them with the rates from the source proposal.

Note: To ensure that the overriding rates are copied successfully:

- *An Exchange Rate Table must be assigned to the target proposal*.
- *The target Exchange Rate Table must contain all the currencies in the source table, and both tables should have the same timescale*.

Delete Overriding Exchange Rates

You can delete any overriding rate you no longer need, and have ProPricer use the rates entered in the Exchange Rate Table assigned to the proposal.

Delete a Single Overriding Default Rate

- Right-click the currency, and then click **Delete Default Rate Overrides**.

Delete the Overriding Default Rate of a Specific Currency

1. Right-click the currency, and then click **Delete All Overrides**.
2. Click **Yes** when prompted.

Note: This procedure also deletes the overriding rates entered in the Rates for Currency Code grid if the table uses a timescale.

Delete all Overriding Rates for a Proposal

- Click the down arrow next to the **Exchange Rate** icon in the **Overrides** group on the ribbon, and then click **Delete**.

Exchange Rate Overrides Grid

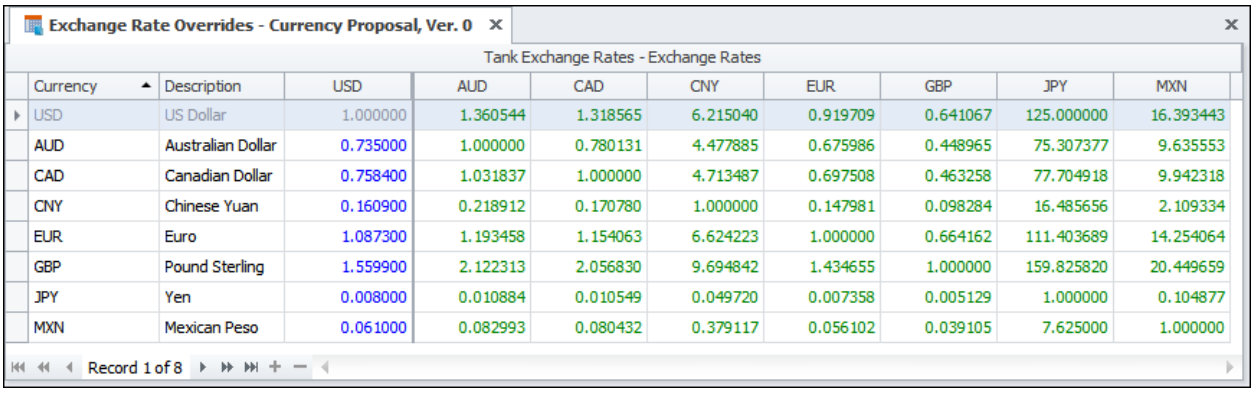
This is where you enter proposal-specific exchange rates. The tab that opens in the Workspace shows *Exchange Rate Overrides*, followed by the name of the proposal.

If you entered a timescale for the table, there will be two grids: Default Exchange Rates and Rates for Currency Code. If you did not enter a timescale, you will only see the Exchange Rates grid.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Exchange Rates/Default Exchange Rates

This is where you override the exchange rates from the Exchange Rate Table assigned to the proposal. The rates you enter only apply to the proposal, so the data in the Exchange Rate Table remains the same.



Currency	Description	USD	AUD	CAD	CNY	EUR	GBP	JPY	MXN
USD	US Dollar	1.000000	1.360544	1.318565	6.215040	0.919709	0.641067	125.000000	16.393443
AUD	Australian Dollar	0.735000	1.000000	0.780131	4.477885	0.675986	0.448965	75.307377	9.635553
CAD	Canadian Dollar	0.758400	1.031837	1.000000	4.713487	0.697508	0.463258	77.704918	9.942318
CNY	Chinese Yuan	0.160900	0.218912	0.170780	1.000000	0.147981	0.098284	16.485656	2.109334
EUR	Euro	1.087300	1.193458	1.154063	6.624223	1.000000	0.664162	111.403689	14.254064
GBP	Pound Sterling	1.559900	2.122313	2.056830	9.694842	1.434655	1.000000	159.825820	20.449659
JPY	Yen	0.008000	0.010884	0.010549	0.049720	0.007358	0.005129	1.000000	0.104877
MXN	Mexican Peso	0.061000	0.082993	0.080432	0.379117	0.056102	0.039105	7.625000	1.000000

Currency

This column shows the ISO 4217 code of the currency.

Description

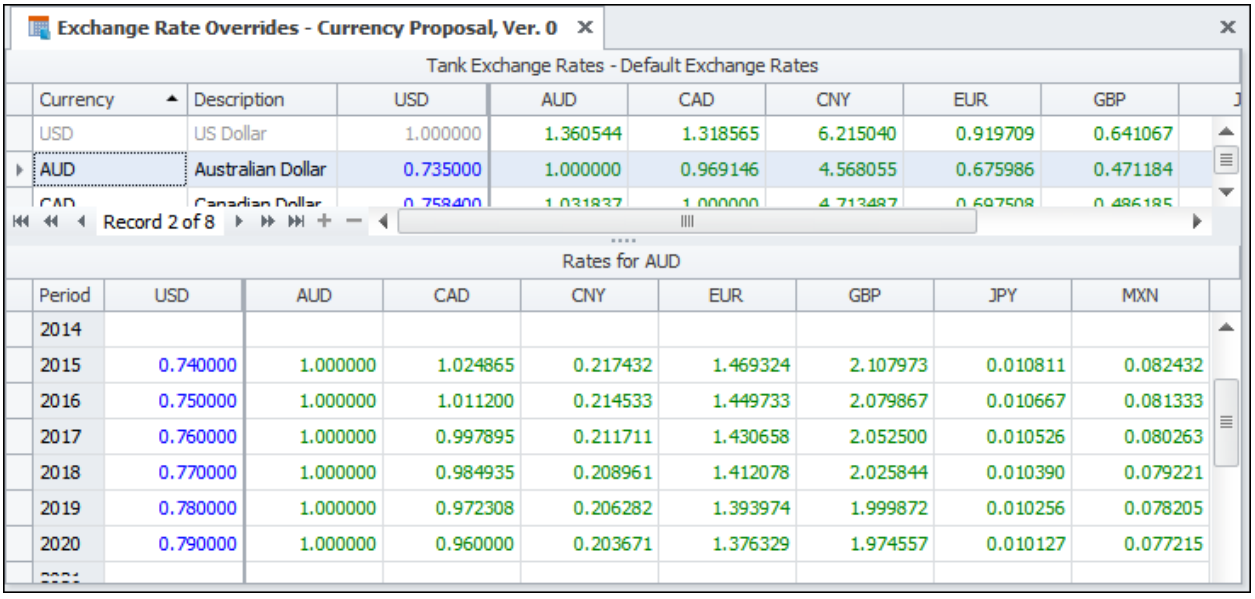
This column shows the full name of the currency. It cannot be edited.

Exchange Rates

Enter the number of units of the base currency you can purchase with one unit of the foreign currency.

Rates for *Currency Code*

This grid appears if a timescale was entered for the Exchange Rate Table. It allows you to enter overriding annual, quarterly, monthly, or daily rates. If you do not enter an overriding rate, ProPricer uses the default exchange rate in the **Exchange Rates** grid.



Override the Exchange Rates of a Proposal

There may be times when you need to change the exchange rates for a specific proposal, but you do not want to change the rates in the Exchange Rate Table because you use that table with other proposals. ProPricer allows you to enter exchange rate overrides that are specific to that proposal, thus eliminating the need to create a new Exchange Rate Table. The overriding rates do not affect the rates in the Exchange Rate Table.

1. Select the appropriate proposal.
2. Click the **Exchange Rate** icon in the **Overrides** group on the **Proposal** ribbon. The grid that opens will be a copy of the Exchange Rate Table assigned to the proposal, but the name of the tab will show *Exchange Rate Overrides* followed by the name of the proposal.
3. Enter the overriding rates. The color of the rates will change from black to blue, indicating an override.
4. Press **Ctrl**+**S** or move to another row to save your work.

Indirect Rate

Indirect rate overrides allow you to define proposal-specific indirect rates that override the rates from the Indirect Rate Table assigned to the proposal. If you use the same Indirect Rate Table with other proposals, but need to change the indirect rates for a specific one, you do not have to create a new Indirect Rate Table for that proposal. You can simply enter overriding rates. In essence, you are creating a proposal-specific Indirect Rate Table.

You enter the overriding rates on the **Indirect Rate Overrides** grid. The tab will show *Indirect Rate Overrides*, followed by the name of the proposal for which you want to enter the overriding rates. The grid will show the rates from the Indirect Rate Table assigned to the proposal.

Notes:

- *The overrides are saved in the proposal-specific table. They are not saved in the global table.*
- *Rates from the Indirect Rate Table are shown in black. Overridden rates are shown in blue.*
- *You can only change the description of the indirect pool and the rates.*
- *You cannot add new indirect pools nor delete existing ones.*

During pricing, ProPricer will use any overriding rates first. If there are no overriding rates, it will use the rates from the Indirect Rate Table assigned to the proposal.

If you change the Indirect Rate Table of a proposal for which you entered overriding rates, the overriding rates will be conserved. However, there are two exceptions:

- If the new Indirect Rate Table has a different timescale, all overriding rates will be deleted.

- If the new Indirect Rate Table is missing some of the indirect pools that have overriding rates, the overriding rates for the missing indirect pools will be deleted.

Copy Overriding Indirect Rates to Another Proposal

1. Select the proposal whose overriding rates you want to copy.
2. On the **Proposal** ribbon, in the **Overrides** group, click the down arrow next to the **Indirect Rate** icon, and then click **Copy**. The **Select Proposals** dialog box will open.
3. Select the target proposal(s) and click **OK**. ProPricer will delete any existing overriding rates in the target proposal and replace them with the rates from the source proposal.

Note: To ensure that the overriding rates are copied successfully:

- *An Indirect Rate Table must be assigned to the target proposal*.
- *The target Indirect Rate Table must contain all the indirect pools in the source table, and both tables should have the same timescale and use the same Algorithm*.

Copy Overriding Indirect Rates within a Table

1. Right-click the indirect pool whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the target indirect pool.
3. Click **OK**.

ProPricer will check to see if overriding rates have been entered for the target indirect pool, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Delete Overriding Indirect Rates

You can delete any overriding rate or description you no longer need, and have ProPricer use the rates/descriptions entered in the Indirect Rate Table assigned to the proposal.

Delete an Overriding Description

1. Right-click the indirect pool, and then click **Delete Description Overrides**.
2. Click **Yes** when prompted.

Delete a Single Overriding Rate

- Select the rate, and then click **Delete**.

Delete All the Overriding Rates for a Specific Indirect Pool

1. Select the indirect pool.
2. Right-click anywhere in the **Rate Overrides** grid, and then click **Delete Discrete Overrides**.
3. Click **Yes** when prompted.

Delete All the Overrides (Description and Rates) Entered for a Specific Indirect Pool

1. Right-click the indirect pool, and then click **Delete All Overrides**.
2. Click **Yes** when prompted.

Delete All Overriding Rates for a Proposal

- Click the down arrow next to the **Indirect Rate** icon in the **Overrides** group on the ribbon, and then click **Delete**.

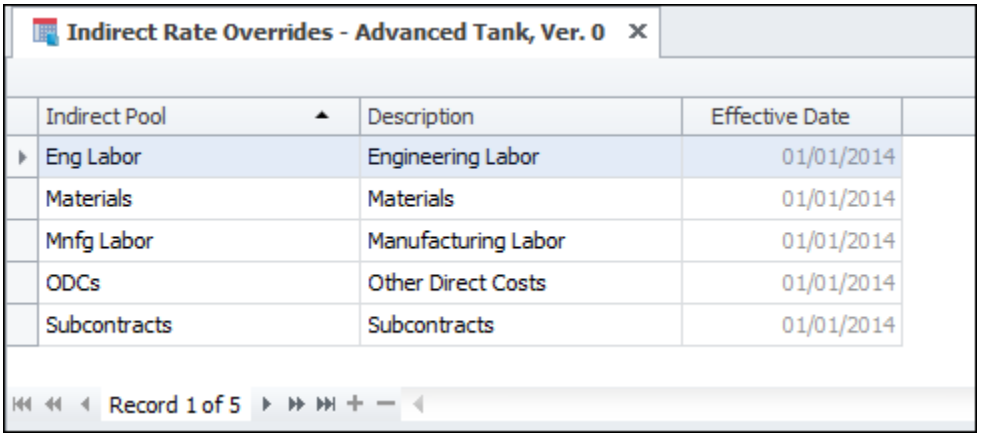
Indirect Rate Overrides Grid

This is where you enter proposal-specific rates for indirect elements and change the description of the indirect pools. The tab that opens in the Workspace shows *Indirect Rate Overrides*, followed by the name of the proposal. The top grid shows the name of the Indirect Rate Table assigned to the proposal, followed by *Indirect Pools*. The bottom grid is Rate Overrides.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Indirect Pools

This grid shows all the indirect pools in the table.



Indirect Pool

Shows the name of the indirect pool.

Description

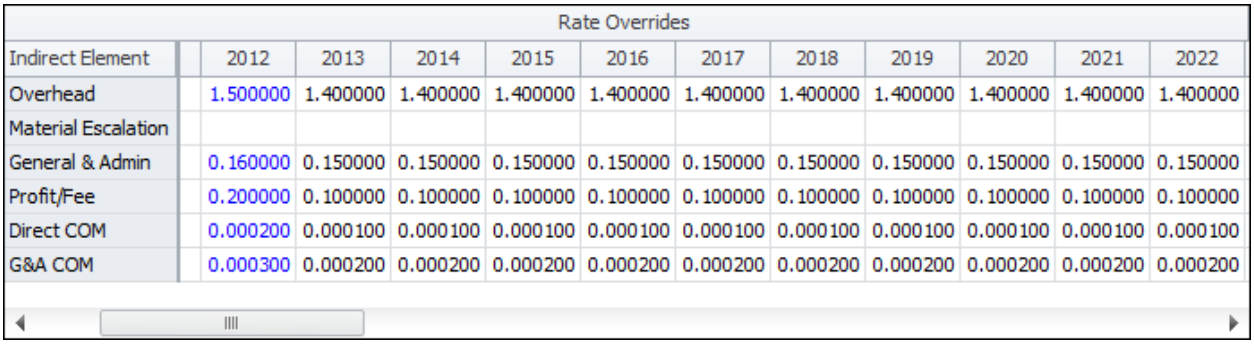
Shows the description of the indirect pool. This field can be edited.

Effective Date

Shows the date that the rate takes effect. This is for information only.

Rate Overrides

This grid shows the rates of the indirect pool selected.



Rate Overrides

Indirect Element	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Overhead	1.500000	1.400000	1.400000	1.400000	1.400000	1.400000	1.400000	1.400000	1.400000	1.400000	1.400000
Material Escalation											
General & Admin	0.160000	0.150000	0.150000	0.150000	0.150000	0.150000	0.150000	0.150000	0.150000	0.150000	0.150000
Profit/Fee	0.200000	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000
Direct COM	0.000200	0.000100	0.000100	0.000100	0.000100	0.000100	0.000100	0.000100	0.000100	0.000100	0.000100
G&A COM	0.000300	0.000200	0.000200	0.000200	0.000200	0.000200	0.000200	0.000200	0.000200	0.000200	0.000200

Indirect Element

These fields cannot be edited. They show the names of the indirect elements in the Algorithm assigned to the table.

Periods

These columns show the rates of the indirect elements entered for the indirect pool selected above. You can change as many rates as needed, and your overrides will be indicated with blue text.

Override the Indirect Rates of a Proposal

There may be times when you need to change the indirect rates for a specific proposal, but you do not want to change the rates in the Indirect Rate Table because you use that table with other proposals. ProPricer allows you to enter indirect rate overrides that are specific to that proposal, thus eliminating the need to create a new Indirect Rate Table. The overriding rates do not affect the rates in the Indirect Rate Table.

1. Select the appropriate proposal.
2. On the **Proposal** ribbon, in the **Overrides** group, click the **Indirect Rate** icon. The grid that opens will be a copy of the Indirect Rate Table assigned to the proposal, but the name of the tab will show *Indirect Rate Overrides* followed by the name of the proposal.
3. *(Optional)* Change the description of the indirect pool.
4. Enter the overriding rates. The color of the rates will change from black to blue, indicating an override.
5. Press **Ctrl**+**S** or move to another row to save your work.

Rate Band Rate

Rate band overrides allows you to define proposal-specific rate band rates that override the rates from the Rate Band Table assigned to the proposal. If you use the same Rate Band Table with other proposals, but need to change the rate band rates for a specific one, you do not have to create a new Rate Band Table for that proposal. You can simply enter overriding rates. In essence, you are creating a proposal-specific Rate Band Table.

You enter the overriding rates on the **Rate Band Overrides** grid. The tab that opens on the ribbon will show *Rate Band Overrides*, followed by the name of the proposal for which you want to enter the overriding rates. The grid will show the rates from the Rate Band Table assigned to the proposal.

Notes:

- *The overrides are saved to the proposal, not the global table.*
- *Rates from the Rate Band Table are shown in black. Overridden rates are shown in blue. Calculated rates are shown in green.*
- *You can only change the description of the rate band and the rates.*
- *You cannot add new rate bands, nor delete existing ones.*

During pricing, ProPricer will use any overriding rates first. If there are no overriding rates, it will use the rates from the Rate Band Table assigned to the proposal.

If you change the Rate Band Table of a proposal for which you entered overriding rates, the overriding rates will be conserved. However, if the new Rate Band Table is missing some of the rate bands that have overriding rates, the overriding rates for the missing rate bands will be deleted.

You cannot delete a rate band from a global Rate Band Table that has an overriding rate defined for it.

Copy Overriding Rate Band Rates to Another Proposal

1. Select the proposal whose overriding rates you want to copy.
2. On the **Proposal** ribbon, in the **Overrides** group, click the down arrow next to the **Rate Band** icon, and then click **Copy**. The **Select Proposals** dialog box will open.
3. Select the target proposal(s) and click **OK**. ProPricer will delete any existing overriding rates in the target proposal and replace them with the rates from the source proposal.

Note: To ensure that the overriding rates are copied successfully:

- *A Rate Band Table must be assigned to the target proposal*.
- *The target Rate Band Table must contain all the rate bands in the source table*.

Copy Overriding Rate Band Rates within a Table

1. Right-click the rate band whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the target rate band.
3. Click **OK**.

ProPricer will check to see if overriding rates have been entered for the target rate band, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Delete Overriding Rate Band Rates

You can delete any overriding rate or description you no longer need, and have ProPricer use the rates/descriptions entered in the Rate Band Table assigned to the proposal.

Delete an Overriding Description

1. Right-click the description, and then click **Delete Description Overrides**.
2. Click **Yes** when prompted.

Delete a Single Overriding Rate that was Entered Manually

- Select the rate, and then click **Delete**.

Delete All the Overriding Rates that were Entered Manually for a Specific Rate Band

1. Select the rate band.
2. Right-click anywhere in the **Rate Overrides** grid, and then click **Delete Discrete Overrides**.
3. Click **Yes** when prompted.

Delete Overriding Rates that were Entered for a Specific Rate Band with an Escalation Set

1. Select the rate band.
2. Right-click the escalation set, and then click **Delete**.

3. Click **Yes** when prompted.

Delete All the Overrides (Description and Rates) Entered for a Specific Rate Band

1. Right-click the rate band, and then click **Delete All Overrides**.
2. Click **Yes** when prompted.

Delete All Overriding Rates for a Proposal

- Click the down arrow next to the **Rate Band** icon in the **Overrides** group on the ribbon, and then click **Delete**.

Override the Rate Band Rates of a Proposal

There may be times when you need to change the rate band rates for a specific proposal, but you do not want to change the rates in the Rate Band Table because you use that table with other proposals. ProPricer allows you to enter rate band rate overrides that are specific to that proposal, thus eliminating the need to create a new Rate Band Table. The overriding rates do not affect the rates in the Rate Band Table.

1. Select the appropriate proposal.
2. Click the **Rate Band** icon in the **Overrides** group on the **Proposal** ribbon. The grid that opens will be a copy of the Rate Band Table assigned to the proposal, but the name of the tab will show *Rate Band Overrides* followed by the name of the proposal.
3. *(Optional)* Change the description of the rate band.
4. Enter the overriding rates. The color of the rates will change from black to blue, indicating an override. If you use an escalation set to enter rates, the color of the rates will be green.
5. Press **Ctrl**+**S** or move to another row to save your work.

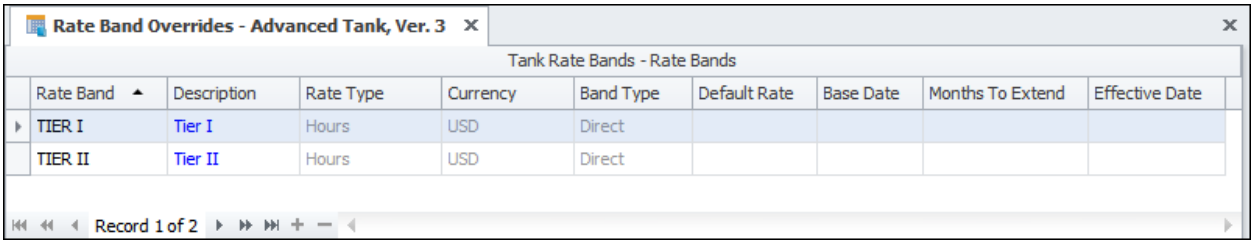
Rate Band Overrides Grid

This is where you enter proposal-specific rates for the rate bands and change the description of the rate band. The tab that opens in the Workspace shows *Rate Band Overrides* followed by the name of the proposal. The top grid shows the name of the Rate Band Table assigned to the proposal followed by *Rate Bands*.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Rate Bands

This grid shows all the rate bands in the table.



Rate Band

Shows the name of the rate band.

Description

Shows the description entered for the rate band in the Rate Band Library.

Rate Type

Shows the rate type from the Rate Band Table.

Type

Shows the band type from the Rate Band Table.

Currency

Shows the currency if the **Multi-Currency** checkbox is selected for the table.

Default Rate

Shows the unit value of the rate band.

Base Date

Shows the date the rate band will begin.

Months To Extend

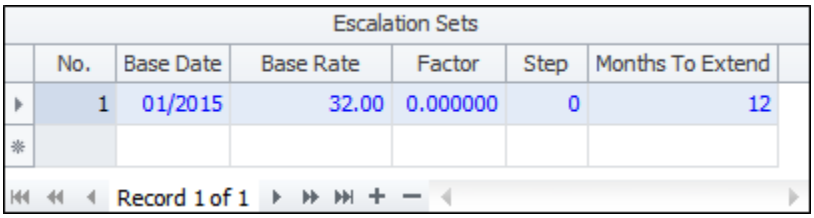
Shows the number of months the rate band will extend.

Effective Date

Shows the date the rate will take effect. This is for information only.

Escalation Sets

Here you can create one or more overriding escalation sets to enter rates for the rate bands in the table. The screenshot shows an escalation set we created for the rate band TIER I above. The escalation set appears blue in color, indicating an override. This grid is empty until you enter an escalation set, even if escalation sets were defined in the original table.



No

ProPricer assigns numbers to the escalation sets based on their start dates. The set with the earliest date receives number 1.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the beginning rate for the escalation set.

Factor

Enter the factor that is applied to the base rate to escalate it. For example, express 1% as *0.01*.

Step

Enter the number of months the base rate remains constant before the factor is applied.

Months to Extend

Enter the number of months that the escalation set should last.

Rate Overrides

This grid shows the original rates from the Rate Band Table associated with the proposal for the selected rate band.

You can use an escalation set to enter overriding rates or enter them manually. If you enter overriding rates manually and then create an escalation set, ProPricer deleted the rates entered manually and then enters the new calculated rates in the cells. Likewise, if you use an escalation set to enter overriding rates, you can still enter rates manually if needed.

The **Rate Overrides** grid shows the original rates, the rates calculated from the escalation set, and the rates entered manually. The rates calculated from the escalation set are green, and overriding rates entered manually are blue.

Rate Overrides							
Month	2014	2015	2016	2017	2018	2019	2020
January	30.00	32.00	33.00	34.73	36.47	38.29	40.20
February	30.00	32.00	33.00	34.73	36.47	38.29	40.20
March	30.00	32.00	33.00	34.73	36.47	38.29	40.20
April	30.00	32.00	33.00	34.73	36.47	38.29	40.20
May	30.00	32.00	33.00	34.73	36.47	38.29	40.20
June	30.00	32.00	33.00	34.73	36.47	38.29	40.20
July	30.00	32.00	33.00	34.73	36.47	38.29	40.20
August	30.00	32.00	33.00	34.73	36.47	38.29	40.20
September	30.00	32.00	33.00	34.73	36.47	38.29	40.20
October	30.00	32.00	33.00	34.73	36.47	38.29	40.20
November	30.00	32.00	33.00	34.73	36.47	38.29	40.20
December	30.00	32.00	33.00	34.73	36.47	38.29	40.20

Scheduled Rate

Scheduled rate overrides allow you to define proposal-specific scheduled rates that override the rates from the Scheduled Rate Table assigned to the proposal. If you use the same Scheduled Rate Table with other proposals, but need to change the scheduled rates for a specific one, you do not have to create a new Scheduled Rate Table for that proposal. You can simply enter overriding rates. In essence, you are creating a proposal-specific Scheduled Rate Table.

You enter the overriding rates on the **Scheduled Rate Overrides** grid. The tab that opens in your Workspace will show *Scheduled Rate Overrides*, followed by the name of the proposal for which you want to enter the overriding rates. The grid will show the rates from the Scheduled Rate Table assigned to the proposal.

Notes:

- *The overrides are saved to the proposal, not the global table.*
- *Rates from the Scheduled Rate Table are shown in black. Overridden rates are shown in blue. Calculated rates are shown in green.*
- *You can only change the description of the scheduled rate, the discount values, and the rates.*
- *You cannot add new scheduled rates, nor delete existing ones.*

During pricing, ProPricer will use any overriding rates first. If there are no overriding rates, it will use the rates from the Scheduled Rate Table assigned to the proposal. With reference to the Discount, the first value ProPricer will use is the one entered in the **Discount** column on the **Resources** tab. If no Discount is entered there, it will use the one entered on the **Scheduled Rate Overrides** grid, and lastly the value entered on the **Pricing** page in the **Proposal** folder of **Proposal Properties**.

If you change the Scheduled Rate Table of a proposal for which you entered overriding rates, the overriding rates will be conserved. However, if the new Scheduled Rate Table

is missing some of the scheduled rates that have overriding rates, the overriding rates for the missing scheduled rates will be deleted.

You cannot delete a scheduled rate from a global Scheduled Rate Table that has an overriding rate defined for it.

Copy Overriding Scheduled Rates to Another Proposal

1. Select the proposal whose overriding rates you want to copy.
2. On the **Proposal** ribbon, in the **Overrides** group, click the down arrow next to the **Scheduled Rate** icon, and then click **Copy**. The **Select Proposals** dialog box will open.
3. Select the target proposal(s) and click **OK**. ProPricer will delete any existing overriding rates in the target proposal and replace them with the rates from the source proposal.

Note: To ensure that the overriding rates are copied successfully:

- *A Scheduled Rate Table must be assigned to the target proposal*.
- *The target Scheduled Rate Table must contain all the scheduled rates in the source table*.

Copy Overriding Scheduled Rates within a Table

1. Right-click the scheduled rate whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the target scheduled rate.
3. Click **OK**.

ProPricer will check to see if overriding rates have been entered for the target scheduled rate, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Delete Overriding Scheduled Rates

You can delete any overriding rate, description, or discount you no longer need, and have ProPricer use the rates/descriptions entered in the Scheduled Rate Table assigned to the proposal.

Delete an Overriding Description

- Select the description, and then click **Delete**.

Delete an Overriding Discount

- Select the discount, and then click **Delete**.

Delete a Single Overriding Rate that was Entered Manually

- Select the rate, and then click **Delete**.

Delete All the Overriding Rates that were Entered Manually for a Specific Scheduled Rate

1. Select the scheduled rate.
2. Right-click anywhere in the **Rate Overrides** grid, and then click **Delete Discrete Overrides**.
3. Click **Yes** when prompted.

Delete Overriding Rates that were Entered for a Specific Scheduled Rate with an Escalation Set

1. Select the scheduled rate.
2. Right-click the escalation set, and then click **Delete**.
3. Click **Yes** when prompted.

Delete All the Overrides (Description, Discount, and Rates) Entered for a Specific Scheduled Rate

1. Right-click the scheduled rate, and then click **Delete All Overrides**.
2. Click **Yes** when prompted.

Delete All Overriding Rates for a Proposal

- Click the down arrow next to the **Scheduled Rate** icon in the **Overrides** group on the ribbon, and then click **Delete**

Override the Scheduled Rates of a Proposal

There may be times when you need to change the scheduled rates for a specific proposal, but you do not want to change the rates in the Schedule Rate Table because you use that table with other proposals. ProPricer allows you to enter scheduled rate overrides that are specific to that proposal, thus eliminating the need to create a new Scheduled Rate Table. The overriding rates do not affect the rates in the Scheduled Rate Table.

1. Select the appropriate proposal.
2. Click the **Scheduled Rate** icon in the **Overrides** group on the **Proposal** ribbon. The grid that opens will be a copy of the Scheduled Rate Table assigned to the proposal, but the name of the tab will show *Scheduled Rate Overrides* followed by the name of the proposal.
3. *(Optional)* Change the description of the scheduled rate.
4. *(Optional)* Change the discount of the scheduled rate.
5. Enter the overriding rates. The color of the rates will change from black to blue, indicating an override. If you use an escalation set to enter rates, the color of the rates will be green.
6. Press **Ctrl**+**S** or move to another row to save your work.

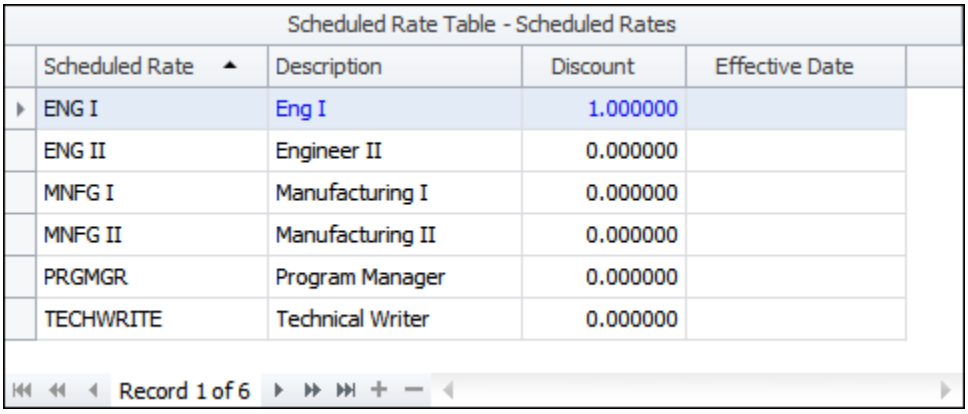
Scheduled Rate Overrides Grid

This is where you can enter proposal-specific scheduled rates and change the description and discount of the scheduled rates. The tab that opens in your Workspace shows *Scheduled Rate Overrides*, followed by the name of the proposal. The top grid shows the name of the Scheduled Rate Table assigned to the proposal, followed by *Scheduled Rates*.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Scheduled Rates

This grid shows all the scheduled rates in the table.



Scheduled Rate

Shows the name of the scheduled rate.

Description

Shows the description of the scheduled rate. You can change it. We changed the description of MECH ENGR, indicated by the blue color.

Discount

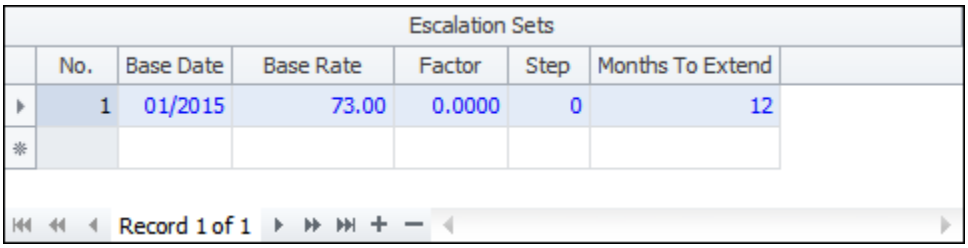
Shows the discount entered for the scheduled rate. You can change it. We changed the discount of MECH ENGR, indicated by the blue color.

Effective Date

Shows the date the rate will take effect. This is for information only.

Escalation Sets

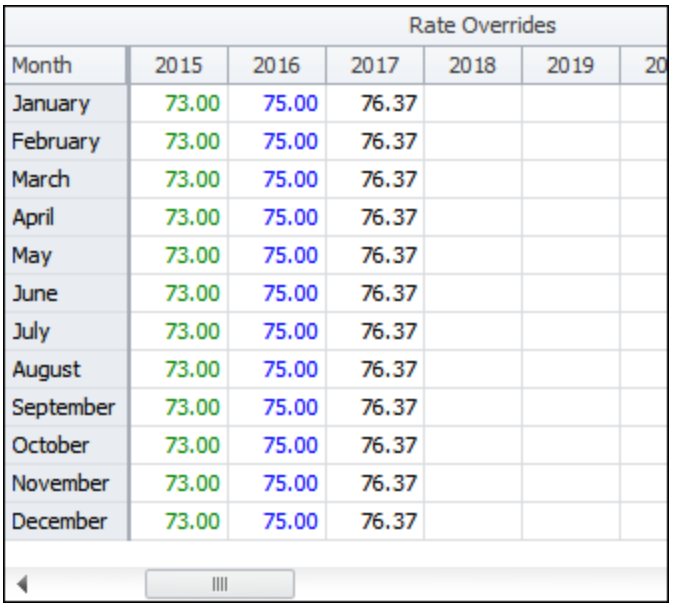
Here you can create one or more overriding escalation sets to enter rates for the scheduled rates in the table. The screenshot shows an escalation set we created for the scheduled rate MECH ENGR above. The escalation set appears blue in color, indicating an override. This grid will be empty until you enter an escalation set, even if escalation sets were defined in the original table.



Rate Overrides

This grid shows the original rates from the Scheduled Rate Table associated with the proposal by month and year for the scheduled rate selected above.

You can use an escalation set to enter overriding rates or enter them manually. If you enter overriding rates manually and then create an escalation set, ProPricer will delete the rates entered manually and then enter the new calculated rates in the cells. Likewise, if you use an escalation set to enter overriding rates, you can still enter rates manually if needed. The screenshot shows the original rates (black), rates calculated from the escalation set above (green) and rates entered manually (blue).



	Rate Overrides					
Month	2015	2016	2017	2018	2019	20
January	73.00	75.00	76.37			
February	73.00	75.00	76.37			
March	73.00	75.00	76.37			
April	73.00	75.00	76.37			
May	73.00	75.00	76.37			
June	73.00	75.00	76.37			
July	73.00	75.00	76.37			
August	73.00	75.00	76.37			
September	73.00	75.00	76.37			
October	73.00	75.00	76.37			
November	73.00	75.00	76.37			
December	73.00	75.00	76.37			

Travel Rate

Travel rate overrides are proposal-specific travel expense rates that are prioritized over the rates from a proposal's Travel Rate Table. If you use the same Travel Rate Table in other proposals but need to change the travel rates for a specific one, you don't need to create a new table for that proposal. Instead, you can set up overriding rates in it.

Enter the overriding rates in the Travel Rate Overrides grid. The workspace tab will show *Travel Rate Overrides*, followed by the name of the proposal.

During pricing, ProPricer will use any overriding rates first. If there are no overriding rates, it will use the rates from the proposal's Travel Rate Table.

If you assign a different Travel Rate Table to a proposal after entering overriding rates, then the overriding rates will be preserved. However, if the new Travel Rate Table is missing some of the destinations that have overriding rates, the overriding rates for the missing destinations will be deleted.

Notes:

- *If the proposal's Travel Rate Table has no timescale, run the Update Travel process to apply the overrides. If the table is monthly, quarterly, or annual, then the overrides will be applied automatically.*
- *After applying overrides, you can protect them from future travel updates.*
- *The overrides do not change the rates in the global Travel Rate Table.*
- *Rates from the Travel Rate Table are black. Overridden rates are blue. Calculated rates are green.*
- *You cannot add or delete destinations in the Travel Rate Overrides grid.*
- *You cannot delete a travel rate from a Travel Rate Table that has an overriding rate defined for it.*

Copy Overriding Travel Rates to Another Proposal

1. Select the proposal whose overriding rates you want to copy.
2. On the **Proposal** ribbon, in the **Overrides** group, click the down arrow next to the **Travel Rate** icon, and then click **Copy**. The **Select Proposals** dialog box will open.
3. Select the target proposal(s) and click **OK**. ProPricer will delete any existing overriding rates in the target proposal and replace them with the rates from the source proposal.

Note: To ensure that the overriding rates are copied successfully:

- *A Travel Rate Table must be assigned to the target proposal*.
- *The target Travel Rate Table must contain all the destinations in the source table*.

Copy Overriding Travel Rates within a Table

1. Right-click the destination whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the target destination.
3. Click **OK**.

ProPricer will check to see if overriding rates have been entered for the target destination, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Delete Overriding Travel Rates

You can delete any overriding rate or description you no longer need, and have ProPricer use the rates/descriptions entered in the Travel Rate Table assigned to the proposal.

Delete an Overriding Description

1. Right-click the destination, and then click **Delete Description Overrides**.
2. Click **Yes** when prompted.

Delete All the Overrides (Description and Rates) Entered for a Specific Destination

1. Right-click the destination, and then click **Delete All Overrides**.
2. Click **Yes** when prompted.

Delete All Overriding Rates for a Proposal

- Click the down arrow next to the **Travel Rate** icon in the **Overrides** group on the ribbon, and then click **Delete**.

Override the Travel Rates of a Proposal

There may be times when you need to change the travel rates in a specific proposal, but you don't want to change the rates in the Travel Rate Table, because you use that table in other proposals. ProPricer allows you to enter travel rate overrides that are specific to that proposal, thus eliminating the need to create a new Travel Rate Table. The overriding rates do not affect the rates in the Travel Rate Table.

1. In the Navigation Pane, select a proposal.
2. On the **Proposal** ribbon, in the **Overrides** group, click **Travel Rate**. The grid that opens will be a copy of the Travel Rate Table assigned to the proposal, but the name of the tab will show *Travel Rate Overrides* followed by the name of the proposal.
3. *(Optional)* Change the description of the destination.
4. Enter the overriding rates. The color of the rates will change from black to blue, indicating an override.
5. Press **Ctrl**+**S** or move to another row to save your work.

Note: Protected travel rate overrides are exempt from the Update Travel process.

Travel Rate Overrides Grid

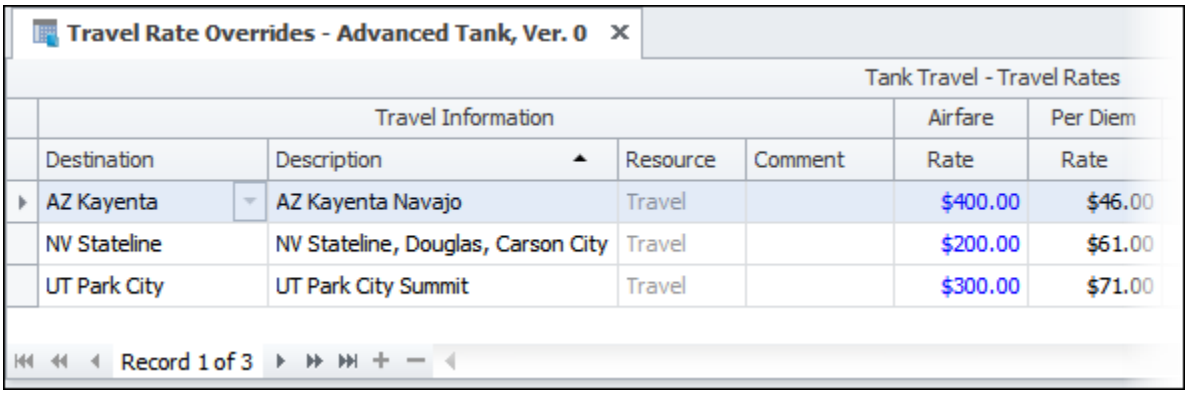
This is where you enter proposal-specific rates based on the assigned Travel Rate Table. Your overrides are indicated by blue text.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

The layout here mirrors that of the proposal's Travel Rate Table. If the table has no timescale, there is only one grid for overriding a destination's travel expense rates. If the table is monthly, quarterly, or annual, there are two more grids for overriding escalation sets and periodic rates.

Note: Protected travel rate overrides are exempt from the Update Travel process.

Travel Information and Expenses



Destination

Name of the destination.

Description

Description of the destination.

Resource

Default resource of the destination.

Currency

Currency of the rate. This column appears if the **Multi-Currency** checkbox is selected in the Travel Rate Table's properties.

Resource Fields

Value entered for each resource field.

Comment

Comment entered for the destination.

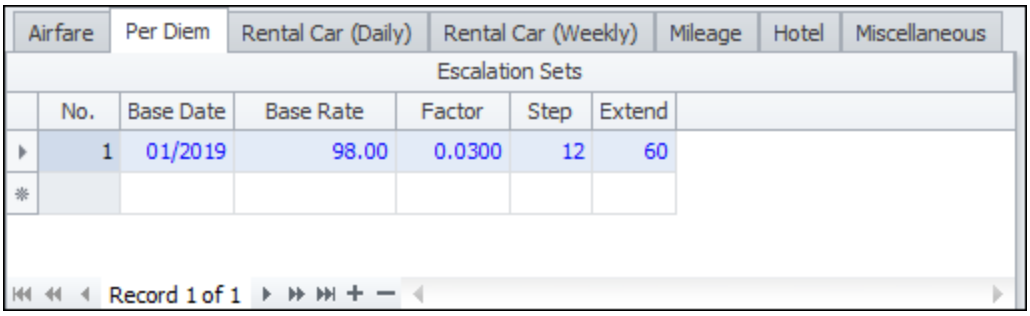
Travel Expenses

Rates for the travel expenses (Airfare, Per Diem, Rental Car, Mileage, Hotel, Miscellaneous, and any expenses created in the Travel Expense Library). If the **Enable Weekly Rental Car Rate** checkbox is selected in the Travel Rate Table's properties, then the Rental Car group contains an additional Weekly Rate column. If the **Enable Monthly Rental Car Rate** checkbox is selected, then the group contains a Monthly Rate column.

A Currency column appears for each expense if the **Multi-Currency** checkbox is selected in the Travel Rate Table's properties. It shows the currency entered for the expense in the Travel Rate Table.

Escalations Sets

Use escalation sets to regulate how a travel expense rate periodically increases. If the proposal has a timephased Travel Rate Table, the expenses appear as separate tabs, and each tab contains this grid.



No.

The cells of this column cannot be edited. ProPricer assigns numbers to the escalation sets, based on their start dates. The set with the earliest date receives number 1.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the rate for the first month, quarter, or year.

Factor

Enter the factor that will be applied to the rate to escalate it. For example, express 1% as 0.01.

Step

Enter the number of months, quarters, or years the base rate will remain constant before the factor is applied. For example, a step of 12 in a monthly table will cause the rate to escalate every twelve months.

Months, Quarters, or Years to Extend

Enter how long the escalation set lasts.

Rate Overrides

The Rates grid shows a travel expense's rates by month, quarter, or year. If the proposal has a timephased Travel Rate Table, the expenses appear as separate tabs, and each tab contains this grid.

You can use an escalation set to calculate rates, or you can enter rates manually. Rates from the Travel Rate Table appear black, calculated rates appear green, and overridden rates appear blue. If you enter rates and then create an escalation set that covers any of the same dates, ProPricer will change your rates. Likewise, after creating an escalation set, you can manually change any of the calculated rates.

Rate Overrides

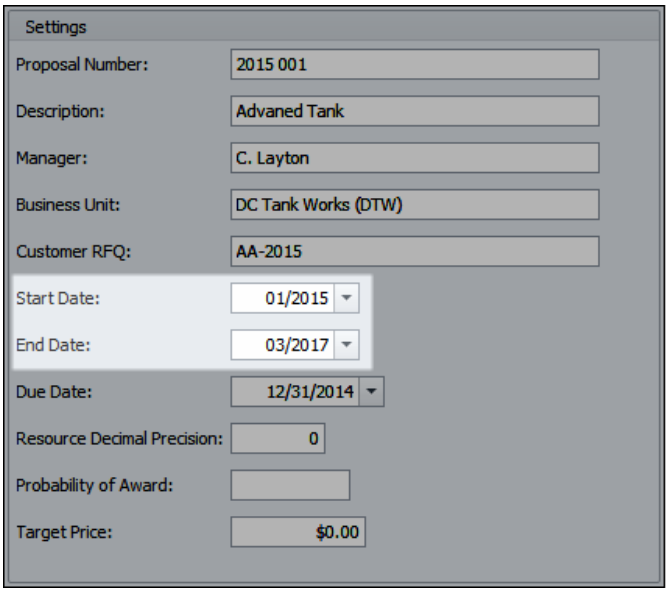
Month	2015	2016	2017	2018	2019	2020	2021	2022	2023
January	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
February	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
March	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
April	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
May	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
June	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
July	90.00	91.80	100.00	100.00	98.00	100.94	103.97	107.09	110.30
August	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
September	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
October	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
November	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30
December	90.00	91.80	93.64	95.51	98.00	100.94	103.97	107.09	110.30

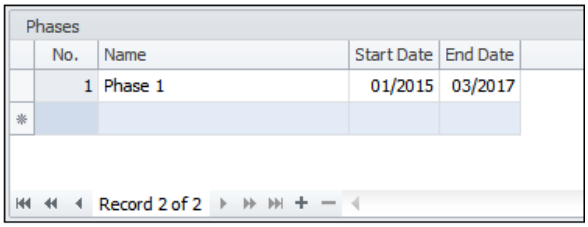
Phases

Phases allow you to divide your proposal into time periods. After setting up phases, you will see an additional Timescale option in applicable reports. You will also be able to select a phase when you switch the timescale of resource input information, or the timescale of Data View.

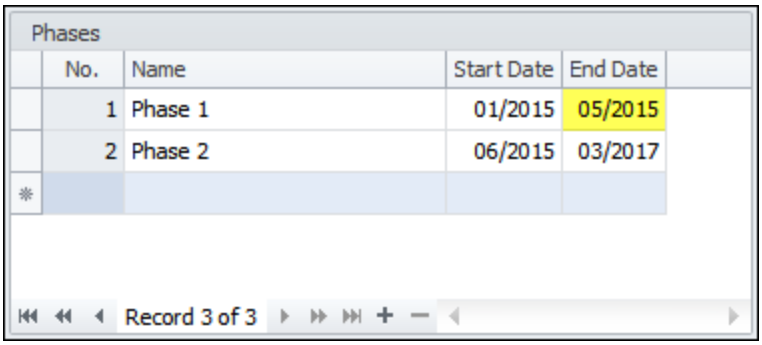
Phases are based on months and can range from one month to ten or more years. Phase dates cannot overlap. They must be consecutive and cover the proposal period.

The start date of the first Phase you define will show the start date of the proposal. The end date will always show the end date of the proposal and cannot be edited.

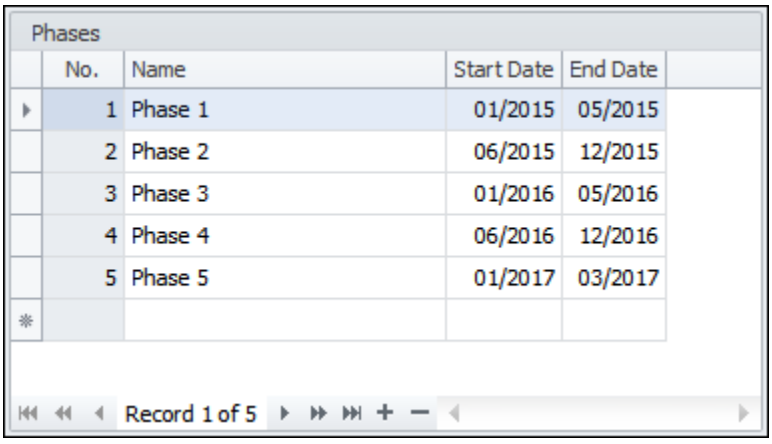




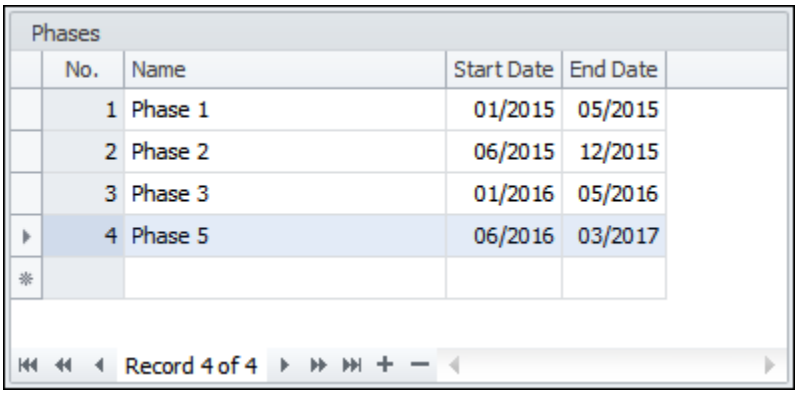
The end date will automatically adjust when you add another Phase and start date.



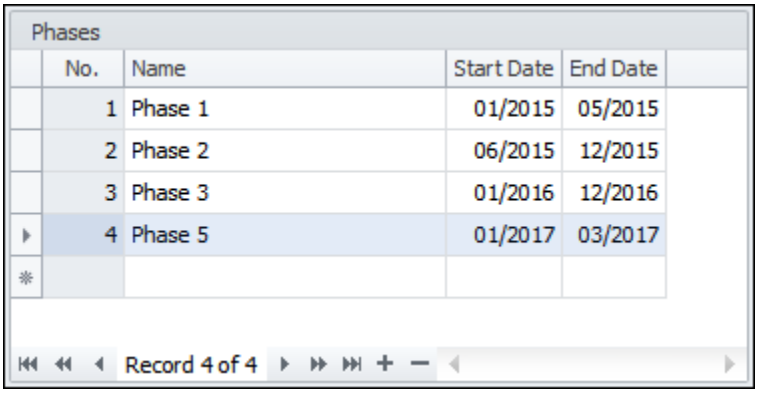
The end date of Phase 1 changed to 05/2015 when we added Phase 2 with a start date of 06/2015.



If we delete Phase 4, the end date of Phase 3 changes to 05/2016, because the start date of Phase 5 is 06/2016.



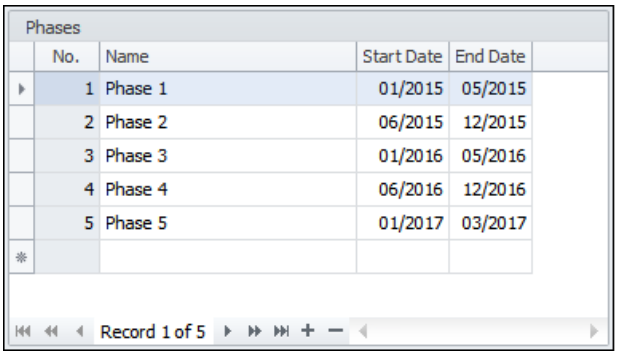
If we change the start date of Phase 5 to 01/2017, the end date of Phase 3 changes to 12/2016.



Each time you modify the start date of a Phase, the end date of the previous Phase will be adjusted.

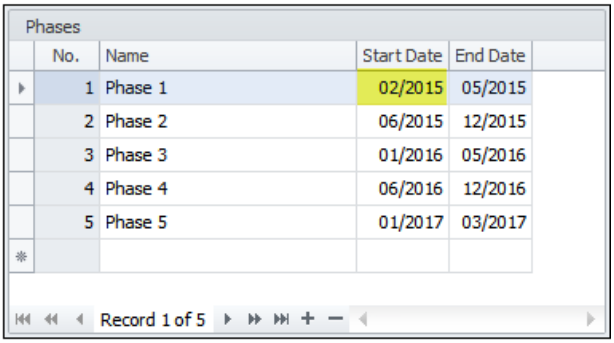
The start date of the first Phase or the end date of the last Phase will be affected if you change the start/end dates of a proposal on the **General** page in the **Proposal** folder of **Proposal Properties** or with the Flex/Shift what-if if the period of the Phase falls within the new proposal period. If the Phase no longer falls within the new period, the Phase will be deleted. For example:

We changed the start date of the proposal from 01/2015 to 02/2015. The screenshot shows the new start date of Phase 1.


Phases

No.	Name	Start Date	End Date
1	Phase 1	01/2015	05/2015
2	Phase 2	06/2015	12/2015
3	Phase 3	01/2016	05/2016
4	Phase 4	06/2016	12/2016
5	Phase 5	01/2017	03/2017

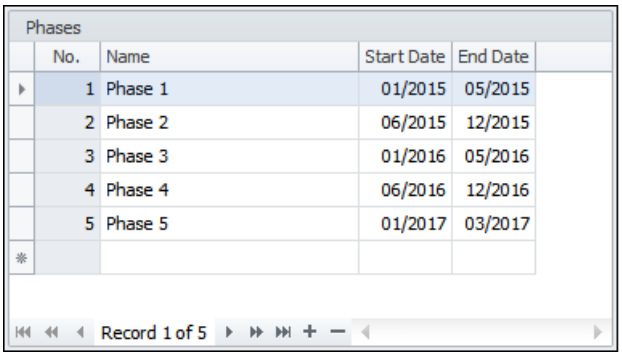
Record 1 of 5


Phases

No.	Name	Start Date	End Date
1	Phase 1	02/2015	05/2015
2	Phase 2	06/2015	12/2015
3	Phase 3	01/2016	05/2016
4	Phase 4	06/2016	12/2016
5	Phase 5	01/2017	03/2017

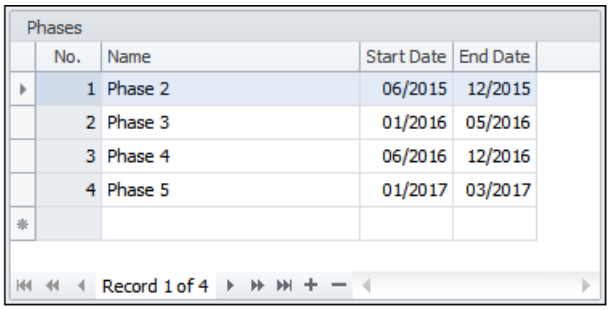
Record 1 of 5

We changed the start date of the proposal from 01/2015 to 06/2015. In this instance, Phase 1 will be deleted because it no longer falls within the proposal period.


Phases

No.	Name	Start Date	End Date
1	Phase 1	01/2015	05/2015
2	Phase 2	06/2015	12/2015
3	Phase 3	01/2016	05/2016
4	Phase 4	06/2016	12/2016
5	Phase 5	01/2017	03/2017

Record 1 of 5


Phases

No.	Name	Start Date	End Date
1	Phase 2	06/2015	12/2015
2	Phase 3	01/2016	05/2016
3	Phase 4	06/2016	12/2016
4	Phase 5	01/2017	03/2017

Record 1 of 4

Define Phases for a Proposal

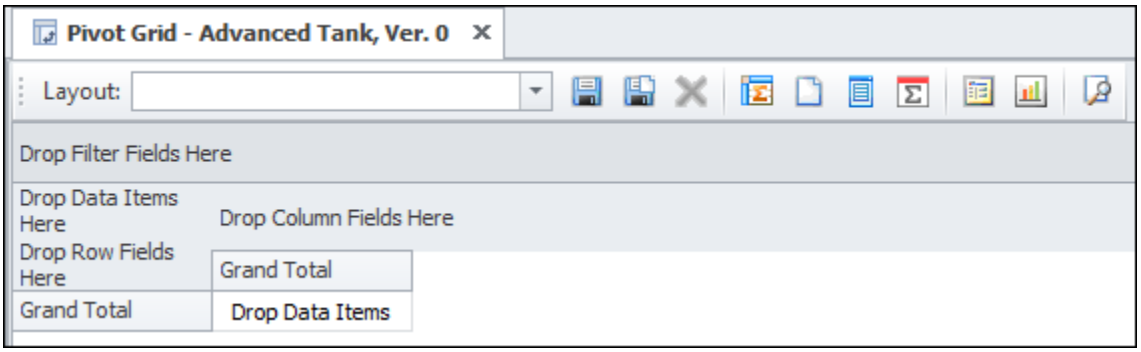
1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Phases** page in the **Reports** folder.
3. Enter a name for the Phase.
4. Enter the start date of the Phase.
5. Repeat this process until all the Phases are defined.
6. Click **OK**.

Pivot Grid

The Pivot Grid provides a quick and easy way to analyze your proposal data. You can use the information from the fields placed in the grid to create Pivot Reports and Pivot Charts. These reports and charts allow you to quickly review and present data when needed.

Note: To include column and row headers when you copy or paste Pivot Grid information, right-click the grid and select ***Copy/Paste Headers*** *first.*

The grid looks like this the first time you open it:



Layout

Select a layout from the list, or enter a name for the layout you created.

Save

Save the current layout for future use.

Save As

Save the layout with a different name.

Delete

Delete the layout.

Design Mode

Lock or unlock the grid. If the grid is locked, the data will not refresh every time you make a change.

Reset

Clear the grid.

Field List

Open the **Pivot Grid Field List** dialog box. This dialog box lists the fields you can use in grid.

Show Totals

Show or hide subtotals and the grand total in the grid.

Options

Select Bid Currency options if Multi-Currency is enabled for the proposal.

Chart

Show or hide a chart of the data.

Print Preview

Preview, print, or export a report of the data.

Pivot Chart

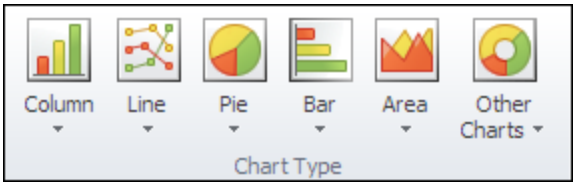
After you add fields to the Pivot Grid, you can view the data in a chart by clicking the **Chart** button. The chart appears below the grid and changes as you select different fields in the grid. The ribbon in the Chart Area offers a variety of design, printing, and exporting options.

Chart Area

This is where you view your pivot chart. You can also use the Chart ribbon to customize, print, and export the chart. Click the arrow in the top-right corner of the Chart Area to expand or collapse the ribbon.

The ribbon is divided into three groups of options: **Chart Type**, **Appearance**, and **Print and Export**.

Chart Type



Column

Select a column chart type to compare values across categories.

Line

Select a line chart type to compare trends over time.

Pie

Select a pie chart type if values across categories can be added together.

Bar

Select a bar chart type to summarize data and compare values across categories.

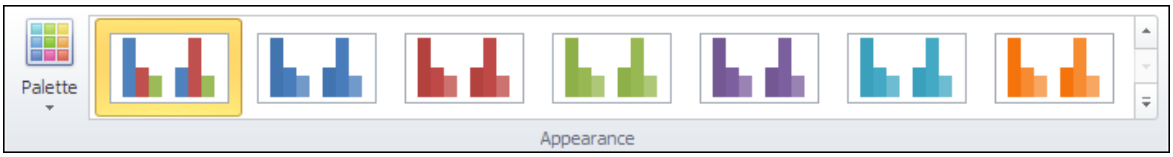
Area

Select an area chart type to compare trends over time or categories.

Other Charts

Click to open a menu of additional chart types.

Appearance



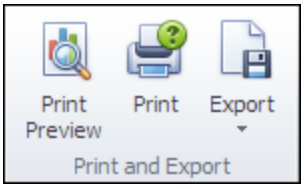
Palette

Click to open a menu of chart colors. The palette you click is immediately applied to your chart and to the sample charts in the Design Menu.

Design Menu

Select a preset chart design. Click the arrows on the right to scroll through and expand the menu.

Print and Export



Print Preview

Preview and edit the page layout.

Print

Open the **Print** dialog box.

Export

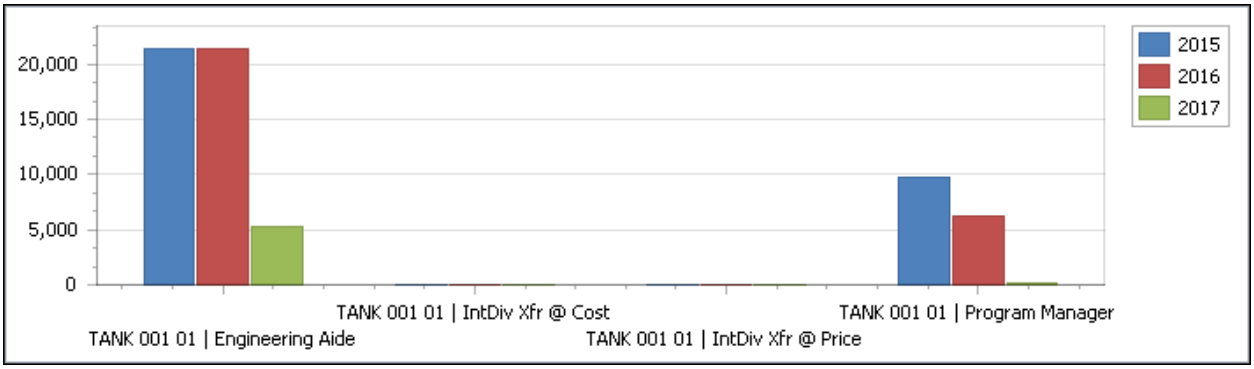
Select a file format for the exported chart graphic.

Examples

The following examples were created using the proposal Advanced Tank, Ver. 0.

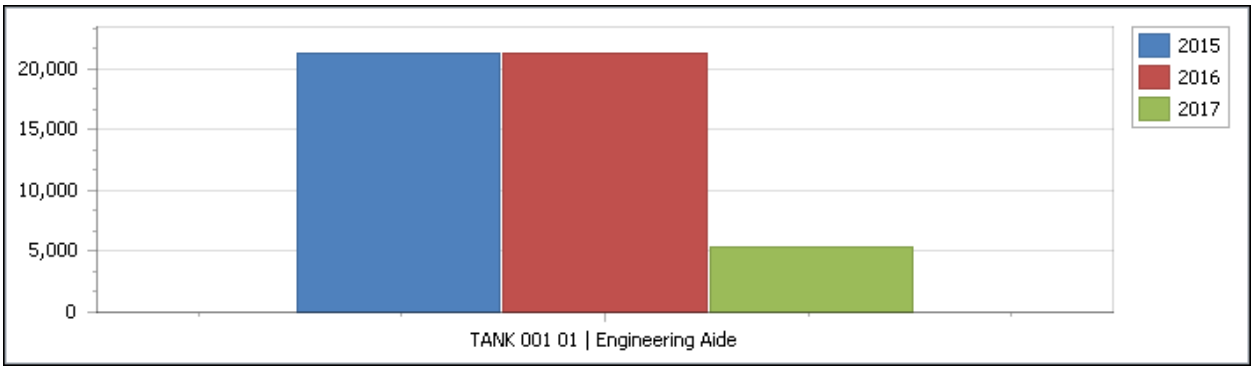
We added **Task ID** and **Resource** to the Row Area, **Year** to the Column Area, and **Hours** to the Data Area. When we click task **TANK 001 01**, the chart shows the hours of all the resources in the task per year.

Hours		Year ▲			
TASK ID ▲	Resource ▲	2015	2016	2017	Grand Total
TANK 001 01	Engineering Aide	21,333	21,334	5,333	48,000
	IntDiv Xfr @ Cost	0	0	0	0
	IntDiv Xfr @ Price	0	0	0	0
	Program Manager	9,680	6,178	142	16,000
TANK 001 01 Total		31,013	27,512	5,475	64,000



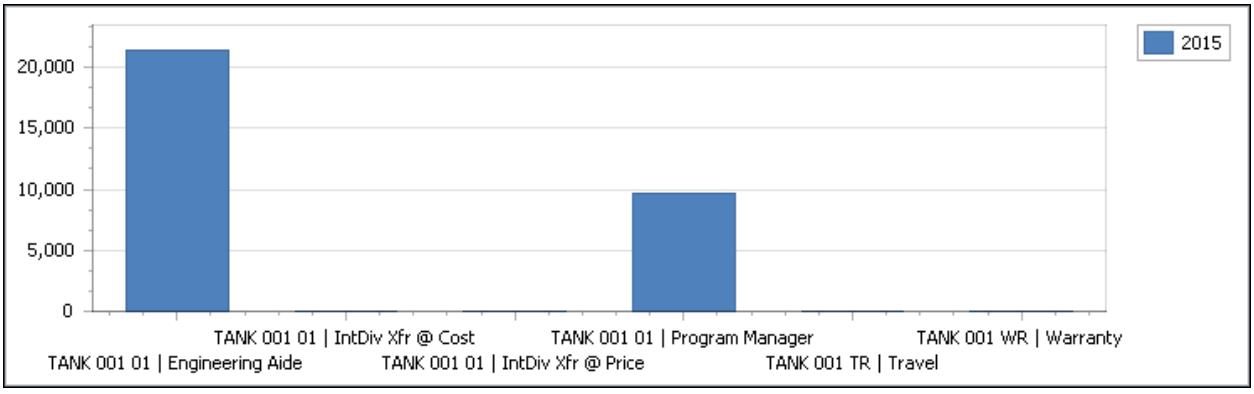
When we click **Engineering Aide**, the chart shows only the hours of that resource.

Hours		Year ▲			
TASK ID ▲	Resource ▲	2015	2016	2017	Grand Total
TANK 001 01	Engineering Aide	21,333	21,334	5,333	48,000
	IntDiv Xfr @ Cost	0	0	0	0
	IntDiv Xfr @ Price	0	0	0	0
	Program Manager	9,680	6,178	142	16,000
TANK 001 01 Total		31,013	27,512	5,475	64,000



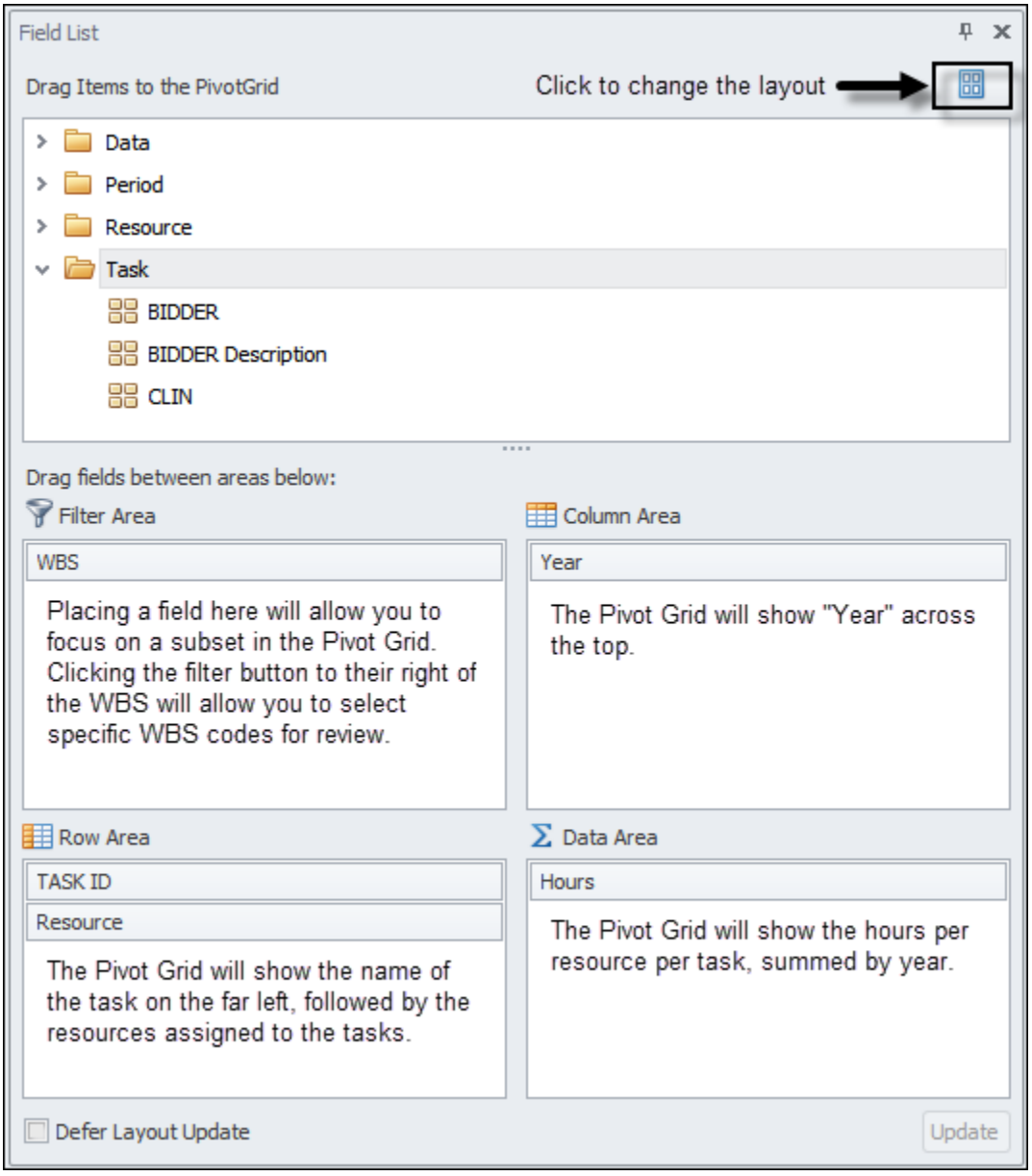
When we click **2015**, the chart shows the hours of all the resources in all the tasks in that year.

Hours		Year ▲			
TASK ID ▲	Resource ▲	2015	2016	2017	Grand Total
TANK 001 01	Engineering Aide	21,333	21,334	5,333	48,000
	IntDiv Xfr @ Cost	0	0	0	0
	IntDiv Xfr @ Price	0	0	0	0
	Program Manager	9,680	6,178	142	16,000
TANK 001 01 Total		31,013	27,512	5,475	64,000
TANK 001 02		14,400	10,800		25,200
TANK 001 03		14,400	14,400	3,600	32,400
TANK 001 04		8,190			8,190
TANK 001 TR	Travel	0	0	0	0
TANK 001 WR	Warranty	0	0	0	0
TANK 002 01		11,520			11,520
TANK 002 02		27,765			27,765
TANK 002 03		1,153	3,847		5,000
TANK 003 01			172,940	15,913	188,853
TANK 004 01			39,440		39,440
TANK 004 02		45,244	45,245	11,311	101,800
TANK 005 01		40,000	40,000	10,000	90,000
TANK 005 02		60,000	60,000	15,000	135,000
TANK 005 03		60,000	60,000	15,000	135,000
TANK 005 04		121,600	121,600	30,400	273,600
TANK 005 05			500	500	1,000
TANK 006 01		121,600	121,600	30,400	273,600
TANK 006 02		0			0
TANK 006 03			0		0
TANK 007 01		64,640	64,640	16,160	145,440
TANK 008 01		64,640	64,640	16,160	145,440
TANK 008 02		42,000			42,000
TANK 008 03			42,000		42,000
Grand Total		728,165	889,164	169,919	1,787,248



Pivot Grid Field List

The Pivot Grid Field List is where you select the fields you want to use in the Pivot Grid.



The Pivot Grid will look like this:

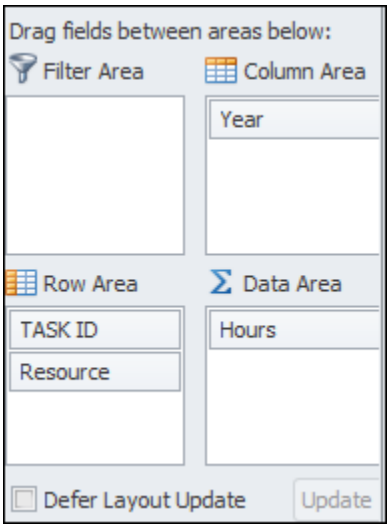
WBS

Hours | Year

TASK ID	Resource	2015	2016	2017	Grand Total
TANK 001 01	Engineering Aide	21,333	21,334	5,333	48,000
	IntDiv Xfr @ Cost	0	0	0	0
	IntDiv Xfr @ Price	0	0	0	0
	Program Manager	9,680	6,178	142	16,000
TANK 001 01 Total		31,013	27,512	5,475	64,000
TANK 001 02		14,400	10,800		25,200
TANK 001 03		14,400	14,400	3,600	32,400
TANK 001 04		8,190			8,190
TANK 001 TR		0	0	0	0
TANK 001 WR		0	0	0	0
TANK 002 01		11,520			11,520
TANK 002 02		27,765			27,765
TANK 002 03		1,153	3,847		5,000
TANK 003 01			172,940	15,913	188,853
TANK 004 01			39,440		39,440
TANK 004 02		45,244	45,245	11,311	101,800
TANK 005 01		40,000	40,000	10,000	90,000
TANK 005 02		60,000	60,000	15,000	135,000
TANK 005 03		60,000	60,000	15,000	135,000
TANK 005 04		121,600	121,600	30,400	273,600
TANK 005 05			500	500	1,000
TANK 006 01		121,600	121,600	30,400	273,600
TANK 006 02		0			0
TANK 006 03			0		0
TANK 007 01		64,640	64,640	16,160	145,440
TANK 008 01		64,640	64,640	16,160	145,440
TANK 008 02		42,000			42,000
TANK 008 03			42,000		42,000
Grand Total		728,165	889,164	169,919	1,787,248

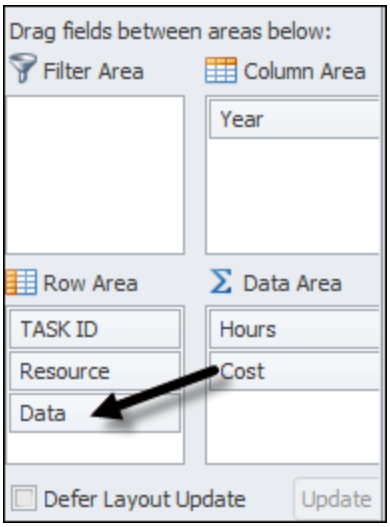
Pivot Grid Field List - Data Area

The Data Area is where you place the fields that have a numeric value. This can be hours, units, cost, direct cost, total cost, or an indirect element. In the following example, the Pivot Grid will show the hours per resource per task, summed by year.



Hours		Year ▲			
TASK ID ▲	Resource ▲	2015	2016	2017	Grand Total
⌄ TANK 001 01	Engineering Aide	21,333	21,334	5,333	48,000
	IntDiv Xfr @ Cost	0	0	0	0
	IntDiv Xfr @ Price	0	0	0	0
	Program Manager	9,680	6,178	142	16,000
TANK 001 01 Total		31,013	27,512	5,475	64,000
› TANK 001 02		14,400	10,800		25,200
› TANK 001 03		14,400	14,400	3,600	32,400
› TANK 001 04		8,190			8,190
› TANK 001 TR		0	0	0	0
› TANK 001 WR		0	0	0	0
› TANK 002 01		11,520			11,520
› TANK 002 02		27,765			27,765
› TANK 002 03		1,153	3,847		5,000
› TANK 003 01			172,940	15,913	188,853
› TANK 004 01			39,440		39,440
› TANK 004 02		45,244	45,245	11,311	101,800
› TANK 005 01		40,000	40,000	10,000	90,000
› TANK 005 02		60,000	60,000	15,000	135,000
› TANK 005 03		60,000	60,000	15,000	135,000
› TANK 005 04		121,600	121,600	30,400	273,600
› TANK 005 05			500	500	1,000
› TANK 006 01		121,600	121,600	30,400	273,600
› TANK 006 02		0			0
› TANK 006 03			0		0
› TANK 007 01		64,640	64,640	16,160	145,440
› TANK 008 01		64,640	64,640	16,160	145,440
› TANK 008 02		42,000			42,000
› TANK 008 03			42,000		42,000
Grand Total		728,165	889,164	169,919	1,787,248

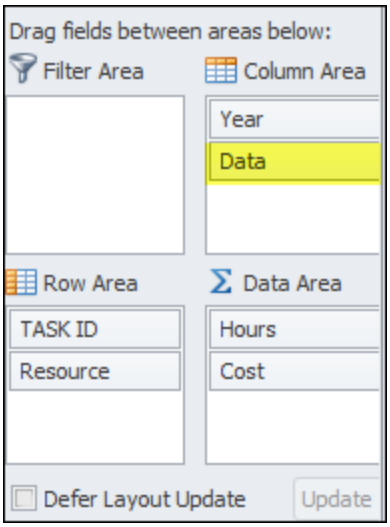
If we place another field in the Data Area, an additional field will appear in the Row Area called Data.



The Data field references the Hours and Cost fields.

Hours	Cost		Year ▲			
TASK ID ▲	Resource ▲	Data	2015	2016	2017	Grand Total
⌄ TANK 001 01	Engineering Aide	Hours	21,333	21,334	5,333	48,000
		Cost	$0.00	$0.00	$0.00	$0.00
	IntDiv Xfr @ Cost	Hours	0	0	0	0
		Cost	$6,933.00	$39,671.00	$3,396.00	$50,000.00
	IntDiv Xfr @ Price	Hours	0	0	0	0
		Cost	$10,778.00	$22,997.00	$1,225.00	$35,000.00
	Program Manager	Hours	9,680	6,178	142	16,000
		Cost	$0.00	$0.00	$0.00	$0.00
TANK 001 01 Total		Hours	31,013	27,512	5,475	64,000
		Cost	$17,711.00	$62,668.00	$4,621.00	$85,000.00
› TANK 001 02		Hours	14,400	10,800		25,200
		Cost	$17,143.00	$12,857.00		$30,000.00
› TANK 008 01		Hours	64,640	64,640	16,160	145,440
		Cost	$88,890.00	$88,890.00	$22,220.00	$200,000.00
› TANK 008 02		Hours	42,000			42,000
		Cost	$180,000.00			$180,000.00
› TANK 008 03		Hours		42,000		42,000
		Cost		$180,000.00		$180,000.00
Grand Total		Hours	728,165	889,164	169,919	1,787,248
		Cost	$7,105,254.20	$11,456,835.10	$719,813.53	$19,281,902.83

Since the Data field does not really contain numeric values (it only references the Hours and Cost fields), we can even move it to the Column Area.

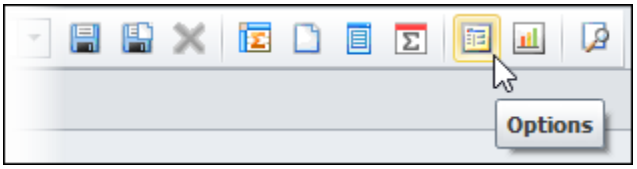


Hours | Cost | Year | Data

TASK ID	Resource	2015 Hours	2015 Cost	2017 Hours	2017 Cost	Grand Total Hours	Grand Total Cost
TANK 001 01	Engineering Aide	21,333	$0.00	5,333	$0.00	48,000	$0.00
	IntDiv Xfr @ Cost	0	$6,933.00	0	$3,396.00	0	$50,000.00
	IntDiv Xfr @ Price	0	$10,778.00	0	$1,225.00	0	$35,000.00
	Program Manager	9,680	$0.00	142	$0.00	16,000	$0.00
TANK 001 01 Total		31,013	$17,711.00	5,475	$4,621.00	64,000	$85,000.00
TANK 001 02		14,400	$17,143.00			25,200	$30,000.00
TANK 001 03		14,400	$103,709.00	3,600	$21,489.00	32,400	$240,000.00
TANK 001 04		8,190	$17,000.00			8,190	$17,000.00
TANK 001 TR		0	$19,822.00	0	$3,868.00	0	$35,294.00
TANK 001 WR		0	$1,443,575.20	0	$424,060.53	0	$4,065,216.83
TANK 002 01		11,520	$81,500.00			11,520	$81,500.00
TANK 002 02		27,765	$122,000.00			27,765	$122,000.00
TANK 002 03		1,153	$0.00			5,000	$0.00
TANK 003 01				15,913	$63,000.00	188,853	$315,000.00
TANK 004 01						39,440	$81,000.00
TANK 004 02		45,244	$388,888.00	11,311	$97,223.00	101,800	$875,000.00
TANK 005 01		40,000	$66,666.00	10,000	$16,668.00	90,000	$150,000.00
TANK 005 02		60,000	$0.00	15,000	$0.00	135,000	$0.00
TANK 005 03		60,000	$0.00	15,000	$0.00	135,000	$0.00
TANK 005 04		121,600	$0.00	30,400	$0.00	273,600	$0.00
TANK 005 05				500	$0.00	1,000	$0.00
TANK 006 01		121,600	$177,776.00	30,400	$44,444.00	273,600	$400,000.00
TANK 006 02		0	$4,291,684.00			0	$4,291,684.00
TANK 006 03						0	$7,733,208.00
TANK 007 01		64,640	$88,890.00	16,160	$22,220.00	145,440	$200,000.00
TANK 008 01		64,640	$88,890.00	16,160	$22,220.00	145,440	$200,000.00
TANK 008 02		42,000	$180,000.00			42,000	$180,000.00
TANK 008 03						42,000	$180,000.00
Grand Total		728,165	$7,105,254.20	169,919	$719,813.53	1,787,248	$19,281,902.83

Pivot Options Dialog Box

To open the **Options** dialog box, go to the toolbar above the Pivot Grid and click **Options**.



This dialog box allows you to show the costs in a bid currency if Multi-Currency is enabled for the proposal. The following examples show task TANK 001 01 in the proposal currency and in the bid currency *Euro*. The direct costs are converted to euros using the rate from the Exchange Rate Table.

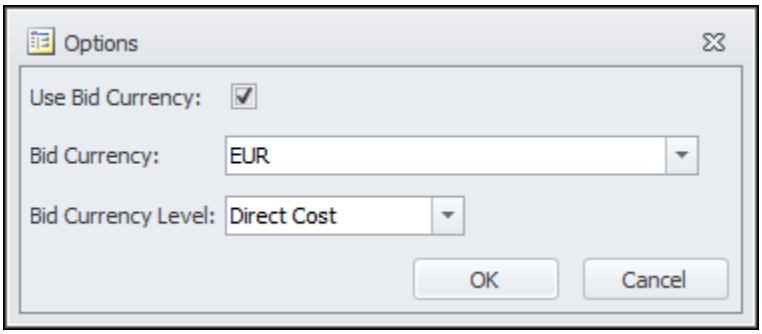
Hours | Direct Cost | Year

TASK ID	Resource	Data	2015	2016	2017	Grand Total
TANK 001 01	Engineering Aide	Hours	21,333	21,334	5,333	48,000
		Direct Cost	$492,792.30	$517,456.17	$135,819.51	$1,146,067.98
	IntDiv Xfr @ Cost	Hours	0	0	0	0
		Direct Cost	$6,933.00	$39,671.00	$3,396.00	$50,000.00
	IntDiv Xfr @ Price	Hours	0	0	0	0
		Direct Cost	$10,778.00	$22,997.00	$1,225.00	$35,000.00
	Program Manager	Hours	9,680	6,178	142	16,000
		Direct Cost	$406,560.00	$272,449.80	$6,575.31	$685,585.11
TANK 001 01 Total		Hours	31,013	27,512	5,475	64,000
		Direct Cost	$917,063.30	$852,573.97	$147,015.82	$1,916,653.09

Hours | Direct Cost | Year

TASK ID	Resource	Data	2015	2016	2017	Grand Total
TANK 001 01	Engineering Aide	Hours	21,333	21,334	5,333	48,000
		Direct Cost	€453,225.70	€475,909.29	€124,914.48	€1,054,049.46
	IntDiv Xfr @ Cost	Hours	0	0	0	0
		Direct Cost	€6,376.35	€36,485.79	€3,123.33	€45,985.47
	IntDiv Xfr @ Price	Hours	0	0	0	0
		Direct Cost	€9,912.63	€21,150.56	€1,126.64	€32,189.83
	Program Manager	Hours	9,680	6,178	142	16,000
		Direct Cost	€373,917.04	€250,574.63	€6,047.37	€630,539.05
TANK 001 01 Total		Hours	31,013	27,512	5,475	64,000
		Direct Cost	€843,431.71	€784,120.27	€135,211.83	€1,762,763.81

The dialog box consists of the following:



Use Bid Currency

Select this checkbox to show the costs in a bid currency.

Bid Currency

Select the currency in which you want to show the costs.

Bid Currency Level

Select the level at which you want to convert the costs.

Pivot Report

Once you have added the fields to the Pivot Grid, you can view the data in a report by clicking the button. The report will open in the grid as well as a ribbon containing standard report options, such as header/footer, page setup, print, search, etc. The example below was created using the proposal Advanced Tank, Ver. 0. We added Task ID and Resource to the Row Area, Year to the Column Area, and Hours and Direct Cost to the Data Area. We also collapsed most of the tasks to provide a screenshot of a complete page.

TASK ID	Resource	Data	2015	2016	2017	Grand Total
TANK 001 01	Engineering Aide	Hours	21,333	21,334	5,333	48,000
		Direct Cost	$492,792.30	$517,456.17	$135,819.51	$1,146,067.98
	IntDiv Xfr @ Cost	Hours	0	0	0	0
		Direct Cost	$6,933.00	$39,671.00	$3,396.00	$50,000.00
	IntDiv Xfr @ Price	Hours	0	0	0	0
		Direct Cost	$10,778.00	$22,997.00	$1,225.00	$35,000.00
	Program Manager	Hours	9,680	6,178	142	16,000
		Direct Cost	$406,560.00	$272,449.80	$6,575.31	$685,585.11
TANK 001 01 Total		Hours	31,013	27,512	5,475	64,000
		Direct Cost	$917,063.30	$852,573.97	$147,015.82	$1,916,653.09
TANK 001 02		Hours	14,400	10,800		25,200
		Direct Cost	$395,143.00	$310,532.00		$705,675.00
TANK 001 03		Hours	14,400	14,400	3,600	32,400
		Direct Cost	$481,709.00	$511,702.00	$125,675.25	$1,119,086.25
TANK 001 04		Hours	8,190			8,190
		Direct Cost	$180,485.00			$180,485.00
TANK 001 TR		Hours	0	0	0	0
		Direct Cost	$19,822.00	$11,604.00	$3,868.00	$35,294.00
TANK 001 WR		Hours	0	0	0	0
		Direct Cost	$1,443,575.20	$2,197,581.10	$424,060.53	$4,065,216.83
TANK 002 01		Hours	11,520			11,520
		Direct Cost	$370,292.00			$370,292.00
TANK 002 02		Hours	27,765			27,765
		Direct Cost	$757,197.50			$757,197.50
TANK 002 03		Hours	1,153	3,847		5,000
		Direct Cost	$39,343.50	$137,845.58		$177,189.08
TANK 003 01		Hours		172,940	15,913	188,853
		Direct Cost		$3,505,503.30	$339,923.12	$3,845,426.42
TANK 004 01		Hours		39,440		39,440
		Direct Cost		$979,180.00		$979,180.00
TANK 004 02		Hours	45,244	45,245	11,311	101,800
		Direct Cost	$1,230,744.40	$1,272,862.48	$329,259.67	$2,832,866.55
TANK 005 01		Hours	40,000	40,000	10,000	90,000
		Direct Cost	$864,666.00	$904,566.00	$236,616.75	$2,005,848.75
TANK 005 02		Hours	60,000	60,000	15,000	135,000
		Direct Cost	$1,323,000.00	$1,389,150.00	$364,651.88	$3,076,801.88
TANK 005 03		Hours	60,000	60,000	15,000	135,000
		Direct Cost	$1,638,000.00	$1,719,900.00	$451,473.75	$3,809,373.75
TANK 005 04		Hours	121,600	121,600	30,400	273,600
		Direct Cost	$2,150,400.00	$2,257,920.00	$592,704.00	$5,001,024.00
TANK 005 05		Hours		500	500	1,000
		Direct Cost		$8,820.00	$9,261.00	$18,081.00
TANK 006 01		Hours	121,600	121,600	30,400	273,600
		Direct Cost	$2,580,176.00	$2,700,300.00	$706,605.50	$5,987,081.50
TANK 006 02		Hours	0			0
		Direct Cost	$4,291,684.00			$4,291,684.00
TANK 006 03		Hours		0		0
		Direct Cost		$7,733,208.00		$7,733,208.00
TANK 007 01		Hours	64,640	64,640	16,160	145,440
		Direct Cost	$1,923,450.00	$2,015,178.00	$527,870.60	$4,466,498.60
TANK 008 01		Hours	64,640	64,640	16,160	145,440
		Direct Cost	$1,923,450.00	$2,015,178.00	$527,870.60	$4,466,498.60
TANK 008 02		Hours	42,000			42,000

Profit/Fee
Profit/Fee Overrides - Priorities

The default profit/fee rate is defined in the Indirect Rate Table. However, you can override this rate in several places when necessary. ProPricer will use the following criteria to determine which profit/fee rate it will use.

Resource

The first place ProPricer checks for a profit/fee override is at the resource level on the **Resources**, **Activities, Travel**, **Material**, **CERs**, **Resource Sets** and **Formulas** tabs. This override has the highest priority since it overrides all other profit/fee rates.

Task

The second place ProPricer checks for a profit/fee override is at the task level. A profit/fee entered for the task will be applied to all resources used in that task.

Proposal Properties

The third place ProPricer checks for a profit/fee override is on the **Pricing** page in the **Proposal** folder of **Proposal Properties**. A profit/fee entered here applies to all the resources used in the proposal.

Indirect Rate Table Overrides

The last place ProPricer checks for a profit/fee override is on **Indirect Rate Overrides** grid for the Indirect Rate Table assigned to the proposal. These overrides apply to all the resources used in the proposal that have been assigned the indirect pool for which overrides have been entered.

If ProPricer does not find any overridden profit/fee rates, it will use the default rate from the Indirect Rate Table.

Set the Profit/Fee of a Proposal

You can enter a profit/fee rate on the **Pricing** page in the **Proposal** folder of **Proposal Properties** to override the profit/fee rates entered for all the indirect pools in the proposal's Indirect Rate Table. This rate will also override any profit/fee rates entered in the **Indirect Rate Overrides** grid for the Indirect Rate Table assigned to the proposal.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Pricing** page in the **Proposal** folder.
3. Enter the rate you want to use in the **Proposal Profit/Fee** field.
4. Click **OK**.

Proposal Properties

The Proposal Properties open automatically when you create a new proposal. Some of the fields might contain default information that has been extracted from a proposal template. You can accept the default data, or you can change it to fit the specific needs of the proposal.

At the top of the Proposal Properties, you can enter the proposal's name, version, and save location. The remaining properties are organized in a tree-like structure, consisting of folders that contain pages and, in some instances, subfolders.

Note: In the Role Information settings, you can grant Access and Edit rights to individual pages of properties.

Proposal

- General
- Calendar
- Pricing
- Three-Point Estimating
  - General Page
  - Rates Page
- Summary Fields
  - General Page
  - Mapping Page
- Resource Fields
  - General Page
  - Mapping Page

- Proposal Input
- Travel
- Resource Allocations
- Proposal CERs
- Currency
- Proposal Rights
- Task Rights
- Notes

Reports

- Title Definitions
- Government Data
    - Section B
    - Risk Assessments
    - Cover Sheet
    - DOE Form 4620
    - FWP Form
        - Page 1
        - Page 2
- Phases
- Footer

Material

- Products

- Pricing

Workflow

- General
- Roles
- Steps

The following elements are common to all pages:

OK

Saves the changes and closes the dialog box.

Cancel

Closes the dialog box without saving the changes.

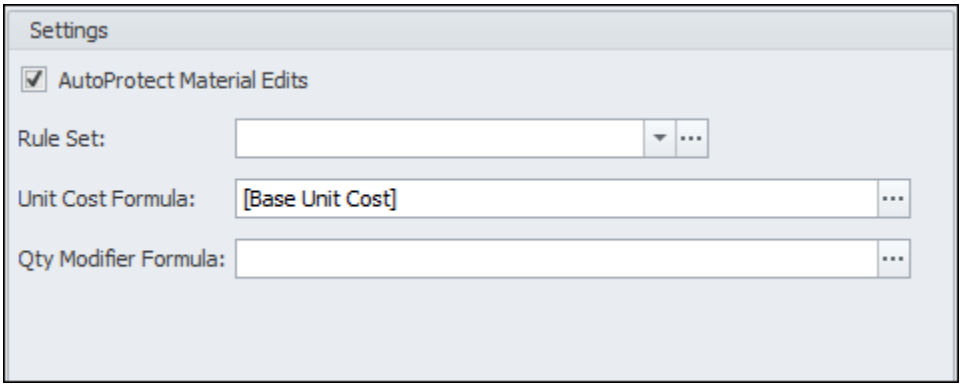
Apply

Saves the changes without closing the dialog box.

Material Folder

Material Pricing Page

The settings on this page are for consolidating and calculating the unit cost of the proposal's parts and assemblies.



AutoProtect Material Edits

Select this checkbox to automatically mark edited materials in tasks as actuals. If you change the costs or resources of a part or an assembly in a task, ProPricer marks that information as actual. If the checkbox is cleared, you can still manually protect material expenses.

Rule Set

Select the consolidation rule set that will be used in the proposal when you consolidate material unit costs.

Click ··· to view and manage the consolidation rule sets in your system.

Unit Cost and Qty Modifier Formulas

Unit Cost Formula

You can edit the formula that calculates the unit cost of materials in the proposal, or you can completely redefine it. The formula editor allows you to set the unit cost calculation using formula functions, mathematical operators, and your own material fields.

Click to open the formula editor. The formula functions available in the editor are the same as those in other applications, such as Microsoft Excel. When you type in the editor, ProPricer instantly notifies you of any errors. Also, a tooltip appears as you type to help you insert functions and fields. In the tooltip, select an item to see an example of the correct syntax, and double-click the item to insert it.

In the unit cost formula, you must specify which field to base the calculation on. The default field entered for all new proposals is **[Base Unit Cost]**, but you can change it. After the base field, you can enter operators and functions to further define how unit cost is calculated. For example, **[Base Unit Cost] * [Complexity Factor]** multiplies Base Unit Cost by the value in a material field named Complexity Factor.

Qty Modifier Formula

Unlike the unit cost formula, you cannot specify which field to base the quantity calculation on. Instead it can only be based on the manufacturing start quantity, and there is no default field entered. The formula functions, mathematical operators, and material fields you enter in the editor create a multiplier that is applied to the manufacturing start quantity.

Click to open the formula editor. The formula functions available in the editor are the same as those in other applications, such as Microsoft Excel. When you type in the editor, ProPricer instantly notifies you of any errors. Also, a tooltip appears as you type to help you insert functions and fields. In the tooltip, select an item to see an example of the correct syntax, and double-click the item to insert it.

The quantity modifier formula always begins with multiplication, which is different than the unit cost formula. For example, entering **[Complexity Factor]** in the editor multiplies Mfg Start Qty by the value in a material field named Complexity Factor.

To add to, subtract from, or divide Mfg Start Qty, begin your formula with **1**, then follow it with the appropriate operator. For example, **1 / [Complexity Factor]** multiplies Mfg Start Qty by one, and then divides it by the Complexity Factor material field value.

Formula functions

The following functions are available in the Unit Cost Formula and Qty Modifier Formula editors:

- And
- Days
- If
- IfBlank
- IsBlank
- Log
- Ln
- Max
- Min
- Not
- Or
- Power
- Round
- RoundDown
- RoundUp
- Year

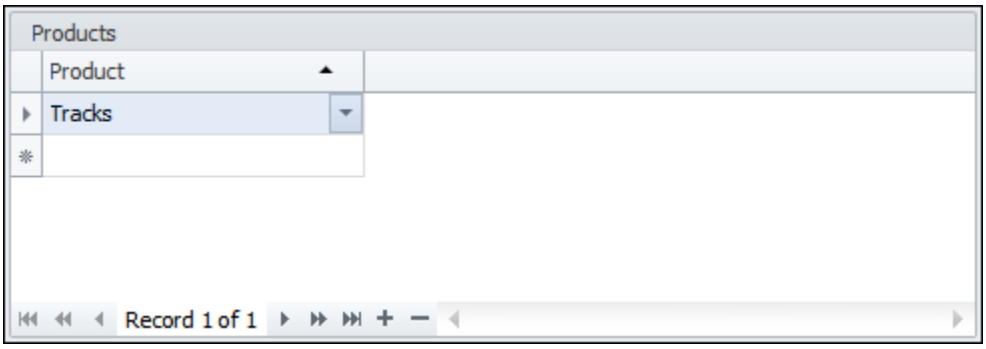
*Note: It is highly recommended that you use the **IfBlank** or **IsBlank** functions in your formula when it contains a material field. For example,*

IfBlank([Complexity Factor], 1) *returns a value of 1 if a Complexity Factor material field is blank. These functions can ensure correct unit cost calculations when a material field has a blank value in the proposal. Otherwise, blank values are treated as zeroes.*

Note: *If your material fields are for entering dates, you can use the* ***Days*** *function to get the number of days between two dates. It is recommended that you add a value of 1 to the result when the date range includes the start and end dates. For example,* ***Days([End Date], [Start Date]) + 1*** *adds one to the result from the dates in End Date and Start Date material fields.*

Products Page

On this page, you assign products to the current proposal. Each product you enter here will appear in a separate tab in Material View.



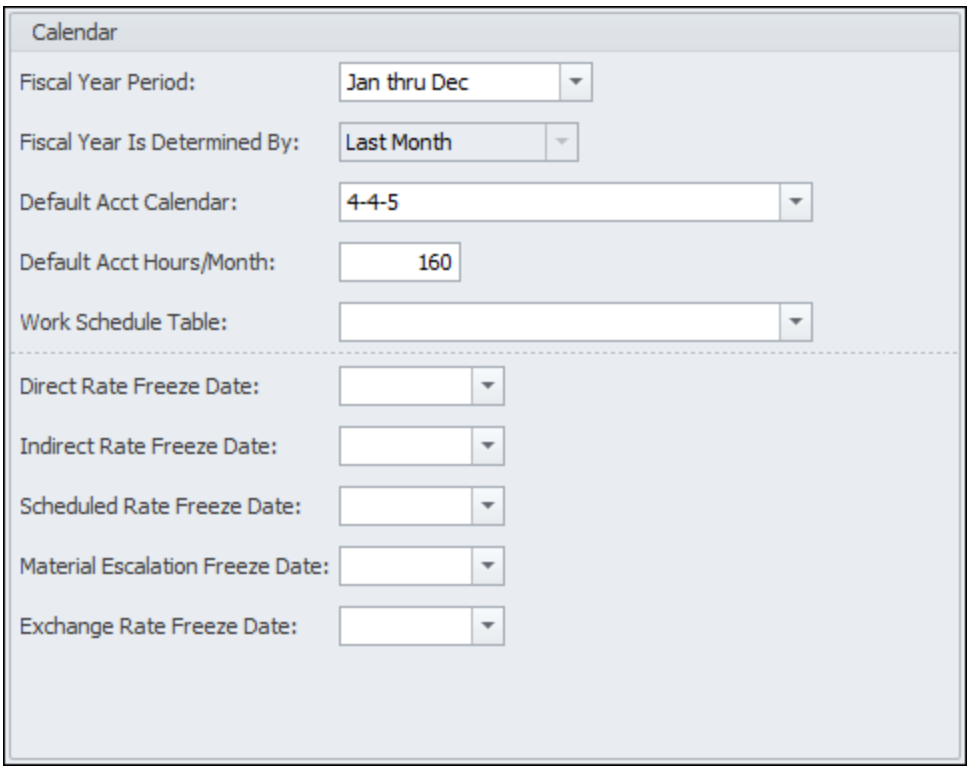
Product

Enter the name of the product you want to assign to the proposal.

Proposal Folder

Calendar Page

On this page, you can specify the fiscal year period of the proposal, assign an accounting calendar and a Work Schedule Table to the proposal, and enter the average number of hours per month an employee will work on the contract. You can also enter freeze dates to limit rate escalation/de-escalation and material escalation in the proposal. The fields will show the default options entered on the Calendar page of the System Options. You can accept or change the default options.



Fiscal Year Period

Enter the fiscal year period of the company.

Fiscal Year Is Determined By

If you changed the fiscal year period to something other than *Jan thru Dec*, you can base the fiscal year on the first or last month of the period.

- **First Month** - If the fiscal year begins October 1, 2017 and ends September 30, 2018, then the fiscal year is 2017.
- **Last Month** - If the fiscal year begins October 1, 2017 and ends September 30, 2018, then the fiscal year is 2018.

Default Acct Calendar

Enter the name of the accounting calendar you want to apply to all resources in the proposal.

Default Acct Hours/Month

Enter the default number of hours per month an employee will usually work on the contract. ProPricer uses this figure to calculate equivalent heads for input and reporting purposes when resources have no accounting calendar assigned. If you do not use equivalent heads, leave the default number (160).

Work Schedule Table

Enter the name of the Work Schedule Table to use with the proposal. Work Schedule Tables let you apply rate modifiers and overridden accounting calendar hours to different resources.

Rate Freeze Dates

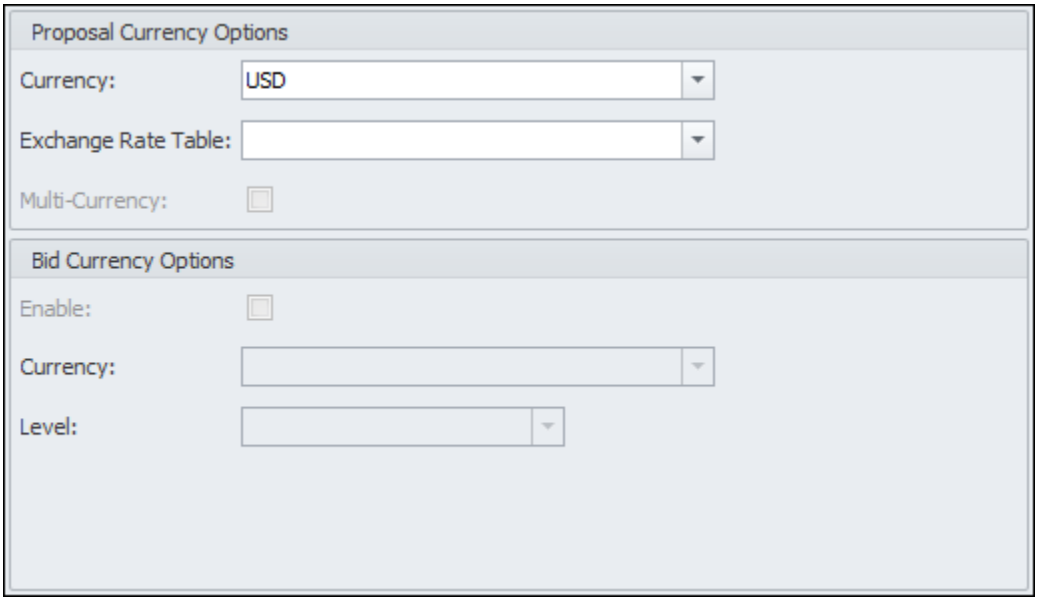
Enter the date that you want a specific type of rate to stop changing due to escalation or de-escalation. This is only available when the proposal type is Standard.

Material Escalation Freeze Date

Enter the date that you want material unit costs to stop escalating. To learn more about material escalation, see Escalation Factors. This is only available when the proposal type is Standard.

Currency Page

On this page, you enter the currency options of the proposal. It has two sets of options: Proposal Currency and Bid Currency. The Proposal Currency section is where you define the proposal currency, assign an Exchange Rate Table to the proposal, and enable Multi-Currency functions for the proposal. The Bid Currency options allow you to show costs in a currency other than the proposal currency, as well as select the level at which you want the costs converted.



Proposal Currency Options

Here you specify the currency in which you want to show the proposal costs. If the currency differs from the system currency, you will need to enter an Exchange Rate Table first.

Currency

By default, this field shows the system currency, but you can change it. You have to enter an Exchange Rate Table before you can enter a currency that differs from the system currency.

Exchange Rate Table

Enter the table that will provide the exchange rates.

Multi-Currency

Select this checkbox to use currencies other than the proposal currency. For example, if you want to assign different currencies to the travel expenses (US dollars to airfare and Euros to hotel), then this checkbox must be selected to enable the Bid Currency options.

Bid Currency Options

These options allow you to show proposal costs in a currency other than the proposal currency. The **Multi-Currency** checkbox must be selected in order to access these options.

Enable

Select this checkbox to enable the Bid Currency options.

Currency

Select the currency in which you want to show the proposal costs.

Level

Select the level at which you want to convert the costs. There are two options:

Direct Cost

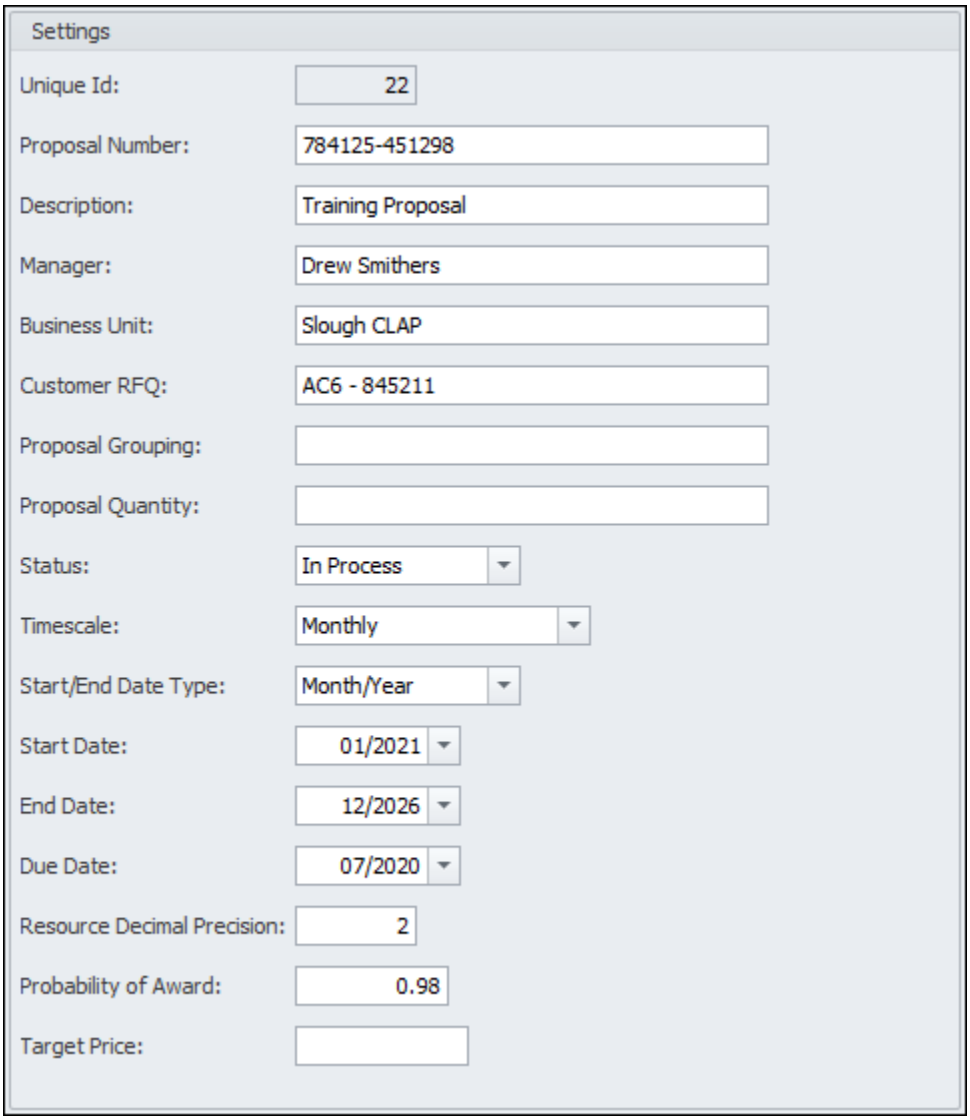
All cost values from Direct Cost to Grand Total are displayed in the bid currency.

Total Price

A Grand Total (Bid) column will appear after the Grand Total column that shows the Grand Total in the bid currency.

General Page

This is the first page you see when you create a new proposal. If you create a proposal from a template, some settings will already be filled in. Any proposal user fields in your system will appear at the bottom of this page.



Unique ID

The proposal's unique ID generates automatically when the proposal is created, and it is read-only. Unlike the name, version, number, and other identifying properties, the UID is more reliable because a person cannot enter it incorrectly or change it mistakenly.

Proposal Number

Enter the internal reference number of the proposal. You can enter up to 255 characters.

Description

Enter a description of the proposal. You can enter up to 255 characters.

Manager

Enter the name of the person responsible for calculating and submitting the proposal. You can enter up to 255 characters.

Business Unit

Enter the name of the business unit bidding the proposal.

Customer RFQ

Enter the RFQ (request for quote) name or number that is assigned to this proposal by the customer.

Proposal Grouping

Enter a group name to assign the proposal to that group. Multiple proposals can belong to the same group. You can enter up to 255 characters.

Proposal Quantity

Enter a quantity for the proposal. This quantity is for reporting purposes only and does not affect data calculation in the proposal. You can enter up to 255 characters.

Status

Enter the current status of the proposal. The built-in options are In Process, Win, Loss, Study, Pending, Canceled, Superseded, Planned, No Bid, Other, and Submitted. The default option is In Process. You can create more proposal status options on the Proposal Statuses Page of System Options.

Timescale

Enter how time is measured within the proposal's period of performance. The available options are Annual, Annual (Fiscal), Quarterly, Monthly, and Daily. The Daily option is only available when the Start/End Date Type is Date.

With the Annual (Fiscal) option, inputs are priced according to the fiscal year settings on the Calendar page of Proposal Properties. Average rates of resources are calculated with direct rates from the fiscal year instead of the calendar year.

You cannot change this setting after entering timephased data in the proposal.

Start/End Date Type

Enter the format for task and spread period dates.

The Month/Year option means that tasks and spread periods always start and end with complete months.

The Date option allows you to specify the day that tasks and spread periods start and end, which affects the distribution of labor resource hours/equivalent heads. When the dates include days and you distribute a resource with a spread curve, ProPricer prorates the estimates in the first and last month accordingly.

The Date option also enables the Daily option in the Timescale setting.

Start Date

Enter when the contract begins (the anticipated award date). This date will be the default start date of all the tasks. You cannot enter task or resource dates that begin before this date.

End Date

Enter when you expect to complete the contract. This date will be the default end date of all the tasks. You cannot enter task or resource dates that fall after the end date.

Due Date

Enter when the proposal should be finished.

Resource Decimal Precision

Enter the number ProPricer uses to round resource hours/units/cost values in the proposal. You can enter a number between 0 and 12. See Decimal Display versus Decimal Precision.

Probability of Award

Enter an estimate, in decimal format, indicating the probability that the contract will be awarded after submitting the proposal. Acceptable values are 0 through 1.

Target Price

Enter an estimate for the total contract value.

Note: The probability of award and target price do not influence the pricing of the proposal. They are used as references when analyzing the finished proposal.

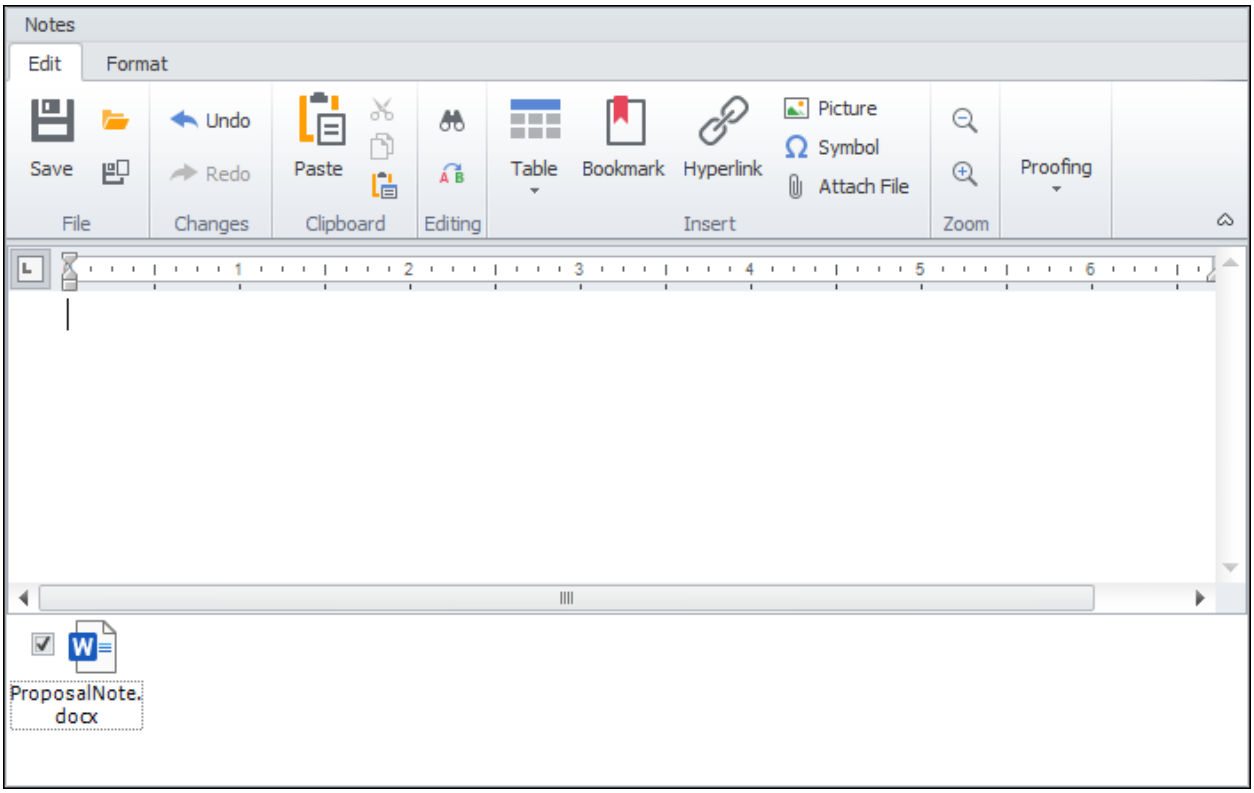
Proposal User Fields

Any proposal user fields in your system appear here. These fields let you enter customized information about your proposals. To create or manage the fields in your system, go to the **Setup** ribbon and click **Proposal User Fields**.

You can include proposal user fields in an algorithm formula. This gives you more control over pricing in proposals. The formula will change depending on what is entered in the fields.

Notes Page

On this page, you can enter notes about the proposal and attach supporting files to it.



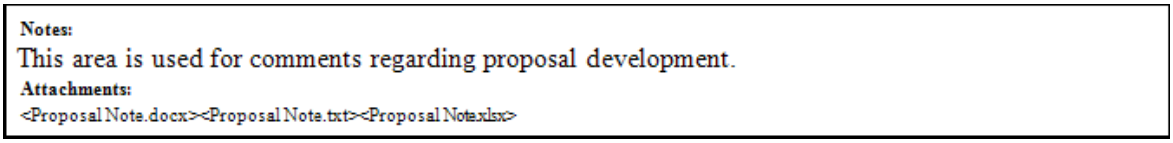
Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in the Proposal Log Report. It will appear in angle brackets (for example, <filename.docx>), like this:



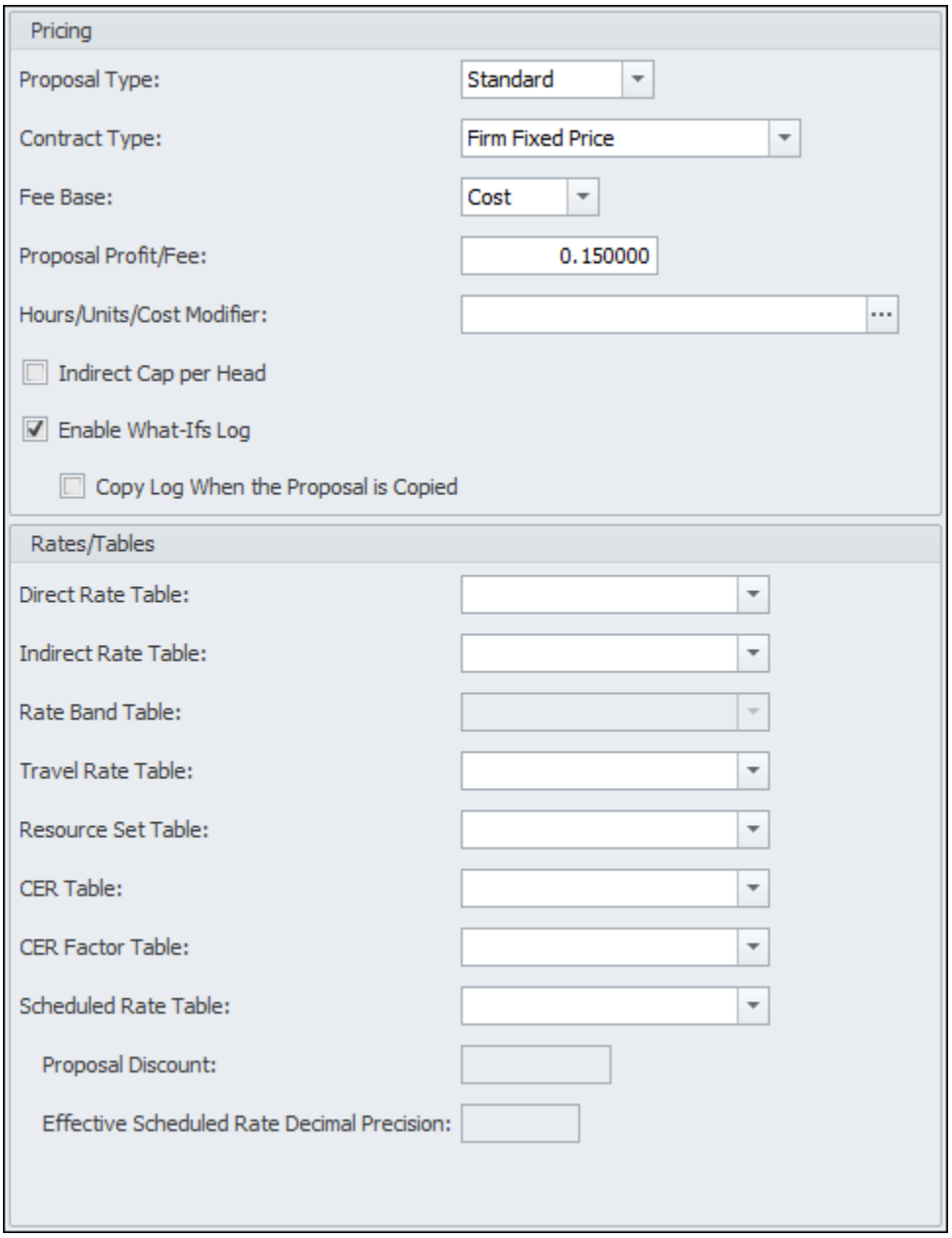
You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Attach Files to the Notes Page of Proposal Properties

1. On the **Proposal** ribbon, click **Properties**.
2. In the **Proposal** folder, click the **Notes** page.
3. In the text editor, do one of the following:
   - Drag a file from your computer and drop it in the designated area.
   - Click **Edit** > **Attach File**, select the file, and then click **Open**.
4. In the Proposal Properties and click **OK**.

Pricing Page

On this page, you choose the pricing options for the proposal and attach rate tables to the proposal. The page consists of two groups of settings: Pricing and Rate Tables.



Pricing

Proposal Type

Select a proposal type that is appropriate for the contract. In Services proposals, the Rate Card is enabled so you can create labor categories and fine tune the resources' direct and indirect rates.

Contract Type

Select the type of pricing you want to use for the proposal. ProPricer uses this information when it prepares government reports to determine the Federal Acquisition Regulation (FAR) range for the contract's risk.

Fee Base

Select the base you want to use to calculate the fee of the proposal. You have two options to choose from:

- **Cost** - the fee is based on the production cost.
- **Sell** - the fee is based on the selling price.

Proposal Profit/Fee

Enter the rate you want to use to override all the profit/fee rates in the proposal's Indirect Rate Table. This rate will also override any profit/fee rates entered in the **Indirect Rate Overrides** grid. Leave this field blank if you do not want to override the profit/fee rates.

Hours/Units/Cost Modifier

You can set up a modifier for the resource hours/units/cost in tasks. This allows you to apply a multiplier to the hours/units/cost of resources using formula functions, mathematical operators, and your own resource fields.

Click to open the formula editor. The formula functions available in the editor are the same as those in other applications, such as Microsoft Excel. When you type in the editor, ProPricer instantly notifies you of any errors. Also, a tooltip appears as you type to help you insert functions and fields. In the tooltip, select an item to see an example of the correct syntax, and double-click the item to insert it.

ProPricer applies the modifier to the base hours/units/cost of a resource and automatically calculates the actual hours/units/cost. In the proposal, you can change the input view to see the base and actual amounts. If you export proposal data, only the actual hours/units/cost information is included with it.

The hours/units/cost modifier formula always begins with multiplication. For example, entering **[Productivity Factor]** in the editor multiplies Hours/Units/Cost by the value in a resource field named Productivity Factor.

To add to, subtract from, or divide Hours/Units/Cost, begin your formula with **1**, then follow it with the appropriate operator. For example, **1 / [Productivity Factor]** multiplies Hours/Units/Cost by one, and then divides it by the Productivity Factor resource field value.

The following functions are available in the Hours/Units/Cost Modifier editor:

- And
- Days
- If
- IfBlank
- IsBlank
- Log
- Ln
- Max
- Min
- Not
- Or
- Power
- Round
- RoundDown

- RoundUp
- Year

*Note: It is highly recommended that you use the **IfBlank** or **IsBlank** functions in your modifier when it contains a resource field. For example, **IfBlank([Productivity Factor], 1)** returns a value of 1 if the Productivity Factor resource field is blank. These functions can ensure correct actual hours/units/cost calculations when a resource field has a blank value in the proposal. Otherwise, blank values are treated as zeroes.*

Indirect Cap per Head

Select the checkbox to apply indirect element caps to each equivalent head distributed for a single resource in a task.

Enable What-Ifs Log

Select the checkbox to capture each occurrence of a what-if in the proposal. The log will record the what-if name, the date and time it was processed, the user who ran it, and the changes to the proposals' hours, direct cost, and total price.

Copy Log When Proposal is Copied

This checkbox is activated after the What-Ifs Log is enabled. Select the checkbox to include the log when the proposal is copied.

Rates/Tables

Rate Card Timescale

Select a timescale that supports the direct rates needed in the proposal. With the Annual (Fiscal) option, rates from the fiscal year are used instead of calendar year rates. This setting is available when the proposal type is Services.

Direct Rate Table

Enter the name of the Direct Rate Table, Composite Rate Table, or T&M Rate Table that will provide the resources and resource rates for the tasks in the proposal.

Note: You can save the proposal without a Direct Rate Table. However, you will only be able to create tasks and add SOW and BOE text to them. You will not be able to add any resources, travel, or material.

Indirect Rate Table

ProPricer will automatically enter the name of the Indirect Rate Table assigned to the Direct Rate Table you entered above. However, you can change it. The overriding Indirect Rate Table must be equivalent to the one assigned to the Direct Rate Table. It must use the same Algorithm and contain all the indirect pools contained in the original. The name of the overriding Indirect Rate Table appears in blue.

Rate Band Table

Enter the name of a different Rate Band Table to override the one that may already be assigned to the proposal. The table name turns blue to indicate an override.

Travel Rate Table

Enter the name of the Travel Rate Table that will provide the travel expense rates.

Resource Set Table

Enter the name of the Resource Set Table that will provide the resource sets.

CER Table

Enter the name of the CER Table that will provide the CERs.

CER Factor Table

Enter the name of the CER Factor Table that will provide the CER factors you can assign to a CER.

Scheduled Rate Table

Enter the name of the Scheduled Rate Table that will provide the scheduled rates for the resources assigned to the tasks. You can only use scheduled rates if the fee base of your proposal is **Sell** and your Algorithm supports them.

Proposal Discount

Enter a value to override the discounts entered in the Scheduled Rate Table. It does not replace the value entered in the table, and it is only used to calculate the costs. It also overrides any value entered in the **Discount** column of the **Scheduled Rates Overrides** grid, but it does not override any value entered directly in the **Discount** column on the **Resources** tab. Leave this field blank if you do not want to override the discounts.

Effective Scheduled Rate Decimal Precision

Enter the number you want ProPricer to use to round the effective scheduled rate, which is the rate itself multiplied by the discount. You can enter a number from 0 to 6. The default number is 2. If you do not want to round the effective scheduled rate, leave this field blank. To learn more, see Decimal Display versus Decimal Precision.

Proposal CERs Page

On this page, you define the cost estimating relationships (CERs) you want ProPricer to automatically assign to every task in the proposal, or to just the tasks specified in a task selection.

Defining Proposal CERs is optional. You can add CERs to individual tasks if you prefer, but defining a Proposal CER is an easy way to ensure that the CERs you know need to be used in every task are assigned to them. You can also change the definition of a Proposal CER and add it to the same task multiple times. Additionally, you can add Proposal CERs to both Regular tasks and Summary tasks.

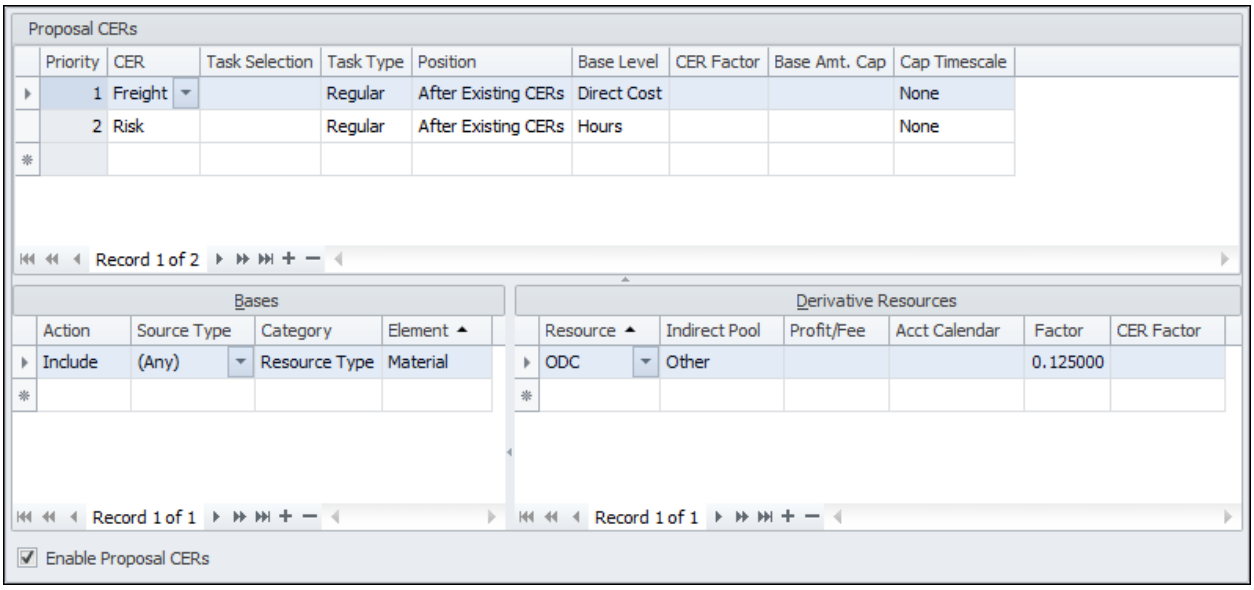
Any Proposal CER can be modified to fit the needs of the proposal. If you change the CER in the proposal's CER Table, the change will go into effect when you right-click the **Proposal CERs** grid and select **Update CER**.

The position you enter for a Proposal CER and the order in which you add CERs with the same position play an important role in the calculation of the input values of the derivative resources. This is because the derivative resources added to the task from one Proposal CER can affect the input values of the derivative resources of the subsequent Proposal CERs.

Notes:

- *ProPricer will not add any Proposal CER to the tasks until you have selected the **Enable CERs** checkbox.*
- *The input values of derivative resources will not be calculated if the conditions of the base resources are not met. For example: The Category and Element of the base resource are Resource Class and Manufacturing respectively, and resource Senior Engineer has not been added to the task.*
- *ProPricer will not add a Proposal CER to a task if the Base Level of the CER is an indirect element that does not exist in the Algorithm used by the proposal.*

The **Proposal CERs** page is divided into three grids: **Proposal CERs**, **Bases**, and **Derivative Resources**.



Proposal CERs

In this grid, you select the CERs you want to add to the proposal as Proposal CERs.

Priority

This column is for information only. It indicates the order in which Proposal CERs are added to the proposal, as well as the order in which they will appear on the **CERs (Data View)** tab. This is especially important when dealing with Proposal CERs with the same position since the derivative elements of one Proposal CER can influence derivative values of subsequent Proposal CERs.

CER

Enter the name of the CER you want to define as a Proposal CER.

Task Selection

Enter a task selection if you want to assign the Proposal CER to specific tasks. Leave this field empty to assign the Proposal CER to all the tasks in the proposal.

If no task selection exists, or if the appropriate tasks are not included in an existing one, click the ellipsis (...) button to open the **Task Selections** grid and create or modify an existing one.

Task Type

Enter the type of tasks to which you want to assign the Proposal CER. You can assign the CER to Regular tasks or Summary tasks only, or you can select **Any** to add it to both types of tasks.

Position

Select whether you want the Proposal CER to be added before or after other CERs assigned to the task. The order in which CERs are arranged on the **CERs** tab of Task View is a major factor in the calculation of the input values of the derivative resources.

Base Level

This column shows the base level entered for the CER in the proposal's CER Table. However, you can change it.

CER Factor

This column shows the CER factor entered for the CER in the proposal's CER Table. However, you can change it.

Base Amt. Cap

If you enter a base amount cap, ProPricer will stop calculating the derivative resource input values when the base resource reaches the cap. The cap timescale determines how the cap is applied in a proposal.

For example, let's say the CER base level is *Direct Cost*, and the base amount cap is *5,000* with no cap timescale. In a proposal, the CER calculation will stop when the direct cost of the base reaches $5,000. If the cap had an annual timescale, the calculation in each year would stop when the annual direct cost reaches $5,000.

Cap Timescale

This timescale is for the base amount cap. The options are:

- **None** - The cap is applied to the entire base amount. Once the cap is reached and the CER calculation stops, it will not start again.
- **Annual** - The cap is applied to the base amount of each year. Once the annual cap is reached and the CER calculation stops for that year, it will start again the following year.

Bases

This grid shows the base resources defined for the CER in the proposal's CER Table.

Action

Choose which base resources to include in or exclude from the definition of the CER.

Source Type

A resource's source type indicates how it was added to a task. Select a source type to include or exclude resources of that type. The options are:

- **(Any)** - Any source type. This is the default option.
- **Activity** - Resources added by activities on the Activities tab of Task View.
- **Allocation** - Resources added by resource allocations on the Allocations tab of Task View, and by equipment/ODC allocations.
- **CER** - Resources added by other CERs on the CERs tab of Task View.
- **Direct** - Resources added directly to tasks on the Resources tab of Task View.
- **Formula** - Resources added by formulas on the Formulas tab of Task View.

- **Material** - Resources added by parts and assemblies on the Material tab of Task View.
- **Resource Set** - Resources added by resource sets on the Resource Sets tab of Task View.
- **Travel** - Resources added by trips on the Travel tab of Task View.

Category

This column shows the category entered for the CER in the proposal's CER Table. However, you can change it.

Element

This column shows the element entered for the CER in the proposal's CER Table. However, you can change it.

Resource Fields

These columns appear if there are resource fields defined in the Resource Field Library or Proposal Properties. They show the value entered in proposal's CER Table. However, you can change it.

Entering a value in a resource field tells ProPricer to use resources with that resource field value. You can enter a partial value with the asterisk * wildcard to summarize multiple values containing the same string of characters (for example, *AAA** to account for all values that start with *AAA*, such as *AAA123* and *AAAXYZ*).

(Any) appears as a possible resource field value. **(Any)** means that the values calculated for the derivative elements of the CER will be based on the values of all resources from the selected category, regardless of the entries in their resource fields.

Resources with empty resource fields are included as well. If a resource field is empty, the values of the derivative elements are calculated based on the values of the resources that have no entries in that field.

Derivative Resources

This grid shows the derivative resources defined for the proposal's CER Table.

Resource

This column shows the derivative resource entered for the CER in the proposal's CER Table. However, you can change it.

Resource Fields

These columns appear if there are resource fields defined in the proposal's CER Table or the Proposal Properties. They show the value entered in the CER Table. However, you can change it.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table of the proposal for the resource.

Profit/Fee

Enter a profit/fee rate for the resource.

Accounting Calendar

This column shows the accounting calendar assigned to the resource in the proposal's Direct Rate Table. However, you can change it.

Rate Band

This column appears only if you have assigned a Rate Band Table to the proposal’s Direct Rate Table. It shows the rate band entered for the resource.

Currency

This column appears only if Multi-Currency is enabled for the proposal. The column will show the proposal currency of resources whose rate type is *Cost*. You can change it.

Factor

This column shows the factor entered for the derivative resource in the proposal's CER Table. However, you can change it.

CER Factor

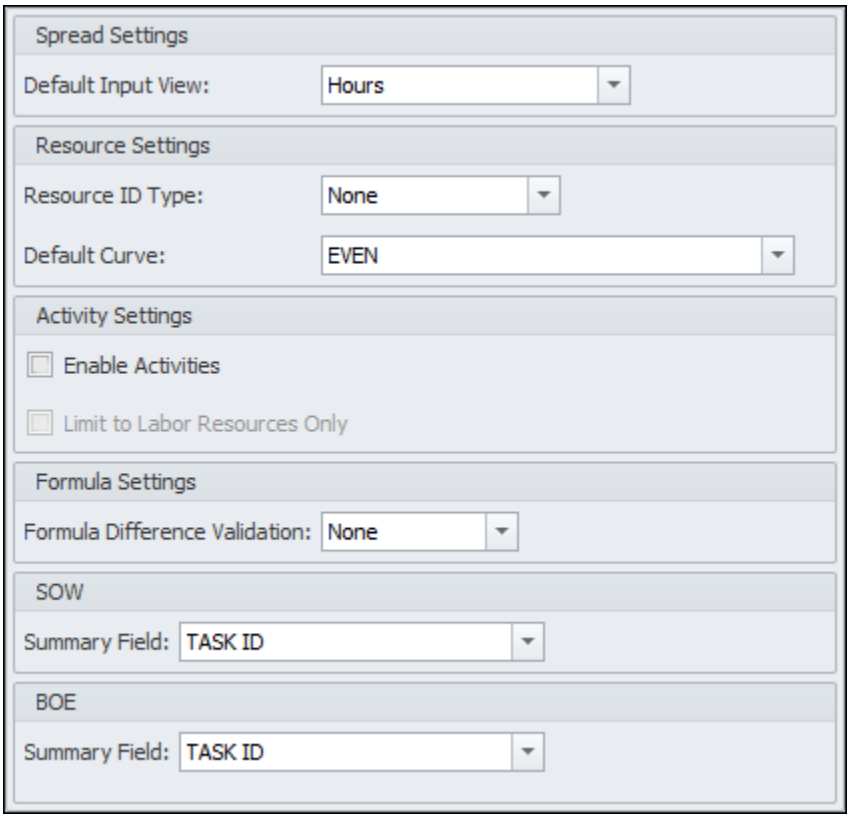
This column shows the CER factor entered for the derivative resource or CER in the proposal's CER Table. However, you can change it.

Enable Proposal CERs

Select this checkbox to add the CERs to the tasks in the proposal.

Proposal Input Page

On this page, you set options related to the entry of proposal data.



Spread Settings

Default Input View

Set the default format of input data for labor resources assigned to your tasks.

Note: In Task View and Resource View, you can quickly switch between hours and equivalent heads. At the top of the ***Resource Input*** *grid, click* ***Hours/Units/Cost*** *or* ***Equiv. Heads/Unit/Cost****. Alternatively, right-click the grid, go to* ***View*** *>* ***Input View****, and then select an option.*

Resource Settings

Resource ID Type

Specify how resources are identified in tasks.

None

A unique ID is not given to each resource.

Text

In a proposal's Resource Input information, a **Resource ID** column appears. Type text in the column to give each resource a unique ID.

Auto Number

In a proposal's Resource Input information, a **Resource ID** column appears. In the column, ProPricer automatically enters a unique ID when a resource is added to a task. Numbering starts at *1* and continues consecutively with each new resource.

Default Curve

Set the default spread curve to use when a new resource is assigned to a task. If a default curve is not needed, select **None**.

Activity Settings

Enable Activities

Select this checkbox to enable the **Activities** tab in Task View.

Limit to Labor Resource Only

Select this checkbox to only allow resources whose resource type is *Labor* to be added to the **Activities** tab.

Formula Settings

Formula Difference Validation

Specify what will happen when the result of the formula differs from the spread amount on the **Formulas** tab.

None

ProPricer will ignore the difference and allow you to leave the tab.

Prohibit

ProPricer will not allow you to leave the tab until there is no difference between the result and spread amount.

Prompt

ProPricer will inform you of the difference and ask if you want to take care of it before leaving the tab.

*Note: The default setting is **None**. Selecting **Prohibit** or **Prompt** only affects formulas entered after the change. Formulas entered prior to the change are not affected. We recommend you run the Audit Report to identify any differences between the result and spread amount.*

SOW

Summary Field

Select the summary field that will be associated with SOW text when that information is entered in the proposal. The default field is the task name summary field, such as *TASK ID*. The selected summary field will appear on the SOW input tab.

When SOW text is linked to the task level, it can only be entered per task. When it is linked to a higher level, such as *WBS*, it can be entered for a group of related tasks or for a single task.

If a summary field is not available to be selected, redefine it (in **Proposal Properties** > **Summary Fields** > **General**) to meet either of the following specifications:

- **Data Type** is set to *List*, and the **Value List** contains values.
- **Data Type** is set to *Text*, a Title Table containing elements is assigned, and **Validate** is selected.

After the selected summary field is used for entering task data in the proposal, this setting can no longer be changed.

BOE

Summary Field

Select the summary field that will be associated with BOE text when that information is entered in the proposal. The default field is the task name summary field, such as *TASK ID*. The selected summary field will appear on the BOE input tab.

When BOE text is linked to the task level, it can only be entered per task. When it is linked to a higher level, such as *WBS*, it can be entered for a group of related tasks or for a single task.

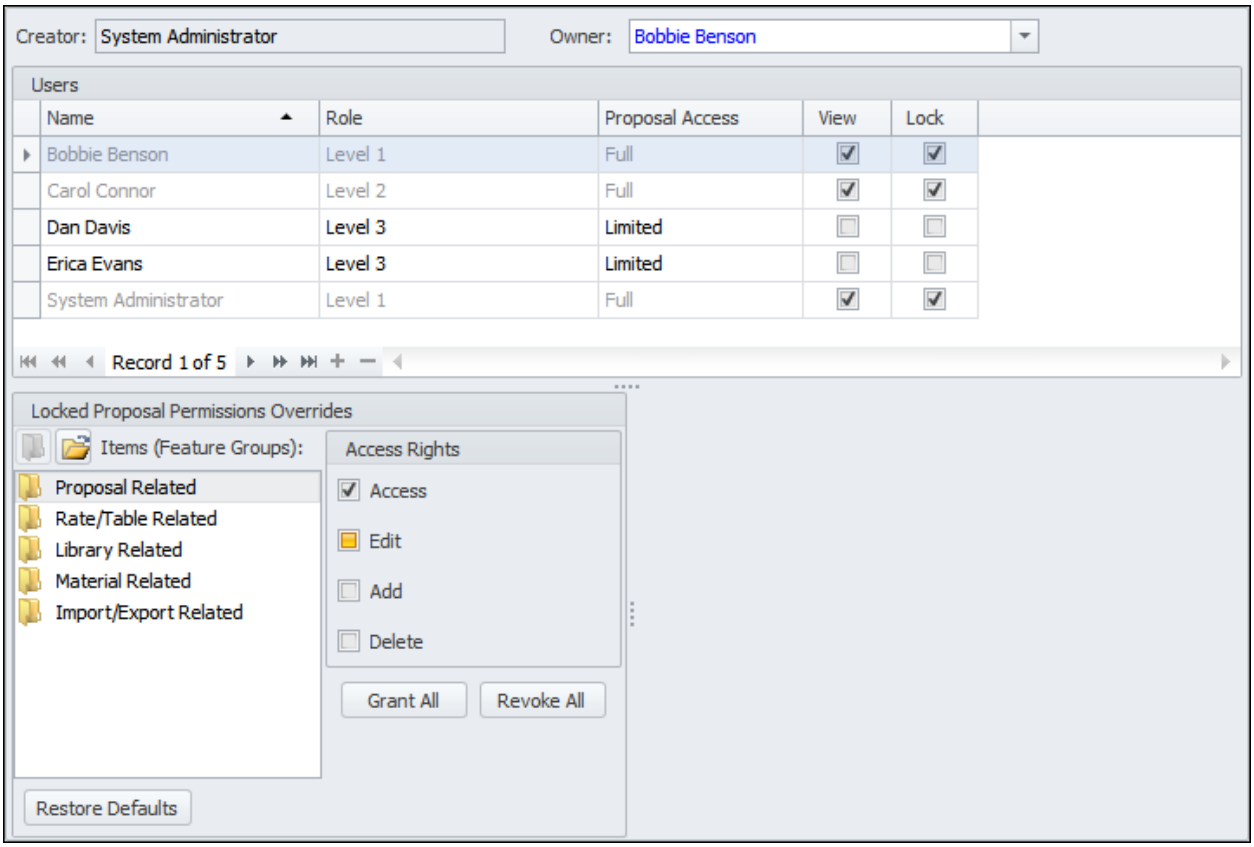
If a summary field is not available to be selected, redefine it (in **Proposal Properties** > **Summary Fields** > **General**) to meet either of the following specifications:

- **Data Type** is set to *List*, and the **Value List** contains values.
- **Data Type** is set to *Text*, a Title Table containing elements is assigned, and **Validate** is selected.

After the selected summary field is used for entering task data in the proposal, this setting can no longer be changed.

Proposal Rights Page

On this page, you grant users the ability to view and lock/unlock the current proposal. You can also override any Locked Proposal Access Right for a specific user.



Creator

This field shows the name of person who created the proposal.

Owner

Select the user who will have the same capabilities as the Proposal Creator. This user can always see the proposal and can also manage the Proposal Rights of the proposal.

Users

In this section you grant View and Lock privileges to users whose Proposal Access is *Limited*. Users with Proposal Access *Full* will always be able to see the complete list of proposals and lock any proposal.

Name

This field shows the name of the user.

Role

This field shows the role assigned to the user.

Proposal Access

This field shows whether the user has Full or Limited access to the proposal.

View

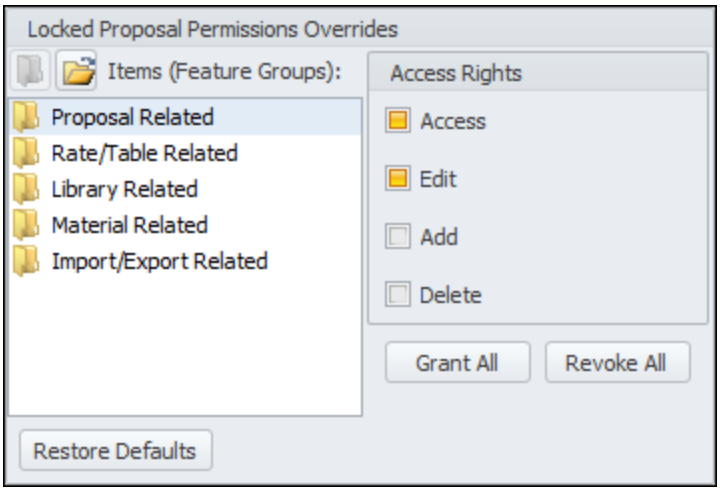
Select this checkbox if you want the user to be able to see the proposal in his list of proposals. You can only select the checkboxes of users whose Proposal Access is *Limited*.

Lock

Select this checkbox if you want the user to be able to lock/unlock the proposal. You can only select the checkboxes of users whose Proposal Access is *Limited.* The **Lock** checkbox is linked to the **View** checkbox. If a user does not have view rights, he or she does not have lock rights.

Locked Proposal Permissions Overrides

In this section, you can override any Locked Proposal Access Right for a specific user. It is subdivided into two groups: **Items (Feature Groups)** and **Access Rights**.



Items (Feature Groups)

This box displays five folders containing different ProPricer features or options. Each folder contains individual elements. Double-click a folder to see its contents. The folders include:

- Proposal Related Options
- Rate/Table Related Options
- Library Related Options
- Material Related Options
- Import/Export Related Options

Access Rights

The Access Rights consist of **Access**, **Edit**, **Add**, **Delete**, and **Print**. Some elements will not have all these rights available. You can grant rights to all the items in a folder, or open the folder and grant them individually. If you want to grant specific rights on an item-by-item basis, you need to select the **Access** checkbox first to enable the checkboxes of the subsequent rights.

Grant All

Click this button to grant all the Access Rights for the folder or element. All the checkboxes will be selected.

Revoke All

Click this button to revoke all the Access Rights for the folder or element. All the checkboxes will be cleared.

Restore Defaults

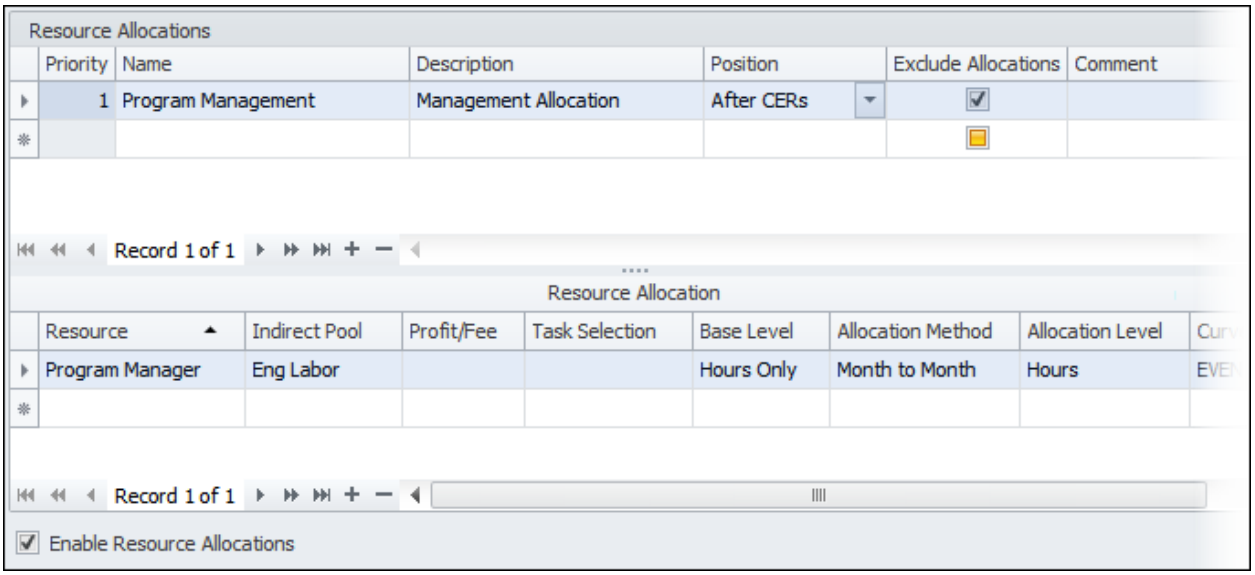
Click the button to restore the original Locked Proposal Access Rights.

Resource Allocations Page

On this page, you create the allocations you want to use to proportionally assign resources to your tasks. You can allocate hours or cost, based on input or a cost level.

If the **Enable Resource Allocations** checkbox at the bottom of the page is selected, an Allocations tab will be added to the Task View.

The Resource Allocations page is divided into two grids: Resource Allocations and Resource Allocation.



Resource Allocations

Priority

This field is for information only. It indicates the order in which resource allocations are added to the proposal.

Name

Enter a name for the resource allocation.

Description

Enter a description of the resource allocation.

Position

Enter *Before CERs* to include the allocated resource in the calculation of the derivative resource. Enter *After CERs* to exclude the allocated resource from the calculation of the derivative resource. See *Allocation Position* to learn more.

Exclude Allocations

Select this checkbox if you want previous allocations to be excluded from the current allocation.

Comment

Enter any applicable comment.

Resource Allocation

Resource

Enter the resource you want to allocate.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter a values in the field as needed.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table for the resource. You can change it. This column is hidden by default.

Profit/Fee

Override the profit/fee rate of the resource. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource's assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Task Selection

Enter a task selection if you want to apply the allocation to specific tasks.

Base Level

Enter the cost level that the allocation is based on. For example, it could be based on total overhead instead of hours.

Allocation Method

Specify whether the allocation will be based on month-to-month or month-to-total values. This changes how ProPricer calculates the allocated amounts in months/quarters/years. See *Month-to-Month* and *Month-to-Total* to learn more.

Allocation Level

Enter the type of cost that the allocation is applied as. For example, it can be applied as a direct cost or an overhead cost.

Curve

Enter a curve to distribute the spread amount.

Spread Method

Enter the spread method that defines how the curve will be applied over the spread period.

Start Date

Enter the date you want the allocation of the resource hours/units/cost to start.

End Date

Enter the date you want the allocation to stop.

Spread Amount

Enter the hours/units/cost you want to allocate for the resource.

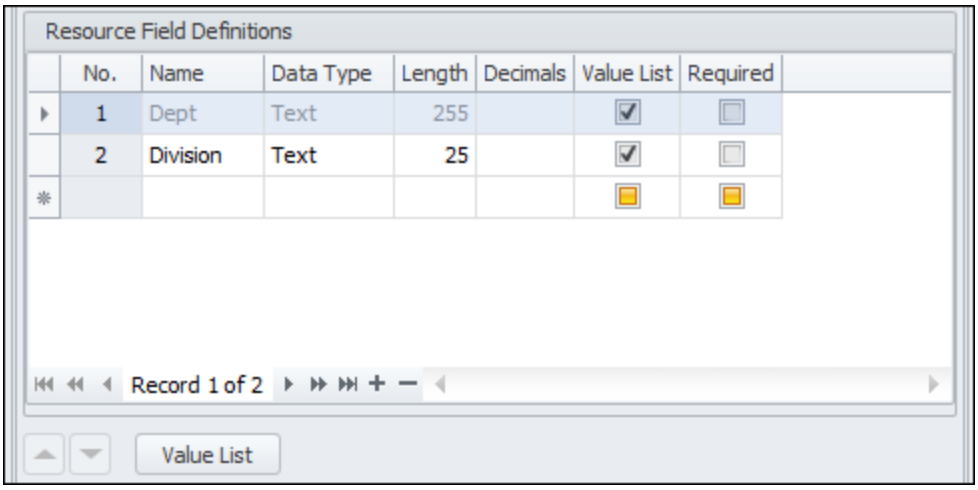
Distribution

Each column represents a month/quarter/year in the spread period and shows how much of the spread amount is distributed during that time.

Resource Fields Folder

General Page

On this page, you define proposal-specific resource fields. The page also shows any resource fields defined in the Resource Field Library, but they are read-only. By entering data in the resource fields, you provide more detailed information about the resources used in your proposal, thus creating different identities of the same resource. In this way, you can use resources with the same name more than once in the same task, because the resources have different values in the resource fields.



No.

Shows the order of the resource fields.

Name

Shows the name of each field from the Resource Field Library, if any exist. You can enter a name to create a proposal-specific resource field.

Data Type

Select the type of data that can be entered in a resource field.

Number

A number must be entered.

Text

Text must be entered. This is the default setting.

After a text resource field is created and used in a proposal, you can convert its text entries into a value list. To convert text entries, change the field's data type from **Text** to **List**.

Length

This field is available for editing only if the data type of the resource field is *Text*. The number entered here defines the maximum number of characters that an entry in the field can have. The default value is 255, which is also the maximum allowed for the field.

Decimals

This field is available for editing only if the data type of the resource field is *Number*. The value entered here specifies how many digits appear after the decimal point. This value overrides the value entered in Regional and Language Options of the Microsoft Windows Control Panel. The maximum number of decimal places that you can enter for a resource field is 12. The default is zero.

Value List

Select the checkbox to enable and show the predefined values of the resource field, or clear it to disable and hide the values.

When a resource field has a disabled value list:

- The resource field is not available for resource field mapping in a proposal.
- The resource field still appears in proposals and users can enter new values in them, but existing predefined values do not appear as options in the field.
- You can import values to the resource field.
- You can export the resource field and its value list.

Required

Select this checkbox to make the field required when resource information is entered in the proposal.

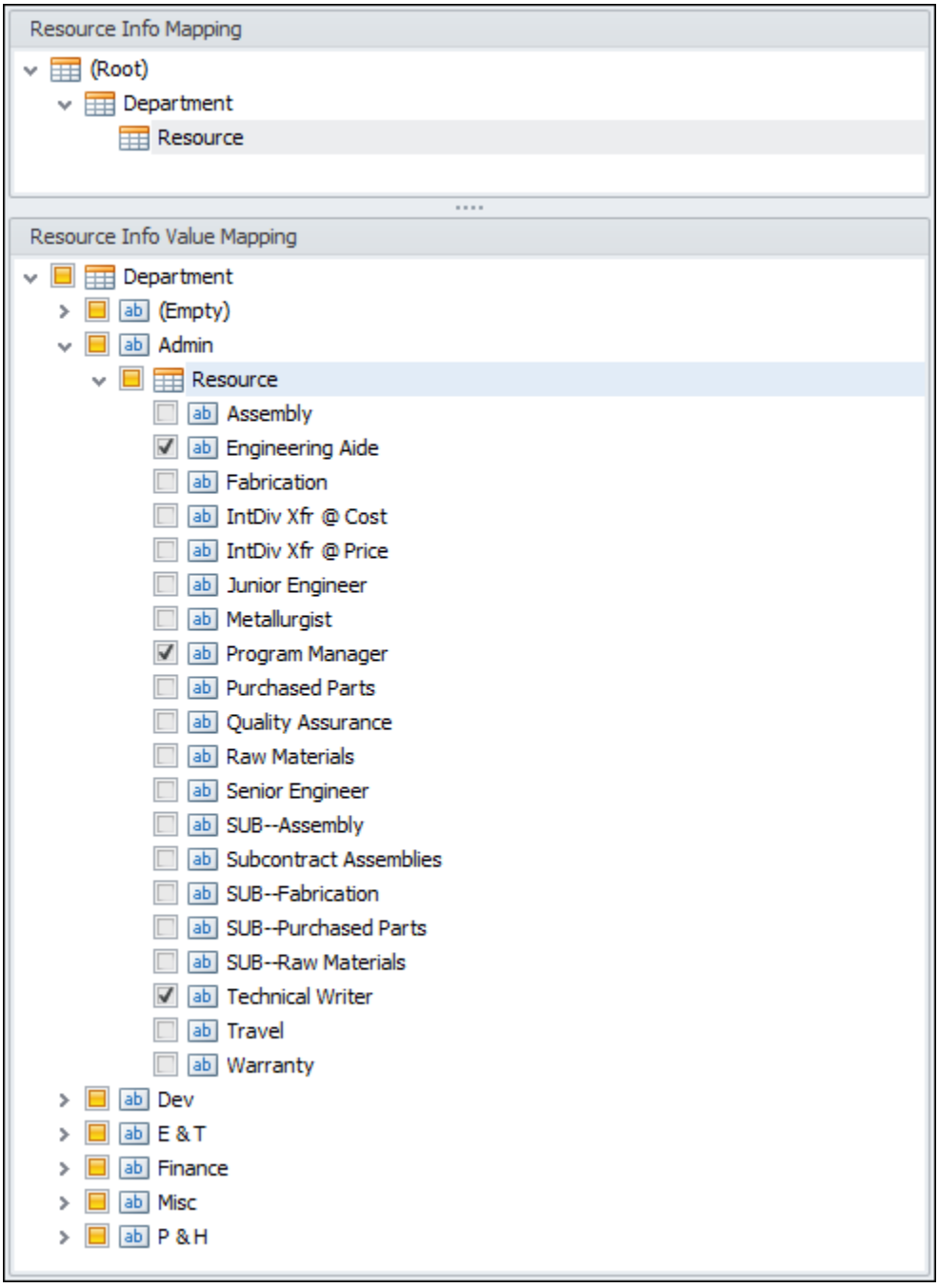
Value List button

Click this button to open the Value List dialog box and set the predefined values that are acceptable in the resource field.

Mapping Page

After defining resource fields for a proposal on the General page, you can map the fields and their values on this Mapping page (located in the Resource Fields subfolder). It is divided into two sections: Resource Field Mapping and Resource Field Value Mapping.

Note: If the value list of a resource field is disabled, then the resource field is not available for resource field mapping.



Resource Info Mapping

Resource fields appear in a tree structure that you can manipulate to create parent-child relationships between fields. The main element of this structure is **(Root)**. All other elements within it are resource fields.

(Root)

You can undo a correlation between mapped resource fields by dropping the child element here. In the preceding screenshot, **Resource** is a child element mapped to **Department**. If **Resource** were dropped onto **(Root)**, then **Resource** would become a base resource field, just like **Department**.

Base Resource Fields

Base fields are the highest-level resource fields in the structure. The filtering of resource field values during resource input begins with an entry in a base field. You can map numerous other fields to a base field, and you can have multiple base fields in your mapping.

Mapped Resource Fields

A resource field becomes mapped when you drop it onto another field. Once mapped, it is considered a child element, and the higher-level field is its parent. Unlike a base resource field, a mapped field can simultaneously be a parent and a child in the mapping structure.

Resource Info Value Mapping

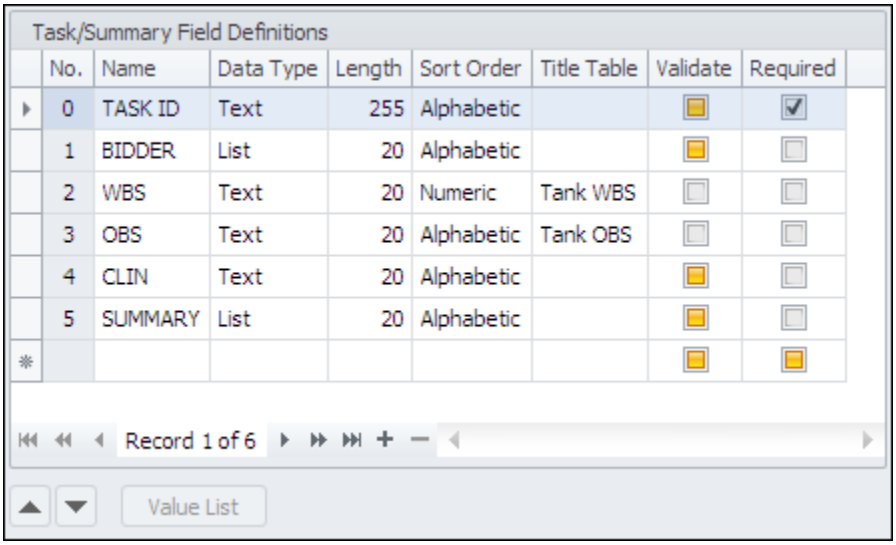
The hierarchical structure of your resource field mapping from the previous section automatically appears in this section. The values provided by each resource field's value list are also displayed. Your value mapping in this section determines how values will be filtered when an entry is made in a base resource field.

The checkboxes allow you to specify which values will be available in each resource field during resource input. You can select or clear all values of a resource field with the checkbox next to that field. A partially filled resource field checkbox indicates that some of its values are selected, but not all. You can also select or clear values individually with their checkboxes.

Summary Fields Folder

General Page

Here you can define up to 100 summary fields for categorizing the proposal's tasks. The field that identifies tasks can be renamed and changed, but it cannot be deleted.



No.

Shows the order that the summary fields will appear in the **Tasks** grid. Use the **Up** and **Down** arrows to reorder fields.

Name

Enter a name for the summary field, which is also the label of the column in the **Tasks** grid.

Data Type

Select the type of data that can be entered in a summary field.

AutoNumber

Automatically creates unique names for new tasks. AutoNumbering starts at *1* and continues consecutively with each new task. AutoNumbered task names are not editable.

Date

A calendar date must be entered. **Sort Order** is automatically changed to *Chronologic*. If chosen, the **Length**, **Title Table**, and **Validate** fields are not available.

List

A value from the field's value list must be entered.

Number

A number must be entered. **Sort Order** is automatically changed to *Numeric*. If chosen, the **Length**, **Title Table**, and **Validate** fields are not available.

Text

Text must be entered. This is the default setting.

After a text summary field has been created and used in a proposal, you can convert its text entries into a value list. Just change the field's data type from *Text* to *List*. At that point, you can choose to make the value list hierarchical by creating a roll-up with a specific step size.

Length

The length can only be changed if the data type is *Text*. It defines the maximum number of characters that an entry in the field can have. The default value is 255.

Sort Order

Select how the summary field entries will be sorted and rolled up on reports. There are two options to choose from:

Alphabetic

The entries are treated as strings of characters. Words are sorted based on the order of the letters. The numbers 1, 2, 10, 20, 100, 200 sorted alphabetically would result in 1, 10, 100, 2, 20, 200.

Numeric

The entries are treated as segmented strings that are sorted based on their value. The numeric sort of the numbers in the previous example would result in 1, 2, 10, 20, 100, 200.

Title Table

Enter the name of the Title Table you want to assign to the summary field. Assigning a Title Table to a summary field allows you to draw the summary field entries from the Title Table. One advantage of using a Title Table is that it provides hierarchical relationships for the entries in the field which, in turn, will help with the structure of the proposal, as well as with the reporting process.

Note: You cannot attach a Title Table to the Task ID summary field, nor can you attach a Title Table to a summary field if its data type is something other than Text.

Validate

Select this checkbox if you want ProPricer to validate the entries in the summary fields based on elements in the Title Table. If you choose to validate the summary field, ProPricer will not allow you to enter an element that does not exist in the Title Table specified.

Required

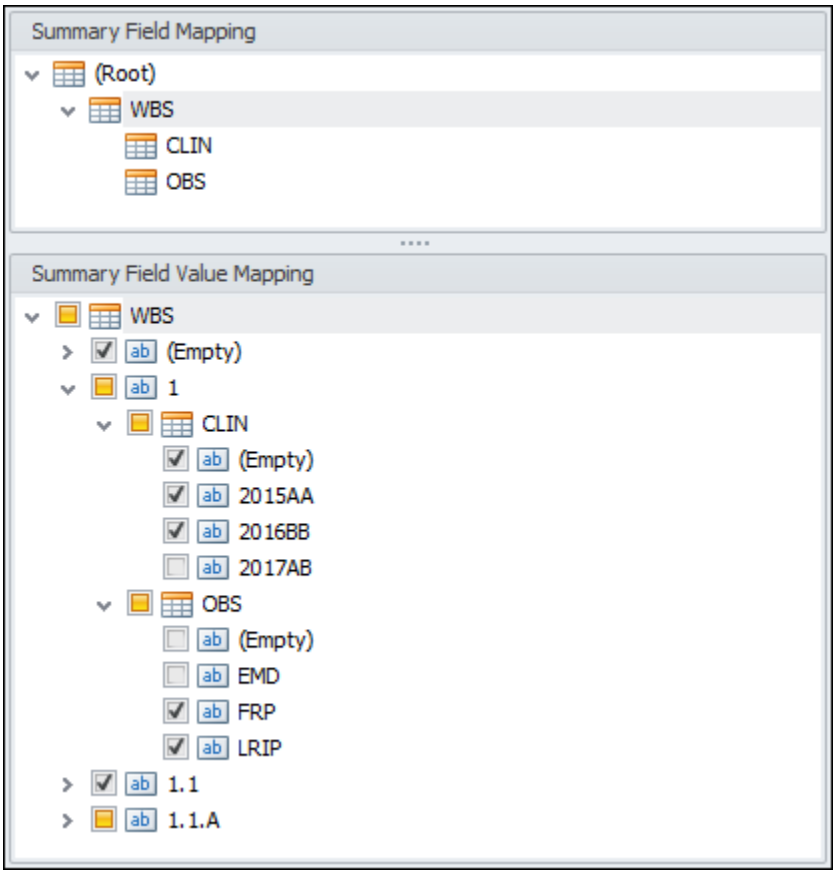
Select this checkbox to make the field required when task information is entered in the proposal.

Value List

This button becomes available if you selected Data Type *List*. It allows you to set the values that can be entered in the summary field.

Mapping Page

After defining summary fields for a proposal on the General page, you can map the fields and their values on this Mapping page (located in the Summary Fields subfolder). It is divided into two sections: Summary Field Mapping and Summary Field Value Mapping.



Summary Field Mapping

Summary fields eligible for mapping appear in a tree structure that you can manipulate to create parent-child relationships between fields. The main element of this structure is **(Root)**. All other elements within it are summary fields.

(Root)

You can undo a correlation between mapped summary fields by dropping the child element here. In the preceding screenshot, **CLIN** and **OBS** are

child elements mapped to **WBS**. If **CLIN** were dropped onto **(Root)**, then **CLIN** would become a base summary field, just like **WBS**.

Base Summary Fields

Base fields are the highest-level summary fields in the structure. The filtering of summary field values during task input begins with an entry in a base field. You can map numerous other fields to a base field, and you can have multiple base fields in your mapping.

Mapped Summary Fields

A summary field becomes mapped when you drop it onto another field. Once mapped, it is considered a child element, and the higher-level field is its parent. Unlike a base summary field, a mapped field can simultaneously be a parent and a child in the mapping structure.

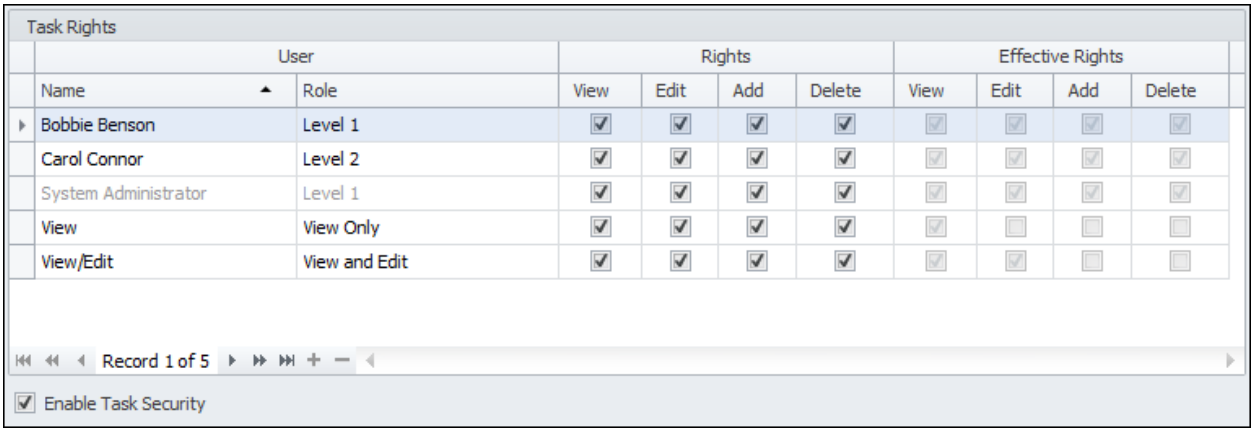
Summary Field Value Mapping

The hierarchical structure of your summary field mapping from the previous section automatically appears in this section. The values provided by each summary field's value list or Title Table are also displayed. Your value mapping in this section determines how values will be filtered when an entry is made in a base summary field.

The checkboxes allow you to specify which values will be available in each summary field during task input. You can select or clear all values of a summary field with the checkbox next to that field. A partially filled summary field checkbox indicates that some of its values are selected, but not all. You can also select or clear values individually with their checkboxes.

Task Rights Page

On this page, you restrict the actions a user can perform on the tasks in the current proposal. For example, you can allow a user to edit a task, but not delete it. The initial rights are inherited from the permissions associated with a user's role. The page is divided into three sections: User, Rights, and Effective Rights.



User

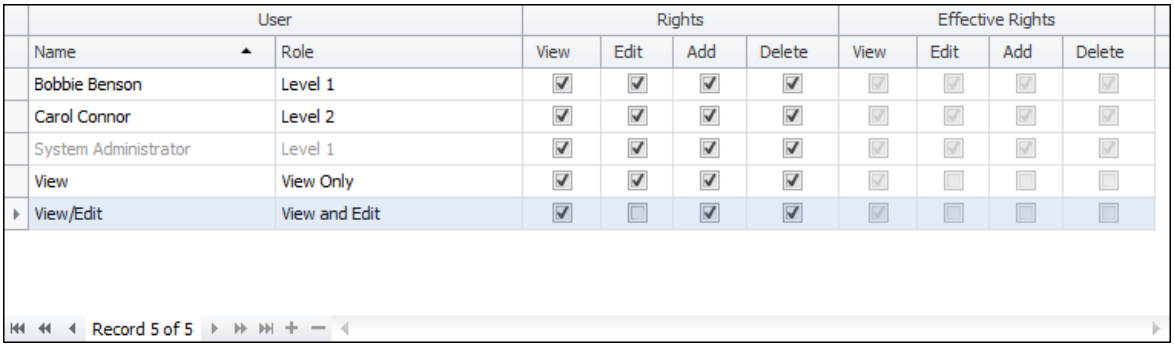
The **User** section shows a list of the people who have been granted View Rights to the proposal and the role assigned to them. This is for information only and cannot be edited.

Rights

The **Rights** section is where you limit the user's rights granted by the role. The section consists of View, Edit, Add, and Delete checkboxes that are all selected by default. The **Effective Rights** section in the screenshot above shows the rights inherited from the roles (we did not select/clear any of the checkboxes in the **Rights** section). The *View Only* role assigned to user *View* does not allow him to edit, add, or delete tasks. Even though the Edit, Add, and Delete checkboxes are selected in the **Rights** section, *View* will only be able to see the tasks. You can only revoke a right that has been granted by the role.

Effective Rights

The **Effective Rights** section shows the View, Edit, Add, and Delete rights that will be used with the proposal. It is a combination of the rights inherited from the role and changes in the **Rights** section. It is read only and cannot be edited. In the following example, we cleared the **Edit** checkbox in the **Rights** section for user *View/Edit*. The **Effective Rights** section only shows the **View** checkbox selected, indicating that *View/Edit* will only be able to see the tasks in the proposal.



	User		Rights				Effective Rights			
	Name	Role	View	Edit	Add	Delete	View	Edit	Add	Delete
	Bobbie Benson	Level 1	☑	☑	☑	☑	☑	☑	☑	☑
	Carol Connor	Level 2	☑	☑	☑	☑	☑	☑	☑	☑
	System Administrator	Level 1	☑	☑	☑	☑	☑	☑	☑	☑
	View	View Only	☑	☑	☑	☑	☑	☐	☐	☐
▸	View/Edit	View and Edit	☑	☐	☑	☑	☑	☐	☐	☐

Record 5 of 5

Enable Task Security

Select this checkbox to apply the changes made here. You can clear the checkbox while you set the task rights of the users and then select it again when you want the changes to take effect.

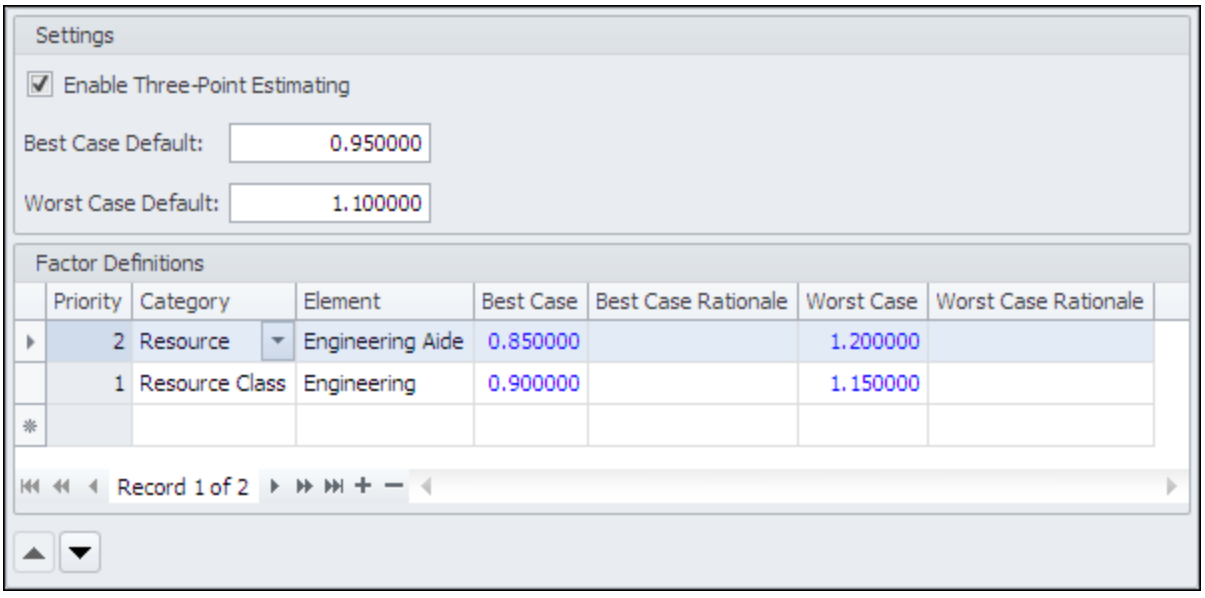
Three-Point Estimating Folder

General Page

Here you can enable and disable Three-Point Estimating in your proposal, and you can control how the Best Case and Worst Case estimates are calculated.

After you enable the feature and enter Best Case and Worst Case factors, ProPricer will display data in Three-Point Estimating View and in the Three-Point Estimating tab of Task View. You will also be able to enter task-specific factor overrides in the Best Case Factor and Worst Case Factor columns of Task View.

*Note: In proposals, there is a quick way to check your Best Case and Worst Case estimates while working on the Most Likely estimates. If a grid shows distribution data for direct resources, like in the **Resources** tab, look for a **Most Likely** button at the top of the grid. Clicking the button will switch the display of estimates instantly, and the button name will change to reflect the data you are viewing.*



Settings

Enable Three-Point Estimating

Select this checkbox to use Three-Point Estimating in the proposal. Once enabled, the **Three-Point Estimating** tab appears in Task View.

Best Case Default

Enter the default factor that will be used to calculate the Best Case distribution of resource hours/units and the Best Case direct cost. This value is a percentage of the Most Likely estimates, so an entry of *1.000000* (100%) means that the Best Case hours/units/cost data is the same as the Most Likely hours/units/cost data.

Worst Case Default

Enter the default factor that will be used to calculate the Worst Case distribution of resource hours/units and the Worst Case direct cost. This value is a percentage of the Most Likely estimates, so an entry of *1.000000* (100%) means that the Worst Case hours/units/cost data is the same as the Most Likely hours/units/cost data.

Factor Definitions

In this section, you can create Best Case and Worst Case factors for specific resources, resource classes, and resource types. These factors override the default Best Case and Worst Case factors.

Priority

This column shows the order ProPricer will use to determine which set of Best Case and Worst Case factors to apply. The value in the **Priority** column cannot be edited, but the order can be rearranged with the up and down arrows below the grid.

Priority is important when more than one Factor Definition is applicable. In this situation, ProPricer applies the factors of the definition with the highest Priority.

For example, in the preceding screenshot, factors are defined for the *Engineering* resource class. Factors are also defined for the *Engineering*

Aide resource, which is in the *Engineering* class. As a result, both Factor Definitions will be viable when ProPricer encounters *Engineering Aide* data in our tasks. However, the *Engineering Aide* definition has a higher Priority than the *Engineering* definition, so *0.85* and *1.20* will be used to calculate the Best Case and Worst Case estimates for the *Engineering Aide* resource. For all other resources in the *Engineering* class, ProPricer will use the factors *0.90* and *1.15*.

*Note: The greater the number, the higher the Priority. In the preceding screenshot, the **Resource** definition with Priority **2** takes precedence over the **Resource Class** definition with Priority **1**.*

Category

Enter the Category for which you want to define factors. Each Category is a different resource detail level (that is, resource, resource class, and resource type).

Element

Enter the specific Category Element for which you want to define factors. This will be a single resource, resource class, or resource type, depending on your entry in the **Category** column. Enter **(Any)** to define factors for all resources, classes, or types in the Category.

Resource Fields

These columns appear if there are resource fields in the proposal. Enter a predefined value for the resource field, or enter **(Any)** to define factors for all resource field values.

Task Selection

This column is hidden by default. Enter a task selection if you want to define factors for specific tasks. Leave the field empty if you want the factors to be applicable to all tasks in the proposal. If no task selection exists, or if the appropriate tasks are not included in an existing one, click the ellipsis (...)

button to open the **Task Selections** grid and create or modify an existing one.

Best Case

Enter a different Best Case factor that will override the default Best Case factor. Overrides appear as blue text.

Best Case Rationale

Explain how the Best Case factor was determined. Click the arrow in the field to open a larger entry area. You can enter up to 4,000 characters.

Worst Case

Enter a different Worst Case factor that will override the default Worst Case factor. Overrides appear as blue text.

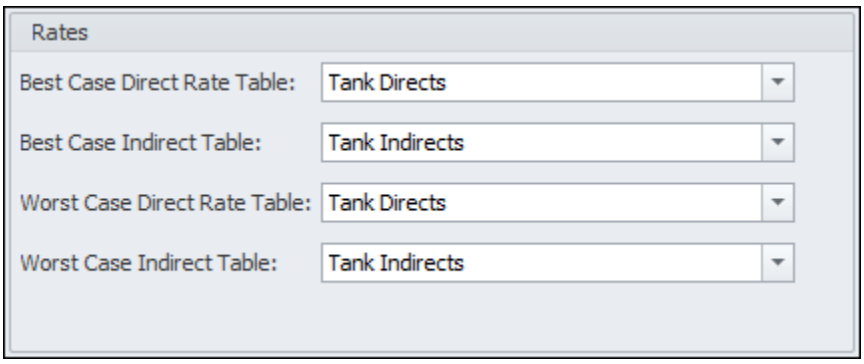
Worst Case Rationale

Explain how the Worst Case factor was determined. Click the arrow in the field to open a larger entry area. You can enter up to 4,000 characters.

Rates Page

On this page, you select the Direct Rate Tables and Indirect Rate Tables that will be used to calculate the Best Case and Worst Case estimates. You can use the same set of rates in all three scenarios (Best Case, Most Likely, and Worst Case), or you can use different rates.

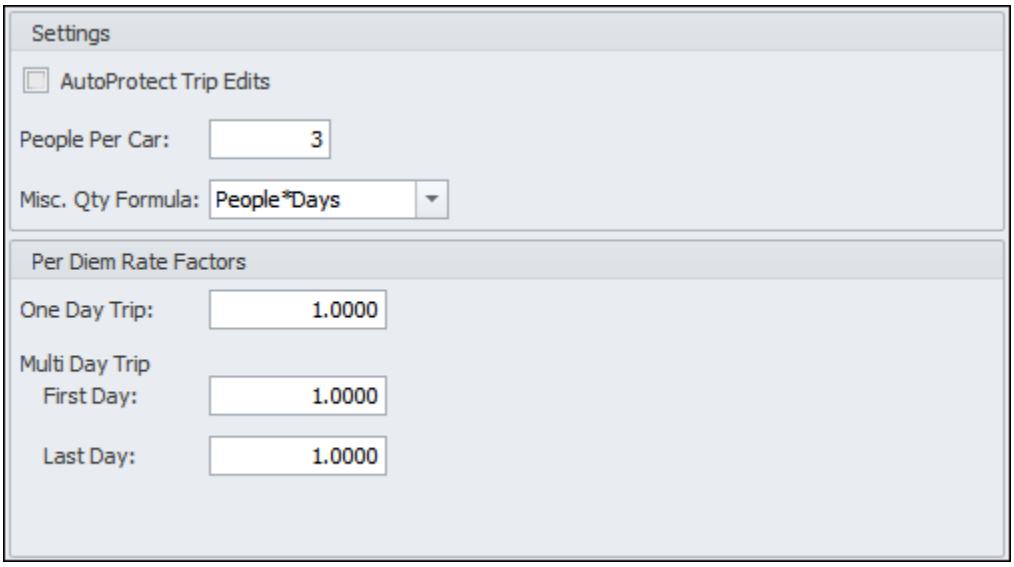
While different rate tables can be selected for each scenario, the Best Case and Worst Case tables must use the same Algorithm as the Most Likely tables. The Direct Rate Tables must also contain the same resources as the Most Likely Direct Rate Table.



Note: the Direct Rate Table and Indirect Rate Table for the Most Likely scenario are set on the Pricing page of the Proposal Properties.

Travel Page

On this page, you set the travel options for the proposal.



Settings

AutoProtect Trip Edits

Select this checkbox to automatically mark the travel expense rates of task trips as actuals. If you change the rate for a travel expense in a task, ProPricer marks that rate as actual. If the checkbox is cleared, you can still manually protect travel expenses.

People Per Car

Enter a number from *1* to *5* that sets the maximum number of people that can rent a single car. The default is *1*.

Miscellaneous Quantity Formula

Select the formula you want to use to calculate the miscellaneous travel expenses. The default value is *0*, but you can choose from:

1

The quantity is equal to *1*.

Days

The quantity is equal to the number of days the people are on a trip.

Max(Days-2,0)

The quantity is equal to the trip duration, not including the first and last days. If the duration is one to two days, then the quantity will be *0*.

Min(Days,2)

The quantity is equal to the first and last days in the trip duration, so the quantity will not exceed *2*. If the duration is one day, then the quantity will be *1*.

People

The quantity is equal to the number of people taking a trip.

People*Days

The quantity is equal to the number of people taking a trip multiplied by the trip duration.

People*Max(Days-1,0)

The quantity is equal to the number of people taking the trip multiplied by a one-day reduction of the trip duration. If the duration is one day, then the quantity will be *0*.

People*Max(Days-2,0)

The quantity is equal to the number of people taking the trip multiplied by a two-day reduction of the trip duration. If the duration is one to two days, then the quantity will be *0*.

People*Min(Days,2)

The quantity is equal to the number of people taking the trip multiplied by the first and last days in the trip duration.

Per Diem Rate Factors

This group of options allows you to set the factor values you want ProPricer to use to calculate the per diem rates for trips. The default factor in each field is *1*, but can you change it to any number between *0* and *1*.

One Day Trip

The factor for trips that last only a day.

Multi Day Trip

First Day

The factor for the first day of all trips.

Last Day

The factor for the last day of all trips.

Reports Folder

Footer Page

On this page, you enter the text you want to appear in the footer section of every report you generate for the proposal. This page may contain text entered on the Footer page of the Report Defaults. You can accept it or change it.

Footer

Enter the text you want to print in the footer of your reports. This text is optional. For example, you can enter a security message, such as *Company Private*, *Proprietary*, *Confidential*, etc. or any other text that is appropriate for your company.

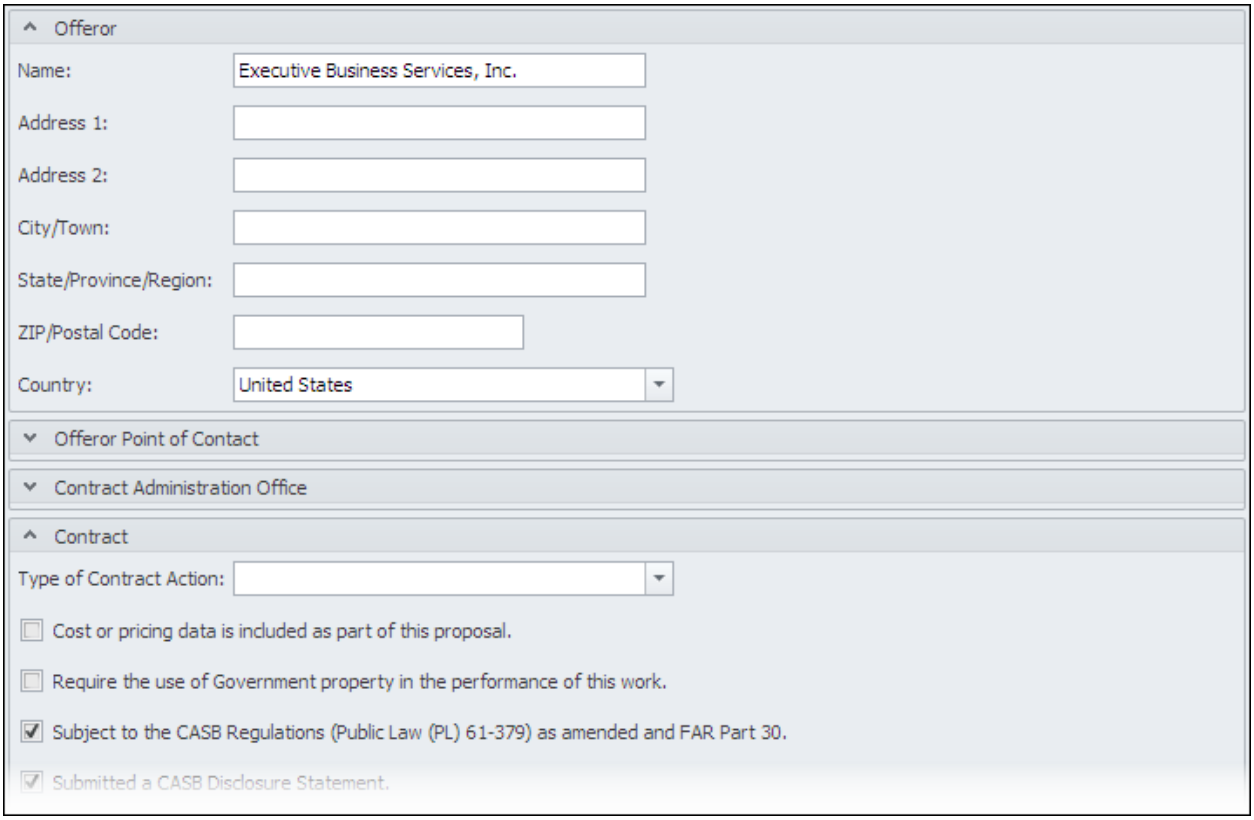
Restore Defaults

Click this button to restore the default text entered on the **Footer** page of **Report Defaults**.

Government Data Folder

Cover Sheet Page

On this page, you enter the information required to run the Proposal Cover Sheet Report. The dialog box is divided into four sections: Offeror, Offeror Point of Contact, Contract Administration Office, and Contract. We collapsed the Offeror Point of Contact and Contract Administration Office sections in the screenshot.



Offeror

In this section, enter the name and address of your company.

Offeror Point of Contact

In this section, enter the name, title, phone number, and email address of the contact person.

Contract Administration Office

In this section, enter the name and address of the Contract Administration Office.

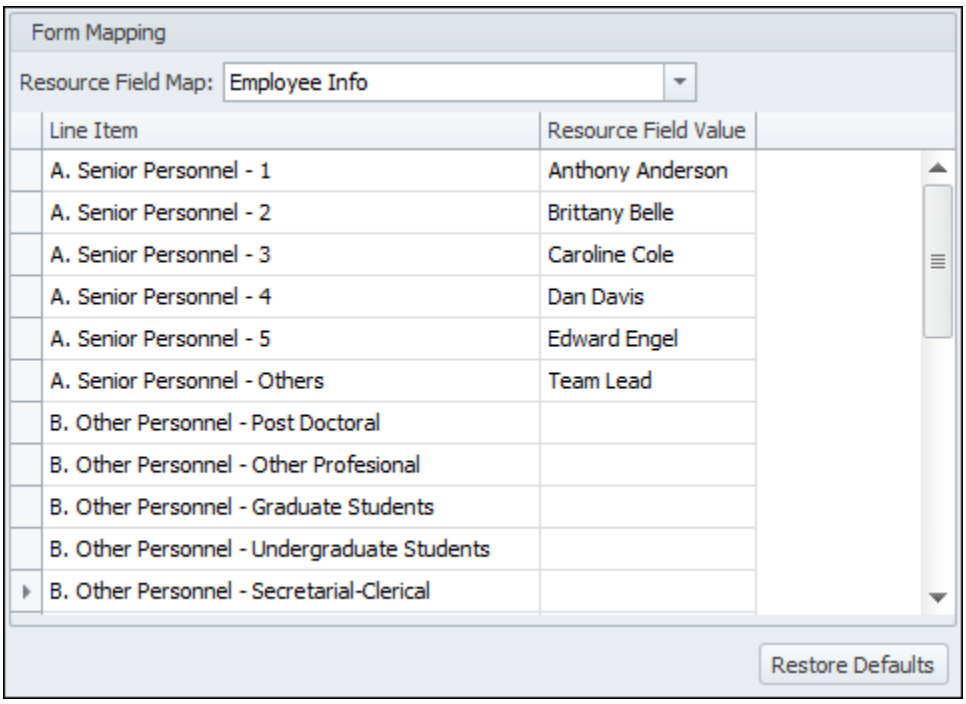
Contract

In this section, you establish the type of contract you are submitting. You also specify if it includes cost or pricing data, if it requires the use of government property, and if it complies with various regulations and requirements. Select the checkboxes of all the apply.

DOE Form 4620 Page

This page is exclusively for the DOE Form 4620 Report. To run the report on any proposal, the form mapping must be set up here first. In the Report Defaults, you can set up the default form mapping for all new proposals.

These settings use a resource field and its values to associate resources with the line items in DOE Form 4620.



Form Mapping

Resource Field Map

Select an existing resource field from the Resource Field Library. This field provides the values you map to each line item.

Line Item

These line items correspond to the ones in the report. The line item names cannot be edited.

Resource Field Value

Select a resource field value to map it to a line item. This determines how the report calculates each item’s cost. If a resource has the value assigned to it in a task, then the line item will include that resource.

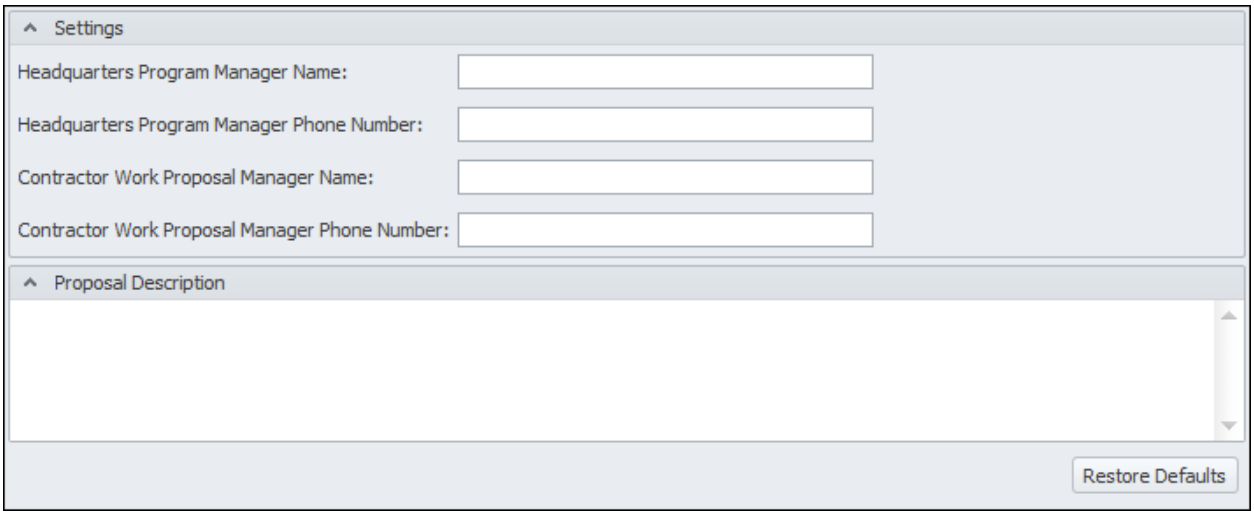
Restore Defaults

Restore the original form mapping settings on this page.

FWP Form Folder

FWP Form - Page 1

On this page, you enter general proposal information for the first page of the FWP Form Report. To set up additional proposal information for the report, go to the FWP Form Report Defaults. For milestones, form mapping, and report requirements, go to FWP Form - Page 2 in the Proposal Properties.



Settings

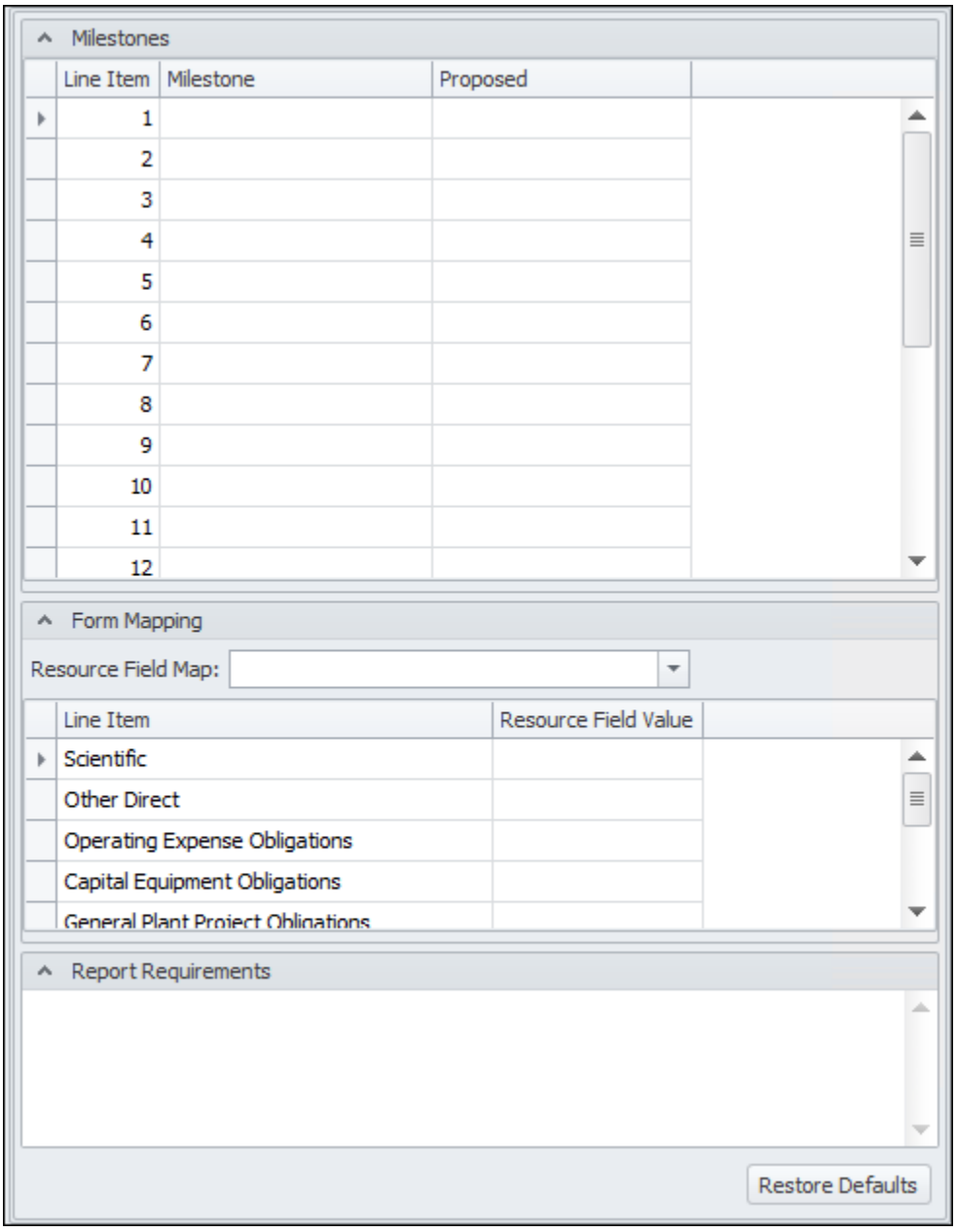
Use these settings to fill in boxes 7 and 11 of the FWP Form. The setting names correspond to the box names on the form.

Proposal Description

Describe the scope of the work in the proposal. This information is for box 13 of the form. The maximum character limit is 2,000.

FWP Form - Page 2

On this page, you enter milestones and reporting information for the second page of the FWP Form Report. To set up additional proposal information for the report, go to FWP Form - Page 1 in the Proposal Properties and to the FWP Form Report Defaults.



Milestones

Enter milestones for box 20 of the form.

Line Item

These numbers indicate the order of the milestones on the form. They cannot be edited.

Milestone

Enter a name or brief description of the milestone.

Proposed

Enter the planned start and end dates of the milestone.

Form Mapping

Resource Field Map

Select an existing resource field from the Resource Field Library. This field provides the values you map to each line item.

Line Item

These line items correspond to the items in boxes 17, 18, 19, 19.1, 19.2, 19.3, 19.4, and 19.5 of the form. The line item names cannot be edited.

Resource Field Value

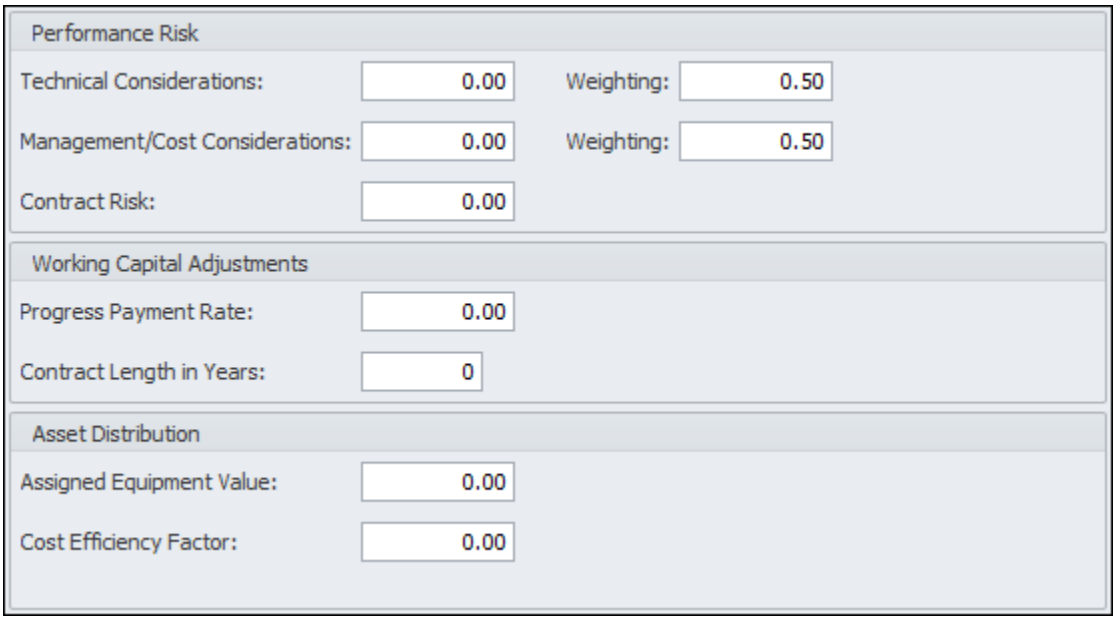
Select a resource field value to map it to a line item. This determines how the report calculates each item's equivalent heads or cost. If a resource has the value assigned to it in a task, then the line item will include that resource.

Report Requirements

Describe the reports that will provide the status, progress, results, etc. of the proposed work. This information is for box 21 of the form. The maximum character limit is 2,000.

Risk Assessments Page

Contracts often may have certain risks associated with their performance. These risks depend on various factors, such as the contract type, the technology used, the contract period, potential hidden costs, etc., and need to be considered to determine the proposal profit/fee objective on DD Form 1547. You define these risks on this page.



Performance Risk

These risks fall within predefined percentage ranges that depend on the type of the contract specified. Both Technical and Management/Cost considerations are used in the calculation of a weighted performance risk. Therefore, each of these risks needs to be assigned a relative weight in addition to the risk factor. The weights are expressed as a percent, and their sum must equal 1.

Working Capital Adjustments

The values entered in this section are used to calculate the Working Capital (item 25) on the DD Form 1547.

Progress Payment Rate

The rate entered here is used to calculate the Cost Financed value. The cost financed is calculated as the total costs (item 20 on the report) minus the

total costs multiplied by the rate. Thus, if the total cost is $500 and the progress payment rate is 10%, the cost financed would be $500 - 500 x 10% = $450. The cost financed is zero if the progress payment rate is zero. The cost financed would also be zero if the progress payment rate were 100%.

Contract Length in Years

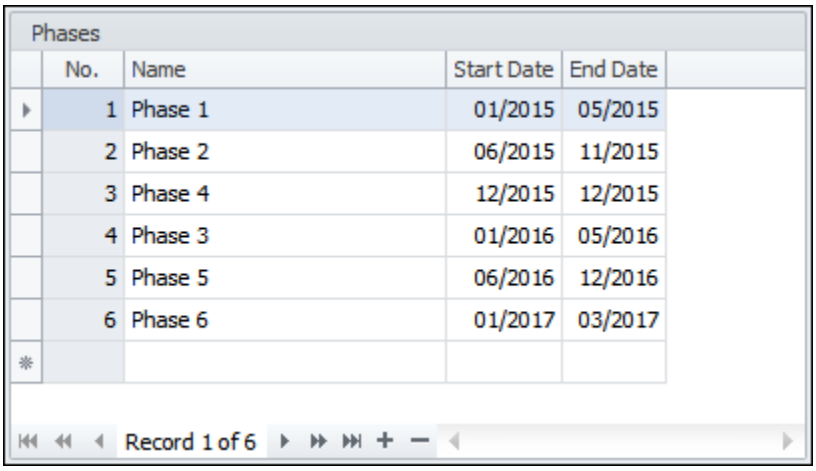
The length of the contract must be between 0 and 100 years. This influences the calculation of the length factor.

Asset Distribution

The asset factors specified here are used in the calculation of the profit/fee objective of the proposal. They appear on DD Form 1547, items 28 and 29.

Phases Page

On this page, you can define time periods in your proposal for estimating and reporting purposes. The periods cannot overlap, and they must encompass the proposal's entire period of performance.



When the proposal's timescale is daily, the full date format is acceptable for phase date ranges so that phases can begin and end on specific days. The exact dates of a phase are used for the input and calculation of your proposal's resource estimates. Rate tables with escalation also support the full date format, which allows ProPricer to correctly escalate rates based on the full phase dates.

In applicable reports, each phase you create appears as a Timescale option.

No.

Shows the order of the phase.

Name

Enter a name for the phase.

Start Date

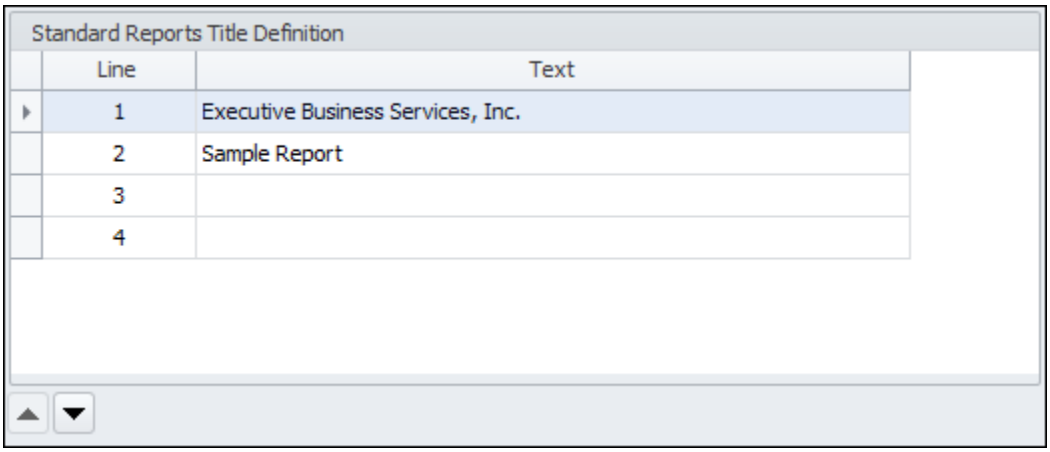
Enter the date the phase begins.

End Date

This field cannot be edited. The first phase shows the end date of the proposal by default and automatically adjusts when you add another phase and start date.

Title Definition Page

On this page, you enter the text you want to appear in the header section of every report you generate for a proposal. It may contain text entered on the Title Definitions page of the Report Defaults. You can accept it or change it.



Line

Shows the positions of the lines of header text. Use the arrow buttons below the grid to change the positions.

Text

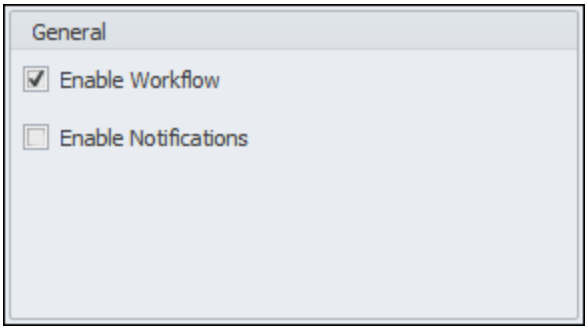
There are four lines available for you to enter up to 255 characters per line, as well as two variables: [Company Name] and [Report Name]. These variables tell ProPricer to print the name of your company and the name of the report, respectively. These variables occupy lines 1 and 2 by default.

To restore the default settings from the Report Defaults, right-click anywhere in the grid and then click **Restore Defaults** on the shortcut menu. It is important to note that the system defaults are only loaded to new proposals. Any changes made in the Report Defaults will not affect existing proposals until you restore the default settings.

Workflow Folder

General Page

This page consists of two options:



Enable Workflow

Select this checkbox to use Workflow in the proposal.

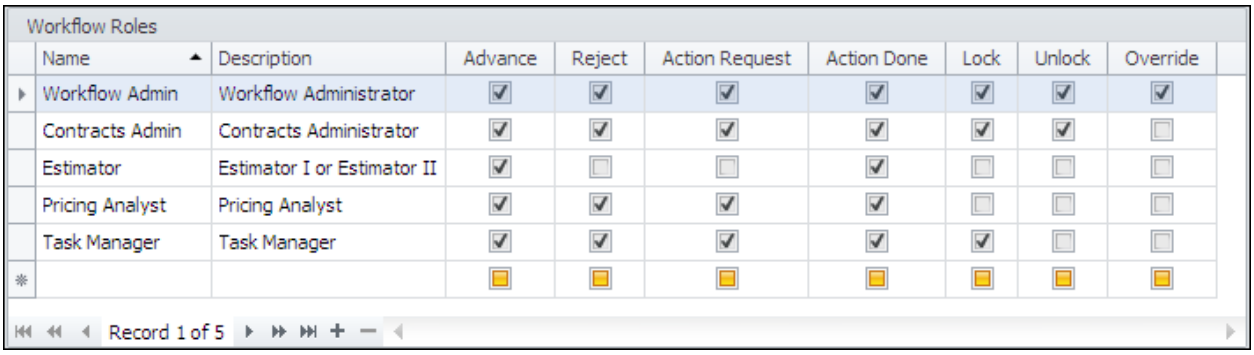
Enable Notifications

Select this checkbox to send an email when the status of a step changes.

Roles Page

On this page, you define the Workflow roles and their tracking actions, and you assign users to the roles.

Workflow Roles



Name

Enter a name for the role.

Note: Workflow Administrator is a program default and cannot be deleted.

Description

Enter a longer name or short description of the role.

Advance

Moves the step from its current position to the next one.

Reject

Rejects the step and resets it to the previous step.

Action Request

Indicates that additional work is needed.

Action Done

Indicates that additional work is complete.

Lock

Locks the task and prevents others from changing it.

Unlock

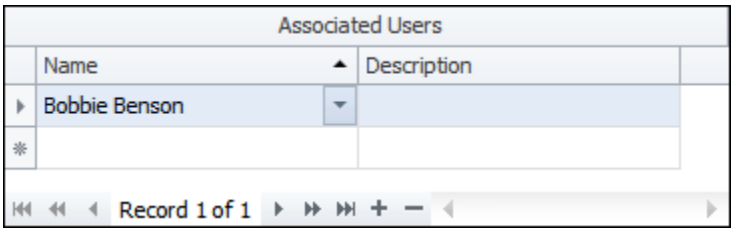
Unlocks the task and allows others to change it.

Override

Allows the role to select a step other than the one that follows.

Associated Users

Here you assign the users to the roles.



Name

Enter the name of the user you want to assign to the role.

Description

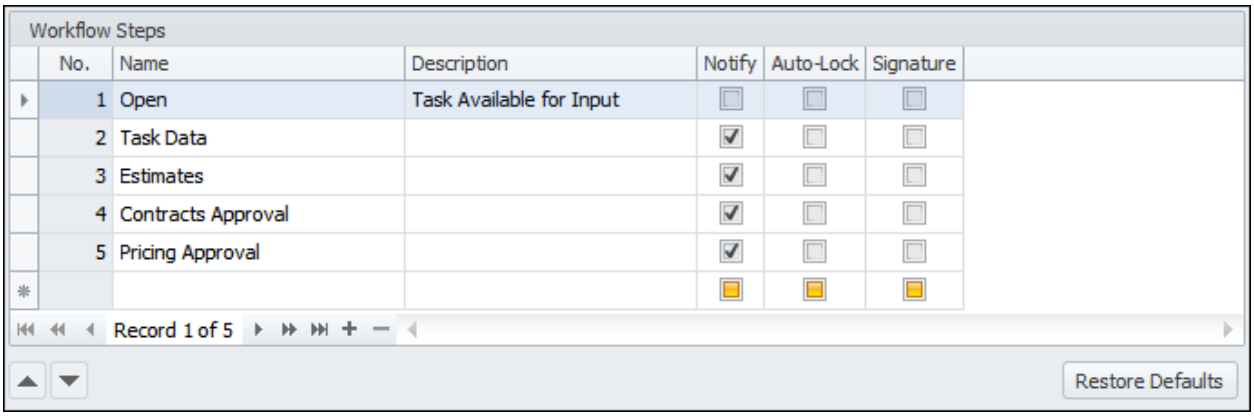
This field shows the description entered for the user.

Steps Page

On this page, you define the steps, their associated roles, and the email address of additional people who should be notified when the step changes.

Workflow Steps

In this section, you define the steps.



No.

This column defines the order of the steps. You cannot enter data in this field, but you can rearrange the order with the Up and Down arrows below the grid.

Name

Enter the name of the step.

Description

Enter a description of the step.

Notify

Select this checkbox to send an email to the role assigned to the next step when the status of the current step changes.

Auto-Lock

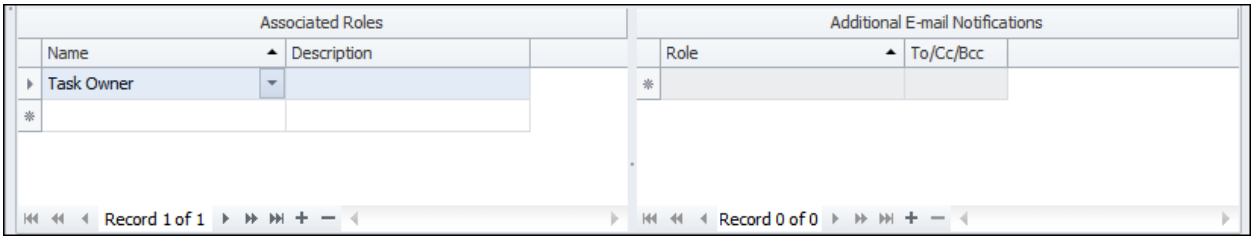
Select this checkbox to prevent the task data from being edited once it has advanced.

Signature

Select this checkbox to require the role assigned to the step to sign off on the step by entering their ProPricer password.

Associated Roles and Additional E-mail Notifications

In this section, you assign the roles to the steps and enter the email addresses of additional roles that should be notified when the status of the step changes.



Associated Roles

Name

Enter the name of the role you want to assign to the step.

Description

This field shows the description entered for the role.

Additional E-mail Notifications

Role

Enter the name of any additional role that should be notified when the status of the step changes.

To/Cc/Bcc

Enter how the role will receive the email.

Proposal Templates

Templates simplify the setup of new proposals by providing default Proposal Properties. With a variety of system-level templates, you and your team can quickly begin working on something new.

If your templates have settings for proposal CERs or resource field mapping, you should learn how to update proposals from a template. This will save time when some changes in a template must be applied to one or more proposals.

When you create a proposal, the chosen template handles nearly everything for you. The only required additional setup is the new proposal's period of performance. If you use phases or resource allocations, you'll need to set those up each time, too.

ProPricer has one built-in template, and you can make more. To create a new template, either start with a blank slate and set up all the properties, or base the template on an existing proposal and copy its properties.

Consider using access tags with templates, as you would with proposals. This is a good way to control which templates are available to your different business units, for example.

Copy a Proposal Template

1. In the Navigation Pane, click the **Proposal Templates** button, then do one of the following:
   - Expand the **Proposal Templates** folder to show all the proposals in it.
   - Double-click the **Proposal Templates** folder to open the Proposal Template List.
2. Right-click a template and click **Copy**.
3. *(Optional)* Change the save location of the new template.
4. Enter a unique name and description for the new template.
5. Click **OK**.

Create a Proposal Template

Create a Standard Template

Follow these steps to create a proposal template with standard Proposal Properties. Many properties will be blank, so you'll need to set them up one by one.

1. Do one of the following:
   - In the Main Menu, click **New Proposal Template**.
   - In the Navigation Pane, click the **Proposal Templates** button, right-click the **Proposal Templates** folder, then click **New Proposal Template**.
2. *(Optional)* At the top of the **Proposal Template Properties** dialog box, rename the template and change its save location.
3. Set up the properties. The pages of properties are organized in folders and subfolders. In the **Proposal** folder, the first one is the **General** page.
4. When you finish setting up the template, click **OK** to save your changes and close the dialog box.

Create a Template from a Proposal

Follow these steps to create a proposal template based on an existing proposal. The Proposal Properties in the template will match the proposal.

1. In the Navigation Pane, click the **Proposal Templates** button, right-click the **Proposal Templates** folder, then click **New Template from Proposal**.
2. Select the proposal that the template will be based on, then click **OK**.
3. *(Optional)* At the top of the **Proposal Template Properties** dialog box, rename the template and change its save location.

4. *(Optional)* Change the properties provided by the proposal. The pages of properties are organized in folders and subfolders. In the **Proposal** folder, the first one is the **General** page.

5. When you finish setting up the template, click **OK** to save your changes and close the dialog box.

Delete a Proposal Template

1. In the Navigation Pane, click the **Proposal Templates** button, then do one of the following:
   - Expand the **Proposal Templates** folder to show all the proposals in it.
   - Double-click the **Proposal Templates** folder to open the Proposal Template List.
2. Right-click a template and click **Delete**.
3. Click **Yes** to confirm the deletion when prompted.

Lock a Proposal Template

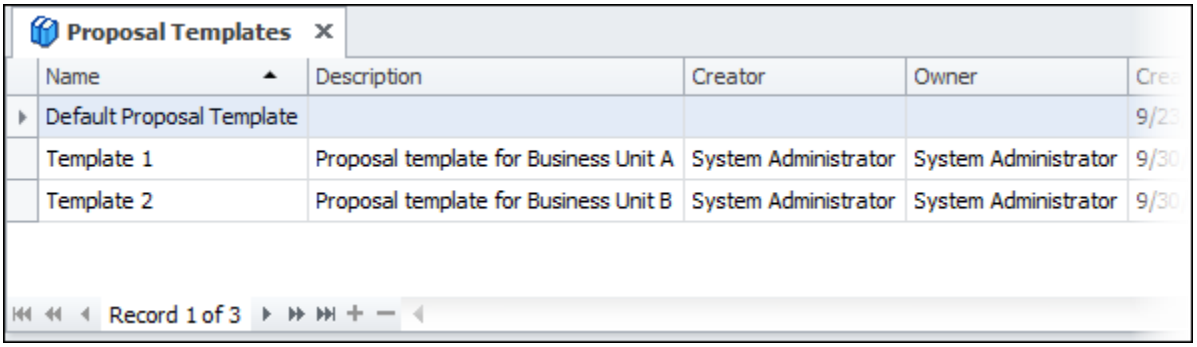
1. In the Navigation Pane, click the **Proposal Templates** button, then do one of the following:
   - Expand the **Proposals Templates** folder to show all the templates in it.
   - Double-click the **Proposals Templates** folder to open the Proposal Template List.
2. Right-click a template and click **Lock**.
3. In the **Lock Proposal Template** dialog box, select a global data option, then click **Process**.

Proposal Template List

The Proposal Template List shows all of your templates. It is also a convenient place to copy and delete templates.

If you create proposal user fields in your system, they appear as additional columns in this grid.

Many columns are hidden by default. To show hidden columns, right-click the grid, go to **View** > **Show Columns**, and then select what you want to see.



Name

The name of the template.

Proposal Number

The default internal reference number for new proposals.

Description

The default description that will be entered in new proposals.

Creator

The person who created the template.

Owner

The default owner that will be entered in new proposals.

Creation Date/Time

The date and time the template was created.

Modification Date/Time

The date and time the template was last modified.

Manager

The default manager that will be entered in new proposals.

Locked

If the checkbox is selected, the template is locked.

Locked Date/Time

The date and time the template was locked.

Location

Where the template is stored. If there is no folder name after the backslash, it is stored in the root **Proposal Templates** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Business Unit

The default business unit that will be entered in new proposals.

Customer RFQ

The default RFQ name or number that will be entered in new proposals.

Proposal Grouping

The default group or category that will be entered in new proposals.

Proposal Quantity

The default quantity that will be entered in new proposals. It is used to calculate the extended cost of a proposal in reports.

Status

The default status that will be entered in new proposals.

Timescale

The default timescale that will be entered in new proposals. This is the measurement of time within a proposal's period of performance.

Start/End Date Type

The default task and spread period date format that will be entered in new proposals.

Target Price

The default estimated total contract value that will be entered in new proposals.

Probability of Award

The default probability of award that will be entered in new proposals.

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Unlock a Proposal Template

1. In the Navigation Pane, click the **Proposal Templates** button, then do one of the following:
   - Expand the **Proposals Templates** folder to show all the templates in it.
   - Double-click the **Proposals Templates** folder to open the Proposal Template List.
2. Right-click a template and click **Unlock**.
3. In the **Unlock Proposal Template** dialog box, select an option for handling duplicate global data, then click **Process**.

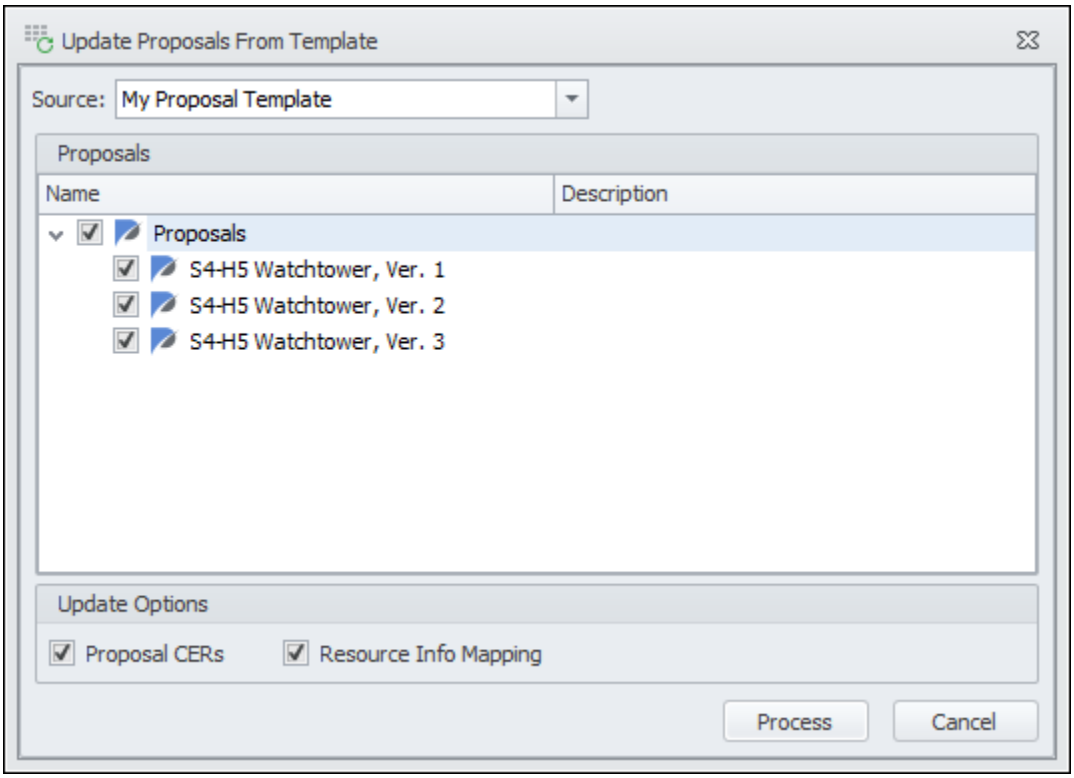
Update Proposals from a Template

Update Proposals from a Template

1. In the Navigation Pane, click the **Proposals** button, then do one of the following:
   - Expand the **Proposals** folder to show all the proposals in it.
   - Double-click the **Proposals** folder to open the Proposal List.
2. Right-click a proposal and click **Update Proposals from Template**.
3. In the **Source** field, select a proposal template to update from.
4. In the **Proposals** section, select the proposals that will be updated.
5. In the **Update Options** section, select the type of information to update. You can update proposal CERs and resource field mapping.
6. Click **Process**.

Update Proposals from a Template Dialog Box

From here, you can choose a template and update proposal CERs and resource field mapping in one or more proposals.



Source

Select the proposal template that is the source of the updated information.

Proposals

Select each proposal to update.

Update Options

Select the type of information to update.

Process

Click to start the update process.

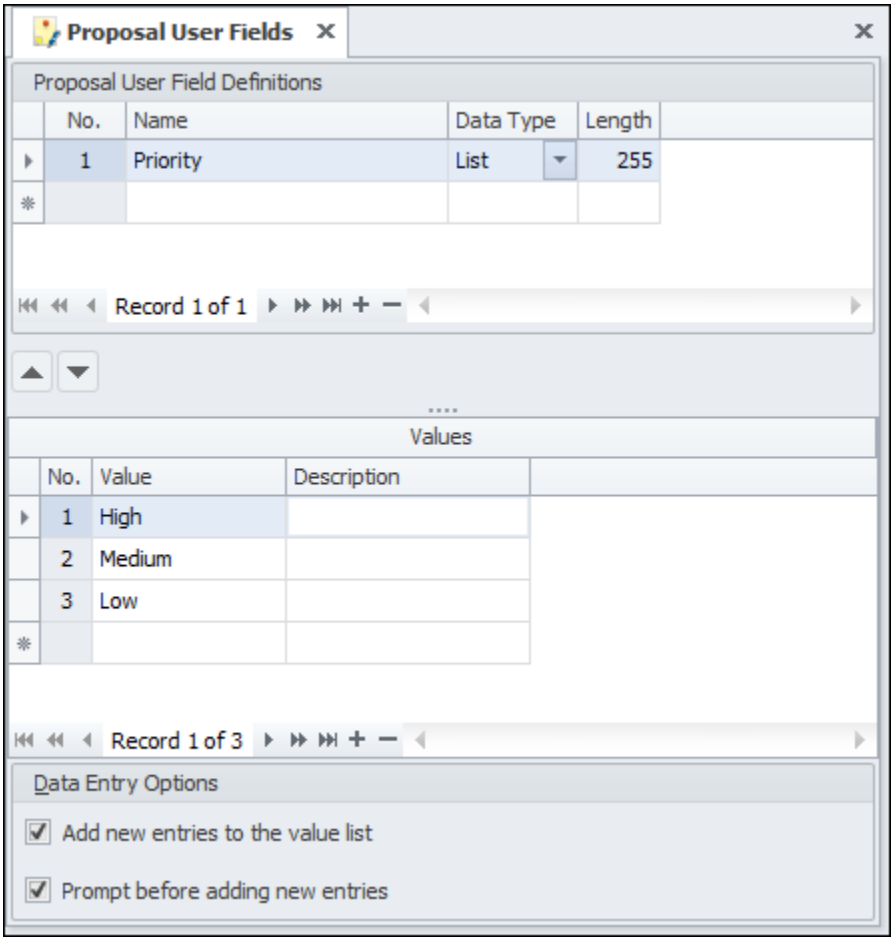
Cancel

Click to close the dialog box without updating proposals.

Proposal User Fields

Proposal user fields customize the information that people can enter on the General page of the Proposal Properties. When you create a field, it immediately appears in the properties of all proposals and proposal templates. It also shows up in the Proposal List and Proposal Template List. How a field looks and behaves depends on the way you define it in your system.

You can include proposal user fields in an Algorithm formula. This gives you more control over pricing in proposals. The formula will change depending on what is entered in the fields.



Proposal User Field Definitions

No.

Shows the order in which the proposal user fields will appear. Use the **Up** and **Down** arrows to reorder fields.

Name

Enter a name for the proposal user field. The character limit is 255.

Data Type

Select the type of data that can be entered in the proposal user field.

Date

Limits the entries to dates.

List

Limits the entries to the ones in the **Values** grid.

Number

Limits the entries to numbers.

Text

Limits the entries to typed text. This is the default setting.

Length

The length can only be changed if the data type is *Text*. It defines the maximum number of characters that an entry in the proposal user field can have. The default value is 255.

Values

If a proposal user field's data type is *List*, you can predefine the list of entries it will accept.

No.

Shows the order of the values. Cannot be edited.

Value

Type the entry you want to appear in the drop-down list of the proposal user field.

Description

Enter a description for the proposal user field value. You can enter up to 255 characters.

Data Entry Options

Add new entries to the value list

Select this checkbox if you want to be able to add new entries to the list during data entry.

Prompt before adding new entries

Select this checkbox if you want ProPricer to prompt you every time a new entry is detected in a proposal user field during data entry.

Proposals

Assign a Business Unit to a Proposal

The name of the business unit that is bidding can be assigned to the proposal.

1. Click the **Proposals** button in the Navigation Pane.
2. Right-click the appropriate proposal.
3. Click **Properties** on the shortcut menu.
4. Click the **General** page in the **Proposal** folder.
5. Enter the name in the **Business Unit** field.
6. Click **OK**.

Assign a Manager to a Proposal

1. In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties** in the shortcut menu.
2. In the **Proposal** folder, click the **General** page.
3. In the **Manager** field, enter the name of the person.
4. Click **OK**.

Assign the Customer's RFQ to a Proposal

1. In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties** in the shortcut menu.
2. In the **Proposal** folder, click the **General** page.
3. In the **Customer RFQ** field, enter the name or number.
4. Click **OK**.

Change the Currency of a Proposal

When you create a proposal, the System Currency entered on the **General** page in the **Currency** folder of **System Options** is automatically entered in the **Currency** field on the **Currency** page of **Proposal Properties**. You can use this currency or change it.

1. In the Navigation Pane, click the **Proposals** button, right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. In the **Proposal** folder, click the **Currency** page.
3. in the **Currency** field, enter the desired currency.
4. Click **OK**.

Notes:

- *You can only use currencies that are enabled on the **Currency** page of **System Options**.*
- *If you change the currency after entering an Exchange Rate Table, the currency must exist in the table.*
- *If you enter a currency that differs from the system currency without assigning an Exchange Rate Table to the proposal, you can add resources with the rate type **Hours** or **Units** if their rates are in the proposal currency. Changing the proposal currency does not affect resources with the rate type **Cost**.*
- *If you want to change the currency after resources have been added to the proposal, you must assign an Exchange Rate Table to the proposal first. If your proposal only uses resources with rate type Cost, you can change the currency without assigning an Exchange Rate Table. The **Change Currency** dialog box appears with two options:*
  - *Leave the existing costs unchanged.*
  - *Convert the costs with the following exchange rate.*

Copy a Proposal

1. In the Navigation Pane, click the **Proposals** button, then do one of the following:
   - Expand the **Proposals** folder to show all the proposals in it.
   - Double-click the **Proposals** folder to open the Proposal List.
2. Right-click a proposal and click **Copy**.
3. *(Optional)* Change the save location of the new proposal.
4. Enter a unique name and description for the new proposal.
5. *(Optional)* Select the **Copy Workflow Status** checkbox to keep the same task status and Workflow Log Report data in the new proposal.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new proposal in the Workspace.
7. Click **OK**.

Create a Proposal

Create a Standard Proposal

Follow these steps to create a proposal with standard Proposal Properties. Many properties will be blank, so you'll need to set them up one by one.

1. Do one of the following:
   - In the Main Menu, click **New Proposal**.
   - In the Navigation Pane, click the **Proposals** button, right-click the **Proposals** folder, then click **New Proposal**.
2. *(Optional)* At the top of the **Proposal Properties** dialog box, rename the proposal and change its save location.
3. Set up the properties. The pages of properties are organized in folders and subfolders. In the **Proposal** folder, the first one is the **General** page.
4. When you finish setting up the proposal, click **OK** to save your changes and close the dialog box.

Create a Proposal from a Template

Follow these steps to create a proposal based on an existing template. The Proposal Properties in the proposal will match the template.

1. In the Navigation Pane, click the **Proposals** button, right-click the **Proposals** folder, then click **New Proposal from Template**.
2. Select the template that the proposal will be based on, then click **OK**.
3. *(Optional)* At the top of the **Proposal Properties** dialog box, rename the proposal and change its save location.

4. *(Optional)* Change the properties provided by the template. The pages of properties are organized in folders and subfolders. In the **Proposal** folder, the first one is the **General** page.

5. When you finish setting up the proposal, click **OK** to save your changes and close the dialog box.

Delete a Proposal

1. In the Navigation Pane, click the **Proposals** button, then do one of the following:
   - Expand the **Proposals** folder to show all the proposals in it.
   - Double-click the **Proposals** folder to open the Proposal List.
2. Right-click a proposal and click **Delete**.
3. Click **Yes** to confirm the deletion when prompted.

Enter Proposal Notes

1. Do one of the following:

   - Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.

   - Select the appropriate proposal. Click the **Proposal** ribbon, and then **Properties** in the **Proposal** group.

2. Click the **Notes** page in the **Proposal** folder.

3. Enter the text.

4. Click **OK**.

Grant/Revoke Lock Rights to a Proposal

The person who created the proposal, as well as any person with Proposal Access *Full* can determine which people who will be able lock a proposal. Lock rights can only be granted to people whose Proposal Access is *Limited*. People with Proposal Access *Full* will always be able to lock a proposal.

1. Do one of the following:

    - Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, click **Properties**, and then click the **Proposal Rights** page in the **Proposal** folder.

    - Right-click the appropriate proposal, and then click **Proposal Rights** on the shortcut menu.

2. Select the **Lock** checkbox of the users you want to allow to lock the proposal.

3. Click **OK**.

Note: A user cannot have Lock rights without View rights.

Grant/Revoke View Rights to a Proposal

The person who created the proposal, as well as any person with Proposal Access *Full* can determine which people who will be able to see it in their list of proposals. View rights can only be granted to people whose Proposal Access is *Limited*. People with Proposal Access *Full* will always be able to see the complete list of proposals.

1. Do one of the following:

    - Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, click **Properties**, and then click the **Proposal Rights** page in the **Proposal** folder.

    - Right-click the appropriate proposal, and then click **Proposal Rights** on the shortcut menu.

2. Select the **View** checkbox of the users you want to allow to see the proposal in their list of proposals.

3. Click **OK**.

Lengthen the Proposal Period

If you find that you need more time to complete the contract, you can change the proposal period. ProPricer offers you two ways to do this. You can change the end date entered in Proposal Properties, or use the Flex/Shift what-if.

Change the Date Entered in Proposal Properties

1. Do one of the following:
    - Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
    - Select the appropriate proposal. Click the **Proposal** ribbon, and then **Properties** in the **Proposal** group.
2. Click the **General** page in the **Proposal** folder.
3. Enter the new date in the **End Date** field.
4. Click **OK**.

Use the Flex/Shift What-If

1. Do one of the following:
    - Select a proposal. On the **Proposal** ribbon, in the **What-Ifs** group, click **Flex/Shift**.
    - Open a proposal. Right-click the **Tasks** grid, and then click **Flex/Shift**.
2. *(Optional)* Make a copy of the proposal before performing this what-if.

3. Enter the new end date in the appropriate **New** column. You can also use the spin button in the **Offset** column to move the dates accordingly.

4. Select your Respread Method and Pricing Options.

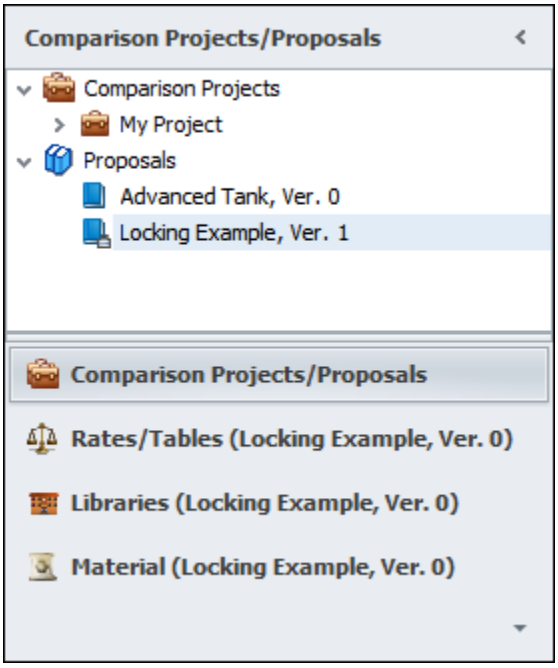
5. Click **OK** to apply the changes.

Locked Proposals

When your proposal is ready for evaluation, submitting, etc., you can segregate it and the rate tables and library elements related to it by locking it. When you lock a proposal, ProPricer takes a snapshot of the proposal and related rate table and library data, thus allowing you to review proposal-specific data while keeping an up-to-date set of library/rate data from impacting information within the locked proposal.

When a proposal is locked, you can only view and report the proposal data unless you have been granted the appropriate Locked Proposal Access Rights to edit it. SOW and BOE texts can be edited since they do not affect the price of the proposal.

When you select a locked proposal in the Navigation Pane, the name and version of the proposal appear in parentheses next to the **Rates/Tables**, **Libraries**, and **Material** folders.



When you open a folder, you will only see the elements associated with the locked proposal. For example, when we select Advanced Tank in the **Proposals** folder and then open **Rates/Tables**, we see two Indirect Rate Tables and two Direct Rate Tables.

If we select Locking Example, we will only see the Rate Tables associated with the proposal.

Likewise, the Travel Library will only show the destinations used in the proposal, the Material Library, the materials, etc.

Locked Proposal Rights regulate what operations can be performed with a locked proposal, such as What-Ifs, copying the locked proposal, etc. Some of the features of ProPricer change with a locked proposal:

- Copy - You can copy a locked proposal only if you have been granted the appropriate Locked Proposal Access Right.
- Rate Tables - You cannot copy, delete, or change the Rate Tables of a locked proposal if you have not been granted the appropriate Locked Proposal Access Right.

Unlocking a locked proposal returns it to a regular one. Any changes made in the libraries and tables will affect it if the modified data is used in the proposal. When a locked proposal is unlocked, any proposal-specific data is compared and merged with the global data, depending upon Handling Duplicate option selected. ProPricer will perform a Data Consolidation to guarantee the integrity of the information.

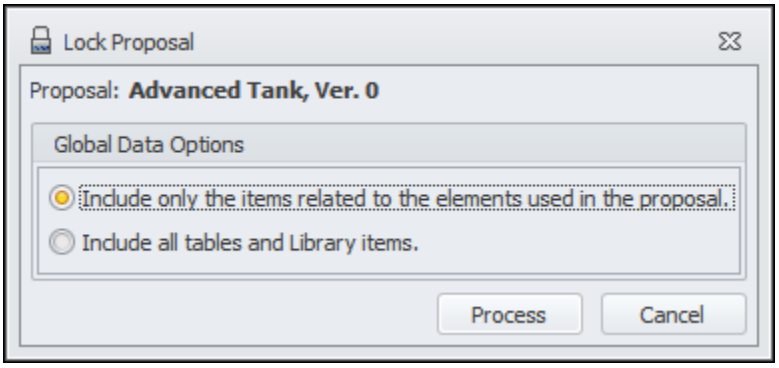
You would normally unlock a proposal first if you need to make changes. However, ProPricer does allow system administrators to grant users edit rights for locked proposals. If the system administrator grants a user edit rights for locked proposals, the user will be able to add, change, and delete elements from certain sections of the proposal. The proposal remains locked, and changes are made locally to that proposal. The changes to a locked proposal do not affect the global data.

Lock a Proposal

1. In the Navigation Pane, click the **Proposals** button, then do one of the following:
   - Expand the **Proposals** folder to show all the proposals in it.
   - Double-click the **Proposals** folder to open the Proposal List.
2. Right-click a proposal and click **Lock**.
3. In the **Lock Proposal** dialog box, select a global data option, then click **Process**.

Lock Proposal or Template Dialog Box

The lock options and process are the same for proposals and proposal templates.



Global Data Options

These two options allow you to select the global data that will be included with the locked proposal or template. You can:

- Include only the global data that has been used. For example, a locked proposal's Direct Rate Table will only contain the resources used in tasks. Since templates do not have tasks and therefore do not use resources, the Direct Rate Table will be empty for a locked template.
- Include all the global data in the tables and libraries, even the items that have not been used. For example, a locked proposal's Direct Rate Table will contain used and unused resources, and a locked template's Direct Rate Table will not be empty.

Process

Click this button to start the lock process.

Cancel

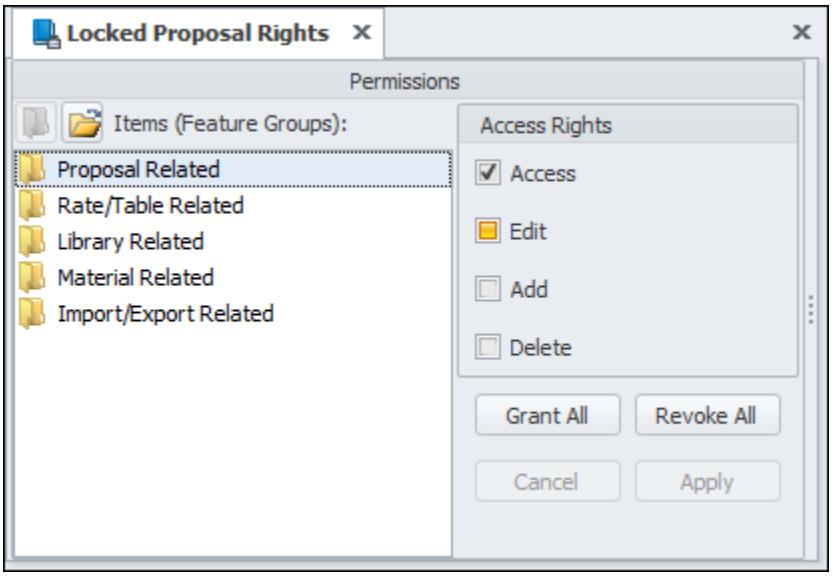
Click this button to close the dialog box without locking the proposal or template.

Locked Proposal Rights

Locked Proposal Rights regulate what items a user can view and/or modify within a locked proposal, as well as the global data associated with it. The Locked Proposal Rights grid is where you set the default Access Rights for all proposals in the system.

Permissions

This section is where you grant the Access Rights. It is subdivided into **Items (Feature Groups)** and **Access Rights**.



Items (Feature Groups)

This box displays five folders containing different ProPricer features or options. Each folder contains individual elements. Double-click a folder to see its contents. The folders include:

- Proposal Related Options
- Rate/Table Related Options
- Library Related Options
- Material Related Options

- Import/Export Related Options

Access Rights

The Access Rights consist of *Access*, *Edit*, *Add*, *Delete* and *Print*. Some elements will not have all these rights available. You can grant rights to all the items in a folder, or open the folder and grant them individually. If you want to grant specific rights on an item-by-item basis, you need to select the **Access** checkbox first to enable the checkboxes of the subsequent rights.

Grant All

Click this button to grant all the Access Rights for the folder or element. All the checkboxes will be selected.

Revoke All

Click this button to revoke all the Access Rights for the folder or element. All the checkboxes will be cleared.

Cancel

Ignores any changes you have made.

Apply

Saves the changes you have made.

Grant/Revoke Locked Proposal Rights

Locked Proposal Rights regulate what items a user can modify within a locked proposal, as well as the global data associated with it. They apply to all users and proposals in the system. However, they can be modified for individual proposals.

Set the Default Access Rights for Locked Proposals

1. Click the **Setup** ribbon, and then click **Locked Proposal Rights** in the **Security** group.
2. In the **Associated Permissions** section:
    2.1. Select the entire folder and click **Grant All**/**Revoke All** to select/clear all the checkboxes of the elements within the folder.
    2.2. Open the folders and grant/revoke the Access Rights to the individual elements within the folder. You must select the **Access** checkbox to enable the subsequent checkboxes.
3. Click **Apply**.

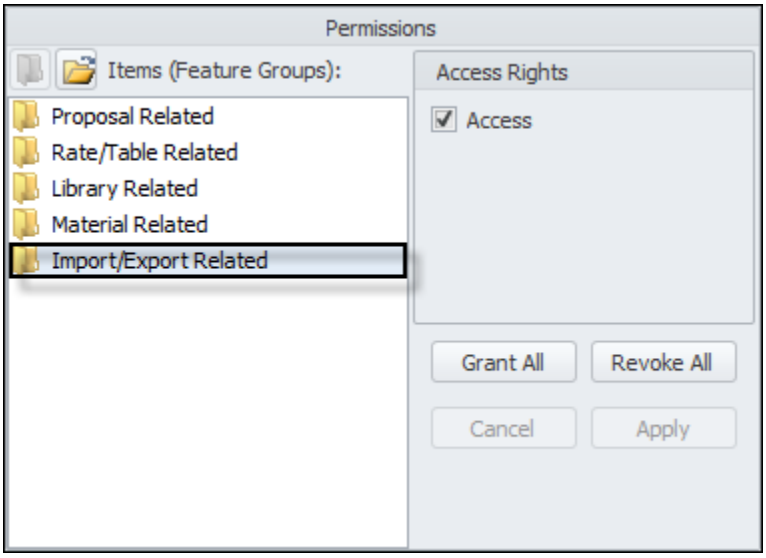
Modify the Access Rights for a Specific Proposal

1. In the Navigation Pane, right-click a proposal, and then click **Proposal Rights**.
2. In the **Associated Permissions** section:
    2.1. Select the entire folder and click **Grant All**/**Revoke All** to select/clear all the checkboxes of the elements within the folder.
    2.2. Open the folders and grant/revoke the Access Rights to the individual elements within the folder. You must select the **Access** checkbox to enable the subsequent checkboxes.

3. Click **OK**.

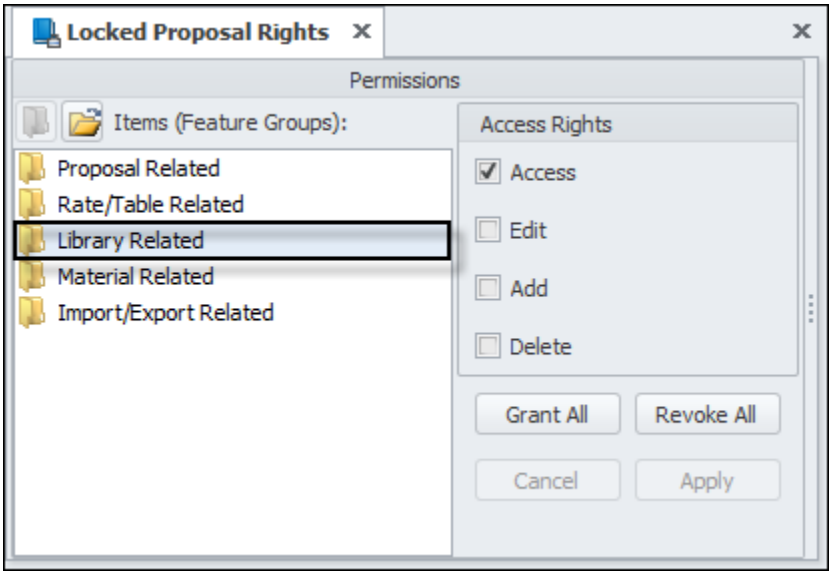
Import/Export Related

The **Import/Export Related** folder is where you grant/revoke Access Rights to the various import and export processes for a locked proposal.



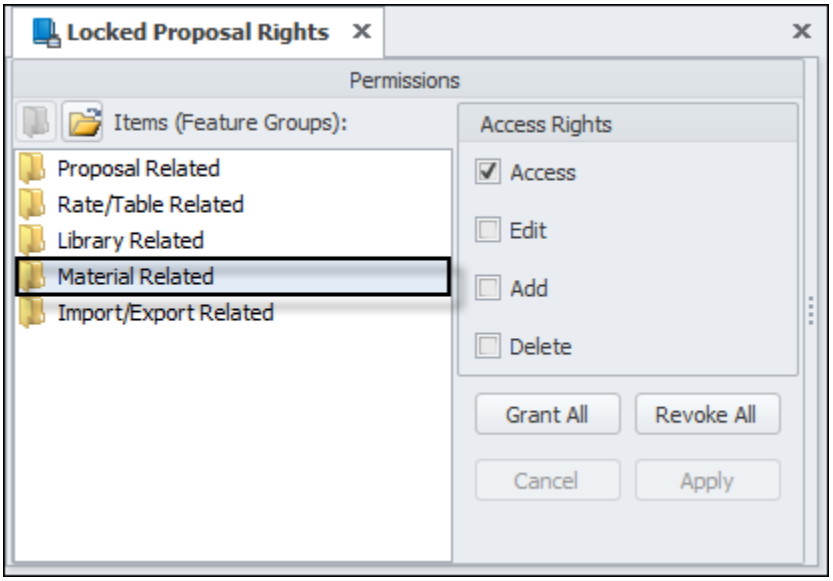
Library Related

The **Library Related** folder is where you grant/revoke Access Rights to the various libraries for a locked proposal.



Material Related

The **Material Related** is where you grant/revoke Access Rights to the various material libraries for a locked proposal.



Override Locked Proposal Access Rights

Locked Proposal Rights determine which elements a user can access and modify when a proposal is locked. You can override the system settings for a specific user.

1. Do one of the following:

   - Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, click **Properties**, and then click the **Proposal Rights** page in the **Proposal** folder.

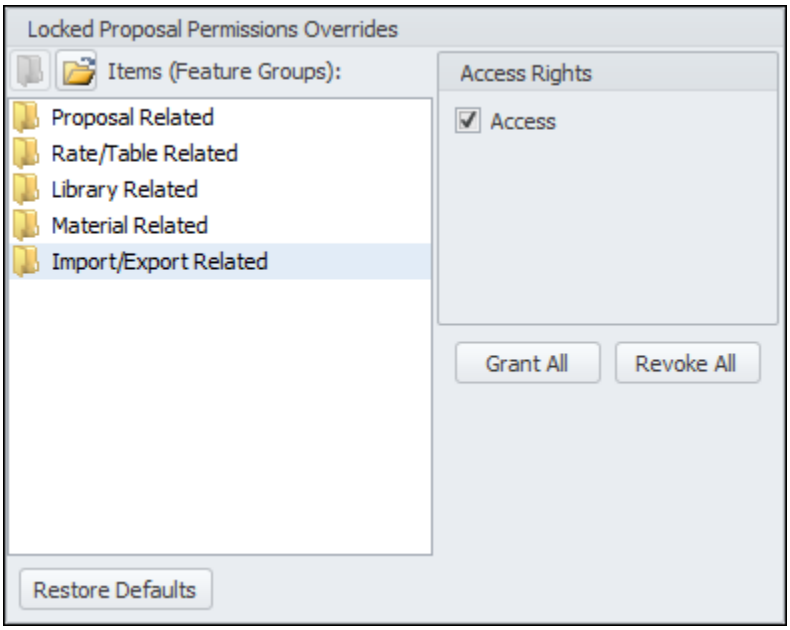
   - Right-click the appropriate proposal, and then click **Proposal Rights** on the shortcut menu.

2. Select the appropriate user and then modify their Access Rights in the **Locked Proposal Permissions Overrides** section.

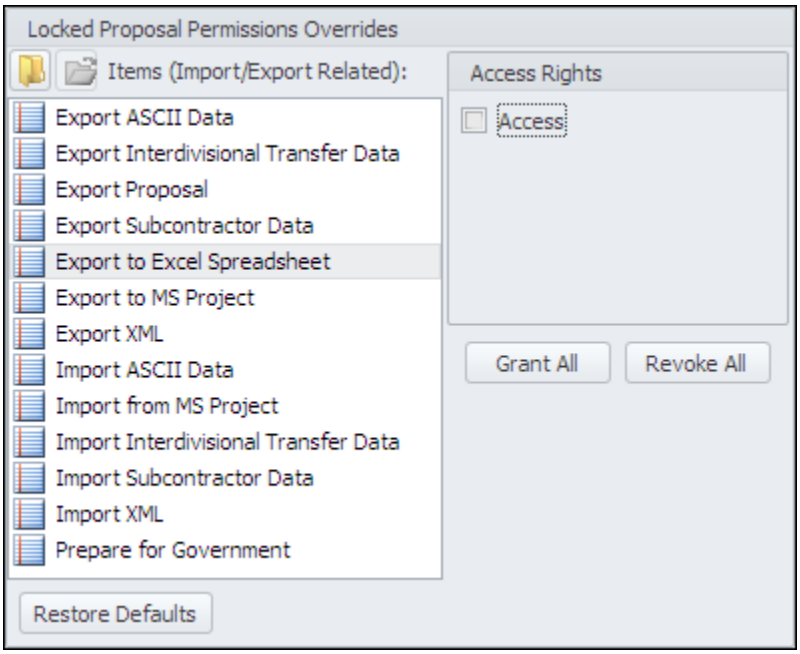
3. Click **OK**.

Locked Proposal Permissions Overrides - Import/Export Related

The **Import/Export Related** folder is where you override the Access Rights of the import and export processes.

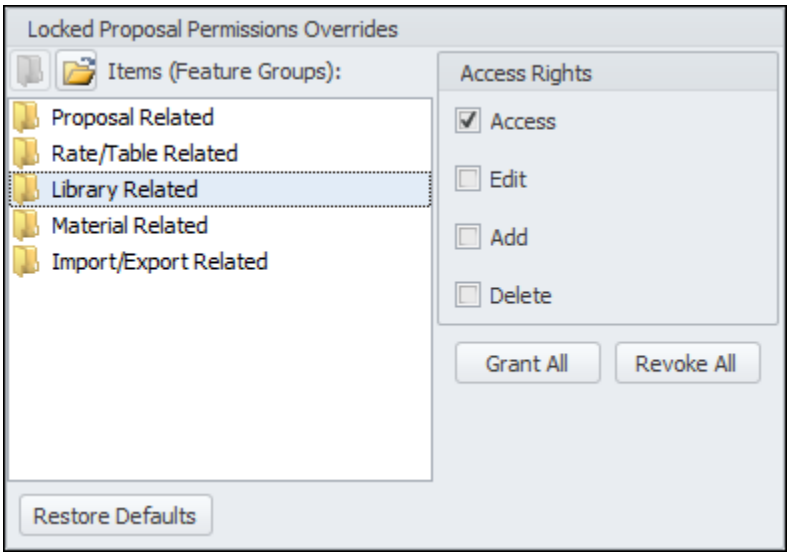


To revoke access to a specific item, open the folder and clear the **Access** checkbox of the item. In the following example, the user will not be able to export to Excel.



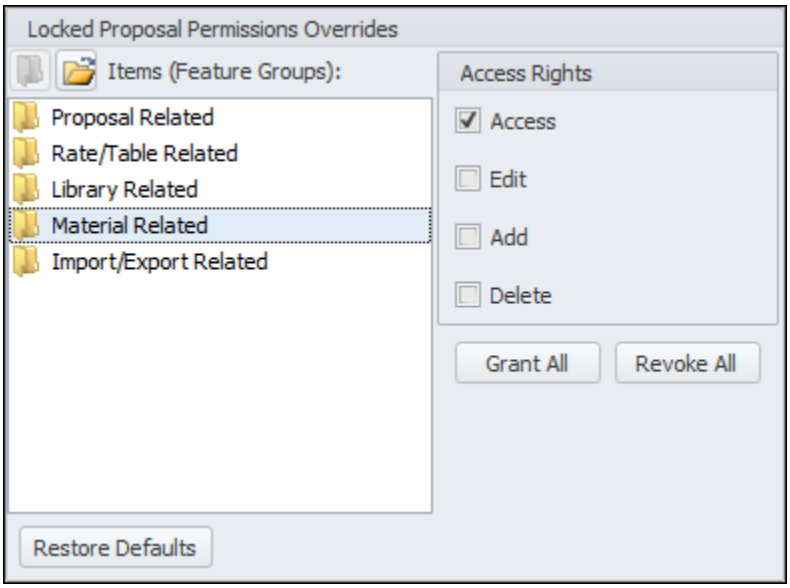
Locked Proposal Permissions Overrides - Library Related

The **Library Related** folder is where you override the Access Rights of the libraries.

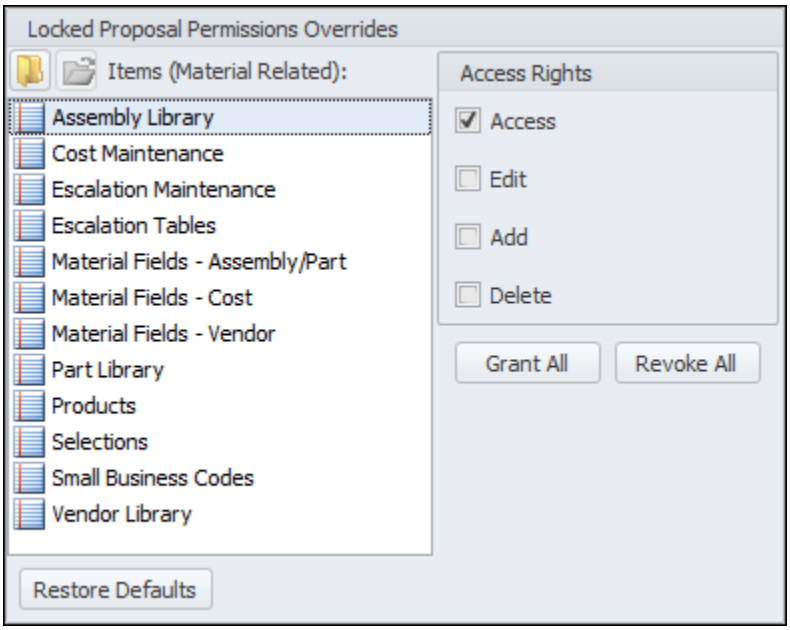


Locked Proposal Permissions Overrides - Material Related

The **Material Related** is where you override the Access Rights of the various material libraries.

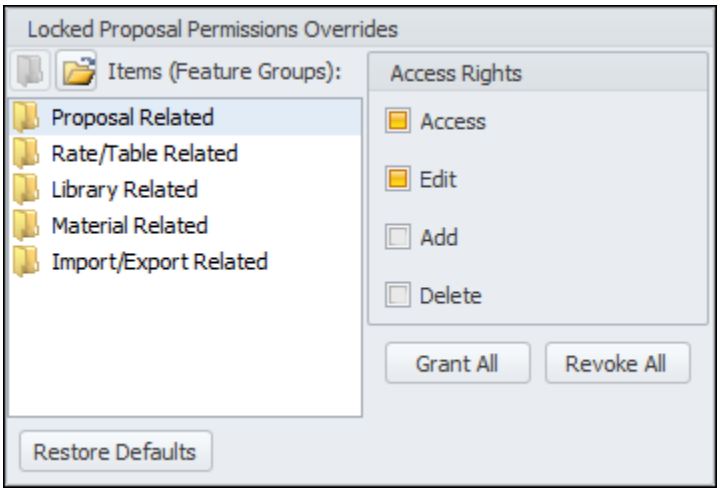


To revoke access to a specific item, open the folder and clear the **Access** checkbox of the item. In the following example, the user can open the Assembly Library, but not make any changes.



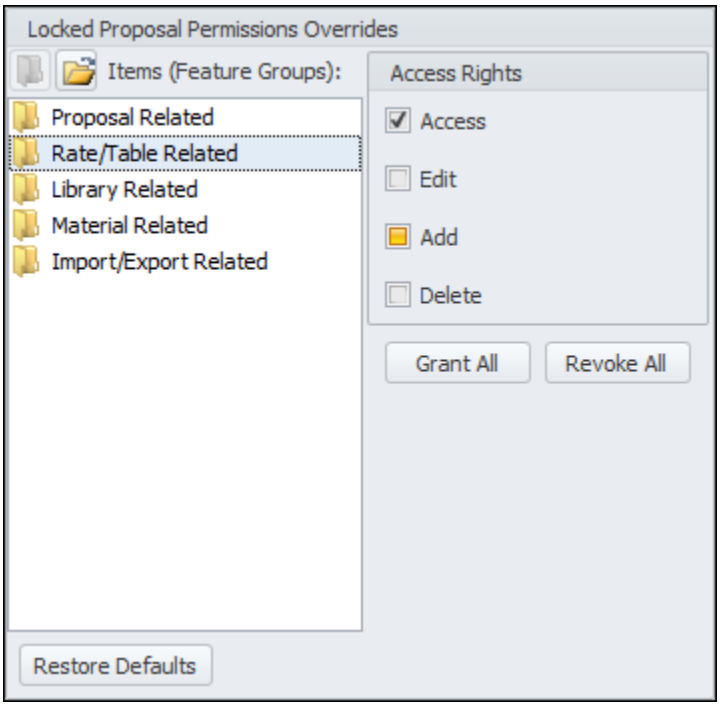
Locked Proposal Permissions Overrides - Proposal Related

The **Proposal Related** folder is where you override the Access Rights of individual Proposal Properties pages, task input options, What-Ifs, Task/Resource Selections, Overrides, and the Update from Library option.



Locked Proposal Permissions Overrides - Rate/Table Related

The **Rate/Table Related** folder is where you override the Access Rights of the rate table.

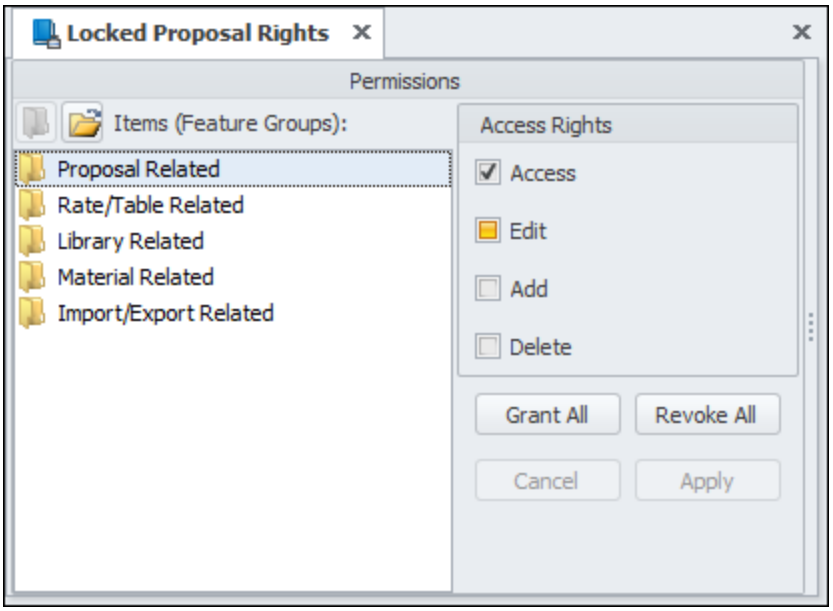


After opening the folder, you will see two sets of Access Rights for each table (for example, *Direct Rate Tables* and *Direct Rate Maintenance*). Maintenance refers to opening and editing the actual table. Tables refers to creating a new table, deleting an existing one, or changing the properties of a table.

To revoke access to a specific item, open the folder and clear the **Access** checkbox of the item.

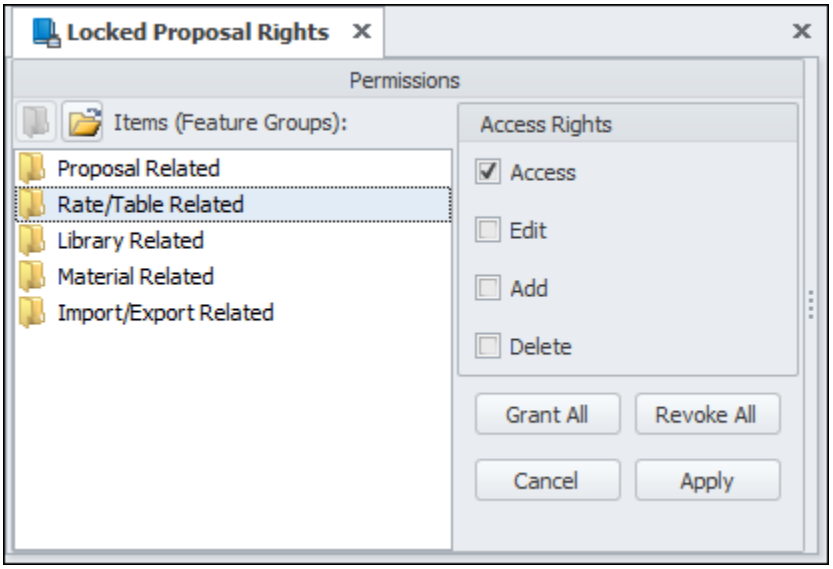
Proposal Related

The **Proposal Related** folder is where you grant/revoke Access Rights to individual Proposal Properties pages, various task input options, what-ifs, task and resource selections, overrides, and the Update from Library option for a locked proposal.



Rate/Table Related

The **Rate/Table Related** folder is where you determine if a user can create a rate table, modify a rate table, and delete a rate table for a locked proposal.



There are two options for each table: **Table Maintenance** and **Tables**. **Table Maintenance** refers to opening and editing the actual table. **Tables** refers to creating a new table, deleting an existing one, or changing the properties of the table.

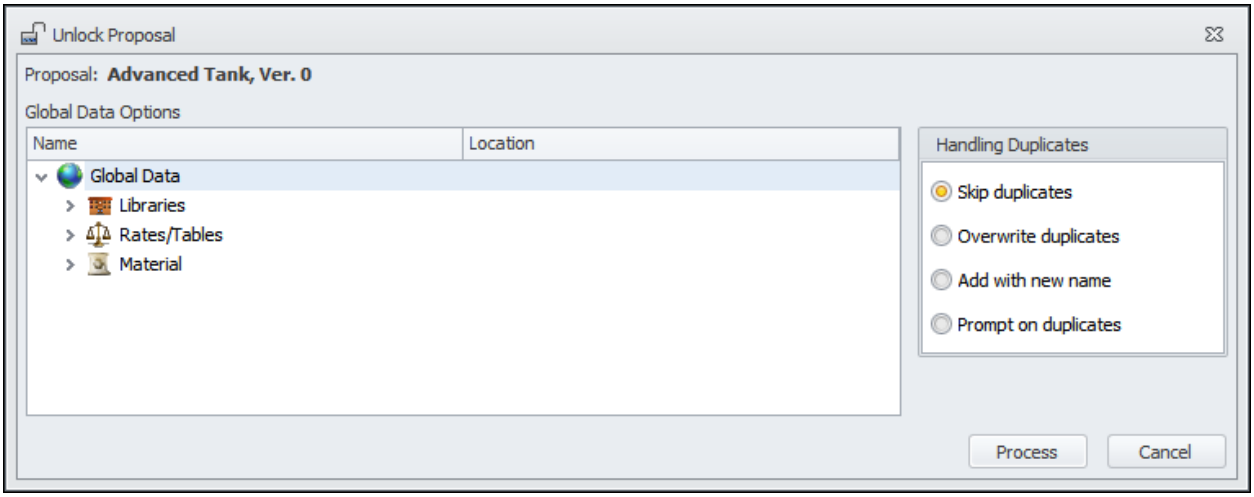
Unlock a Proposal

1. Do one of the following:
    - In the Navigation Pane, expand the **Proposals** folder.
    - Double-click the **Proposals** folder to open the list of proposals.
2. Right-click the locked proposal, and then click **Unlock** on the shortcut menu.
3. Select options for duplicate global data items.
4. Click **Process**.

ProPricer will consolidate the data and unlock the proposal. Details of the consolidation will be provided in a .log file.

Unlock Proposal or Template Dialog Box

The unlock options and process are the same for proposals and proposal templates.



Global Data Options

This area lists the items related to a locked proposal or template. It is divided in two columns: Name and Location. The Name column shows the global records. They are organized in separate folders, each of which provides access to several subfolders. The location column allows you to specify where the unlocked data will go.

Handling Duplicates

Here you select the option you want to use when duplicate records are found. Since the global data of locked proposals and templates is separate from the global data in your database, ProPricer could encounter duplicates during the unlock process. You can select a different option for each type of global data.

Skip duplicates

The record will not be merged with the global data. This is the default option.

Overwrite duplicates

The incoming record will replace the existing record.

Add with new name

You will be asked to enter a new name for the incoming record.

Prompt on duplicates

Every time there is a duplicate record, you will be prompted to select how you want to handle it.

Process

Click to start the unlock process.

Cancel

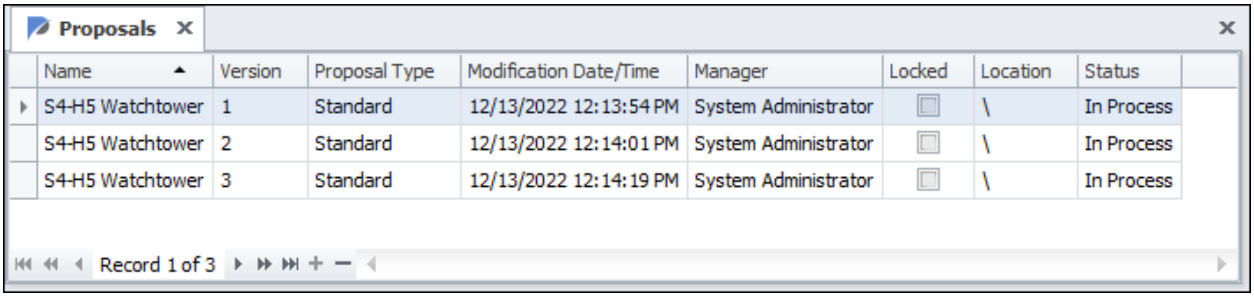
Click to close the dialog box without unlocking the proposal or template.

Proposal List

The Proposal List shows all of your proposals. It is also a convenient place to copy and delete proposals.

If you create proposal user fields in your system, they appear as additional columns in this grid.

Many columns are hidden by default. To show hidden columns, right-click the grid, go to **View** > **Show Columns**, and then select what you want to see.



Name

The name of the proposal.

Version

The version of the proposal.

BOE Source

If you restore a proposal from BOE Pro (a separate estimating product by ProPricer), its name is shown here. The proposal name is read-only, but an asterisk will appear at the end if estimates have been changed in your system. The asterisk indicates that the estimates no longer match the BOE text.

Note: There is a BOE Source field on the BOE input tab for tasks.

Proposal Type

The proposal type selected on the Pricing page of the Proposal Properties.

Unique ID

The proposal's unique ID. This generates automatically when the proposal is created.

Proposal Number

The internal reference number of the proposal.

Description

The description of the proposal.

Creator

The person who created the proposal.

Owner

The person selected as the proposal owner in the Proposal Rights.

Creation Date/Time

The date and time the proposal was created.

Modification Date/Time

The date and time the proposal was last modified.

Manager

The person responsible for the proposal.

Locked

If the checkbox is selected, the proposal is locked.

Locked Date/Time

The date and time the proposal was locked.

Location

Where the proposal is stored. If there is no folder name after the backslash, the proposal is stored in the root **Proposals** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Business Unit

The name of the business unit bidding the proposal.

Customer RFQ

The RFQ name or number that is assigned by the customer.

Proposal Grouping

The group or category that the proposal belongs to.

Proposal Quantity

The quantity used to calculate the extended cost of the proposal in reports.

Status

The current standing of the proposal.

Timescale

The measurement of time within the proposal's period of performance.

Start/End Date Type

The format for task and spread period dates.

Start Date

The date that the contract will begin (the anticipated award date).

End Date

The date that the contract is expected to be completed.

Due Date

The date that the proposal should be finished and ready to submit.

Target Price

The estimated total contract value.

Probability of Award

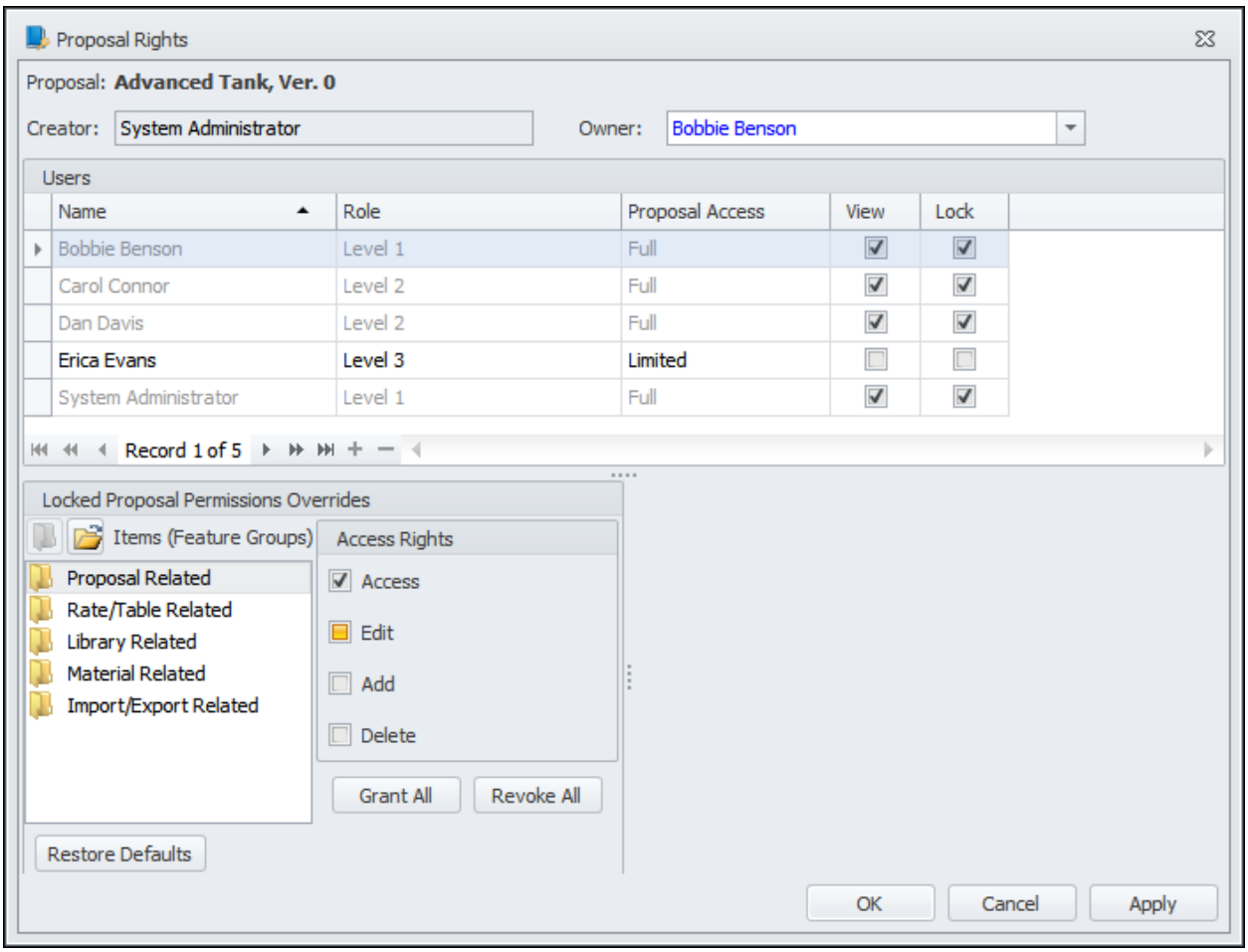
The estimated probability of being awarded the contract after submitting the proposal.

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Proposal Rights

Proposal Rights allow you to select the users you want to be able to view the current proposal in their list of proposals, as well as lock it. You can also override any Locked Proposal Access Right for a specific user.



Proposal

Shows the name of the proposal.

Creator

This field shows the name of person who created the proposal.

Owner

Select the user who will have the same capabilities as the Proposal Creator; he can always see the proposal and can also manage the Proposal Rights of the proposal.

Users

In this section you grant View and Lock privileges to users whose Proposal Access is *Limited*. Users with Proposal Access *Full* will always be able to see the complete list of proposals and lock any proposal.

Name

This field shows the name of the user.

Role

This field shows the role assigned to the user.

Proposal Access

This field shows whether the user has Full or Limited access to the proposal.

View

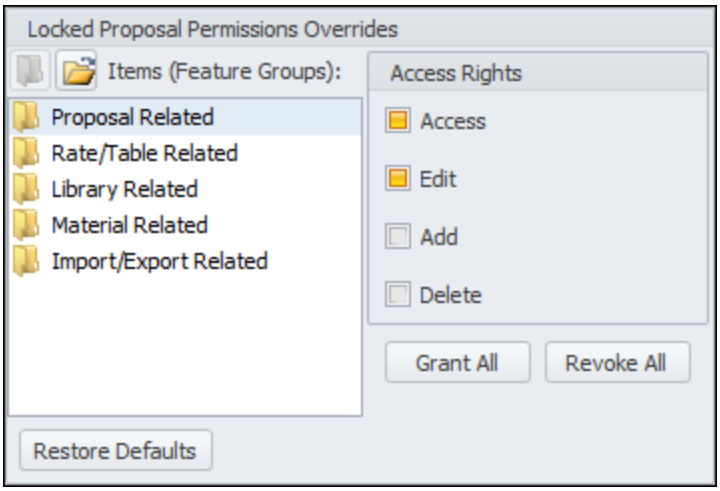
Select this checkbox if you want the user to be able to see the proposal in his list of proposals. You can only select the checkboxes of users whose Proposal Access is *Limited*.

Lock

Select this checkbox if you want the user to be able to lock/unlock the proposal. You can only select the checkboxes of users whose Proposal Access is *Limited.* The **Lock** checkbox is linked to the **View** checkbox. If a user does not have view rights, he or she does not have lock rights.

Locked Proposal Permissions Overrides

In this section you can override a Locked Proposal Access Right for a specific user. It is subdivided into two groups: Items (Feature Groups) and Access Rights.



Items (Feature Groups)

This box displays five folders containing different ProPricer features or options. Each folder contains individual elements. Double-click a folder to see its contents. The folders include:

- Proposal Related Options
- Rate/Table Related Options
- Library Related Options
- Material Related Options
- Import/Export Related Options

Access Rights

The Access Rights consist of *Access*, *Edit*, *Add*, *Delete*, and *Print*. Some elements will not have all these rights available. You can grant rights to all the items in a folder, or open the folder and grant them individually. If you want to grant specific rights on an item-by-item basis, you need to select the **Access** checkbox first to enable the checkboxes of the subsequent rights.

Grant All

Click this button to grant all the Access Rights for the folder or element. All the checkboxes will be selected.

Revoke All

Click this button to revoke all the Access Rights for the folder or element. All the checkboxes will be cleared.

Restore Defaults

Click the button to restore the original Locked Proposal Access Rights.

OK

Saves the changes and closes the dialog box.

Cancel

Closes the dialog box without saving the changes.

Apply

Saves the changes without closing the dialog box.

Set the Contract Type

The Contract Type determines the FAR range for the contract's risk when preparing government reports.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Pricing** page.
3. Select the **Contract Type**.
4. Click **OK**.

Set the Fee Base

Fee Base is used to calculate the reimbursement in addition to the initial estimate of costs.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Pricing** page.
3. Select the **Fee Base**.
4. Click **OK**.

Set the Profit/Fee of a Proposal

You can enter a profit/fee rate on the **Pricing** page in the **Proposal** folder of **Proposal Properties** to override the profit/fee rates entered for all the indirect pools in the proposal's Indirect Rate Table. This rate will also override any profit/fee rates entered in the **Indirect Rate Overrides** grid for the Indirect Rate Table assigned to the proposal.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Pricing** page in the **Proposal** folder.
3. Enter the rate you want to use in the **Proposal Profit/Fee** field.
4. Click **OK**.

Set the Proposal Period

When you create a proposal ProPricer automatically enters the date in which you created the proposal in the **Start** and **End Date** fields. These dates define how long you think it will take to complete the contract, and regulate the dates you can enter for tasks and resources. You cannot enter dates that do not fall within this range.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **General** page in the **Proposal** folder.
3. In the **Start Date** field, enter the date the contract will begin (the anticipated award date).
4. In the **End Date** field, enter the date you expect to complete the contract.
5. Click **OK**.

Set the Risk Assessments

There are certain risks that need to be considered when calculating the proposal's profit/fee objective on DD Form 1747. These risks include contract type, the technology used, the contract period, potential hidden costs, etc.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Risk Assessments** page in the **Proposal** folder.
3. Enter the **Performance Risk** factors and assign weighting values to each factor. The sum of the weighting values should equal 1.
4. Specify the **Contract Risk** factor.
5. Set the **Progress Payment Rate** and the **Contract Length**.
6. Enter an **Assigned Equipment** value.
7. Enter a **Cost Efficiency** factor.
8. Click **OK**.

Update the Current Proposal

The Update Current Proposal option allows you to incorporate into your proposal any changes you have made in the Travel Rate Table, CER Library, Material Libraries, or Resource Set Library. Changing a travel expense or CER in the respective library is not automatically reflected like a change to a direct rate is. You need to tell ProPricer to use the updated information.

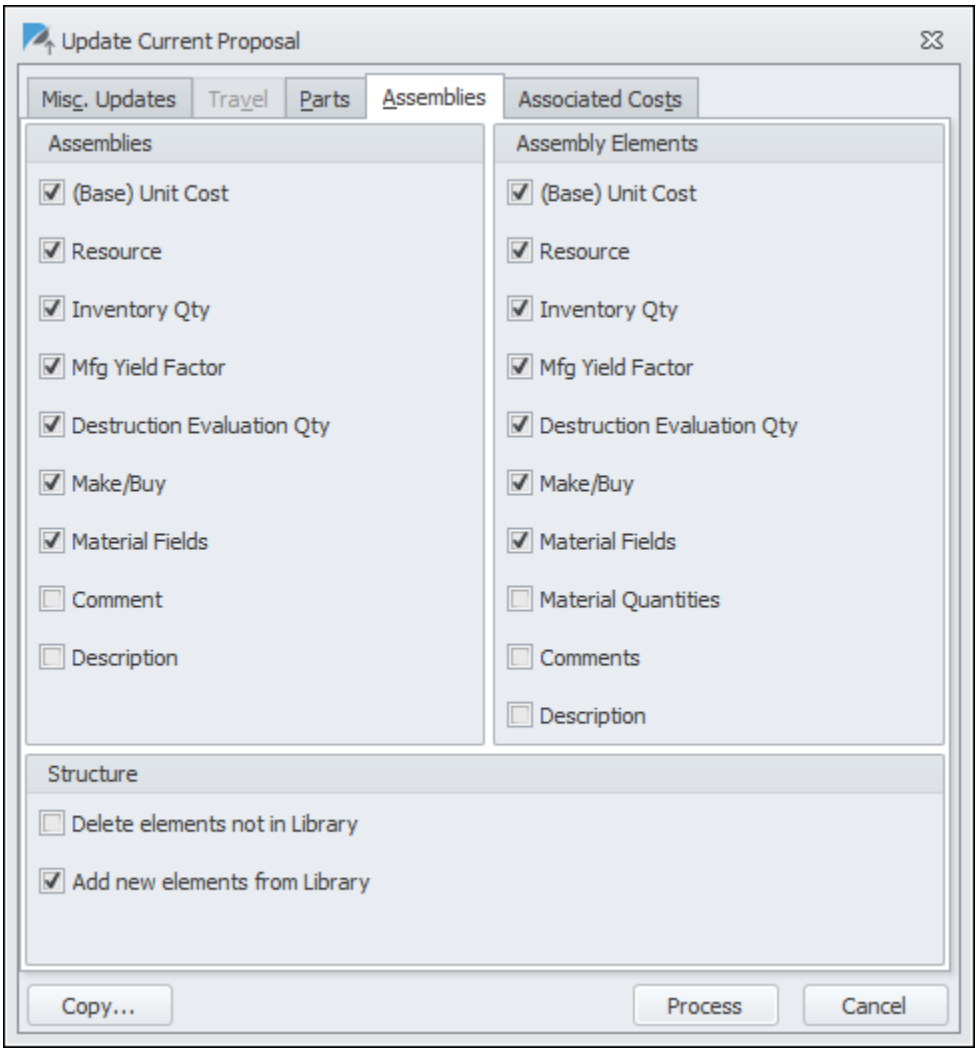
If you made changes to a CER on the **CERs (Structure View)** tab, or on the **Proposal CERs** page in the **Proposal** folder of **Proposal Properties** that you do not want to be replaced with the definition of the CER from the library, you can apply the update on a task-by-task basis. This also applies to changes you made to a Destination directly on the **Travel** tab and to materials on the **Material** tab.

You can also use the option to replace any changes you made in Task View with the data from the libraries.

1. Select the appropriate proposal in the Navigation Pane.
2. Click the **Proposal** ribbon, and then **Update Current Proposal** in the **Update** group.
3. *(Optional)* Make a copy of the proposal.
4. Select the checkboxes of the items you want updated.
5. Click **Process**.

Update Current Proposal - Assemblies

This dialog box is divided into three sections: Assemblies, Assembly Elements, and Structure. Select the checkboxes of the items you want to update, or clear them to keep them as they are.



Assemblies

(Base) Unit Cost

The cost for a single unit of the assembly.

*Note: If selected, the amount in the **(Base) Unit Cost** column on the **Material** tab is what will be updated.*

Resource

The resource assigned to the assembly, as well as any resource fields.

Inventory Qty

The number of assemblies you have in stock.

Mfg Yield Factor

The amount of raw materials or purchased parts in the delivered end item divided by the total amount of raw materials or purchased parts consumed during manufacturing.

Destruction Evaluation Qty

The number of assemblies lost during the evaluation process.

Make/Buy

The value indicating whether the assembly is made or bought.

Material Fields

The values in any materials fields.

Comment

Any applicable text.

Description

The assembly description.

Assembly Elements

(Base) Unit Cost

The cost for a single part of the assembly.

Resource

The resource assigned to the part, as well as any resource fields.

Inventory Qty

The number of individual parts you have in stock.

Mfg Yield Factor

The amount of raw materials or purchased parts in the delivered end item divided by the total amount of raw materials or purchased parts consumed during manufacturing.

Destruction Evaluation Qty

The number of parts lost during the evaluation process.

Make/Buy

The value indicating whether the part is made or bought.

Material Fields

The values in any materials fields.

Material Quantities

This option updates the **Adj Upgrade Qty**, **Mfg Yield Factor**, **Mfg Start Qty**, **Destr Eval Qty**, **Total Mfg Start Qty** columns.

Comments

Any applicable text.

Description

The part description.

Structure

Delete elements not in library

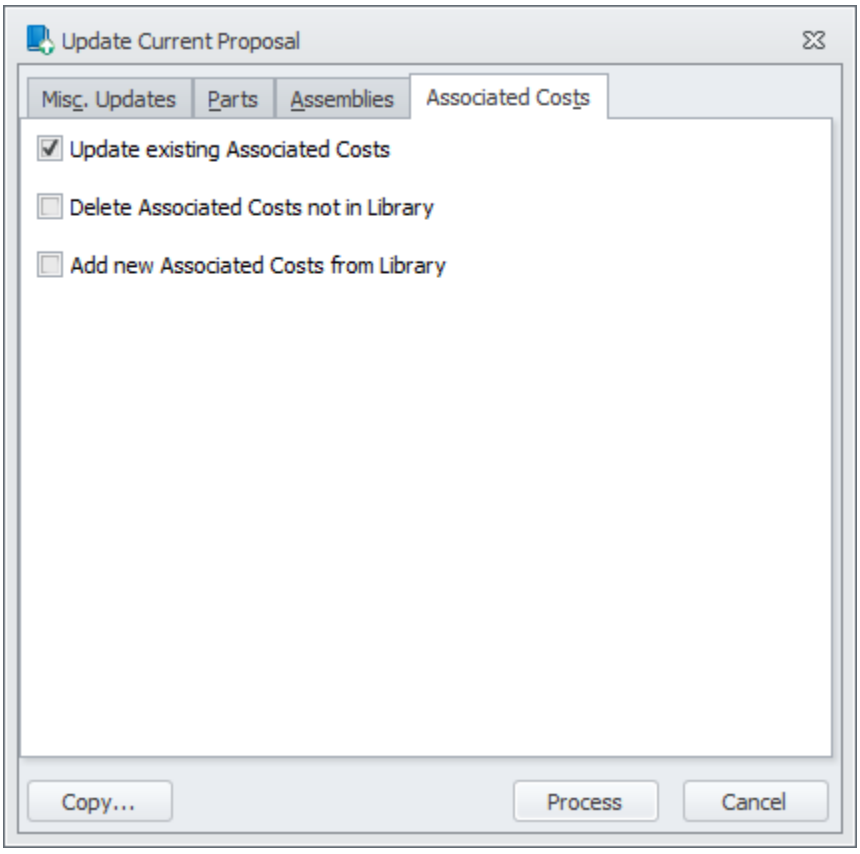
This option will delete all parts not found in the library.

Add new elements from library

This option will add all parts recently entered in the library.

Update Current Proposal - Associated Costs

This dialog box allows you to select which items you want to update from the library. Select the checkboxes of the items you want to update, or clear them to keep them as they are.



Update existing Associated Costs

This option will replace all Associated Costs with those from the library.

Delete Associated Costs not in Library

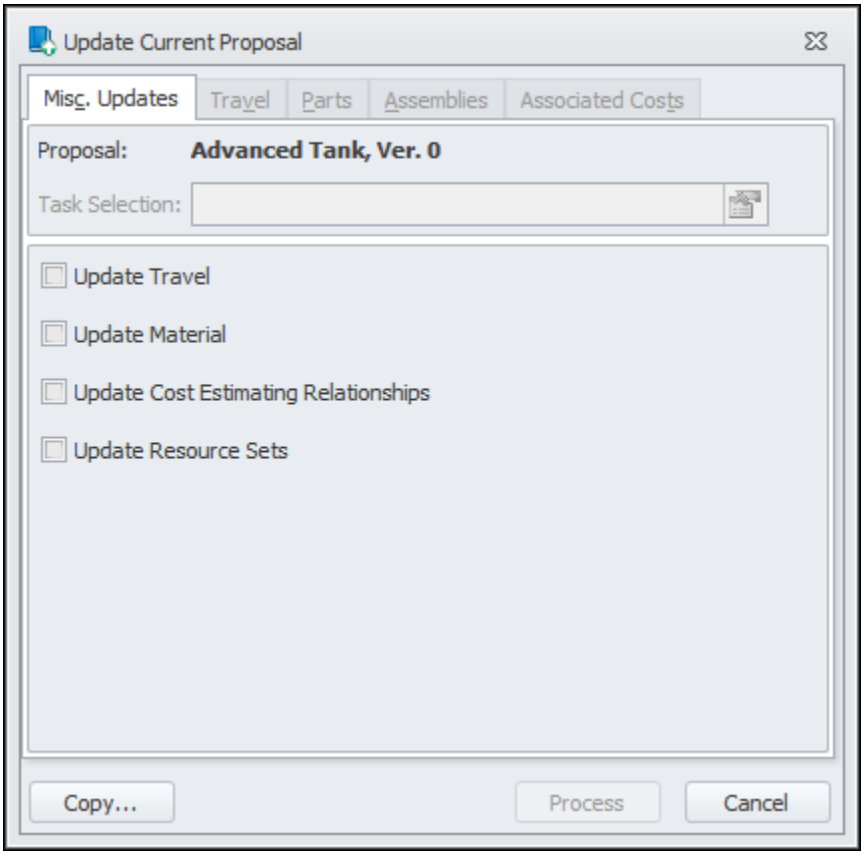
This option will delete any Associated Cost not found in the library.

Add new Associated Costs from Library

This option will add all Associated Costs recently defined in the library.

Update Current Proposal - Miscellaneous Updates

The **Misc. Updates** tab of this dialog box allows you to select the items you want to update. If you select **Update Travel**, the **Travel** tab will be enabled. If you select the **Update Material**, the **Parts**, **Assemblies**, and **Associated Costs** tabs will be enabled.



Miscellaneous Updates

Proposal

This field shows the name and version of the proposal.

Update Travel

Select this checkbox to enable the **Travel** tab. It will incorporate into the proposal any changes made to the rates, resources assigned to the travel expenses, and comments in the Travel Rate Table, as well as Travel Rate Overrides.

Update Material

Select this checkbox to enable the **Parts**, **Assemblies**, and **Associated Costs** tabs.

Update Cost Estimating Relationships

Select this checkbox to incorporate into the proposal any changes made to the CERs in the library.

Update Resource Sets

Select this checkbox to incorporate into the proposal any changes made to the resource sets in the library.

Copy

Performing the update will modify the proposal. You can make a copy of the proposal if you want to maintain the original data. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will update the data of the copy.

Process

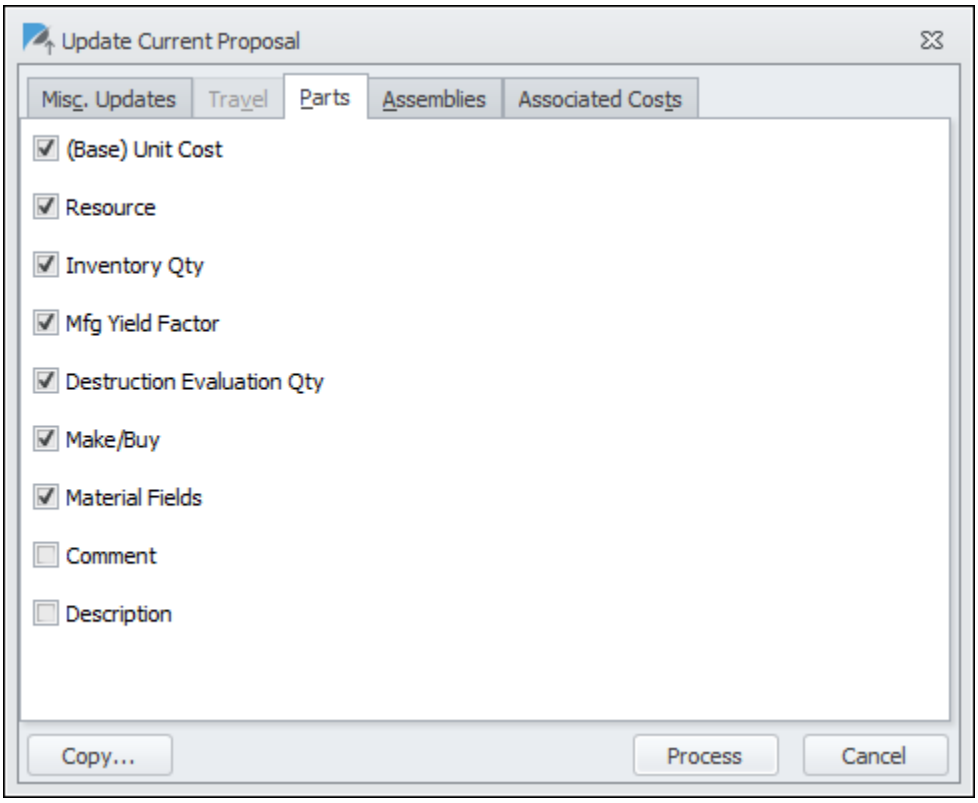
Click this button to update the data. The dialog box will remain open during the process.

Cancel

Click this button to cancel the update and close the dialog box.

Update Current Proposal - Parts

This dialog box allows you to select which items you want to update from the library. Select the checkboxes of the items you want to update, or clear them to keep them as they are.



(Base) Unit Cost

The cost for a single part.

*Note: If selected, the amount in the **Base Unit Cost** column on the **Material** tab is what will be updated.*

Resource

The resource assigned to the part, as well as any resource field.

Inventory Qty

The number of parts you have in stock.

Mfg Yield Factor

The amount of raw materials or purchased parts in the delivered end item divided by the total amount of raw materials or purchased parts consumed during manufacturing.

Destruction Evaluation Qty

The number of parts lost during the evaluation process.

Make/Buy

The value indicating whether the part is made or bought.

Material Fields

The values in any materials fields.

Comment

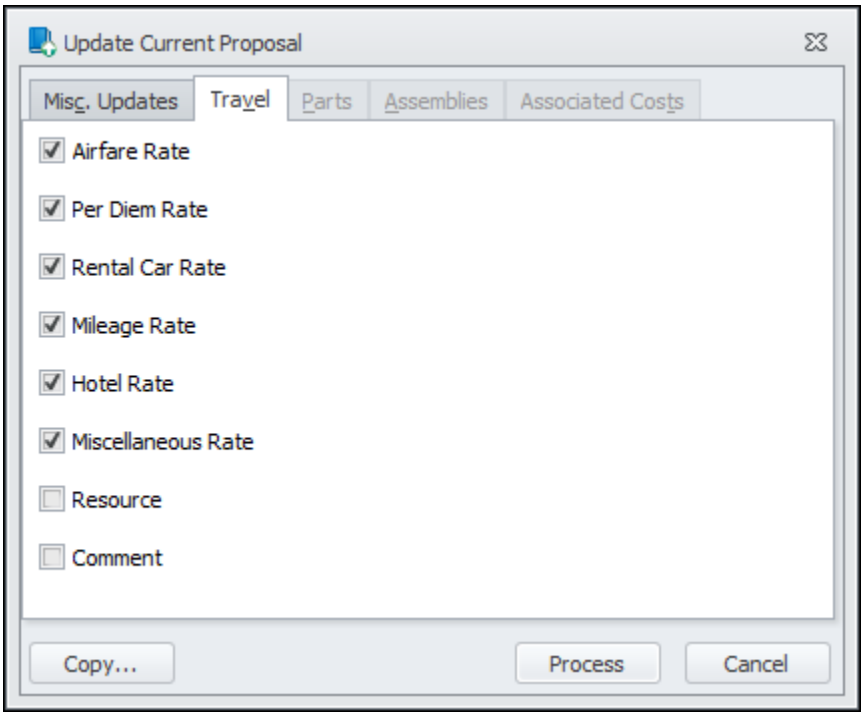
Any applicable text.

Description

The part description.

Update Current Proposal - Travel

This dialog box allows you to select which changes in the Travel Rate Table or Travel Rate Overrides you want to use in the proposal. Select the checkboxes of the items you want to update, or clear them to keep them as they are.



View Totals

The View Totals feature allows you to see your proposal's total labor hours, total direct cost, and total price with one click. Because this feature is accessible from the ribbon, the totals can be viewed at any time from nearly all areas of ProPricer. View Totals displays the hours, direct cost, and price of the proposal most recently selected in the Navigation Pane. The proposal does not need to be open in the Workspace.

1. In the Navigation Pane, click a proposal.
2. On the **Proposal** ribbon, click **View Totals**.

*Note: After editing, adding, or deleting proposal data, you must save your changes before re-pricing the proposal with the **View Totals** button. If you don't save your changes first, then the totals displayed will remain unchanged.*

Rate Adjustments

The adjustment functions on the **Rates** ribbon allow you to simultaneously modify one or more rates in a specific table. Say for example that as of 2015 the G&A, IR&D / B&P rates changed across the board. You can use the Indirect Rate Adjustment to change the rates of every applicable indirect pool instead of having to manually enter the new rate for each indirect pool in the Indirect Rate Table. The following screenshots illustrate how quick it is to use the Indirect Rate Adjustment to change the G&A, IR&D / B&P rates.

The highlighted areas show how many times we would have to manually enter the new rate.

Executive Business Services, Inc.
Indirect Rate Report

Date: 12/14/2015
Time: 8:21:40 AM
Page: 1

Indirect Rate Table: Tank Burdens

Eng Labor - Engineering Labor

	2014	2015	2016	2017	2018	2019
Labor Overhead	0.510000	0.511000	0.512000	0.513000	0.514000	0.515000
G&A, IR&D / B&P	0.080000	0.080000	0.080000	0.080000	0.080000	0.080000
Profit	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000

Materials - Materials

	2014	2015	2016	2017	2018	2019
Material Handling OH	0.051000	0.051100	0.051200	0.051300	0.051400	0.051500
G&A, IR&D / B&P	0.080000	0.080000	0.080000	0.080000	0.080000	0.080000
Profit	0.200000	0.200000	0.200000	0.200000	0.200000	0.200000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000

Mnfg Labor - Manufacturing Labor

	2014	2015	2016	2017	2018	2019
Labor Overhead	1.100000	1.110000	1.120000	1.130000	1.140000	1.150000
G&A, IR&D / B&P	0.080000	0.080000	0.080000	0.080000	0.080000	0.080000
Profit	0.150000	0.150000	0.150000	0.150000	0.150000	0.150000
Mfg Cost of Money	0.002000	0.002000	0.002000	0.002000	0.002000	0.002000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000

ODCs - Other Direct Costs

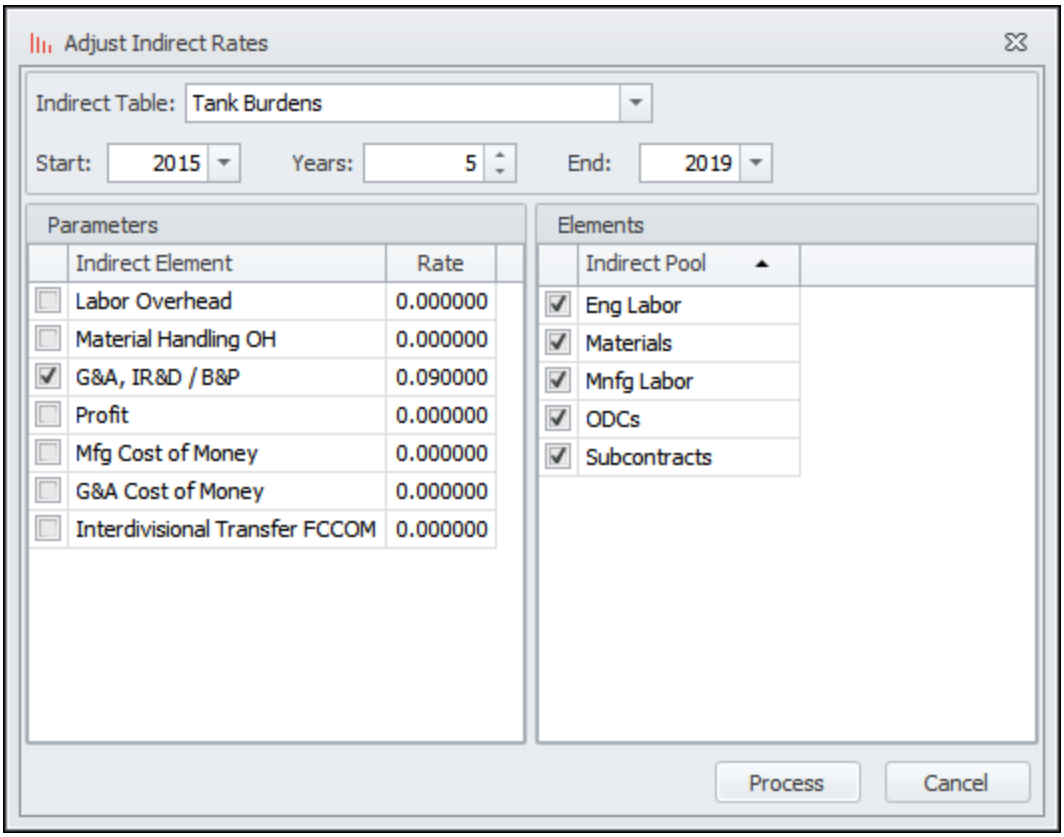
	2014	2015	2016	2017	2018	2019
G&A, IR&D / B&P	0.080000	0.080000	0.080000	0.080000	0.080000	0.080000
Profit	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000
Interdivisional Transfer FCCOM	0.001000	0.001000	0.001000	0.001000	0.001000	0.001000

Subcontracts - Subcontracts

	2014	2015	2016	2017	2018	2019
G&A, IR&D / B&P	0.080000	0.080000	0.080000	0.080000	0.080000	0.080000
Profit	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000

Company Private

We entered the new rate in the **Adjust Indirect Rates** dialog box and selected the applicable indirect pools.



In one step we changed every G&A, IR&D / B&P rate in the Indirect Rate Table.

Executive Business Services, Inc.
Indirect Rate Report

Date: 12/14/2015
Time: 8:47:50 AM
Page: 1

Indirect Rate Table: Tank Burdens

Eng Labor - Engineering Labor

	2014	2015	2016	2017	2018	2019
Labor Overhead	0.510000	0.511000	0.512000	0.513000	0.514000	0.515000
G&A, IR&D / B&P	0.080000	0.090000	0.090000	0.090000	0.090000	0.090000
Profit	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000

Materials - Materials

	2014	2015	2016	2017	2018	2019
Material Handling OH	0.051000	0.051100	0.051200	0.051300	0.051400	0.051500
G&A, IR&D / B&P	0.080000	0.090000	0.090000	0.090000	0.090000	0.090000
Profit	0.200000	0.200000	0.200000	0.200000	0.200000	0.200000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000

Mnfg Labor - Manufacturing Labor

	2014	2015	2016	2017	2018	2019
Labor Overhead	1.100000	1.110000	1.120000	1.130000	1.140000	1.150000
G&A, IR&D / B&P	0.080000	0.090000	0.090000	0.090000	0.090000	0.090000
Profit	0.150000	0.150000	0.150000	0.150000	0.150000	0.150000
Mfg Cost of Money	0.002000	0.002000	0.002000	0.002000	0.002000	0.002000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000

ODCs - Other Direct Costs

	2014	2015	2016	2017	2018	2019
G&A, IR&D / B&P	0.080000	0.090000	0.090000	0.090000	0.090000	0.090000
Profit	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000
Interdivisional Transfer FCCOM	0.001000	0.001000	0.001000	0.001000	0.001000	0.001000

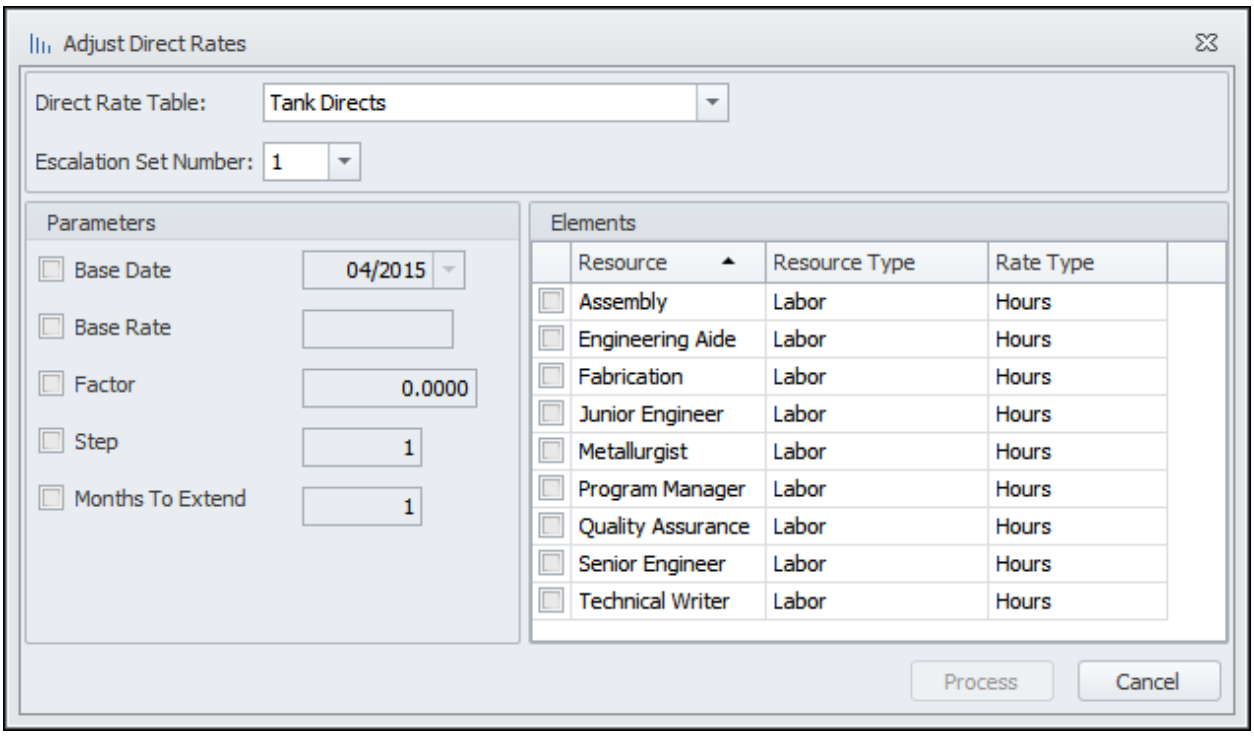
Subcontracts - Subcontracts

	2014	2015	2016	2017	2018	2019
G&A, IR&D / B&P	0.080000	0.090000	0.090000	0.090000	0.090000	0.090000
Profit	0.100000	0.100000	0.100000	0.100000	0.100000	0.100000
G&A Cost of Money	0.003000	0.003000	0.003000	0.003000	0.003000	0.003000

Company Private

Adjust Direct Rates

The **Adjust Direct Rates** option on the **Rates** ribbon allows you to enter different escalation set parameters to change the rates of one or more resources in a Direct Rate Table. You can only adjust the rates of resources whose rates were entered in the Direct Rate Table with an escalation set.



Direct Rate Table

Enter the name of table whose rates you want to adjust.

Escalation Set Number

Enter the number of the escalation set you want to adjust.

Parameters

Select the escalation set parameters you want to adjust.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the rate for the first month.

Factor

Enter the factor that will be applied to rate to escalate it. For example, express 1% as 0.01.

Step

Enter the number of months the base rate will remain constant before the factor is applied.

Months to Extend

Enter the number of months that the escalation set should last.

Elements

Select the resources to which the rate adjustment should be applied.

Resource

This column shows the names of the applicable resources.

Resource Type

This column shows the resource type entered for the resource in the Resource Library.

Rate Type

This column shows how the resource input is measured.

Process

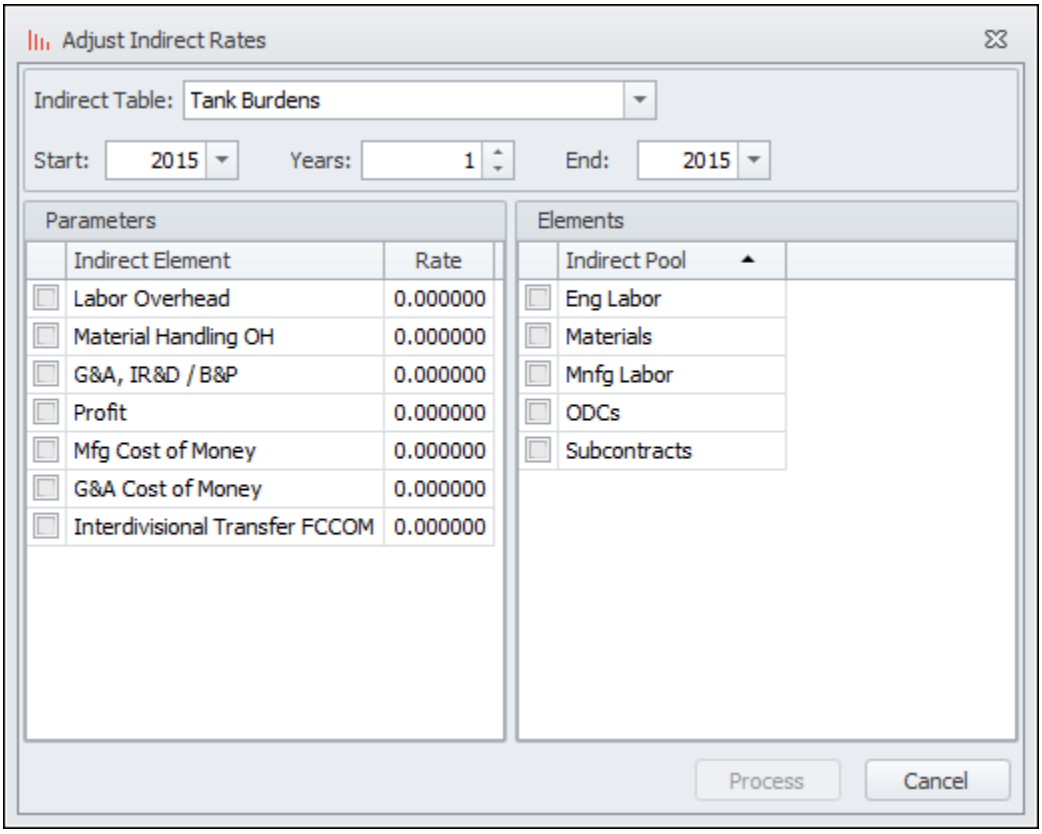
Click this button to adjust the rates.

Cancel

Click this button to close the dialog box without adjusting the rates.

Adjust Indirect Rates

The **Adjust Indirect Rates** option on the **Rates** ribbon allows you to change the rates of one or more indirect elements for one or more pools in an Indirect Rate Table.



Indirect Rate Table

Enter the name of table whose rates you want to adjust.

Start

Depending on the timescale of the table, enter the year, quarter, or month you want to begin adjusting the rates.

Years/Quarters/Months

Enter the number of years, quarters, or months you want the rate adjustment to extend. If you enter an end date, ProPricer will automatically enter the number of years, quarters, or months.

End

Enter the year, quarter, or month you want to stop adjusting the rates. If you enter the number of years, quarters, or months, ProPricer will automatically enter the end date.

Parameters

Select the indirect element rates you want adjust.

Indirect Element

This column shows the elements in the proposal's Indirect Rate Table.

Rate

Enter the new rate.

Elements

Select the indirect pools that the rate adjustment should be applied to.

Indirect Pool

This column shows the pools in the proposal's Indirect Rate Table.

Process

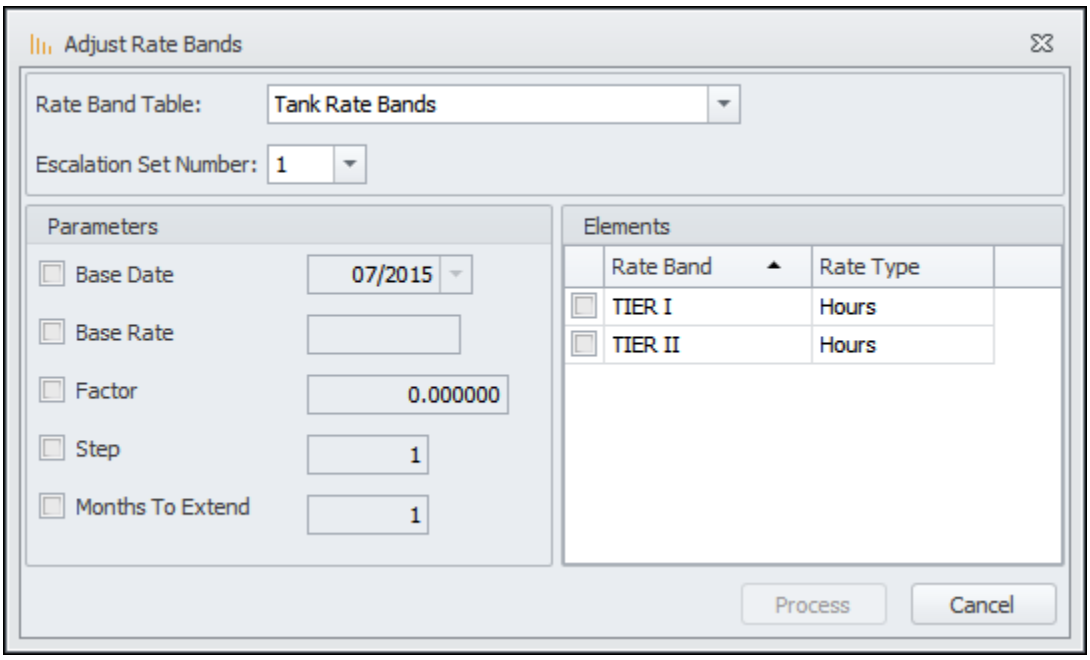
Click this button to adjust the rates.

Cancel

Click this button to close the dialog box without adjusting the rates.

Adjust Rate Bands

The **Adjust Rate Bands** option on the **Rates** ribbon allows you to enter different escalation set parameters to change the rates of one or more rate bands in a Rate Band Table. You can only adjust the rates of rate bands whose rates were entered in the Rate Band Table with an escalation set.



Rate Band Table

Enter the name of table whose rates you want to adjust.

Escalation Set Number

Enter the number of the escalation set you want to adjust.

Parameters

Select the escalation set parameters you want to adjust.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the rate for the first month.

Factor

Enter the factor that will be applied to rate to escalate it. For example, express 1% as 0.01.

Step

Enter the number of months the base rate will remain constant before the factor is applied.

Months to Extend

Enter the number of months that the escalation set should last.

Elements

Select the resources to which the rate adjustment should be applied.

Rate Band

This column shows the names of the applicable rate bands.

Rate Type

This column shows how the resource input is measured.

Process

Click this button to adjust the rates.

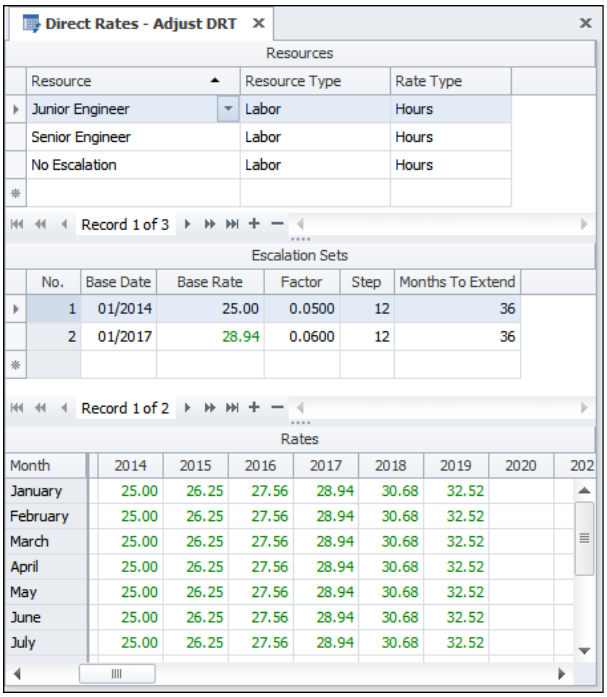
Cancel

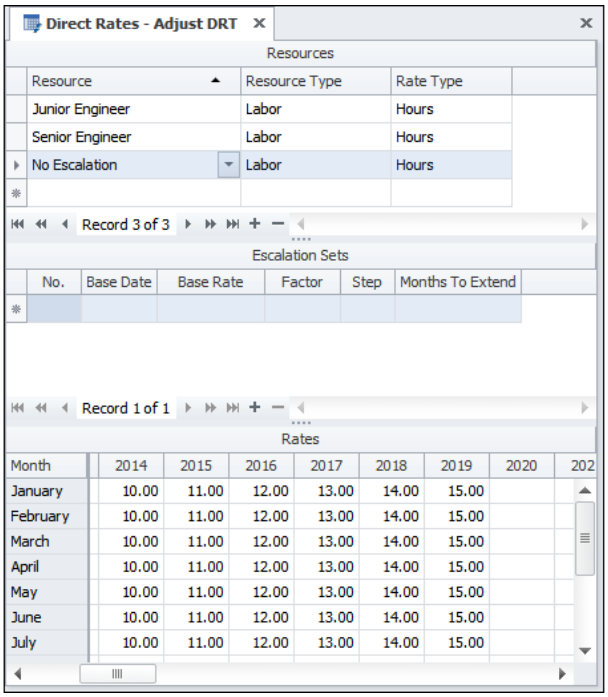
Click this button to close the dialog box without adjusting the rates.

Rate Adjustments and Escalation Sets

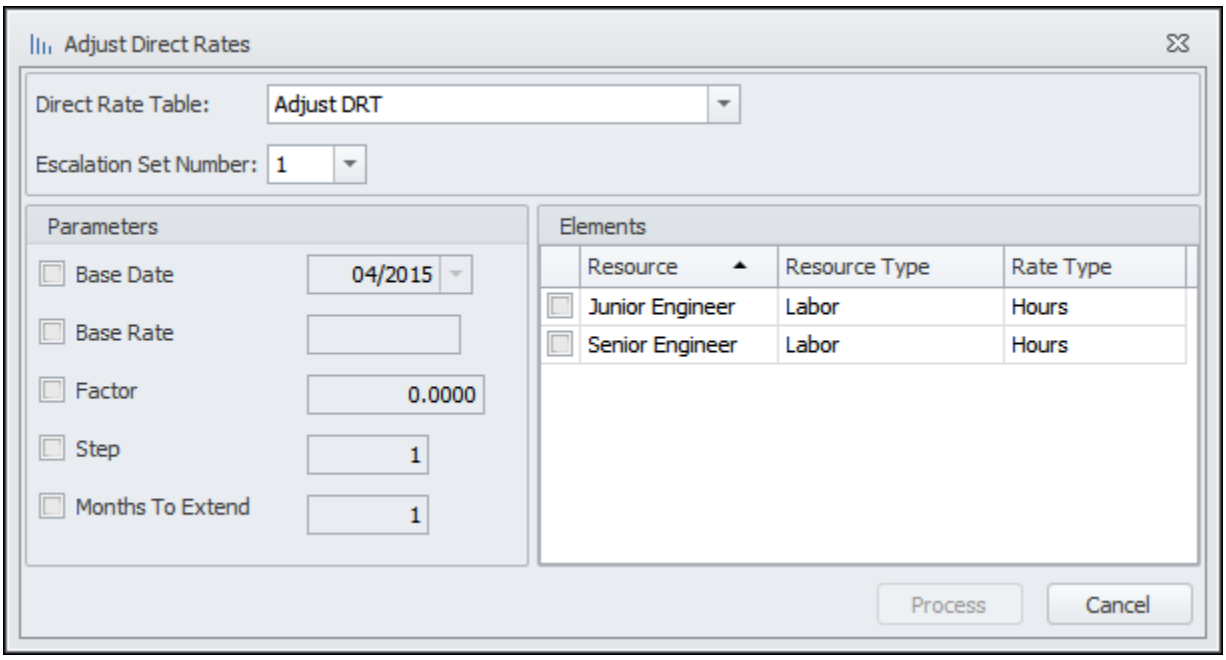
When you run the **Adjust Direct Rates** or **Adjust Rate Bands** options, you enter new escalation set parameters (**Base Date**, **Base Rate**, **Factor**, **Step**, and **Months to Extend**) to adjust the rates. You cannot enter individual rates. The following examples provide additional information about how these options work. The examples illustrate direct rates, but the same applies to rate bands.

We created a Direct Rate Table that has rates for three resources: *Junior Engineer*, *Senior Engineer*, and *No Escalation*. We used escalation sets to enter the rates for *Junior Engineer* and *Senior Engineer*. The rates for *No Escalation* were entered manually.

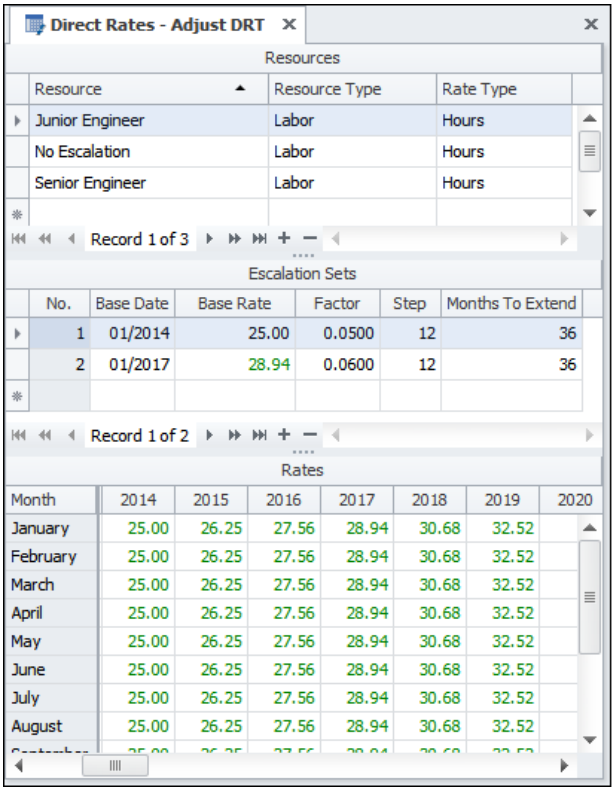


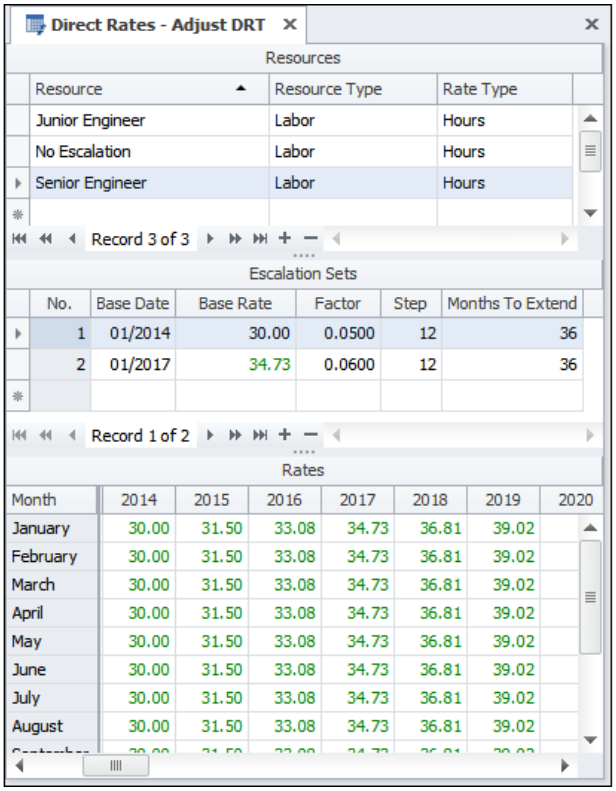


When we open the **Adjust Direct Rates** dialog box, only *Junior Engineer* and *Senior Engineer* appear.

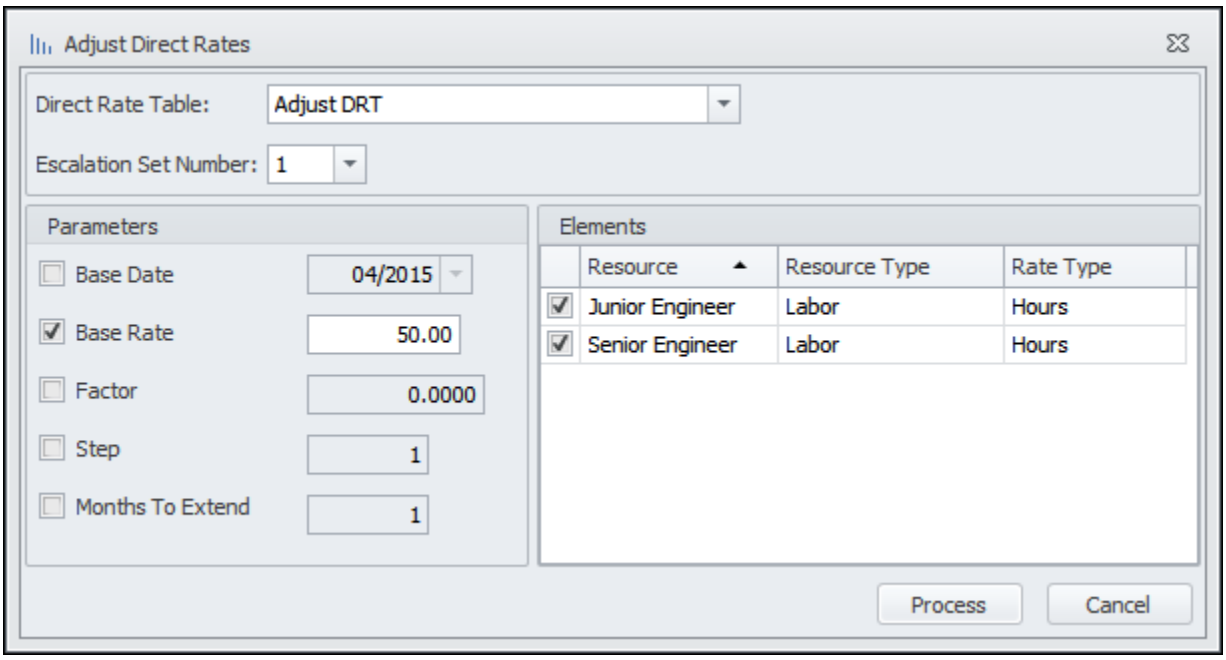


Two escalation sets were used to enter rates for *Junior Engineer* and *Senior Engineer*.

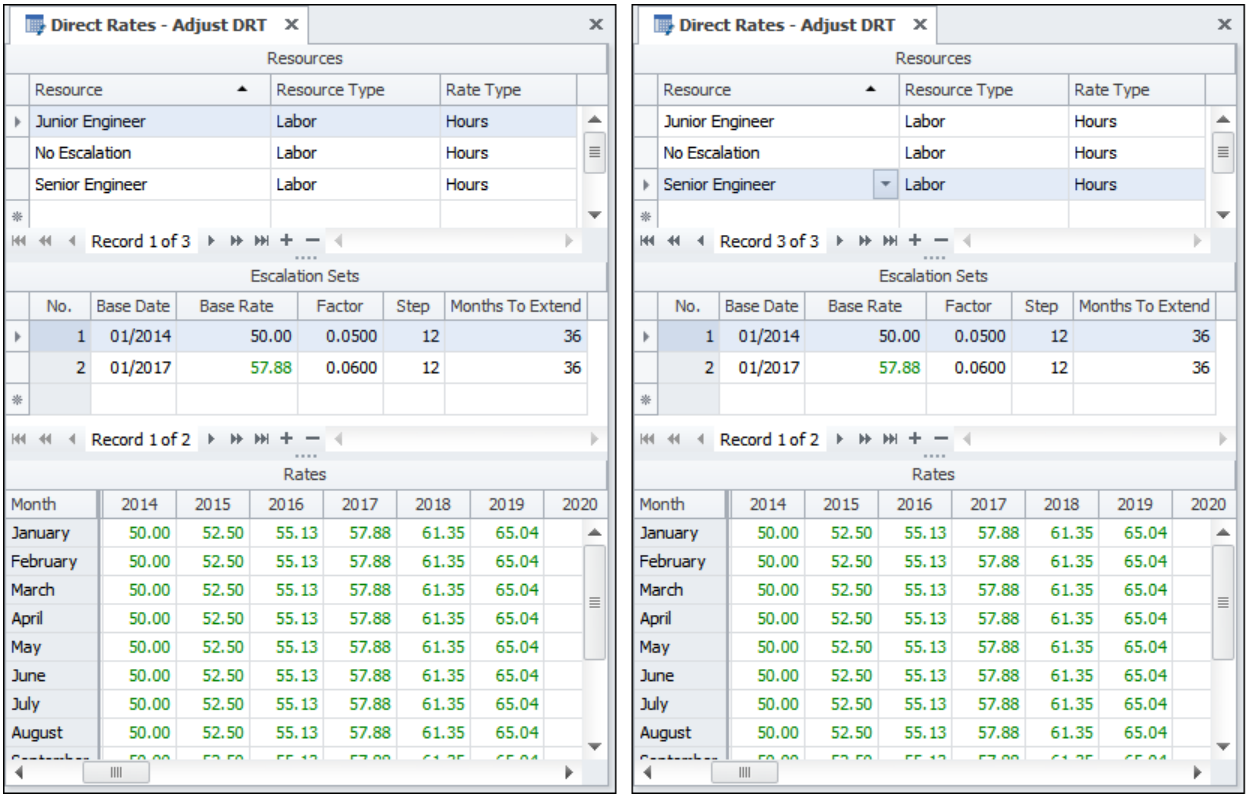




We entered a new **Base Rate** for escalation set *1* and selected both resources.

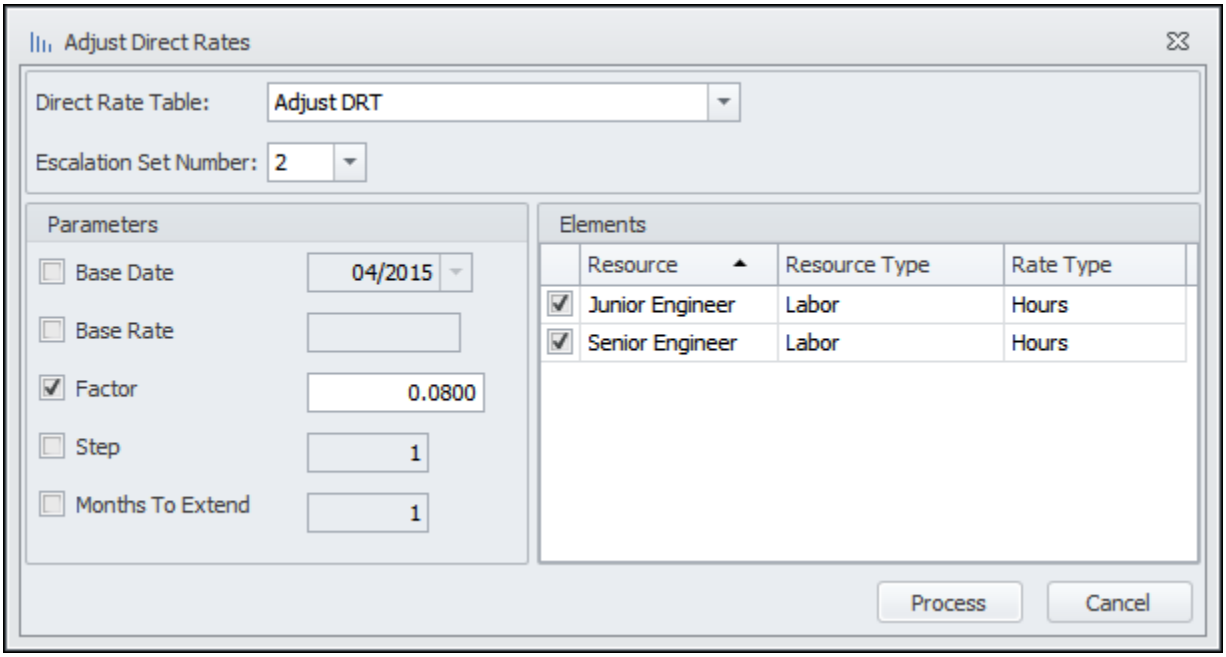


Both resources now start with the same **Base Rate**. Since we did not change the other parameters (**Base Date**, **Factor**, **Step**, **Months to Extend**), the original values apply.

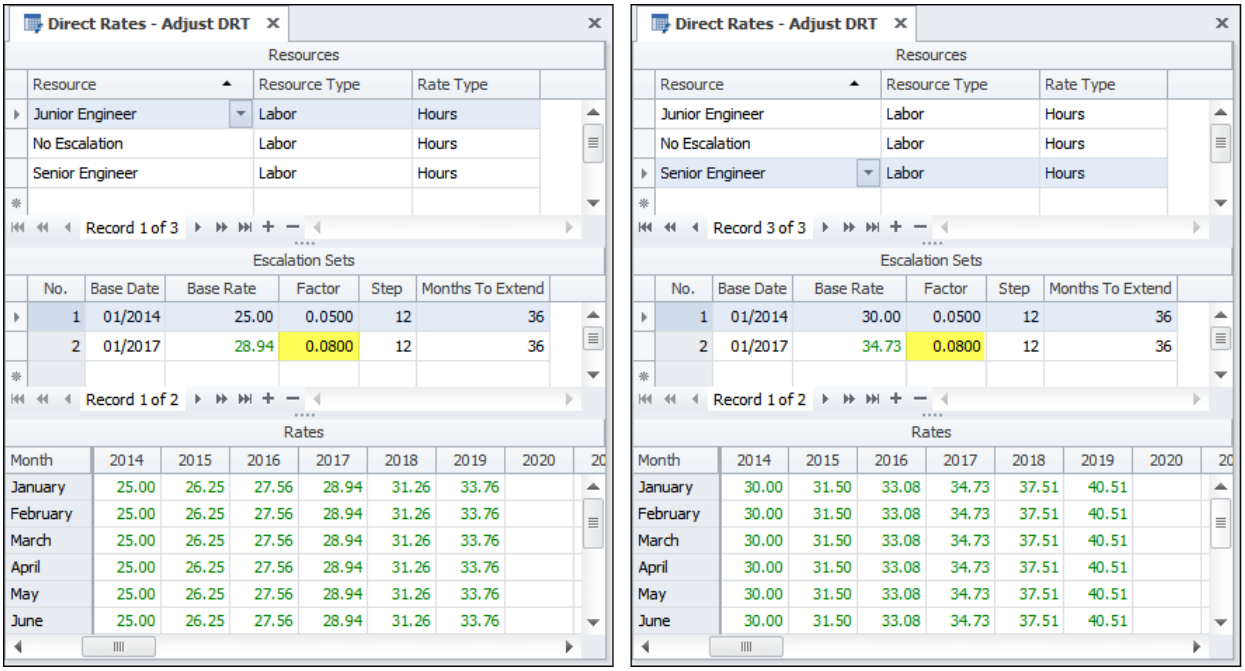


The **Escalation Set Number** field refers to the **No.** column in the grid.

We entered a new **Factor** for escalation set *2* and selected both resources.



The escalation sets of both resources in the Direct Rate Table now show *0.0800*.



Modifying rates with the **Adjust Direct Rates** and **Adjust Rate Bands** options is the same as opening the respective table and modifying the rates there. The **Rate Adjustment** options simply allow you to modify the rates of multiple resources or rate bands in one step.

Rate Bands

ProPricer offers you two ways to enter direct rates for the resources used in the proposal tasks: you can define rates in a Direct Rate Table or in a Rate Band Table. In Rate Band Tables you draw rate bands from the Rate Band Library and enter rates for them. You can then assign these rate bands directly to the resources with the same pay level in a Direct Rate Table, instead of entering the same rates one by one for each separate resource.

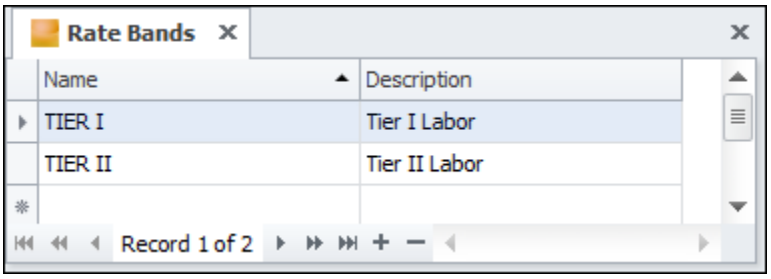
There are two types of rate bands: *Direct* and *Composite*. Direct rate bands are exactly the same as the direct rates you enter in Direct Rate Tables. They are single rates representing the amount of money the use of a resource costs in a month and year. Composite rate bands are single rates that combine the rates from selected rate bands from the current Rate Band Table. The combination of different rate bands in single rates is performed by applying factor values to the rates of the selected base rate bands.

Typically, you will create a Rate Band Table once and then use it across multiple proposals. There is no limit to the number of rate bands you can have in a table.

Rate Band Library

The Rate Band Library is where you create and store rate bands. You use the rate bands listed here in Rate Band Tables. Once a rate band has been added to a table, you define specific rates for it. You can attach a Rate Band Table to a Direct Rate Table, which will allow you assign rate bands to the resources in the Direct Rate Table. In this way you can easily apply the same rates for different resources.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the rate band.

Description

Enter a description for the rate band.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Copy a Rate Band within the Library

1. Right-click the rate band you want to copy, and then click **Copy** on the shortcut menu.

2. Enter a name for the new rate band, and then click **OK**.

Create a Rate Band

You can create as many rate bands as you need in the Rate Band Library. You can then use these rate bands in your Rate Band Tables.

1. Click the **Libraries** button and then double-click **Rate Bands**.
2. Enter a unique name for the rate band in the **Name** column.
3. Enter a short description for the rate band in the **Description** column.
4. Press **Ctrl**+**S** or move to another row to save your work.

Delete a Rate Band from the Library

1. Click the **Libraries** button and then double-click **Rate Bands**.
2. Right-click the rate band you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

*Note: You can only delete rate bands that are not used anywhere in the system. If the rate band is used, ProPricer will display the **Item Usage Info** box instead.*

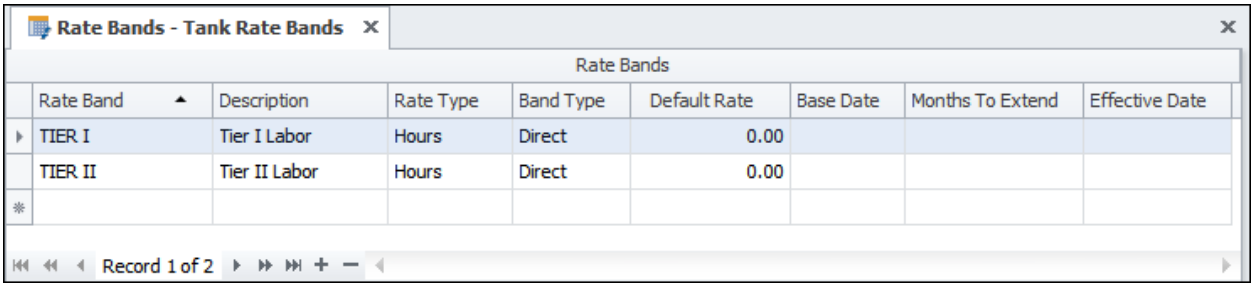
Rate Band Tables

This is where you define rates for rate bands. You can select any of the rate bands from the Rate Band Library and define rates for any of the years within the system period. The table is divided into three grids: Rate Bands, Escalation Sets/Base Rate Bands, and Rates.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Rate Bands

This grid shows all the rate bands in the table. It is also where you add new rate bands and remove unnecessary ones.



Rate Band

Enter the name of the rate band, or select it from the lookup grid.

Description

You cannot enter data in this field. ProPricer extracts its description from the Rate Band Library and displays it here.

Rate Type

Rate Type determines how the resource input will be measured. There are three options available:

- Hours - the resource input is measured in hours or equivalent heads (typically for labor resources).
- Units - the resource input is measured in units (typically for non-labor resources).
- Cost - the units of the resource and the direct cost of the resource have the same numeric expression, that is, the resource input represents cost values (typically for non-labor resources).

Currency

This column appears only if the **Multi-Currency** option is selected in the Rate Band Table properties. It will show the system currency by default, but you can enter different currencies for the rate band rates if necessary.

Band Type

Enter the type of band. There are two types:

- Direct - single rate band rates representing the amount of money chargeable for using a resource.
- Composite - single rate band rates that combine the rates of selected rate bands from the current Rate Band Table.

Default Rate

This column can be edited only if the type of the rate band is *Direct*. Enter the unit value of the rate band if the rate is constant and does not require escalation. The flat rate of a rate band covers the entire system period. If you define a flat rate, you do not have to create escalation sets or enter rates manually. The default flat rate is zero. Every rate band with band type *Direct* entered in the table will have a default rate of *0.00* until another rate is specified.

Base Date

Enter a base date. The base date must fall within the system period.

Months To Extend

Enter the months to extend the composite rate band.

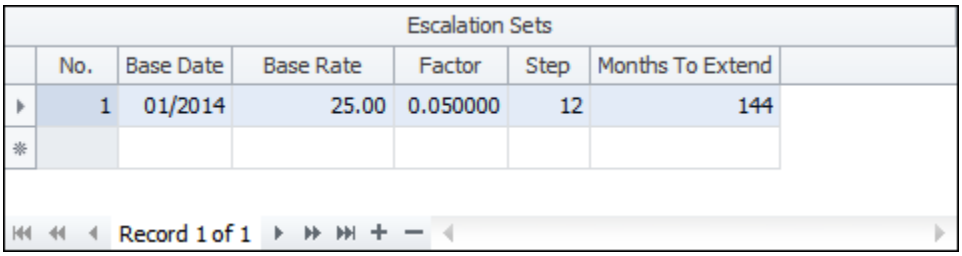
Effective Date

Enter the date the rate will take effect. This is for information only.

Escalation Sets/Base Rate Bands

The name of the second grid depends on the type of the rate band.

If the band type is *Direct*, the grid is called **Escalation Sets** and allows you to define one or more escalation sets for the rate bands in the table. The rates defined through escalation sets overwrite the default rate of a rate band. The grid shows the escalation sets of the rate band currently selected above.



No.

The cells of this column cannot be edited. ProPricer assigns numbers to the escalation sets, based on their starting dates. The set with the earliest date receives number 1.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the beginning rate for the escalation set.

Factor

Enter the factor that is applied to the base rate to escalate it. For example, express 1% as *0.01*.

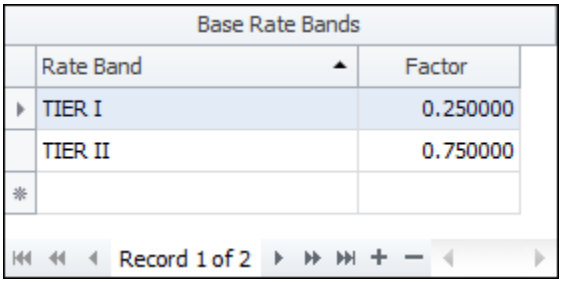
Step

Enter the number of months the base rate remains constant before the factor is applied.

Months to Extend

Enter the number of months that the escalation set should last.

If the band type is *Composite*, the grid is called **Base Rate Bands**. It allows you to select base rate bands from the current Rate Band Table for the composite rate band.



Rate Band

Enter the rate bands to base the composite rate on. You can only select rate bands from the current table.

Factor

Enter a multiplier to be applied to the rates of each base rate band.

Rates

This grid shows the rates for the rate band selected in the **Rate Bands** grid. The value in every cell is the amount of money chargeable for using the resource.

The grid shows all years in the system period. However, you only need to enter rates for the years you require. The timescale is determined by the table properties.

If the band type is *Direct*, you can manually define rates or modify the existing ones by typing rate values in the cells. If, however, you define an escalation set, ProPricer deletes all manually-entered rates and fills the cells with the new escalation rates. The **Rates** grid shows the rates defined through escalation sets or entered manually. It does not show any default rate values.

If the band type is *Composite*, the **Rates** grid cannot be edited. It shows the composite rates calculated based on the data in the **Base Rate Bands** grid.

Rates

Month	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
January	25.00	26.25	27.56	28.94	30.39	31.91	33.50	35.18	36.94	38.78	40.72	42.76
February	25.00	26.25	27.56	28.94	30.39	31.91	33.50	35.18	36.94	38.78	40.72	42.76
March	25.00	26.25	27.56	28.94	30.39	31.91	33.50	35.18	36.94	38.78	40.72	42.76
April	25.00	26.25	27.56	28.94	30.39	31.91	33.50	35.18	36.94	38.78	40.72	42.76
May	25.00	26.25	27.56	28.94	30.39	31.91	33.50	35.18	36.94	38.78	40.72	42.76
June	25.00	26.25	27.56	28.94	30.39	31.91	33.50	35.18	36.94	38.78	40.72	42.76
July	25.00	26.25	27.56	28.94	30.39	31.91	33.50	35.18	36.94	38.78	40.72	42.76

ProPricer shows rate band rates with two, three, four, five, or six digits after the decimal point, depending on the value entered on the **General** page in the **System** folder of **System Options**. If you enter rates with more digits after the decimal point, ProPricer rounds the rate to the value entered when you leave the cell. When you click the rate again, the complete rate appears.

Assign a Rate Band Table to a Proposal

You can use the rates from a Rate Band Table after you assign it to the proposal's Direct Rate Table.

1. In the Navigation Pane, click **Rates/Tables**, and then expand the **Direct Rates** folder.
2. Right-click the appropriate Direct Rate Table, and then click **Properties** in the shortcut menu.
3. In the **Rate Band Table** field, enter the name of the rate band table to use.
4. Click **OK**.

Copy a Rate Band Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
   - Expand the **Rate Bands** folder.
   - Double-click the **Rate Bands** folder to open the list of Rate Band Tables.
3. Right-click the Rate Band Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.

Copy a Rate Band within a Table

Once you have defined the rates for a rate band in a Rate Band Table, you can copy them into another rate band in the table, a rate band in the Rate Band Library, or to a new rate band that does not exist in the library.

1. Right-click the rate band you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the rate band to which you want to copy the rates.
3. Click **OK**.

ProPricer will check to see if rates have been entered for the target rate band, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Note: If the target rate band does not exist in the Rate Band Library, ProPricer will offer you the option to add it to the library. Click ***Yes*** *when prompted to add it to the library. ProPricer will create the rate band in the library and then copy the factors for it in the table. The description of the new rate band will be the same as that of the source rate band.*

Create a Rate Band Table

If you want to assign rate bands to the resources in your proposal, you must create a Rate Band Table and attach it to the proposal's Direct Rate Table.

1. Do one of the following:
   - In the Main Menu, click **New Rate Band Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Rate Bands** folder, then click **New Rate Band Table**.
2. Enter a name and description for the new table.
3. Select a timescale for the rates in the table. The rates can be annual, quarterly, monthly, or daily.
4. *(Optional)* Select the **Multi-Currency** checkbox to be able to enter different currencies for the rates of your resources.
5. Click **OK**. The Rate Band Table will open in the Workspace.

Define a Rate Band

Before you can define rate bands in a Rate Band Table, the rate bands must exist in the Rate Band Library.

1. Click the **Rates/Tables** button, and then expand the **Rate Bands** folder. Double-click the appropriate Rate Band Table.
2. In the **Rate Band** column, Enter the name of the rate band. ProPricer will retrieve the rate band description and enter it in the **Description** column.
3. Specify the rate type.
4. Specify the band type.
    - If you select band type *Direct*, do one of the following:
        - Enter a default rate for the rate band.
        - Define an escalation set for the rate band in the **Escalation Sets** grid.
        - Manually enter the rates in the **Rates** grid.
    - If you select band type *Composite*, do one of the following:
        - Specify the base date and number of months to extend.
        - Select the base rate bands, and type factors for them in the **Base Rate Bands** grid.
5. Press **Ctrl**+**S** or move to another row to save your work.

Notes:

- *If you enter a default rate for a rate band, you do not have to create an escalation set or enter rates in the **Rates** grid. ProPricer will apply the default rate across the entire period the resource is in use.*
- *If the rate band you want to add is not in the Rate Band Library, ProPricer will offer you the option to add it to the library.*

Delete a Rate Band from a Table

1. Click the **Rates/Tables** button and then expand the **Rate Bands** folder. Double-click the appropriate Rate Band Table.

2. Right-click the rate band you want to delete, and then click **Delete** on the shortcut menu.

3. Confirm the deletion when asked.

*Note: You can only delete rate bands that are not used anywhere in the system. If the rate band is used, ProPricer will display the **Item Usage Info** box instead.*

Delete a Rate Band Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Rate Bands** folder.
    - Double-click the **Rate Bands** folder to open the list of Rate Band Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete a Rate Band Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Rate Band Table Properties

The **Rate Band Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Timescale

Select a timescale for the rates in the table. The available options are Annual, Quarterly, Monthly, and Daily.

Multi-Currency

Select this checkbox to enable Multi-Currency functions for the table. This will allow you to enter different currencies for the rates of the resources if needed.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

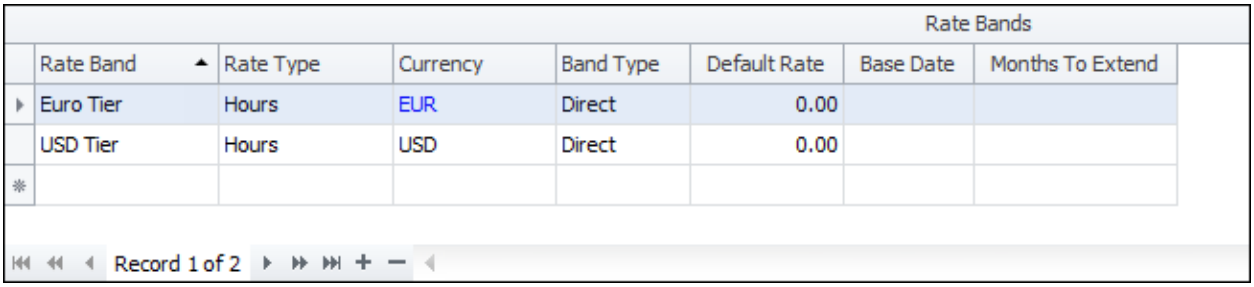
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Rate Band Tables and Multi-Currency

Selecting the **Multi-Currency** checkbox for a Rate Band Table allows you to enter rates in different currencies. When you assign the rate band to the resource, ProPricer will use the rate from the Exchange Rate Table assigned to the proposal to convert the cost to the proposal currency. For example: our system and proposal currency are USD. We created two rate bands: Euro Tier and USD Tier and then added them to a Rate Band Table. We entered a Base Rate of 10.00 for both rate bands. The only difference is the currency.

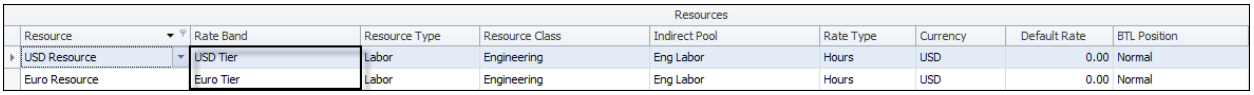


Rate Bands

Rate Band	Rate Type	Currency	Band Type	Default Rate	Base Date	Months To Extend
Euro Tier	Hours	EUR	Direct	0.00		
USD Tier	Hours	USD	Direct	0.00		

Record 1 of 2

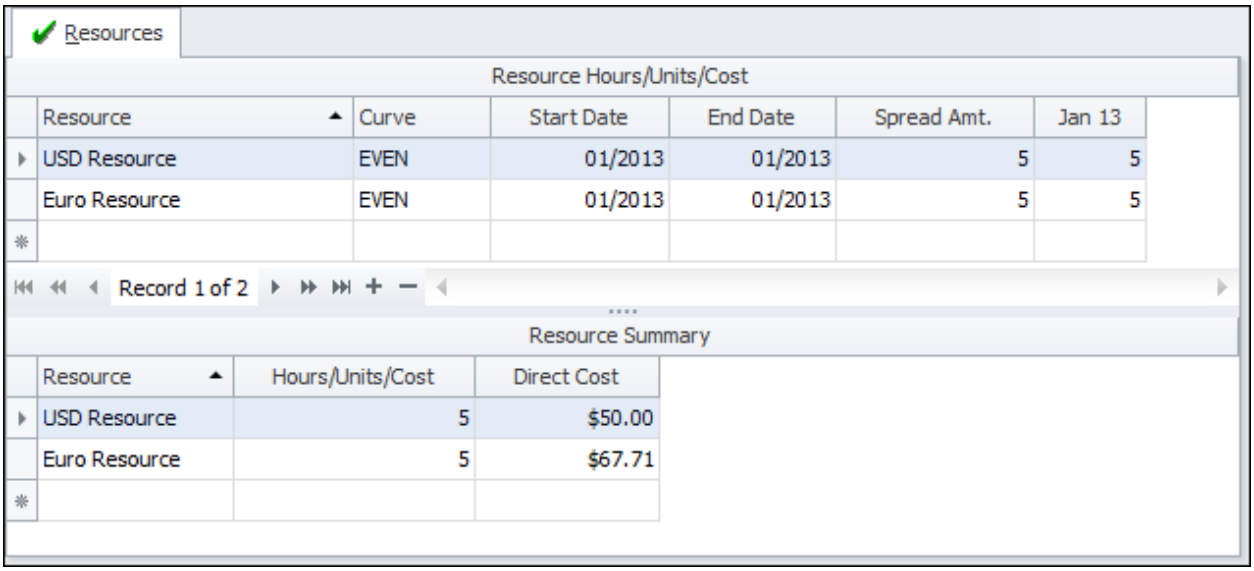
We assigned the Rate Band Table to the proposal's Direct Rate Table and assigned the rate bands to two resources: Euro Resource and USD Resource.



Resources

Resource	Rate Band	Resource Type	Resource Class	Indirect Pool	Rate Type	Currency	Default Rate	BTL Position
USD Resource	USD Tier	Labor	Engineering	Eng Labor	Hours	USD	0.00	Normal
Euro Resource	Euro Tier	Labor	Engineering	Eng Labor	Hours	USD	0.00	Normal

We added both resources to a task and spread 5 hours for them. The **Resources** tab shows $50.00 US dollars for the USD Resource and $67.71 US dollars for the Euro Resource. ProPricer used the rate from the Exchange Rate Table to convert the 50.00 Euros to US dollars (the proposal currency).

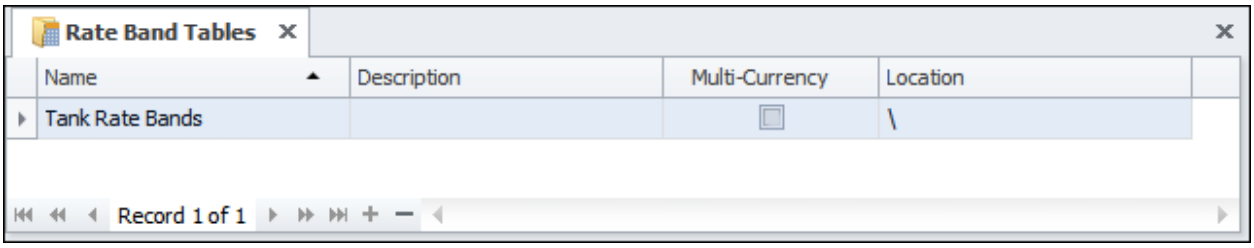


Enable Multi-Currency in a Rate Band Table

1. Right-click the appropriate Rate Band Table, and then click **Properties** on the shortcut menu.
2. Select the **Multi-Currency** checkbox.
3. Click **OK**.

Rate Band Tables List

The Rate Band Tables List shows all the Rate Band Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Timescale

This column shows the measurement of time for rates in the table.

Multi-Currency

This column indicates if Multi-Currency functions have been enabled for the table.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Rate Bands** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Rate Cards

The Rate Card feature is only available in Services proposals. To select a proposal type, go to the Pricing page of the Proposal Properties.

In a proposal's Rate Card, the costs of a resource are automatically calculated as you adjust the resource's direct rate and indirect rates, and vice versa. This can help you find the resource's most competitive rate that fully accounts for indirect costs. You can also blend multiple resources and their rates together by creating a labor category in the Rate Card. Like a single resource, a labor category can be changed in the Rate Card and added to tasks in the proposal.

Most of the default resource data in a Rate Card can be overridden with proposal-specific information that appears as blue text. Once saved, overrides and any other changes you make in a Rate Card are immediately reflected in the tasks that contain the updated resource or labor category. Changes in a Rate Card do not affect global data in rate tables and libraries.

At any time, you can perform Rate Card adjustments that quickly update specific indirect rates for multiple resources simultaneously.

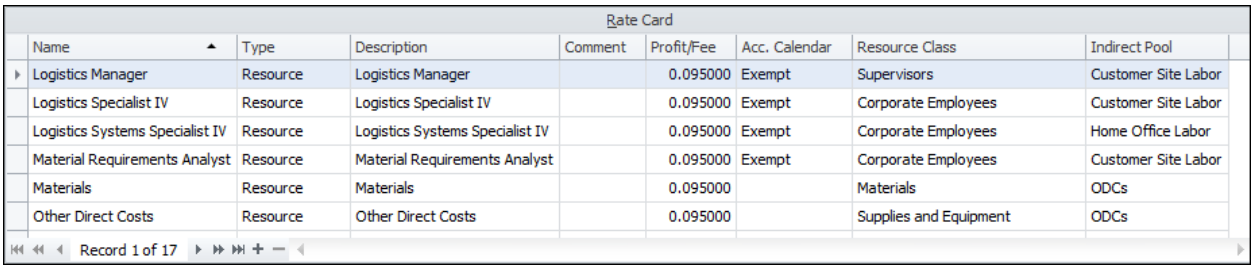
The Rate Card currency always matches the proposal currency. It is not affected when Multi-Currency is enabled in the proposal.

Rate Cards are divided into three grids: Rate Card, Detail Rate Buildup, and Bases.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Rate Card

This grid contains the resources and labor categories in your proposal. Resources from the proposal's Direct Rate Table are displayed automatically.



Rate Card

Name	Type	Description	Comment	Profit/Fee	Acc. Calendar	Resource Class	Indirect Pool
Logistics Manager	Resource	Logistics Manager		0.095000	Exempt	Supervisors	Customer Site Labor
Logistics Specialist IV	Resource	Logistics Specialist IV		0.095000	Exempt	Corporate Employees	Customer Site Labor
Logistics Systems Specialist IV	Resource	Logistics Systems Specialist IV		0.095000	Exempt	Corporate Employees	Home Office Labor
Material Requirements Analyst	Resource	Material Requirements Analyst		0.095000	Exempt	Corporate Employees	Customer Site Labor
Materials	Resource	Materials		0.095000		Materials	ODCs
Other Direct Costs	Resource	Other Direct Costs		0.095000		Supplies and Equipment	ODCs

Record 1 of 17

Name

Enter a name to create a labor category. Resource names appear automatically and cannot be changed.

Type

This column indicates that an item is either a resource or labor category. It is automatically populated and cannot be changed.

Description

The description from the Resource Library appears in this column by default, but you can override it. When you create a labor category, you can enter a description for it or leave the column blank.

Comment

(Optional) Type a note if you have any additional information you want to save. You can click the down arrow to expand the field. If you click **OK**, the field closes, and your comment is saved. If you click **Cancel**, the field closes, and your comment is not saved.

Profit/Fee

If a profit/fee rate is entered in the Proposal Properties, then it appears here by default. If no profit/fee rate for the proposal exists, then the column is blank and the profit/fee rate from the proposal's Indirect Rate Table is used instead. In either situation, you can override the rate. When you make changes in this column, the

rate in the **Detail Rate Buildup** grid is updated automatically. However, the rate in the **Profit/Fee** column remains the same if you change the resource or labor category's profit/fee rate in the **Detail Rate Buildup** grid.

Accounting Calendar

The accounting calendar assigned to a resource in the Resource Library appears in this column by default, but you can override it. If a calendar is not assigned in the Resource Library, then you can assign one to the resource here. When you create a labor category, you can assign a calendar to it or leave the column blank.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Resource Class

The resource class assigned to a resource in the Resource Library or the proposal's Direct Rate Table appears in this column by default. The default entry cannot be overridden, but you can change a class in the Resource Library or override a class in the Direct Rate Table to automatically update this column.

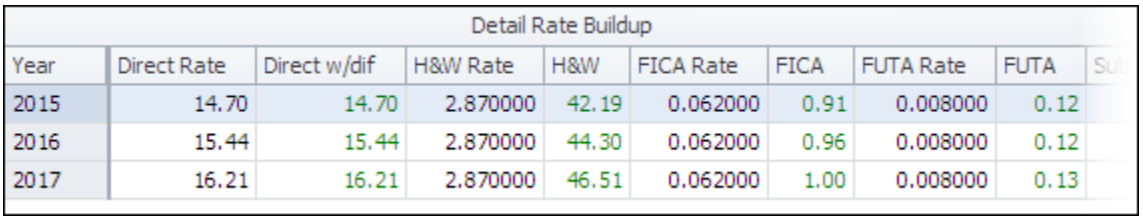
When you create a labor category, you can assign a class to it or leave the column blank.

Indirect Pool

The indirect pool assigned to a resource in the Direct Rate Table appears in this column by default, but you can override it. If an indirect pool is not assigned in the Direct Rate Table, then you can assign one to the resource here. When you create a labor category, you can assign an indirect pool to it or leave the column blank.

Detail Rate Buildup

This grid displays the rates and costs of the resource or labor category selected in the **Rate Card** grid. For a labor category, the blended rates of its resources are shown here. Changes in this grid do not affect the data in the **Bases** grid.



Detail Rate Buildup

Year	Direct Rate	Direct w/dif	H&W Rate	H&W	FICA Rate	FICA	FUTA Rate	FUTA	Su
2015	14.70	14.70	2.870000	42.19	0.062000	0.91	0.008000	0.12	
2016	15.44	15.44	2.870000	44.30	0.062000	0.96	0.008000	0.12	
2017	16.21	16.21	2.870000	46.51	0.062000	1.00	0.008000	0.13	

*Note: While working on a labor category, ProPricer can help you quickly copy data from one year to other years. Right-click a row, select **Copy**, then choose the data to copy and the years to populate.*

Comment

(Optional) Type a note if you have any additional information you want to save. You can click the down arrow to expand the field. If you click **OK**, the field closes, and your comment is saved. If you click **Cancel**, the field closes, and your comment is not saved.

Direct Rate

This column shows the direct rate of the resource or labor category selected in the **Rate Card** grid. You can override the default rate displayed.

If a resource is selected in the **Rate Card** grid, then the resource's rate from the Direct Rate Table appears by default.

If a labor category is selected in the **Rate Card** grid, then the default rate is determined by the labor category's resources, which are listed in the **Bases** grid. The weight and direct rate of each resource in that grid are combined to produce the direct rate of the labor category.

If your direct rates are based on your fiscal year instead of the regular calendar year, go to the Proposal Properties and set the **Rate Card Timescale** to *Annual (Fiscal)*.

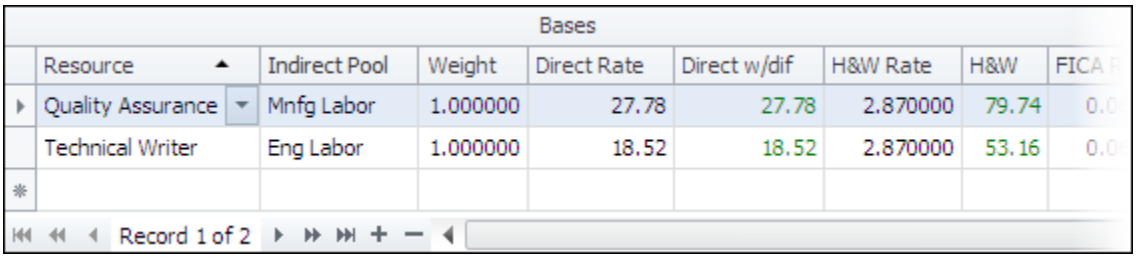
Indirect Elements

These columns come from the elements of the Algorithm assigned to the proposal's Indirect Rate Table. Each indirect element is displayed with a rate column and a cost column. You can override the rates and indirect costs displayed.

Bases

This grid is for building the labor category selected in the **Rate Card** grid. Just as the **Detail Rate Buildup** grid contains rates and costs for a single resource or labor category, the **Bases** grid contains the same data for the individual resources that comprise a labor category. Additionally, the indirect pool and weight of each base resource can be changed in this grid. When resource data is altered in the **Bases** grid, the labor category data in the **Detail Rate Buildup** grid is automatically updated.

Labor category bases and their rates can be different for each year selected in the **Detail Rate Buildup** grid. Also, any resource from the proposal's Direct Rate Table can be a base in multiple labor categories.



Resource

Enter a resource from the proposal's Direct Rate Table.

Indirect Pool

The indirect pool assigned to a resource in the Direct Rate Table appears in this column by default, but you can override it. If an indirect pool is not assigned in the Direct Rate Table, then you can assign one to the resource here.

Comment

(Optional) Type a note if you have any additional information you want to save. You can click the down arrow to expand the field. If you click **OK**, the field closes, and your comment is saved. If you click **Cancel**, the field closes, and your comment is not saved.

Weight

Enter the percentage of the resource's rates to include in the labor category's blended direct and indirect rates. The default value is *1* (or 100%).

Direct Rate

The resource's rate in the Direct Rate Table appears in this column by default, but you can override it.

Indirect Elements

These columns come from the elements of the Algorithm assigned to the proposal's Indirect Rate Table. Each indirect element is displayed with a rate column and a cost column. You can override the rates and indirect costs displayed.

Delete Overriding Rate Card Data

You can delete all the overriding data in the **Detail Rate Buildup** and **Bases** grids of a Rate Card. When you delete overrides, the data is replaced with information from the proposal's Direct Rate Table and Indirect Rate Table.

Delete Overrides in the Detail Rate Buildup Pane

1. Right-click a row for a specific year in the grid.
2. Point to **Delete Overrides**, and then click an option:
    - **Selected Period** - Delete all overriding rates for the highlighted year.
    - **All Periods** - Delete all overriding rates for all years in the grid.
3. Press **Ctrl**+**S** or move to another row to save your changes.

Delete Overrides in the Bases Pane

1. Right-click a row for a specific base resource.
2. Point to **Delete Overrides**, and then click an option:
    - **Selected Base** - Delete all overriding data, including the indirect pool and rates, for the highlighted resource.
    - **All Bases** - Delete all overriding data, including the indirect pool and rates, for all resources in the grid.
3. Press **Ctrl**+**S** or move to another row to save your changes.

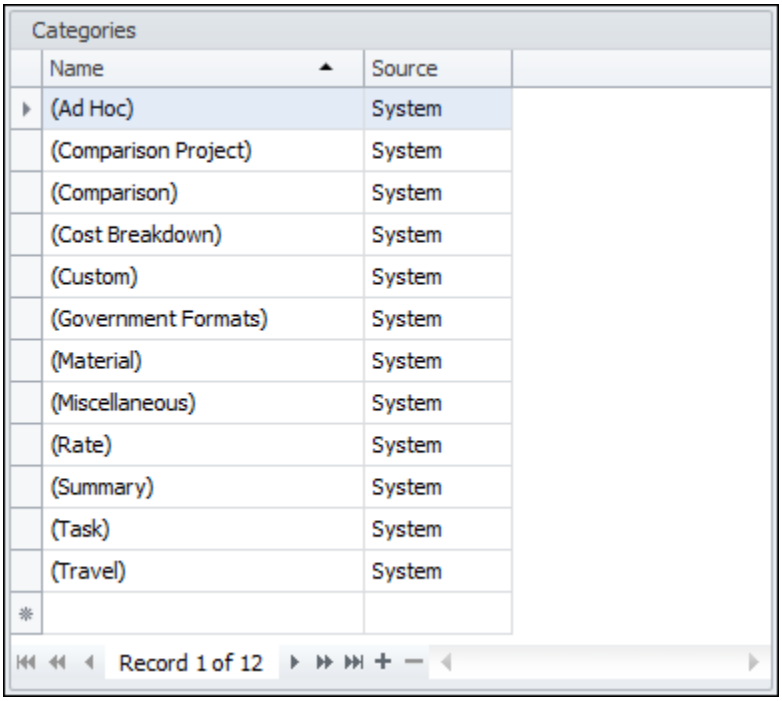
Report Defaults

The default report settings are grouped into the following pages:

- Categories
- DOE Form 4620
- FWP Form
- General
- Layout
- Worksheet Names

Categories Page

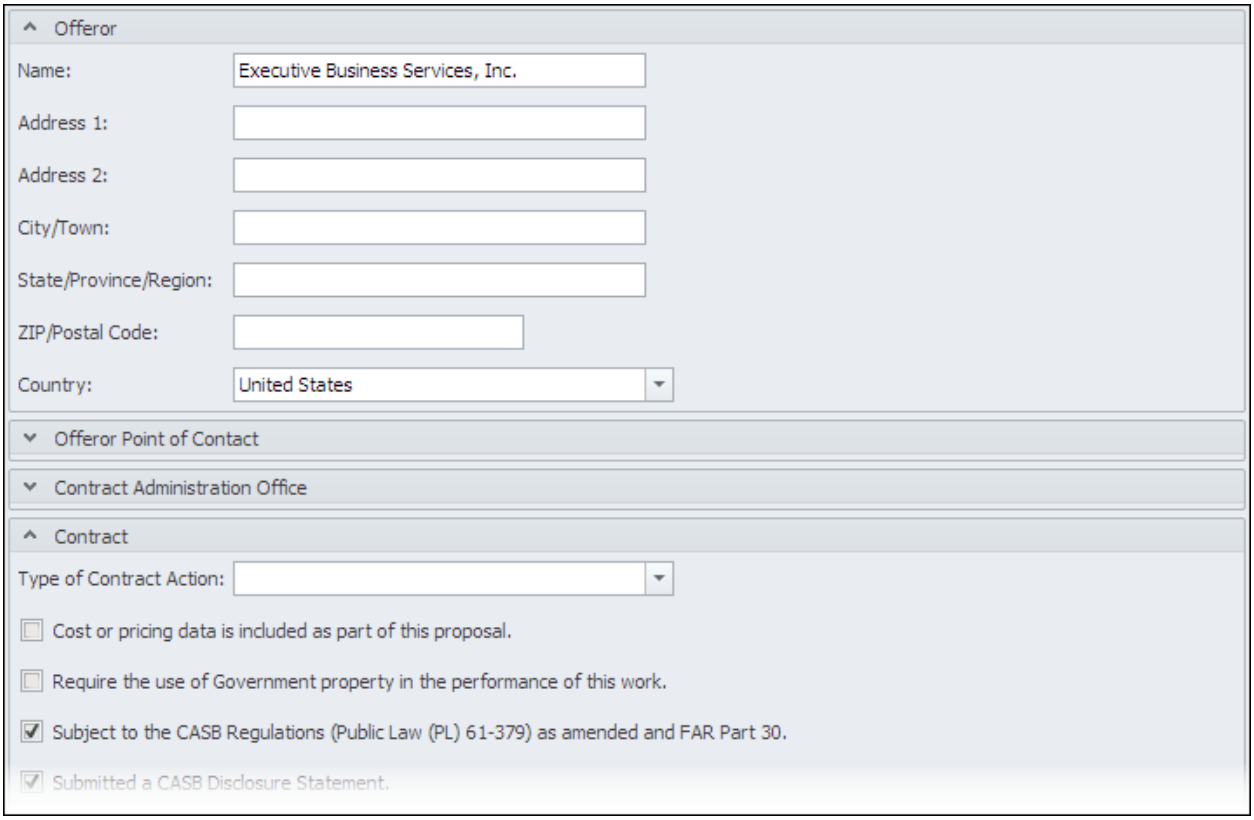
On this page, you create categories for your custom reports. When you create a custom report, you can assign the user category to it. You cannot modify the system categories.



Cover Sheet Page

On this page, you enter the information required to run the Proposal Cover Sheet Report. This information will appear on the Cover Sheet page of the Proposal Properties for every new proposal you create.

The dialog box is divided into four sections: Offeror, Offeror Point of Contact, Contract Administration Office, and Contract. We collapsed the Offeror Point of Contact and Contract Administration Office sections in the screenshot.



Offeror

In this section, enter the name and address of your company.

Offeror Point of Contact

In this section, enter the name, title, phone number, and email address of the contact person.

Contract Administration Office

In this section, enter the name and address of the Contract Administration Office.

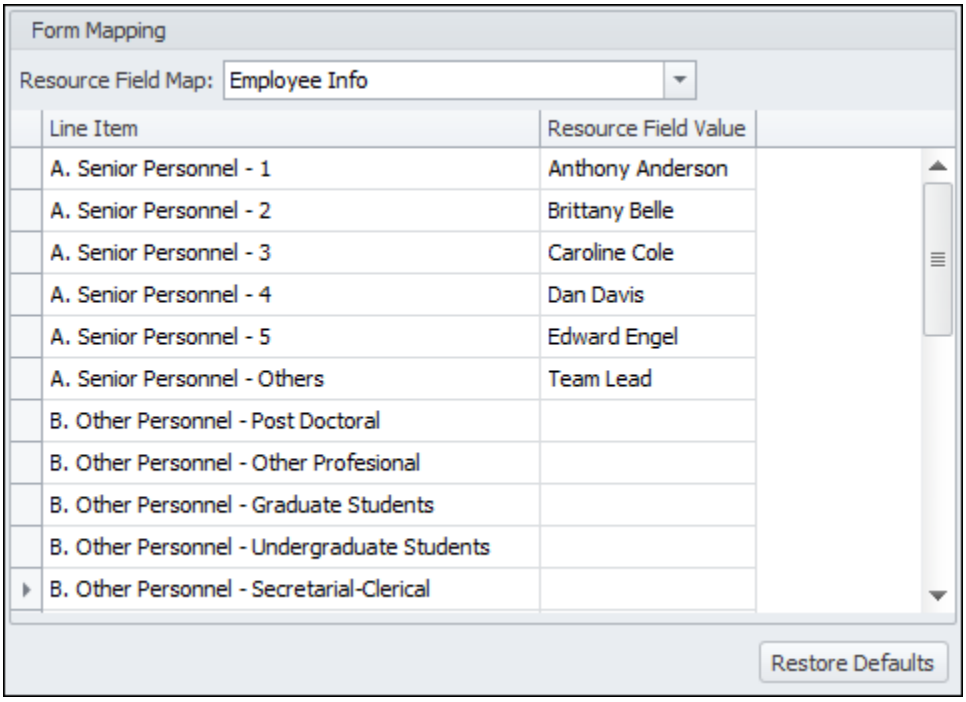
Contract

In this section, you establish the type of contract you are submitting. You also specify if it includes cost or pricing data, if it requires the use of government property, and if it complies with various regulations and requirements. Select the checkboxes of all the apply.

DOE Form 4620 Page

This page is exclusively for the DOE Form 4620 Report. The form mapping you set up here will be entered by default in the Proposal Properties of all new proposals.

These settings use a resource field and its values to associate resources with the line items in DOE Form 4620.



Form Mapping

Resource Field Map

Select an existing resource field from the Resource Field Library. This field provides the values you map to each line item.

Line Item

These line items correspond to the ones in the report. The line item names cannot be edited.

Resource Field Value

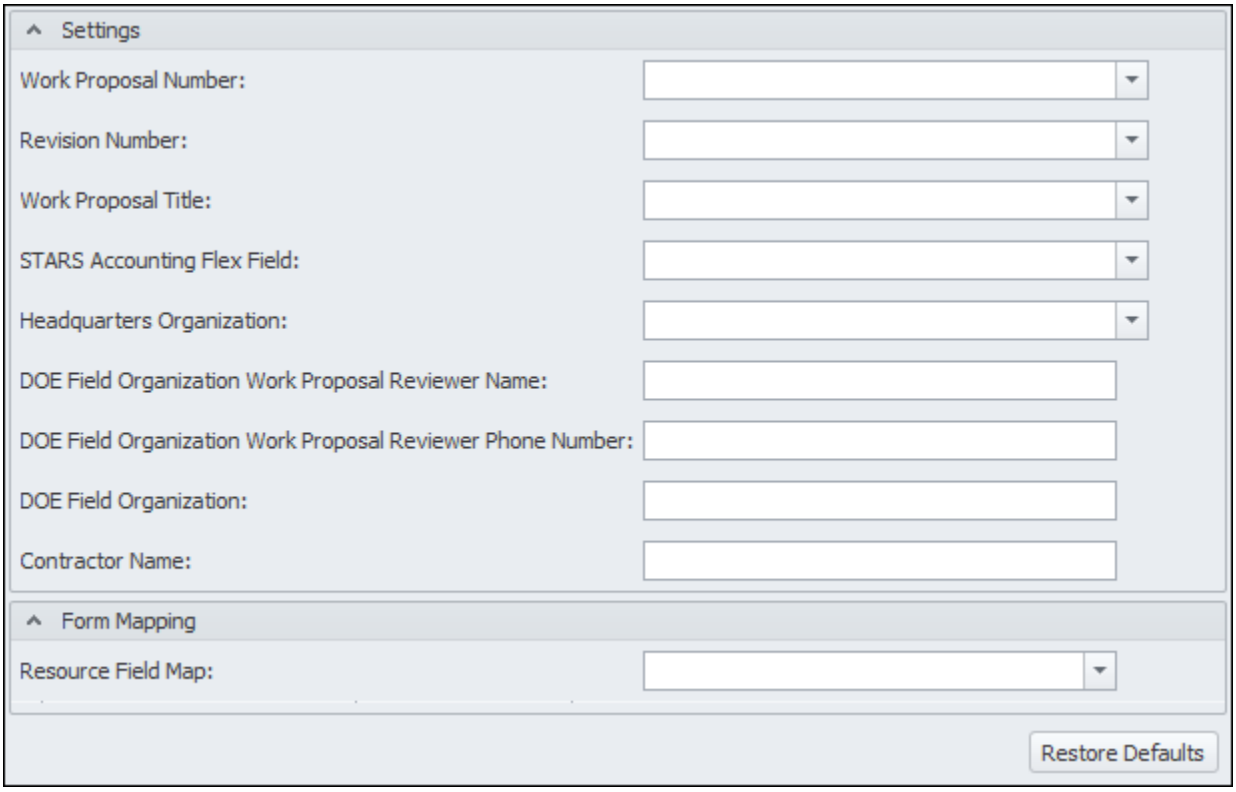
Select a resource field value to map it to a line item. This determines how the report calculates each item’s cost. If a resource has the value assigned to it in a task, then the line item will include that resource.

Restore Defaults

Restore the original form mapping settings on this page.

FWP Form Page

This page is exclusively for the FWP Form Report. The information you enter applies to all proposals that you run the report on.



Settings

Use these settings to fill in boxes 1, 2, 4, 5, 8, 9, 10, and 12 on the first page of the FWP Form. The setting names correspond to the box names on the form.

Form Mapping

Resource Field Map

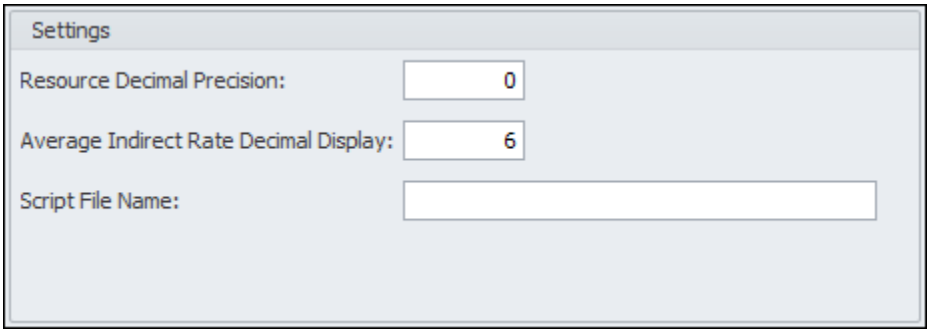
Select an existing resource field from the Resource Field Library. This field provides the values you map to each item in the Proposal Properties. It will be selected by default in the properties of every new proposal you create.

Restore Defaults

Restore the original settings on this page.

General Page

On this page, you set options that affect ProPricer reports.



Resource Decimal Precision

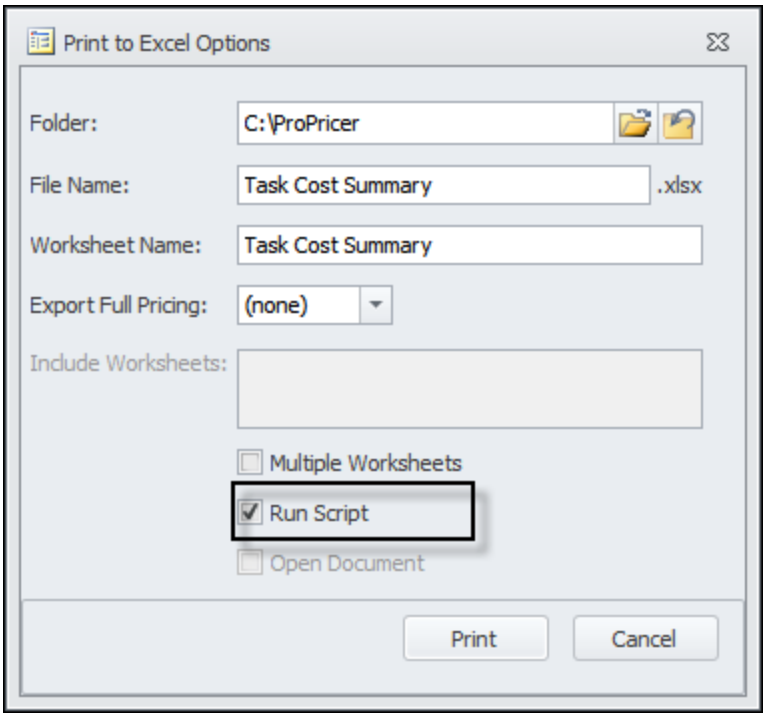
Enter the number you want ProPricer to use to round resource hours/units/cost values. You can enter a number between 0 and 12. See Decimal Display versus Decimal Precision.

Average Indirect Rate Decimal Display

Enter the number of decimal places after the decimal point you want to show for the average indirect rate on reports. The default number is 6, but you can enter a number between 0 and 6.

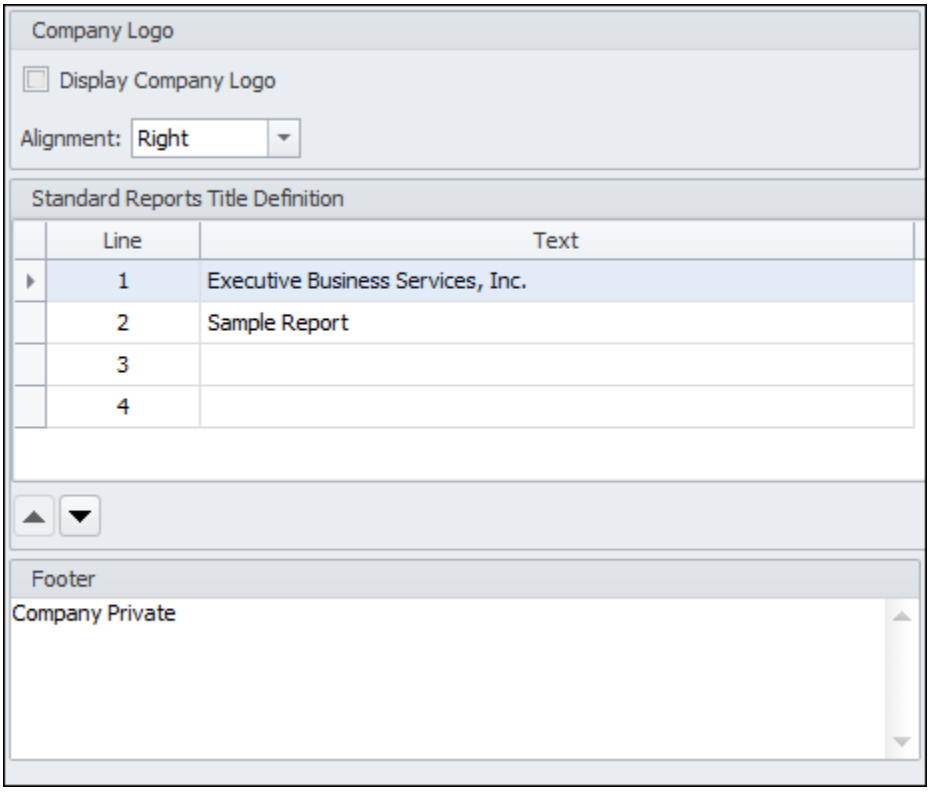
Script File Name

Here you can enter the name of the file and full path, if necessary, that will automatically run a script outside of ProPricer if the **Run Script** checkbox is selected when you click **Print to Excel** or **Print to Word**.


Print to Excel Options
Folder:
C:\ProPricer
File Name:
Task Cost Summary
.xlsx
Worksheet Name:
Task Cost Summary
Export Full Pricing:
(none)
Include Worksheets:
Multiple Worksheets
Run Script
Open Document
Print
Cancel

Layout Page

On this page, you set the default options for the company logo, header, and footer in all reports.



Company Logo

Display Company Logo

Select this checkbox to include your company logo graphic at the top of reports.

Alignment

Set the alignment of your company logo graphic in all reports.

Standard Reports Title Definition

Line

Shows the positions of the lines of header text. Use the arrow buttons below the grid to change the positions.

Text

There are four lines available for you to enter up to 255 characters per line, as well as two variables: [Company Name] and [Report Name]. These variables tell ProPricer to print the name of your company and the name of the report, respectively. These variables occupy lines 1 and 2 by default.

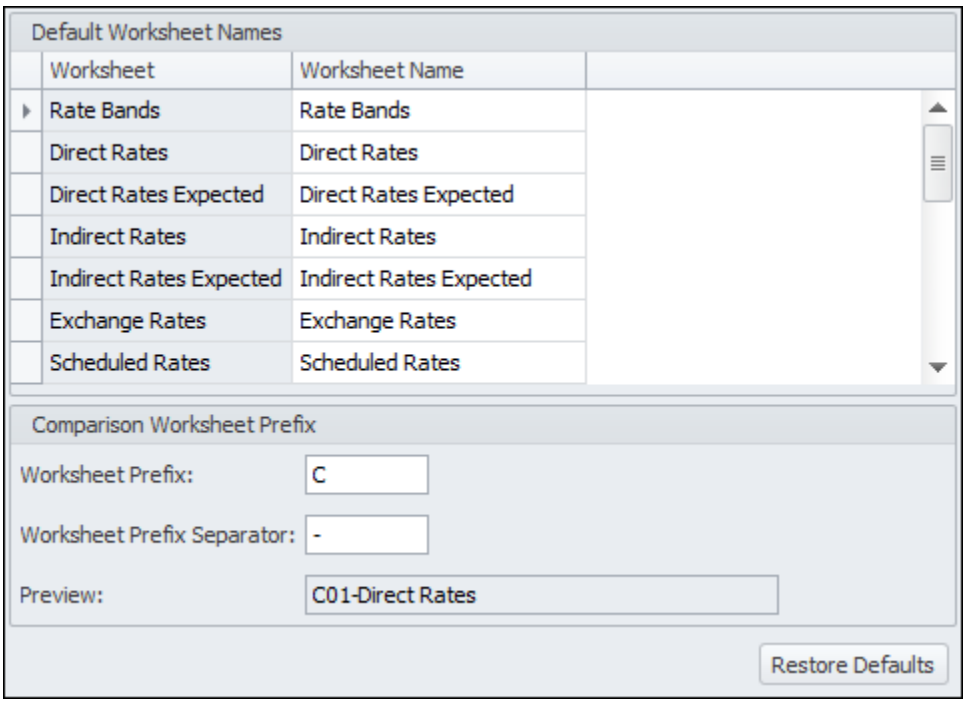
Footer

Enter the text you want to appear in the footer of every report in ProPricer. For example, you can enter a security message, such as *Company Private*, *Proprietary*, *Confidential*, etc., or any other text that is appropriate for your company.

If you make changes and need to restore the default settings, right-click anywhere in the grid and then click **Restore Defaults** on the shortcut menu. ProPricer will enter the name entered in the **Company Data** dialog box and the name of the report.

Worksheet Names Page

On this page, you can change the default names for the worksheets created when you select the **Print to Excel** option for a report and the **Export Full Pricing** checkbox is selected.



Comparison Worksheet Prefix section

The next two options pertain to the Excel worksheets that are created for the comparison reports. The base proposal will use the Default Worksheet Names. The names of the worksheets for the comparison reports will begin with the prefix, 01, 02, 03 (depending on the number of comparison proposals) and the separator.

Worksheet Prefix

Enter the prefix you want the worksheets created for the comparison reports to use.

Worksheet Prefix Separator

Enter the separator you want to use between the prefix and the name of the worksheet.

Preview

This is an example of how the names of the worksheets for the comparison reports will look. It is for information only.

Restore Defaults

Restore the original worksheet names on this page.

Notes:

- *Worksheet names cannot be duplicated.*
- *Worksheet names must conform to the rules established for Excel worksheet names.*
- *Worksheet names cannot be blank.*

Reports

Reporting is a key feature when you need to prepare data for internal or external review processes. Once you have entered all of your data in ProPricer, you can generate standard reports and batch reports in easy-to-read formats that provide quick data validation. You can also choose different options and customize your reports to suit your requirements.

To access the list of available reports, click the **Reports** ribbon, and then click **Report List**. In the list, double-click a report to open the **Report Options**.

Once the options for a report are set, you can print it to your screen, send it to your printer, or print it to a file.

When you print to screen, the report will appear in a new tab in your Workspace, and the **Report Preview** ribbon will appear. The buttons on this ribbon allow you to change the margins and orientation of the report, change the size of the paper, add a watermark, and email the report, among other things. If you change any of the report parameters, you will need to print the report to your screen again or refresh the report. The modified report will open in another tab in the Workspace.

Add a Watermark to a Report

Watermarks are text or pictures that appear behind document text. You can add text watermarks, such as *Draft* or *Confidential*, or you can create your own custom watermark, such as a company logo.

Add a Text Watermark

1. On the **Report Preview** ribbon, in the **Page Background** group, click **Watermark**.
2. In the **Watermark** dialog box, click the **Text Watermark** tab.
3. Type the text you want to appear in the Text field.
4. Define the pages you want to have the watermark.
5. Click **OK**.

Add a Picture Watermark

1. On the **Report Preview** ribbon, in the **Page Background** group, click **Watermark**.
2. In the **Watermark** dialog box, click the **Picture Watermark** tab.
3. Click **Load image** to select the image you want to use.
4. Select the horizontal and vertical alignments.
5. Define the pages you want to have the watermark.
6. Click **OK**.

Ad Hoc Layout

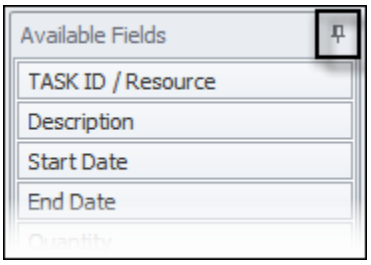
The **Ad Hoc Layout** grid opens when you click ... next to the **Ad Hoc Layout** field in the report options. It shows all layouts specific to that report. It is where you create new or edit existing layouts. Each report has a predefined (Default) layout that cannot be altered or deleted. The grid consists of the following sections: **Ad Hoc Layouts**, **Available Fields**, **Layout**, **Layout Properties**, **Field Properties**, and **Preview**.

The layout can be customized to suit your viewing needs. The **Available Fields** section can be collapsed to offer more workspace. The **Preview** area can be enlarged so you can see more of the report. The **Layout Properties** and **Field Properties** sections are positioned along the right side by default and will hide automatically when you click another area, but you can dock them to a different position and keep them floating in the area if you wish.

Available Fields

This section lists the fields that can be included in the report. The fields that you see will differ by report, the summary element selected, and your Access Rights.

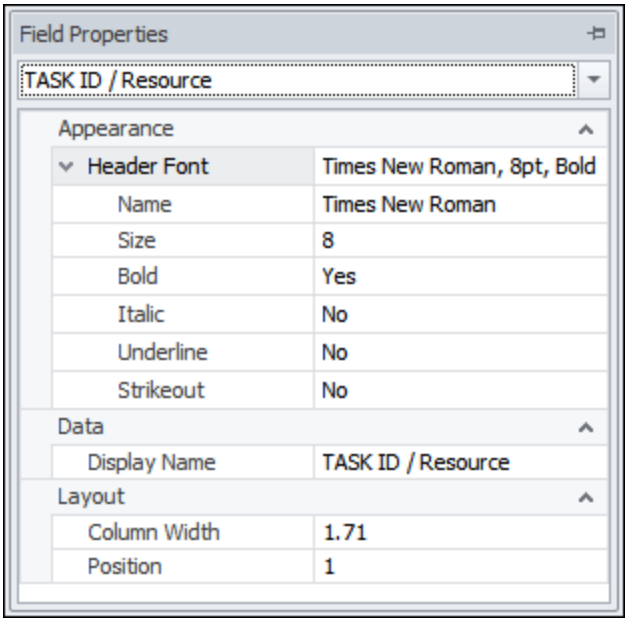
The **AutoHide** pin in the top right corner of the section allows you to hide/dock the section. If the pin is in the horizontal position, AutoHide is enabled. The section will close when you move the cursor to another area. Click the tab to reopen the section. If the pin is in the vertical position, you can dock the section to the position of your choice.



Field Properties

The Ad Hoc Field Properties allow you to define how the individual column headers and corresponding text will appear in the report. Any changes you make will appear in bold letters, indicating it is not the default setting. If you want to restore the default setting, right-click the item and then click **Restore Defaults** on the shortcut menu. Please note that any changes you make in the **Appearance** section are reflected in the **Preview** area only. The **Layout** area will not show the changes.

The **Field Properties** section has an **AutoHide** pin in the top-right corner, which means you can hide it while adding fields or previewing, as well as dock it to a new position. It is divided into three sections: **Appearance**, **Data**, and **Layout**.



Appearance

Header Font

This field shows the name and size of the font selected for the header. Click the plus sign to show the items that can be modified.

Name

Select the font you want to use. The default font is Times New Roman.

Size

Select the font size. The default font size is 8 point.

Bold

Select **Yes** to bold the text in the report.

Italic

Select **Yes** to italicize the text in the report.

Underline

Select **Yes** to underline the text in the report.

Strikethrough

Select **Yes** to strikeout the text in the report.

Data

Display Name

Enter the name of the field as you want it to appear at the top of the column on the report.

Layout

Column Width

Displays the width of the columns in the Layout area. This width can be modified by entering a different number or by using the mouse to drag the boundary to the right of the selected column.

Position

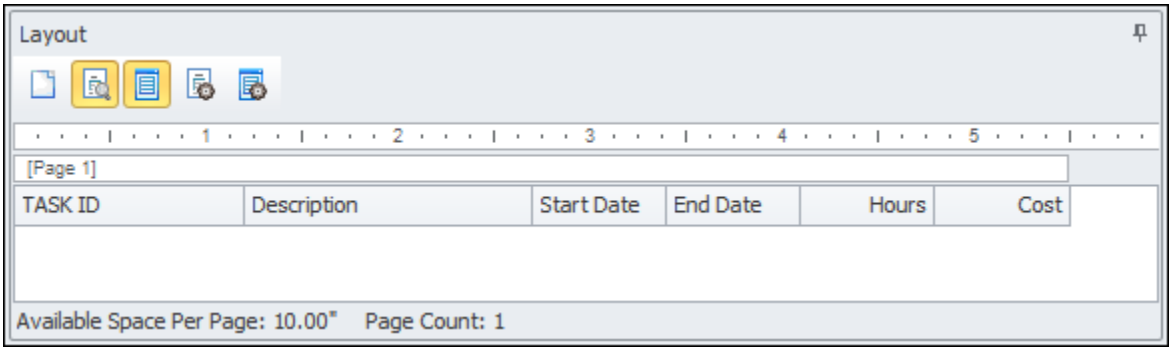
Displays the number defining the position of the column in the Layout area starting with column number 1 on the left and moving to the right. To change the position of the column, enter the number of the position within the grid to which you want to move the column.

Layout Area

The **Layout** area is where you add the fields you want to appear in the report. You can work in conjunction with the **Layout Properties** and **Field Properties** sections to define how the data will appear on the report. Changes to the settings in the **Layout Properties** affect the entire report, while changes to the settings in the **Field Properties** are on a field-by-field basis.

The buttons include: **Clear Layout**, **Show/Hide Preview**, **Show/Hide Available Fields**, **Show/Hide Layout Properties**, and **Show/Hide Field Properties**. The latter four are toggle buttons that will display *Show* if the option is hidden or *Hide* if the option is displayed.

The **AutoHide** pin in the top right corner of the section allows you to hide/dock the section. If the pin is in the horizontal position, AutoHide is enabled. The section will close when you move the cursor to another area. Click the tab to reopen the section. If the pin is in the vertical position, you can dock the section to the position of your choice.



Add a Field

- Method 1: Double-click the field in the **Available Fields** section you want to add.
- Method 2: Drag the field into the **Layout** area.

Remove a Field from the Layout Area

- Method 1: Double-click the field you want to remove.
- Method 2: Drag the field out of the **Layout** area.

Remove All Fields from the Layout Area

- Click the **Clear Layout** button.

Rearrange the Fields in the Layout Area

- Method 1: Drag the field to the position you want.
- Method 2:
    1. Open the **Field Properties** group.
    2. Make sure the correct field is selected.
    3. In the **Layout** section, enter the position you want in the **Position** field.

Change the Width of a Column

- Method 1: Drag the right/left margin of the column until it is the width you want.
- Method 2:
    1. Open the **Field Properties** group.
    2. Make sure the correct field is selected.
    3. In the **Layout** section, enter the width you want in the **Column Width** field.

Change the Unit of Measurement

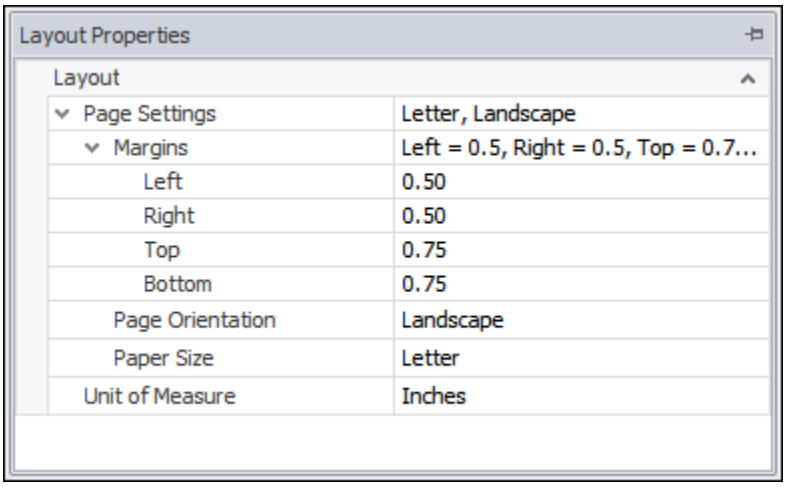
1. Open the **Layout Properties** group.
2. In the **Layout** section, select the measurement setting you want.

The **Available Space Per Page** indicates the width of the page, followed by the number of pages. As you add columns to the layout, ProPricer checks to see if the column will fit on the current page or if it will be added to the next one. The default setting is inches, but you can change it to show centimeters or pixels.

Layout Properties

The Ad Hoc Layout Properties allow you to define the size and orientation of the paper. Any changes you make will appear in bold letters, indicating it is not the default program setting. If you want to restore the default setting, right-click the item and then click **Restore Defaults** on the shortcut menu.

The **Layout Properties** section has an **AutoHide** pin in the top-right corner, which means you can hide it while adding fields or previewing, as well as dock it to a new position.



Layout

Page Settings

This field shows the paper size and orientation. Click the plus sign to show the items that can be modified.

Margins

This field shows margins. Click the plus sign to show the items that can be modified.

Left

Enter the size of the left margin you want to use.

Right

Enter the size of the right margin you want to use.

Top

Enter the size of the top margin you want to use.

Bottom

Enter the size of the bottom margin you want to use.

Page Orientation

Select Landscape or Portrait

Paper Size

Select the size of paper you want to use.

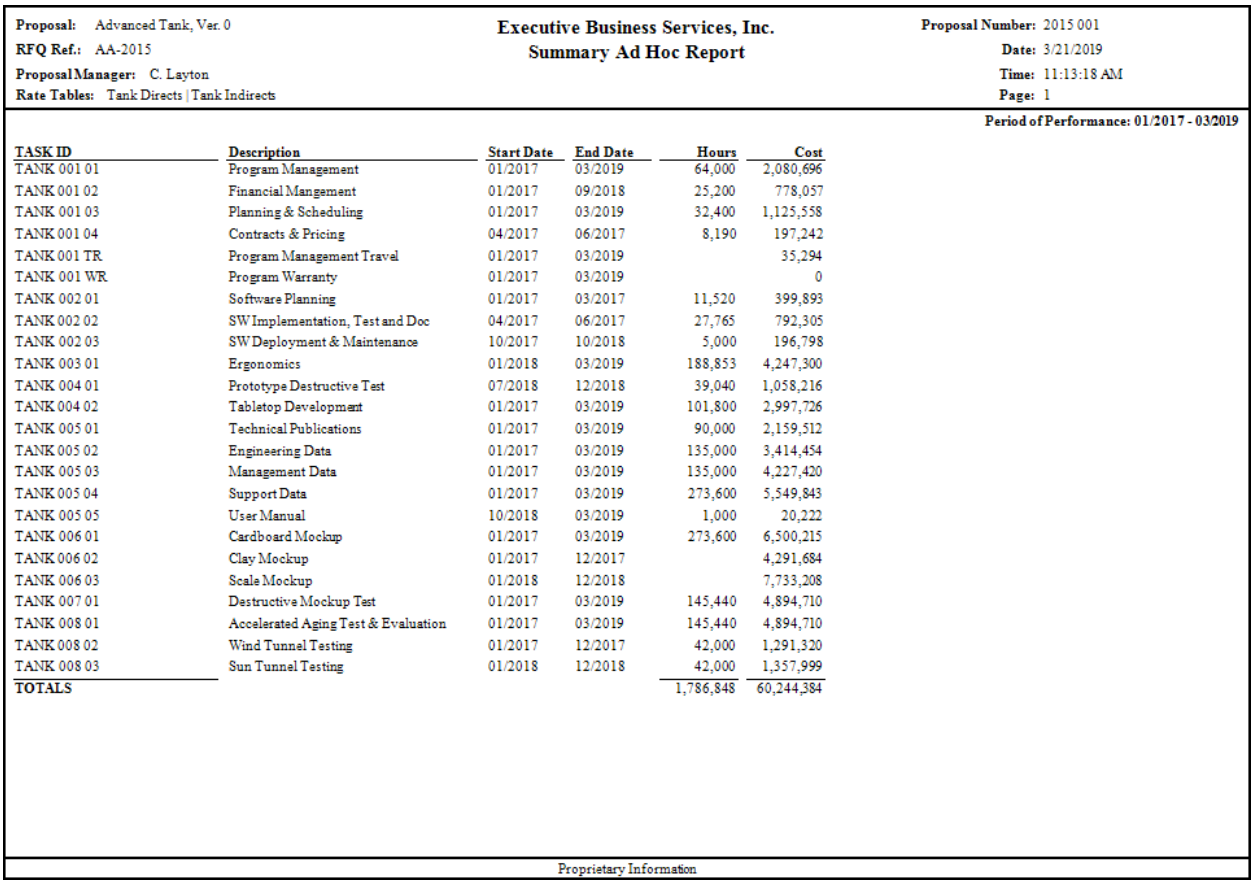
Unit of Measurement

Select the unit you want to use to measure height and characters.

Preview Area

The **Preview** area allows you to see the how the layout looks. Once you click **Preview**, the report will appear in the area. If you are satisfied with the way it looks you can click **OK** to finish selecting the report options and run the report. If you make any changes to the layout, you will need to click the **Preview** button again to refresh the report.

The **Preview** area has the **AutoHide** pin in the top-right corner, which means you can hide it while adding fields or changing the properties of the layout, as well as dock it to a new position.



Proposal: Advanced Tank, Ver. 0
RFQ Ref.: AA-2015
Proposal Manager: C. Layton
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Summary Ad Hoc Report

Proposal Number: 2015 001
Date: 3/21/2019
Time: 11:13:18 AM
Page: 1

Period of Performance: 01/2017 - 03/2019

TASK ID	Description	Start Date	End Date	Hours	Cost
TANK 001 01	Program Management	01/2017	03/2019	64,000	2,080,696
TANK 001 02	Financial Mangement	01/2017	09/2018	25,200	778,057
TANK 001 03	Planning & Scheduling	01/2017	03/2019	32,400	1,125,558
TANK 001 04	Contracts & Pricing	04/2017	06/2017	8,190	197,242
TANK 001 TR	Program Management Travel	01/2017	03/2019		35,294
TANK 001 WR	Program Warranty	01/2017	03/2019		0
TANK 002 01	Software Planning	01/2017	03/2017	11,520	399,893
TANK 002 02	SW Implementation, Test and Doc	04/2017	06/2017	27,765	792,305
TANK 002 03	SW Deployment & Maintenance	10/2017	10/2018	5,000	196,798
TANK 003 01	Ergonomics	01/2018	03/2019	188,853	4,247,300
TANK 004 01	Prototype Destructive Test	07/2018	12/2018	39,040	1,058,216
TANK 004 02	Tabletop Development	01/2017	03/2019	101,800	2,997,726
TANK 005 01	Technical Publications	01/2017	03/2019	90,000	2,159,512
TANK 005 02	Engineering Data	01/2017	03/2019	135,000	3,414,454
TANK 005 03	Management Data	01/2017	03/2019	135,000	4,227,420
TANK 005 04	Support Data	01/2017	03/2019	273,600	5,549,843
TANK 005 05	User Manual	10/2018	03/2019	1,000	20,222
TANK 006 01	Cardboard Mockup	01/2017	03/2019	273,600	6,500,215
TANK 006 02	Clay Mockup	01/2017	12/2017		4,291,684
TANK 006 03	Scale Mockup	01/2018	12/2018		7,733,208
TANK 007 01	Destructive Mockup Test	01/2017	03/2019	145,440	4,894,710
TANK 008 01	Accelerated Aging Test & Evaluation	01/2017	03/2019	145,440	4,894,710
TANK 008 02	Wind Tunnel Testing	01/2017	12/2017	42,000	1,291,320
TANK 008 03	Sun Tunnel Testing	01/2018	12/2018	42,000	1,357,999
TOTALS				1,786,848	60,244,384

Proprietary Information

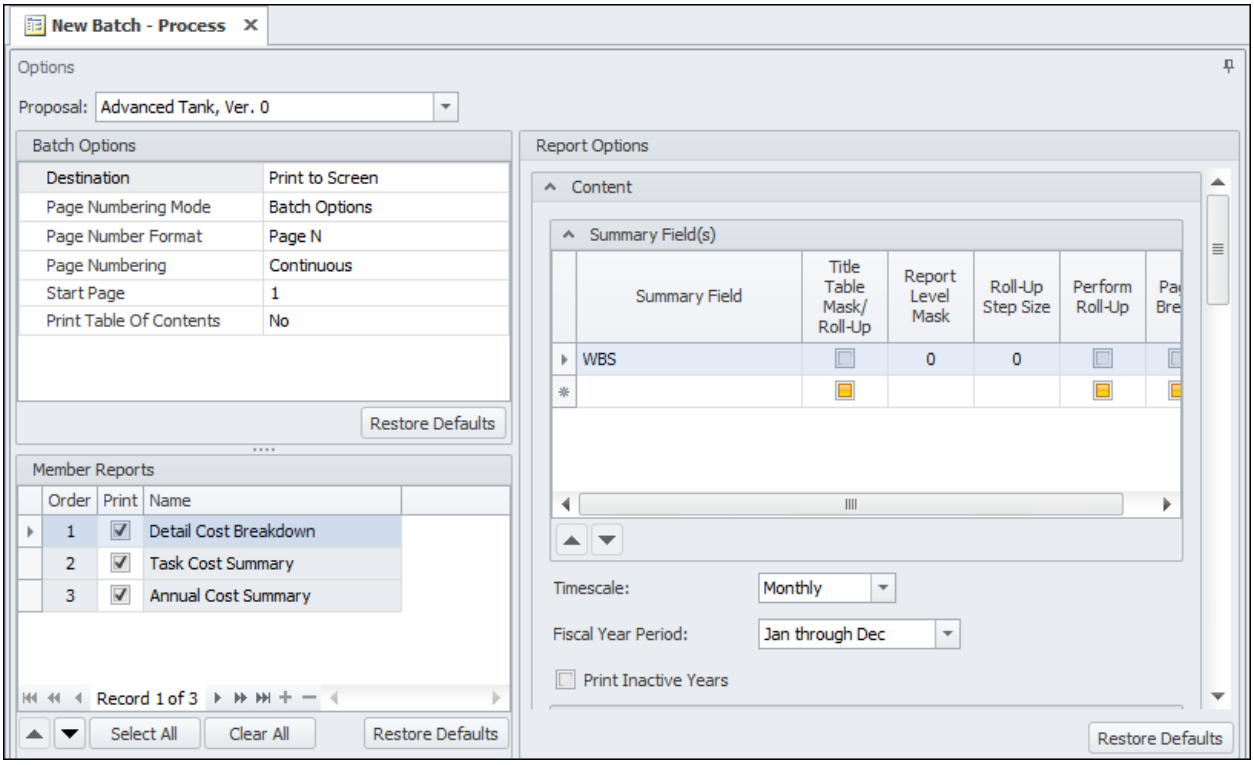
Batch Reports

Batch reports run multiple reports at the same time. Batches can consist of different reports, or different versions of the same report (for example, you can include an Annual Cost Breakdown Report based on WBS, an Annual Cost Breakdown Report based on CLIN, and an Annual Cost Breakdown Report based on Bidder).

You define the batch of reports on the **Setup** tab. The options entered here are the default settings of the batch. Once the batch is defined and you click **Run** on the ribbon, the **Process** tab will open. You can process (run) the batch as is, or make run-time changes on the **Process** tab. Changes made on the **Process** tab are not saved.

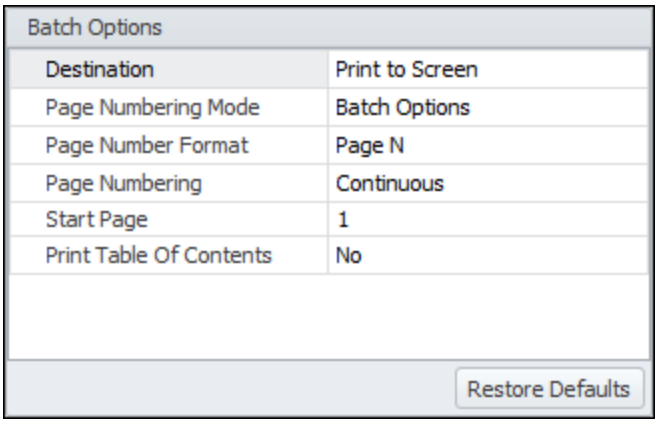
Batch Reports Process

The Batch Reports Process tab that opens in the Workspace after you click **Run** allows you to override the Setup options at run-time. These are temporary changes that are not be saved unless you click **Save As** to create a new batch. The tab is divided into three sections: Batch Options, Member Reports, and Report Options.



Batch Options

These options pertain to the output of the member reports. The options that appear depend on the **Destination** selected.



Print to Screen

- Page Numbering Mode
- Page Number Format
- Page Numbering
- Start Page
- Print Table Of Contents

Print to Printer

- Page Numbering Mode
- Page Number Format
- Page Numbering
- Start Page
- Print Table Of Contents

Print to Excel

- Export Full Pricing
- Open Exported Document
- Output Mode
- Folder

- File Name
- Print Table Of Contents

Print to Word

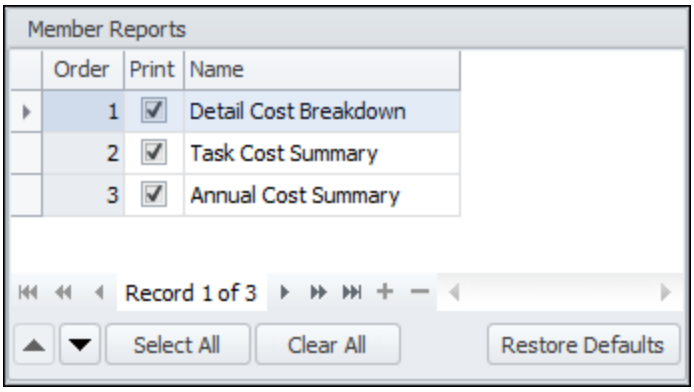
- Print Attachments
- Open Exported Document
- Output Mode
- Folder
- File Name
- Page Numbering Mode
- Page Number Format
- Page Numbering
- Start Page
- Print Table Of Contents

Restore Defaults

Click this button to restore the options entered during Setup.

Member Reports

Select the checkboxes of the reports to include in the batch, or clear the checkboxes to exclude the reports. You cannot add new reports, nor delete existing reports.



Select All/Clear All

Click a button to select the checkboxes of all the member reports, or clear all the checkboxes.

Restore Defaults

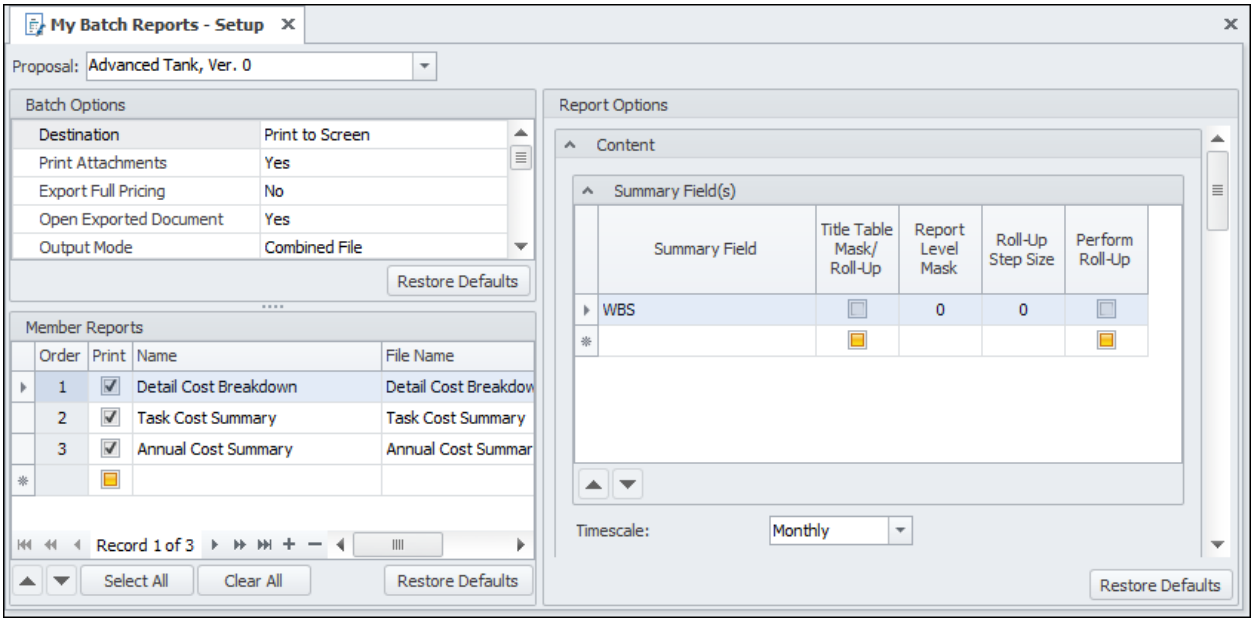
Click this button to restore the options entered during Setup.

Report Options

This section shows the report options of the report selected in the **Member Reports** section. You can change any option as needed. The options can be changed on a report-by-report basis, or for multiple reports. If you select more than one report in the **Member Reports** section, the **Report Options** section will show a consolidation of the options of the reports selected. Click the **Restore Defaults** button to restore the options entered during Setup.

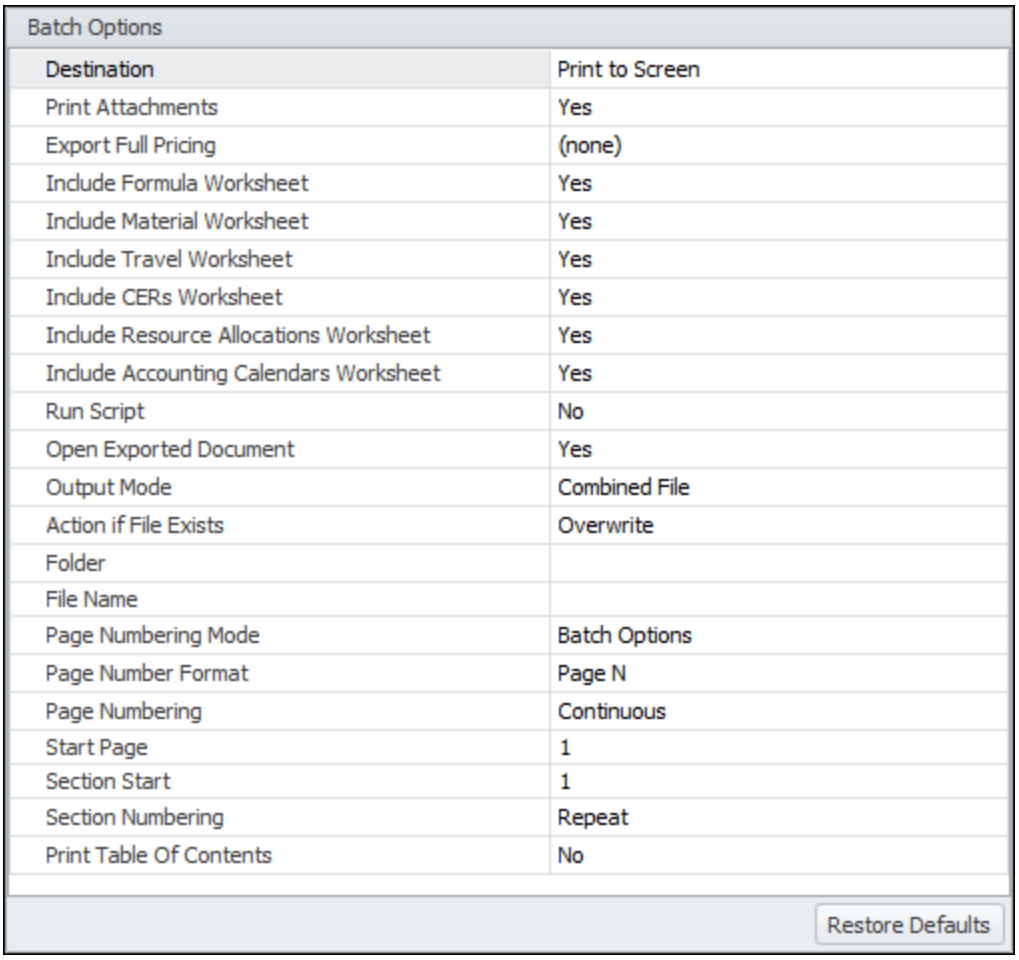
Batch Reports Setup

The Batch Report Setup tab that opens in the Workspace is where you add the reports to the batch, set the batch report options, and set the individual report options. After you enter the options for the member reports, click **Save** to be able to run the batch. The tab is divided into three sections: Batch Options, Member Reports, and Report Options.



Batch Options

These options pertain to the output of the member reports.



Destination

Enter the destination for the reports. You can choose **Print to Screen**, **Print to Printer**, **Print to Excel**, **Print to Word**, or **Print to PDF**.

Print Attachments

If you select **Print to Word**, you can print any files attached to the member reports.

Export Full Pricing

If you select **Print to Excel**, you can create an Excel file that contains the complete pricing information of the proposal. If applicable to the report, there are two options to choose from: **Monthly** and **Annual**. These options include the complete pricing information by month or year, respectively.

Include ... Worksheets

Select **Yes** to include a supporting worksheet in the batch, or select **No** to exclude it.

Open Exported Document

If you select **Print to Word** or **Print to Excel**, you can open the document automatically once the process is finished.

Output Mode

Create a **Combined File** with all the member reports, or create **Separate Files** for each individual report.

Action if File Exists

Overwrite an existing file that has the same name as the new file, or create the new file with a new name.

Folder

If you select **Print to Excel** or **Print to Word**, enter the folder where the member reports should be placed.

File Name

If you select **Print to Excel** or **Print to Word** in conjunction with **Combined File**, enter a name for the batch file that will be created. Example

Page Numbering Mode

This option regulates the Page and Section options that follow. There are two options:

- **Batch Options** - The individual reports are treated as one report. The Page and Section options that follow will override the corresponding options of the individual reports.
- **Report Options** - The reports are treated as separate reports. They will use their individual Page and Section options.

Page Number Format

Select how you want the page numbers to appear on the report. The options include:

- **None** - Select this option if you do not want to print page numbers.
- **Page N** - Select this option to print page numbers on all the pages. This is the default setting.
- **Page N of M** - Select this option to print running-total page numbers, such as 2 of 10.
- **Section - Page N** - Select this option to print a section number before the page number.

Page Numbering

Set the page numbering to start over with each report or to be continuous across all reports.

Start Page

Enter the number with which the first member report will start printing. The number can be between 1 and 999. This option is not available if you select the **Page N of M** Page Number Format.

Section Start

Enter a number or letter with which the section of the first member report will start printing. You can enter up to three characters.

Section Numbering

Set the section numbering to start over with each report or to be continuous across all reports.

Print Table Of Contents

Enter **Yes** to include a standard table of contents at the beginning of the batch. It will list all printed reports, and if you print the batch to your screen, it will show the

page number that each report starts on. If you print to Excel or Word, the table of contents will not show page numbers.

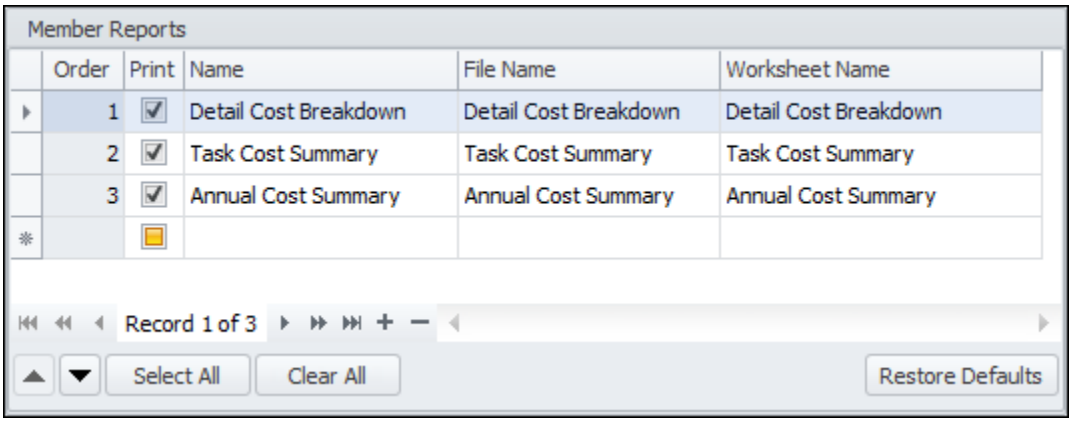
To include a custom table of contents, enter **No**. Then select your Table of Contents Report as the first member report in the batch.

Restore Defaults

Click this button to restore the preset batch options.

Member Reports

Here you select the reports you want to include in the batch.



Order

This column cannot be edited. It shows the order in which the member reports will be printed. Use the up and down arrows to move rearrange the order.

Print

This checkbox is automatically selected when you enter the name of a report.

Name

Enter the name of the report to include in the batch.

File Name

If you selected **Separate Files**, enter a name for the file that will be created.

Worksheet Name

Enter the name of the Excel worksheet that will be created. Example

Select All/Clear All

Click a button to select the checkboxes of all the member reports, or clear all the checkboxes.

Restore Defaults

Click this button to restore the original member report options.

Report Options

This section shows the report options of the report selected in the **Member Reports** section. It is where you select the options with which you want to run the report. The report options can be set on a report-by-report basis, or for multiple reports. If you select more than one report in the **Member Reports** section, the **Report Options** section show a consolidation of the options of the reports selected. Click the **Restore Defaults** button to use the original report settings.

Create a Batch Report

1. On the **Reports** ribbon, in the **Reports** group, click **New Batch Report**. This opens the **Batch Report Setup** ribbon.

2. In the **Batch Options** section, enter a name for the file that will be created, and then select the output and paging options that will apply to all the reports. If you plan on creating separate files for each report, you will enter this information for each report once it has been added.

3. In the **Member Reports** section, enter the reports you want to include in the batch. If you previously selected the **Separate Files** option, enter a name for the file that will be created for each report. If you previously selected **Print to Excel** in the **Destination** field, enter a name for the worksheets that will be created.

4. In the **Report Options** section, set the options with which you want to run the report selected in the **Member Reports** section.

5. Click **Save** when you are finished.

6. Enter a name and description for the report, and select the category in which you want it to appear in the Report List. Click **OK**.

7. Click **Run**, and then click **Process** on the **Batch Report Process** ribbon that opens.

Delete a Batch Report

1. Click the **Reports** ribbon, and then click **Report List** in the **Reports** group.
2. Right-click the batch report you want to delete, and then click **Delete** on the shortcut menu.
3. Click **Yes** to confirm the deletion when prompted.

Modify a Batch Report

You can make changes to the batch on the **Batch Report Setup** ribbon or the **Batch Report Process** ribbon. Changes made on the **Setup** ribbon must be saved before you can run the batch. Changes made on the **Process** ribbon are run-time modifications and are not saved unless you click the **Save As** icon to create a new batch.

Modify a Batch on the Batch Report Setup Tab

1. Click the **Reports** ribbon, and then **Report List** in the **Reports** group.
2. In the **Report List**:
    2.1. Select the report, and then click **Edit** in the **Reports** group.
    2.2. Right-click the report, and then click **Edit** the shortcut menu.
3. Make the changes on the **Setup** tab, and then save the report.

Modify a Batch on the Batch Report Process Tab

1. Click the **Reports** ribbon, and then **Report List** in the **Reports** group.
2. In the **Report List**:
    2.1. Double-click anywhere in the row of the report.
    2.2. Select the row of the report and press **Enter**.
    2.3. Select the row of the report and click **Run** in the **Reports** group on the ribbon.
3. Make the run-time changes on the **Process** tab, and then click **Process** on the ribbon to run the batch.

Notes on Setting Batch Report Options for Multiple Reports

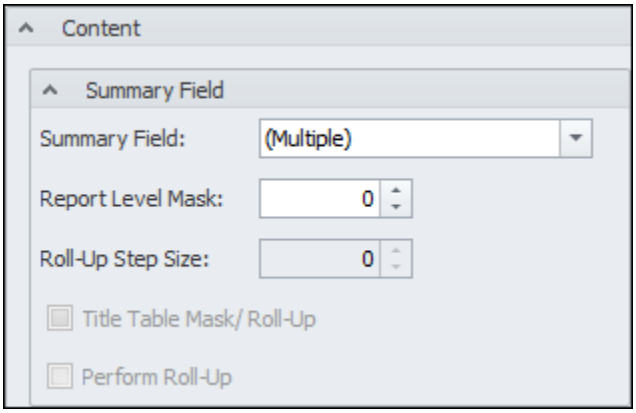
When you add reports to the **Member Reports** section, each report is added with its default report options (**Task ID** entered as the summary field, for example). When you select multiple member reports, the **Report Options** section shows a consolidated list of the options. Some report options will not appear when multiple reports are selected (Summary Field(s) grid, User Title Definition). You have to set these options for the individual report.

The start/end dates correspond to the shortest period. For example, the rates in your Direct Rate Table span 12 years and your proposal period is three years. If you select the Direct Rate Report with a proposal-related report, the start/end dates you can enter correspond to the start/end dates of the proposal.

The following examples illustrate some things you may see in the consolidated list of report options.

Member Reports Use Different Options

One of our member reports uses the summary field **TASK ID**. The other report uses **WBS**. When we select both reports, the **Summary Field** option will be set to **(Multiple)**, indicating the reports do not use the same summary field.

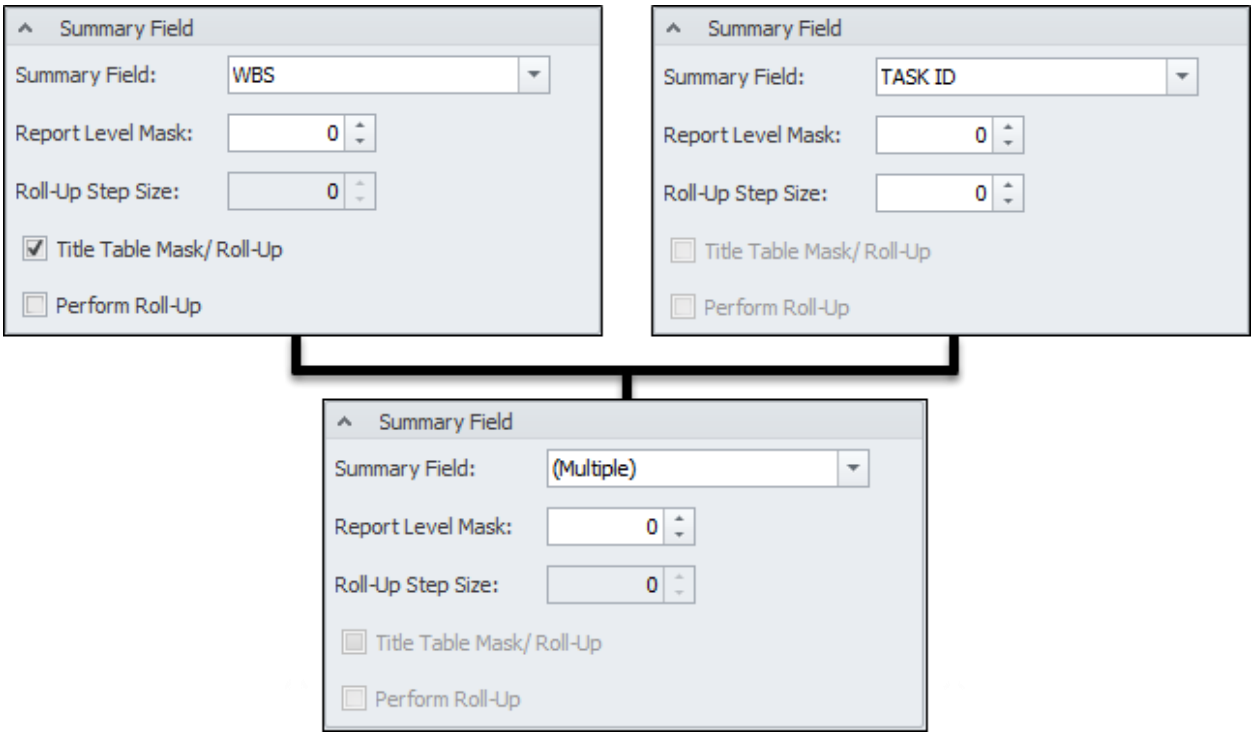


You can leave **(Multiple)** and have both reports use their respective summary field, or select a summary field from the drop-down menu. If you select one from the menu, both reports will use that summary field.

(Multiple) may appear in nonessential fields. If you see it in **Task Selection** for example, you can delete it and have the reports print data for all the tasks.

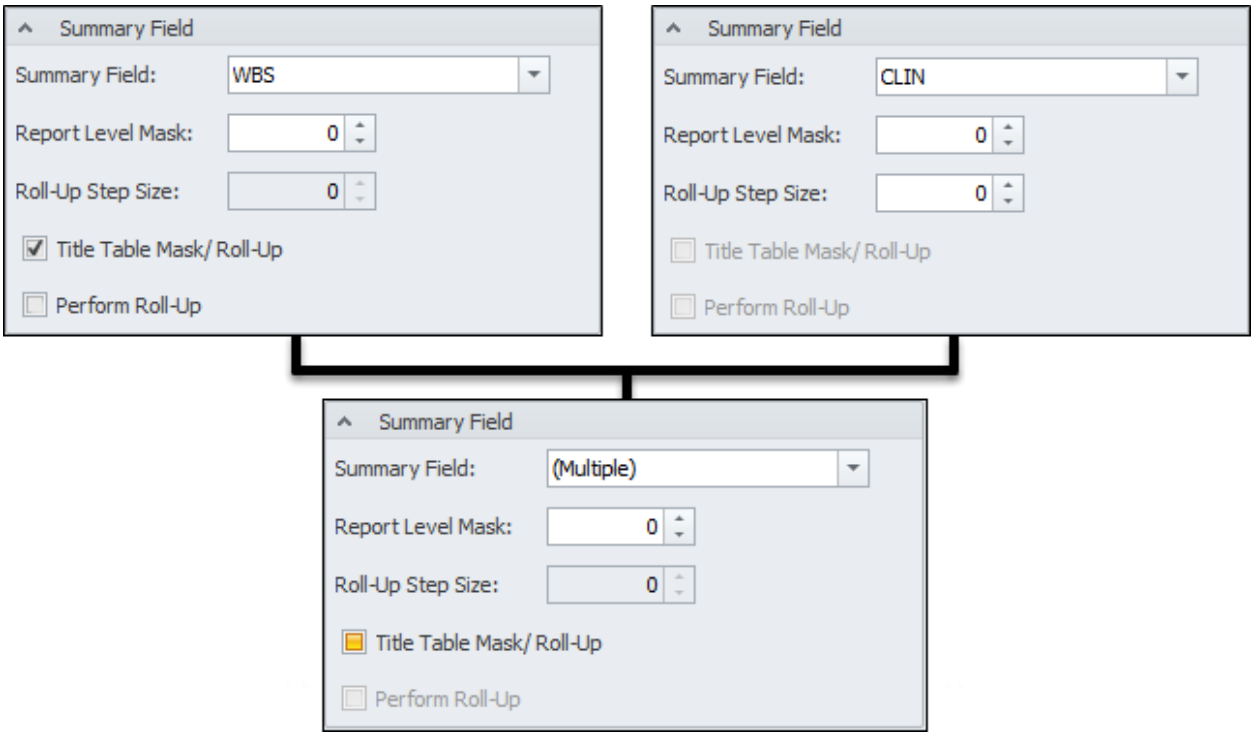
Option is Read Only

One of our member reports uses the summary field **WBS** with **Hierarchical Mask/Roll-Up**. The other reports uses **TASK ID**. When we select both reports, the **Hierarchical Mask/Roll-Up** option is unavailable since this option does not apply to **TASK ID**.



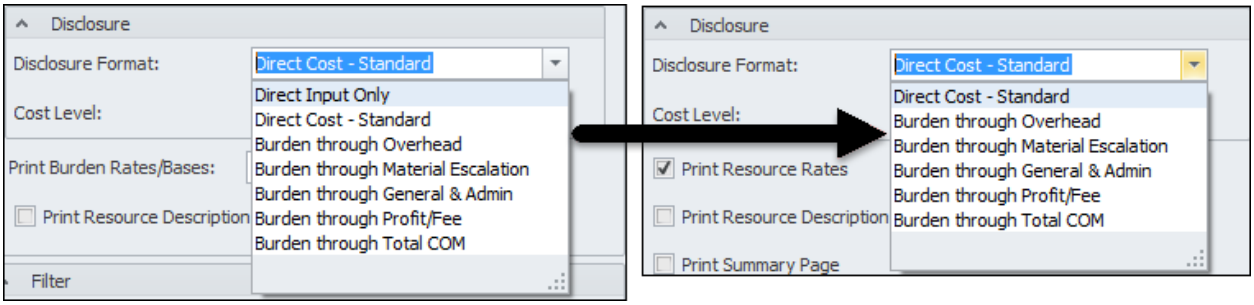
Checkbox Status

One of our member reports uses **WBS** with **Hierarchical Mask/Roll-Up**. The other one uses **CLIN** without a Title Table. When we select both reports, the **Hierarchical Mask/Roll-Up** checkbox is neither selected nor clear, indicating that one of the reports does not use the **Hierarchical Mask/Roll-Up** option.



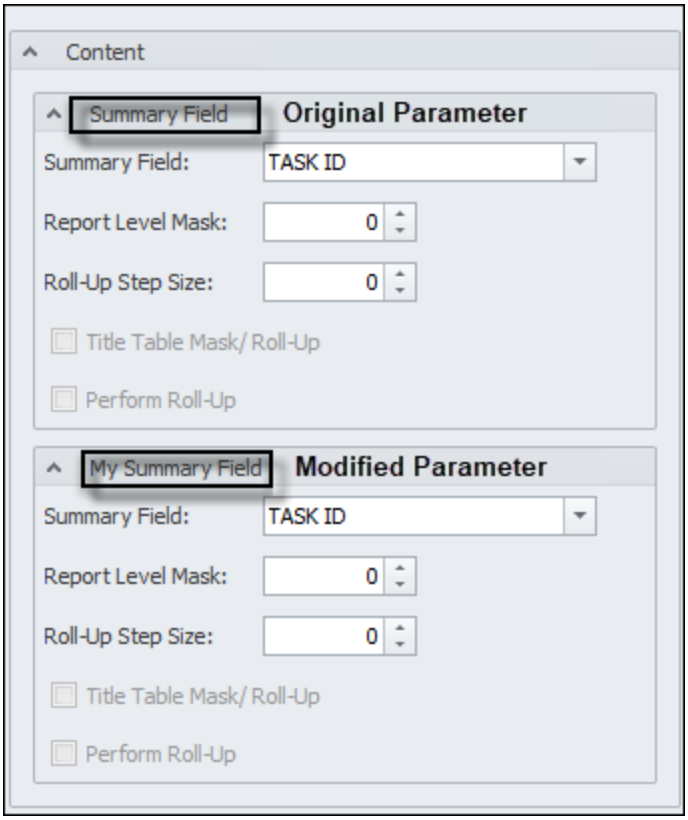
Only Valid Options Appear

One of the **Disclosure Format** options for a report is **Direct Input Only**. If this report is selected with other reports that do not have the same option, **Direct Input Only** will not appear in the **Disclosure Format** drop-down menu because it is not an applicable option for all the reports.



Parameter Names and Captions Must Match

If one of your reports is a custom report and you changed the name of the parameter, the parameter will appear by itself and will only apply to the custom report.



Run a Batch Report

1. Click the **Reports** ribbon, and then **Report List** in the **Reports** group.
2. In the **Report List**, do one of the following:
    - Double-click anywhere in the row of the report.
    - Select the row of the report and press **Enter**.
    - Select the row of the report and click **Run** in the **Reports** group on the ribbon.
3. Click **Process**.

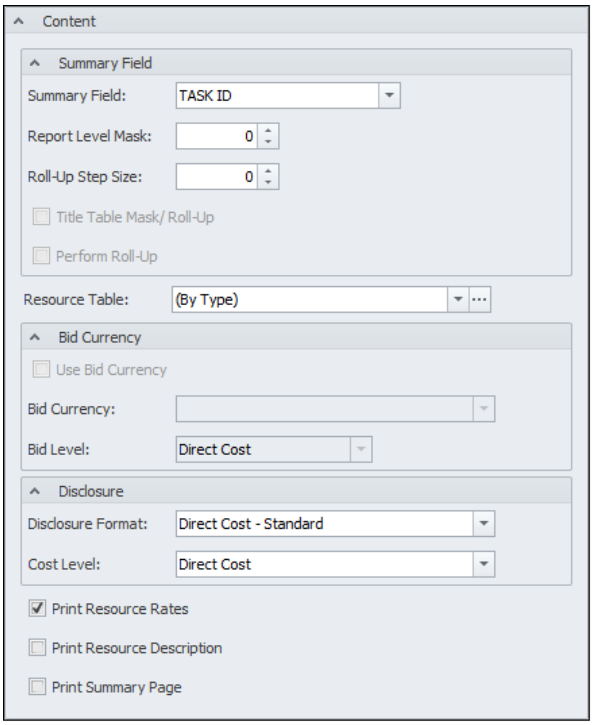
*Note: You can make run-time changes on the **Process** tab before you run the batch of reports. These changes will not be saved unless you click the **Save As** icon to create a new batch.*

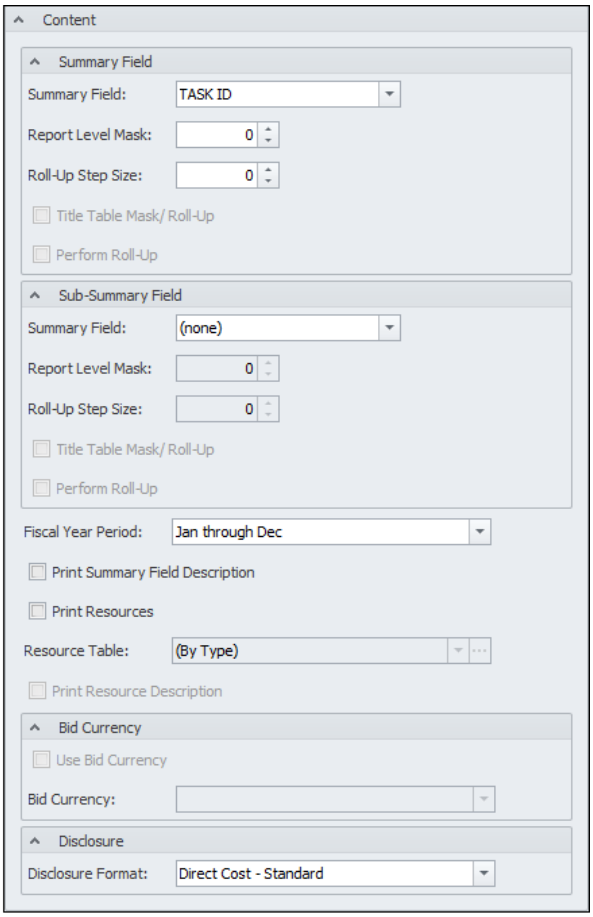
Setting Batch Report Options

The default report options are defined during the batch report setup. The report options can be set on a report-by-report basis, or for multiple reports.

*Note: If you press **Ctrl+S**, you will save the data in the section you are working, but the batch will not be saved. Click the **Save** icon on the ribbon to save the batch.*

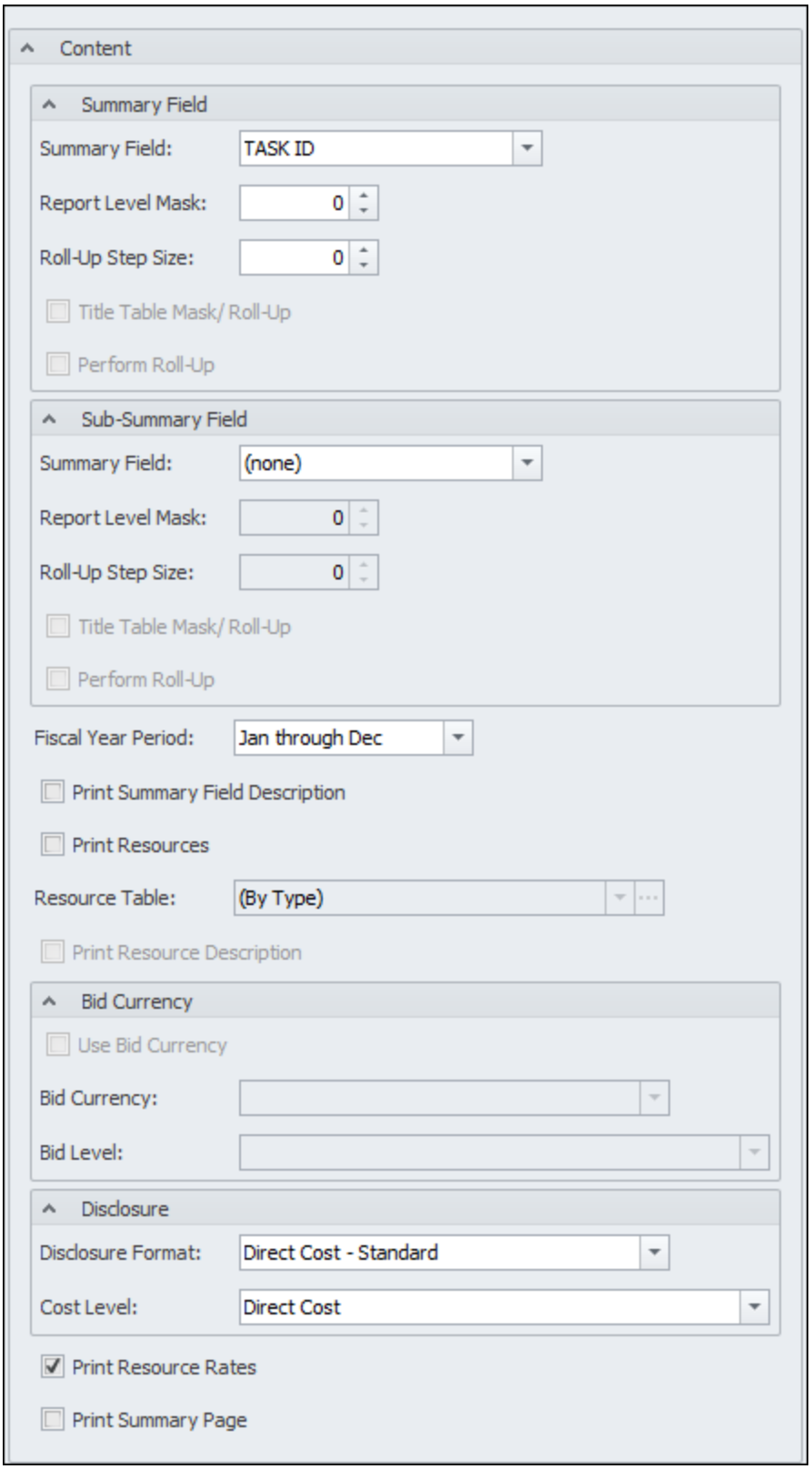
If you select more than one report in the **Member Reports** section, the **Report Options** section will show a consolidation of the options of the reports selected. This is a convenient way to set the same options for the reports selected. For example, these are the Content options for two of our member reports:





The reports have some options in common (**Summary Field**, **Disclosure Format**, **Bid Currency**), and other options that are not (**Fiscal Year**, **Bid Level**, **Cost Level**). When

we select both reports in the **Member Reports** section, the **Report Options** section shows a combined list of the report options.


Content
Summary Field
Summary Field:
TASK ID
Report Level Mask:
0
Roll-Up Step Size:
0
Title Table Mask/ Roll-Up
Perform Roll-Up
Sub-Summary Field
Summary Field:
(none)
Report Level Mask:
0
Roll-Up Step Size:
0
Title Table Mask/ Roll-Up
Perform Roll-Up
Fiscal Year Period:
Jan through Dec
Print Summary Field Description
Print Resources
Resource Table:
(By Type)
Print Resource Description
Bid Currency
Use Bid Currency
Bid Currency:
Bid Level:
Disclosure
Disclosure Format:
Direct Cost - Standard
Cost Level:
Direct Cost
Print Resource Rates
Print Summary Page

The options the reports have in common that you select here apply to both reports. They will be generated with the same Summary Element, Mask, Roll-Up, Disclosure Format, etc. Some report options will not appear when multiple reports are selected (Summary Field(s) grid, User Title Definition). You will have to set these options for the individual report.

E-mailing Generated Reports

Once you have generated a report to your screen, you can use one of the following options to email it: pdf, mht, rtf, xls, xlsx, csv, txt, or as an image file.

1. On the **Report Preview** ribbon, click **E-Mail As** in the **Export** group.
2. Select the option you want.
3. Enter the corresponding Export Options.
4. Click **OK**.
5. In the **Save As** dialog box, navigate to where you want to export the file.
6. Enter a different name for the report if necessary.
7. Click **Save**.
8. Enter the email recipients.
9. Click **Send**.

Export a Report Design

You can export any report design created with ProPricer.

1. On the **Reports** ribbon, click **Report List**.
2. Click the report in the list.
3. On the **Reports** ribbon, click **Export**.
4. Enter the path of the folder where the file will be saved.
5. Enter a different name for the report.
6. Click **Save**.

Note: You can also:

- *Right-click the report in the Report List, and then click **Export**.*
- *Click **Export** in the **Report** group on the **Report Designer** ribbon.*

Exporting Generated Reports

Once you have printed a report to your screen, you can export it as any of the following file types: pdf, html, mht, rtf, xls, xlsx, csv, and txt. You can also export it as an image file.

1. On the **Report Preview** ribbon, click **Export As** in the **Export** group.
2. Select the option you want.
3. Enter the corresponding Export Options.
4. Click **OK**.
5. In the **Save As** dialog box, navigate to where you want to export the file.
6. Enter a different name for the report if necessary.
7. Click **Save**.

Import a Report Design

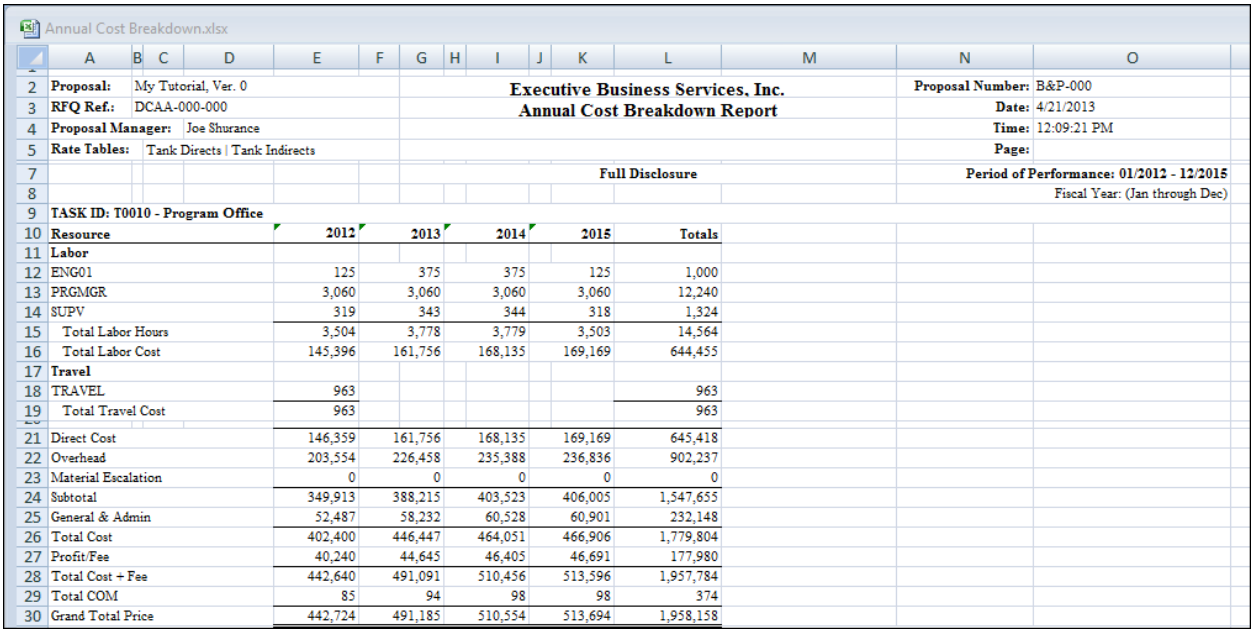
1. You can import any report design created with the current version of ProPricer, as well as report designs created with version 8.9.
2. On the **Reports** ribbon, click **Import**.
3. For reports from version 8.9 of ProPricer, locate the file with the .pcr file name extension. For reports from version 9 of ProPricer, locate the .ppr file name extension.
4. Click **Open**.
5. In the **Report Properties** dialog box:
    5.1. Enter a new name for the report.
    5.2. Change the description of the report.
    5.3. Enter a different category for the report.
    5.4. Click **OK**.

Print a Report to a File

There are three options you can use to export a report to a file: **Print to Word**, **Print to Excel**, and **Print to PDF**.

1. Select the report you want to run.
2. Enter the report parameters.
3. Click the down arrow next to the **Print to Screen** button and select **Print to Word, Print to Excel**, or **Print to PDF**. (If you ran the report previously with something other than Print to Screen, the button will show the last option used.)
4. Enter the folder where the file will be saved.
5. Enter a name for the file.
6. Click **Print**.

This is an excerpt of the .xlsx file created with the **Print to Excel** option for the Annual Cost Breakdown Report.



Annual Cost Breakdown.xlsx

2	**Proposal:**	My Tutorial, Ver. 0					**Executive Business Services, Inc.**					**Proposal Number:**	B&P-000	
3	**RFQ Ref.:**	DCAA-000-000					**Annual Cost Breakdown Report**					**Date:**	4/21/2013	
4	**Proposal Manager:**	Joe Shurance										**Time:**	12:09:21 PM	
5	**Rate Tables:**	Tank Directs | Tank Indirects										**Page:**		
7							**Full Disclosure**					**Period of Performance: 01/2012 - 12/2015**		
8												Fiscal Year: (Jan through Dec)		
9	**TASK ID: T0010 - Program Office**													
10	**Resource**			**2012**	**2013**	**2014**	**2015**	**Totals**						
11	**Labor**													
12	ENG01			125	375	375	125	1,000						
13	PRGMGR			3,060	3,060	3,060	3,060	12,240						
14	SUPV			319	343	344	318	1,324						
15	Total Labor Hours			3,504	3,778	3,779	3,503	14,564						
16	Total Labor Cost			145,396	161,756	168,135	169,169	644,455						
17	**Travel**													
18	TRAVEL			963				963						
19	Total Travel Cost			963				963						
21	Direct Cost			146,359	161,756	168,135	169,169	645,418						
22	Overhead			203,554	226,458	235,388	236,836	902,237						
23	Material Escalation			0	0	0	0	0						
24	Subtotal			349,913	388,215	403,523	406,005	1,547,655						
25	General & Admin			52,487	58,232	60,528	60,901	232,148						
26	Total Cost			402,400	446,447	464,051	466,906	1,779,804						
27	Profit/Fee			40,240	44,645	46,405	46,691	177,980						
28	Total Cost + Fee			442,640	491,091	510,456	513,596	1,957,784						
29	Total COM			85	94	98	98	374						
30	Grand Total Price			442,724	491,185	510,554	513,694	1,958,158						

This is an excerpt of the .docx file created with the **Print to Word** option for the Bid Cost Worksheet Report.

Executive Business Services, Inc.
Bid Cost Worksheet Report

Proposal: My Tutorial, Ver. 0 | **Proposal Number:** B&P-000
RFQ Ref.: DCAA-000-000 | **Date:** 1/20/2014
Proposal Manager: Joe Shurance | **Time:** 17:22:20
Rate Tables: Tank Directs | Tank Indirects | **Page:** 1

Direct Cost - Standard | **Period of Performance:** 01/2012 - 12/2015
Start Date: 01/2012
End Date: 12/2015

TASK ID: T0010 - Program Office

BIDDER: Jones | **WBS:** 1.1.1
OBS: PMO | **CLIN:** 0001AA
SUMMARY: Total

Statement of Work:

The Statement of Work text is used to describe what will be accomplished during the execution of this task. It is helpful to be as specific as possible here and include references to customer specifications.

Attachments:
<SOW.docx>

Basis of Estimate:

The Basis of Estimate text is typically used to describe the basis for the hours/effort being proposed for the task. Past performance on similar contracts can be used here to determine a basis for the current task being estimated.

Attachments:
<BOE.docx>

Resource	Hours	Units	Cost
Labor			
ENG01	1,000		33,020
PRGMGR	12,240		538,615
SUPV	1,324		72,819
Total Labor	14,564		644,455
Travel			
TRAVEL			963
Total Travel			963
Total:	**14,564**		**645,418**

This is an excerpt of the .pdf file created with the **Print to PDF** option for the Annual Cost Summary Report.

Proposal: Advanced Tank, Ver. 0
RFQ Ref.: AA-2015
Proposal Manager: C. Layton
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Summary Report

Proposal Number: 2015 001
Date: 8/9/2015
Time: 12:05:53 PM
Page: 1

Direct Cost - Standard

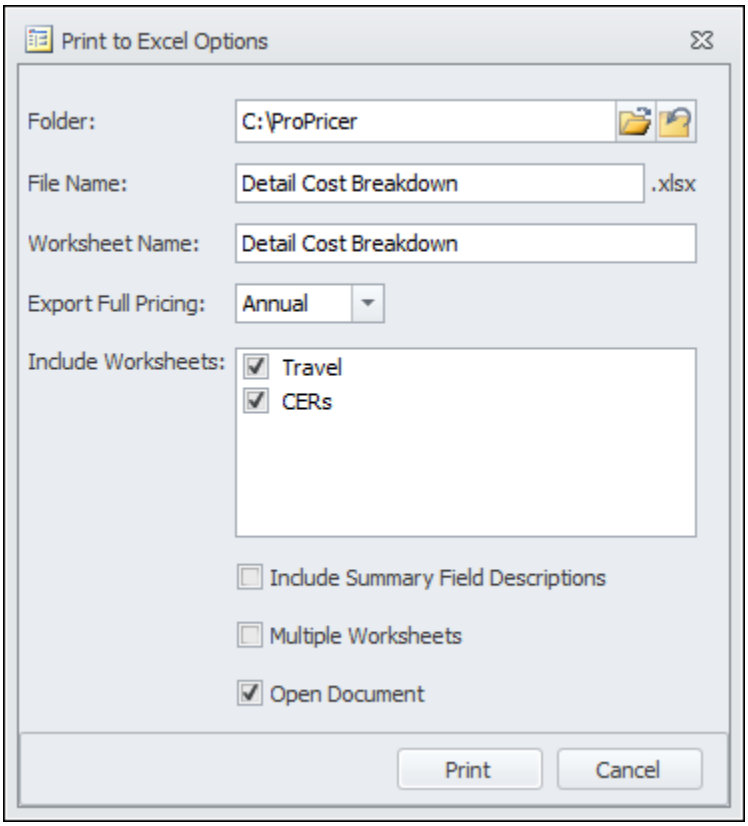
Period of Performance: 01/2015 - 03/2017
Fiscal Year: (Jan through Dec)

WBS	2015	2016	2017	Total
1.1.A	2,380,460	3,061,759	574,944	6,017,164
1.2.A	395,143	310,532		705,675
1.2.A.1	481,709	511,702	125,675	1,119,086
1.2.A.1.1	180,485			180,485
1.3.A	370,292			370,292
1.3.A.1	757,198			757,198
1.3.A.2	39,344	137,846		177,189
1.4.A		3,505,503	339,923	3,845,426
2.1.A.1.1	1,230,744	2,252,042	329,260	3,812,047
2.3.A	864,666	904,566	236,617	2,005,849
2.3.B	1,323,000	1,389,150	364,652	3,076,802
2.3.C	1,638,000	1,719,900	451,474	3,809,374
2.3.D	2,150,400	2,257,920	592,704	5,001,024
2.3.E		8,820	9,261	18,081
3.1.A	2,580,176	2,700,300	706,606	5,987,082
3.1.B	4,291,684			4,291,684
3.1.C		7,733,208		7,733,208
4.1.A	1,923,450	2,015,178	527,871	4,466,499
4.2.A	1,923,450	2,015,178	527,871	4,466,499
4.2.B	1,188,000			1,188,000
4.2.C		1,238,400		1,238,400
TOTALS	23,718,201	31,762,004	4,786,856	60,267,062

Proprietary Information

Print to Excel Options Dialog Box

The **Print to Excel Options** dialog box contains the following elements:



Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you saved. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

File Name

Enter a name for the file ProPricer is going to create. The file name extension is automatically added to the file name.

Worksheet Name

Enter a name for the Worksheet, or accept the default.

Export Full Pricing

If applicable to the report, there are three options to choose from: *(none)*, *(default)*, and *Annual*. The *Annual* option includes the complete pricing information by year. The *(default)* option includes complete pricing information according to the proposal's timescale on the **General** page of the **Proposal Properties**. *Annual* and *(default)* also populate the **Include Worksheets** area with supporting worksheets that you can choose to include.

Include Summary Field Descriptions

Select this checkbox to include columns for summary field descriptions in the sheet named *P* (for *Pricing*).

Multiple Worksheets

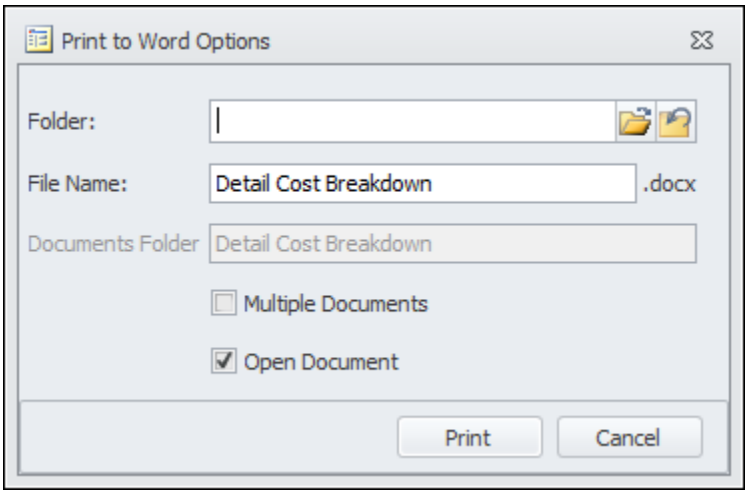
Select this checkbox to separate the report into multiple worksheets based on the page breaks defined. Page breaks can be set via the **Start On New Page** and **Start Each Record On New Page** designer properties.

Open Document

Select this checkbox to open the file once it is created.

Print to Word Options Dialog Box

The **Print to Word Options** dialog box contains the following elements:



Folder

Enter the path of the folder where the file will be saved. This field may show the location of the last file you saved. Click to open the **Browse for Folder** dialog box if you want to change the folder. Click to clear the field.

File Name

Enter a name for the file ProPricer is going to create. The file name extension is automatically added to the file name.

If **Multiple Documents** is selected, **File Name** cannot be changed.

Print Attachments

If the report has the option to print the names of the files attached to the **SOW** tab, **BOE** tab, or **Proposal Notes** page in the **Proposal** folder of **Proposal Properties**, select this checkbox to print the contents of the attached files.

Documents Folder

If **Multiple Documents** is selected, you can change the name of the subfolder that will contain the multiple documents.

Multiple Documents

Select this checkbox to separate the report into multiple documents based on the summary field chosen in the Report Options. For example, if the report is organized by the TASK ID summary field, ProPricer prints a document for every task in the report.

The file name of each document automatically matches the corresponding summary field value. You cannot specify the file names of multiple documents.

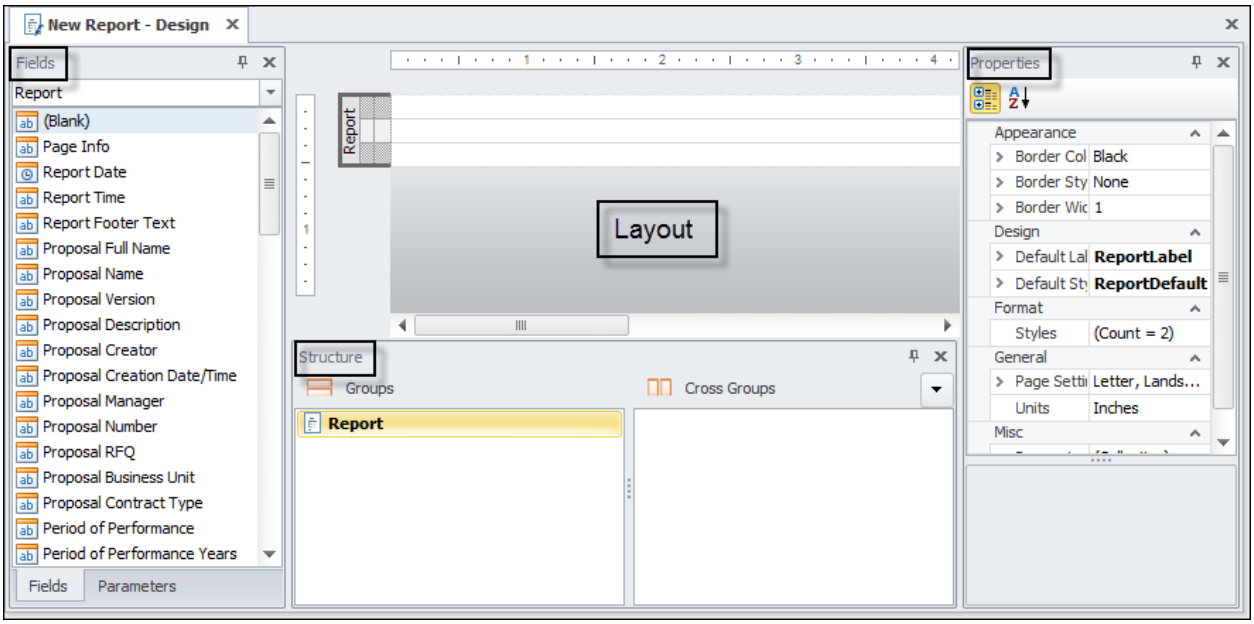
Open Document

Select this checkbox to open the file once it has been created.

Report Designer

Report Designer is where all your custom reports begin. It contains the Layout area, Fields panel, Parameters panel, Properties panel and Structure panel.

The Fields/Parameters panel, Properties panel, and Structure panel have the AutoHide pin, which allows you to hide the panel when you move the mouse to another area. If the pin is in the horizontal position, AutoHide is enabled. If AutoHide is not enabled, you can dock the panel to the area of your choice. You can also close each panel completely by clicking the Close button. To open the panel again, you will have to click **Show** on the ribbon, and then select panel you want to see.



Layout Area

Here is where you design the report. First you add groups to the Report group and then drag the fields/parameters you want the report to print.

Fields/Parameters

Fields and parameters create the body of the report. The elements you will see in the panel depend on the groups you have added to the layout and the section selected.

Properties

The options in this panel allow you to define the appearance of the report: font, borders, whether a section appears on all pages, can be split between pages, etc. The options available depend on the item selected (a field, group, Header band or section, Detail band or section, etc.).

Structure

This panel shows the Header, Detail, and Footer bands of the groups you have added.

Custom Reports

Reporting is a significant part of the proposal-making process. How your proposal will be evaluated and whether you will sign a contract may depend on how the data is presented. ProPricer offers several built-in reports. However, we understand that they may not always fit your company's needs. Report Designer allows you to customize a built-in report, or create new one.

Create a Category for a Custom Report

The **Category** column in the **Report List** grid shows the category to which the report belongs. When you create a custom report, you can assign a system category to it, or use one of your own.

1. On the **Setup** ribbon, in the **Preferences** group, click **Report Defaults**.
2. Click the **Categories** page.
3. In the **Name** column, enter the name of the category.
4. Click **OK**.

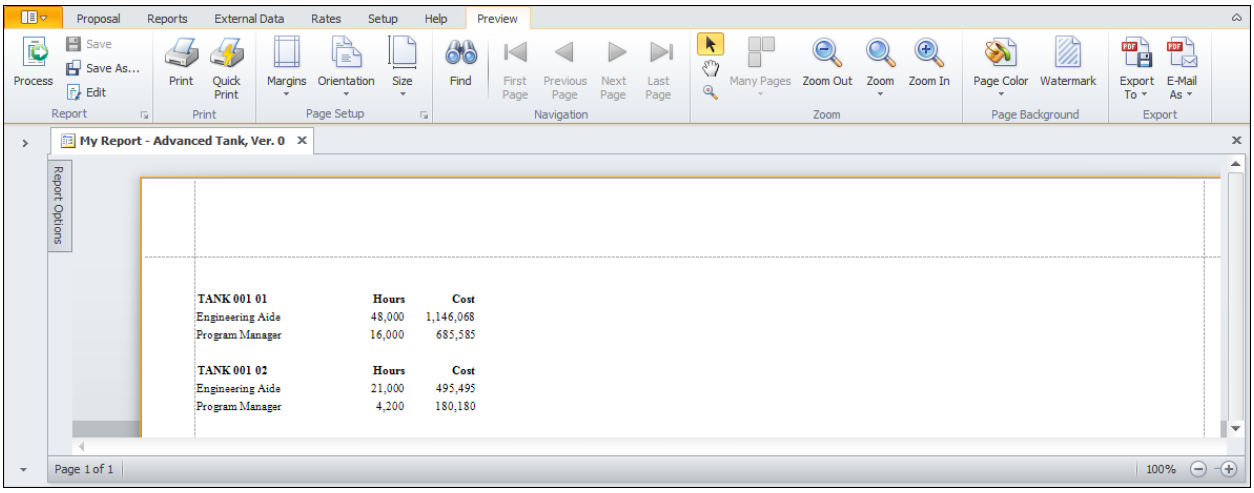
Create a Custom Report

1. On the **Reports** ribbon, in the **Reports** group, click **New Report**. The **Report Design** ribbon will open.
2. Add the appropriate fields/parameters from the **Report** group in the **Header** section.
3. Format the fields and add borders.
4. Insert the groups that contain the fields/parameters you need.
5. Add the fields/parameters you want to appear in the report.
6. Format the fields and add borders.
7. Click **Save** when you have finished.
8. Enter a **Name** and **Description** for the report, and select the **Category** in which you want it to appear in the Report List.
9. Click **Run** to select the **Report Options** and view the report.
10. Click **Edit** to make any changes.

Custom Report Preview

Selecting the Print to Screen option when you run your custom report allows you to preview the report before printing it or exporting it to Excel. This makes it very easy to see if you omitted a field/total, forgot to include cost analysis, need to format some elements, etc.

When the report opens in your screen, you will notice the ribbon changes from Report Design to Report Preview. This ribbon contains six groups of options specific to the printed report: Report, Page Setup, Navigation, Zoom, Page Background, and Export. The Report Options tab is also located to the left of the report.



If you need to make changes to the report, click **Edit** in the **Report** group to open Report Designer.

Delete a Custom Report

1. Click the **Reports** ribbon, and then click **Report List** in the **All Reports** group.
2. Right-click the custom report you want to delete, and then click **Delete** on the shortcut menu.
3. Click **Yes** to confirm the deletion when prompted.

Export a Custom Report Design

1. Click the **Reports** ribbon.
2. Click **Report List** in the **All Reports** group.
3. Select the report, and then click **Export** in the **Design** group.
4. Enter the path of the folder where the file will be saved.
5. Click **Save**.

Note: You can also:

- *Right-click the report in the Report List, and then click **Export**.*
- *Click **Export** in the **Report** group on the **Report Designer** ribbon.*

Import a Custom Report Design

1. On the **Reports** ribbon, click **Import** in the **Design** group.
2. Locate the file with the .pcr file name extension for reports from 8.9 or the .ppr file name extension for reports from 9.
3. Click **Open**. In the **Report Properties** dialog box:
4. Enter a new name for the report.
5. Change the description of the report.
6. Enter a different category for the report .
7. Click **OK**.

Plan Your Custom Report

Designing custom reports is a creative process, which may follow numerous paths. Taking a few minutes to plan your report before you create it can save you a lot of time and effort. The following questions/tips may help you in the planning process.

Purpose of the report

Why you need the report?

Target audience

Who will read the report? Only you, middle management, executive management, your customer? Knowing who will see the report helps you determine what data should be included.

Data

What information do you want to show on the report? Do you want to show task data, resource usage, cost information, materials, travel? Do you need to show indirect costs? The answers to these questions will help you determine which groups you need to include in the report and how you need to combine them.

Rough draft

Make a sketch of the report on paper. The sketch may help you see where you need to place the fields.

Run a Custom Report

There are two ways you run a custom report: from the Report List or while working on a custom report in Report Designer.

Run a Custom Report from the Report List

1. Click the **Reports** ribbon, and then **Report List** in the **All Reports** group.
2. In the **Report List**:
   - Double-click anywhere in the row of the report.
   - Select the row of the report and press **Enter**.
   - Select the row of the report and click **Run**.
3. Select the report options.
4. Click **Print to Screen** to display the report on your screen before printing. Click the down arrow next to the **Print to Screen** button to access the **Print to Printer** and **Print to Word** or **Print to Excel** when applicable.

Run a Custom Report from Report Designer

1. Click **Run** in the **Report** group on the **Report Designer** ribbon.
2. Select the report options.
3. Click **Print to Screen** to display the report on your screen before printing. Click the down arrow next to the **Print to Screen** button to access the **Print to Printer** and **Print to Word** or **Print to Excel** when applicable.

Note: The Quick Run option will run the report with the default Report Options, or with the Report Options selected the last time you ran the report. This is a very convenient way to test your report during the design process.

Design Basics

Add a Blank Field

You can add blank fields to use as labels to identify fields, rows, and columns, type explanations, etc. Blank fields can be placed anywhere in the layout where needed.

1. Select the section in the layout where you want to place a label.
2. From the Field panel, click (Blank) and drag it to the desired location.
3. Double-click the field to enter the text.
4. Resize the field to the necessary width.
5. Apply formatting if desired.

Add a Field

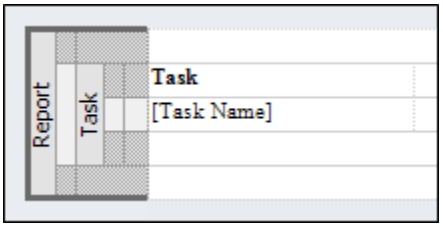
Groups provide the structure (Header, Detail, and Footer bands and sections) of a report, as well as the fields and parameters you can use in any given section. Some fields are common to all groups, while others are group specific. The **Fields** panel shows the fields you can drag into the **Layout** area.

1. Select the section in which you want to place the field. The **Fields** panel will show the list of the fields you can use.
2. Drag the field into the section.

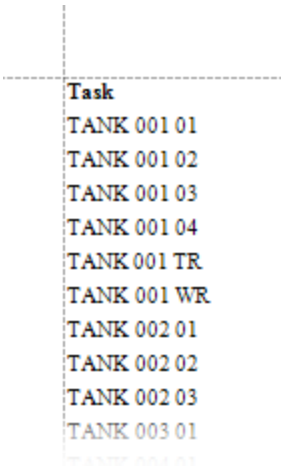
Smart Placement

ProPricer uses a smart placement feature. When you add a field, the label is automatically added as well. Follow this example to see how it works.

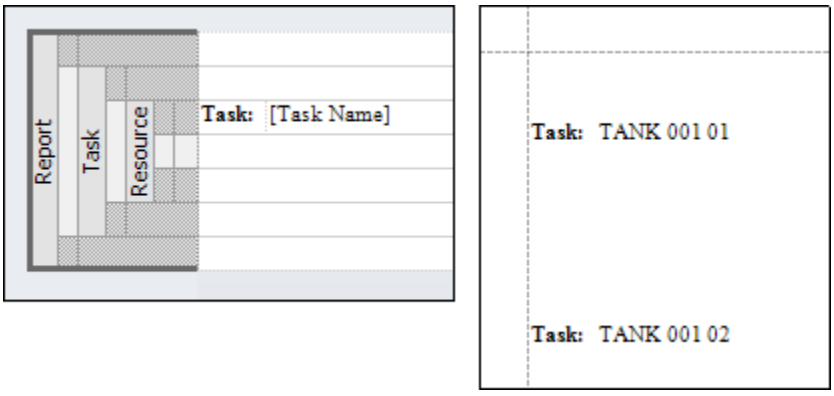
Embed the **Task** group in the **Report** group, and then add the **Task Name** field. The label **Task** is automatically added in the **Header** section of the **Task** group.



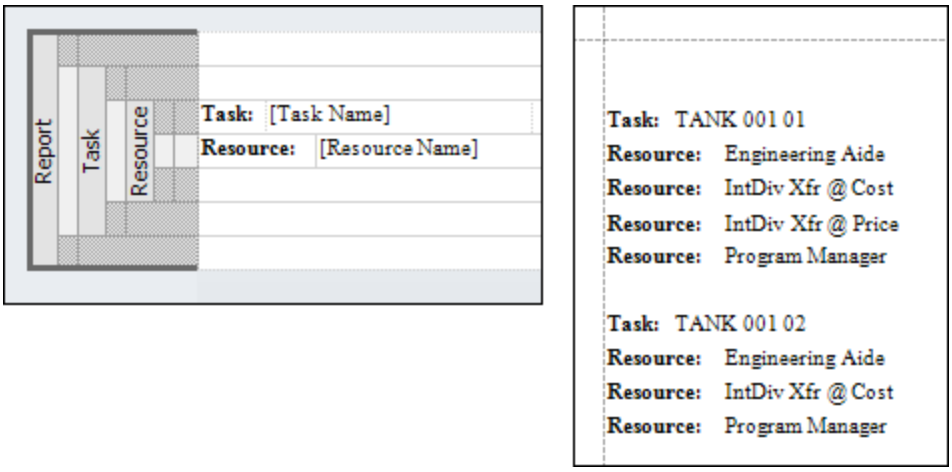
Print the report to screen.



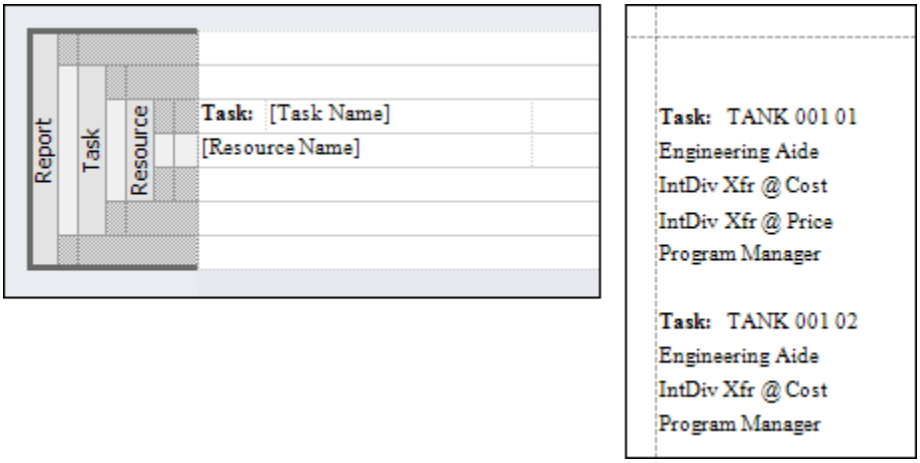
Embed the **Resource** group in the **Task** group to print the resources by task. When you select the **Header** section of the **Resource** group, the **Fields** panel shows the fields available in the **Task** group. This is because the **Header** and **Footer** section of a child group pertain the **Detail** band of the parent group. When you drag the **Task Name** field into the **Header** section, ProPricer changes the field to **Task:** [Task Name]. The **Detail** section of the **Resource** group is empty in the printed report because you did not add any fields.



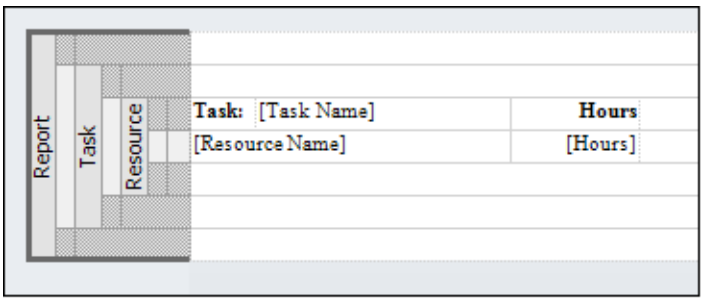
Add the **Resource Name** field to the **Detail** section.

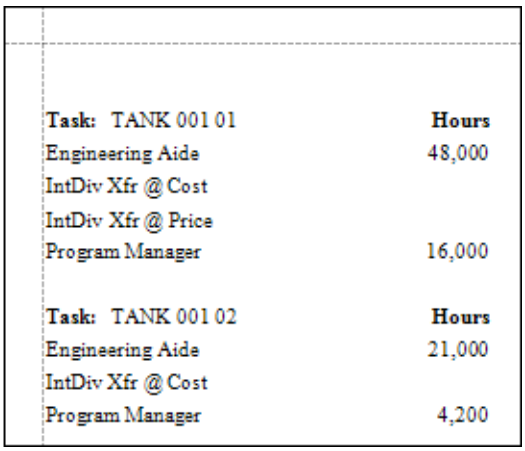


When you place a field/label combination in the **Layout** area, you can see that the label and data fields are two separate design elements. This offers you greater design possibilities.

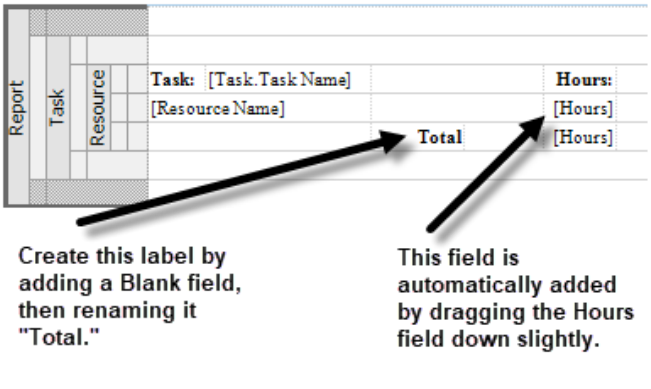


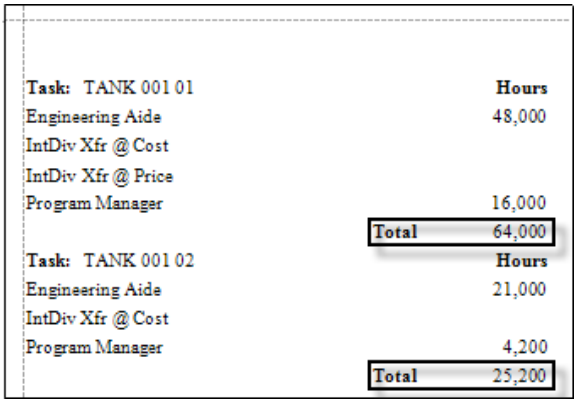
Now we want to see the hours per resource per task. Drag the **Hours** field into the **Detail** section. The **Hours** label is automatically added.





The **Hours** field is a Multi-Context field. Multi-Context fields are common to most groups and print calculated values based on the section in which they are placed. A very interesting feature of some of the Multi-Context fields is that if you drag the cursor down slightly into the footer section, ProPricer will automatically add a third field, which will print a total. You do not have to add the field to get a total.





Notes:

- *To place a blank label, drag **(Blank)** into the **Layout** area. Double-click the field, and then type the text you want to appear.*
- *To add a label without its corresponding data field, press the **Shift** key and drag the field into the **Layout** area.*
- *To add a data field without its corresponding label, press the **Ctrl** key and drag the field into the **Layout** area.*

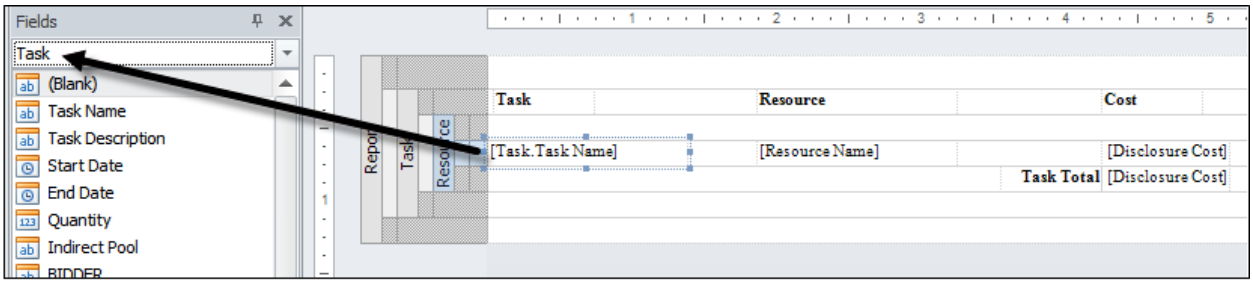
- *You can add fields from parent groups in child groups by changing the group in the **Fields** panel.*
- *Once a field has been added to the **Layout** area, you can change it by opening the drop-down box and selecting another field. Remember to change the corresponding label/data field as well.*
- *Before you release the field, you can move it around in the **Layout** area to change how it will appear: stacked with the label on top or side by side.*
- *When you drag a field into the **Layout** area, pink lines will appear to help you align them.*

Add a Field from a Parent Group in a Child Group

There may be times when you want to show data from a higher group at a lower group's level. You can do this by changing the group in the **Fields** panel and then selecting the field you want. You can add a field from a parent group in a child group, but not the other way around.

In the following example, we want to print a table-like report that shows the name of the task, followed by the name of the resource and resource cost. We also want to show a task total after all the resource rows.

To create the layout, add the **Task** group to the **Report** group, and then embed the **Resource** group in the **Task** group. You can add all resource-related fields directly from the **Resource** group, but you will need to add the **Task Name** field from the **Task** group in the **Detail** section of the **Resource** group (as shown below).



When you print the report to screen, it looks like this:

Task	Resource		Cost
TANK 001 01	Engineering Aide		1,146,068
TANK 001 01	IntDiv Xfr @ Cost		50,000
TANK 001 01	Program Manager		685,585
		Task Total	1,881,653
TANK 001 02	Engineering Aide		495,495
TANK 001 02	IntDiv Xfr @ Cost		30,000
TANK 001 02	Program Manager		180,180
		Task Total	705,675

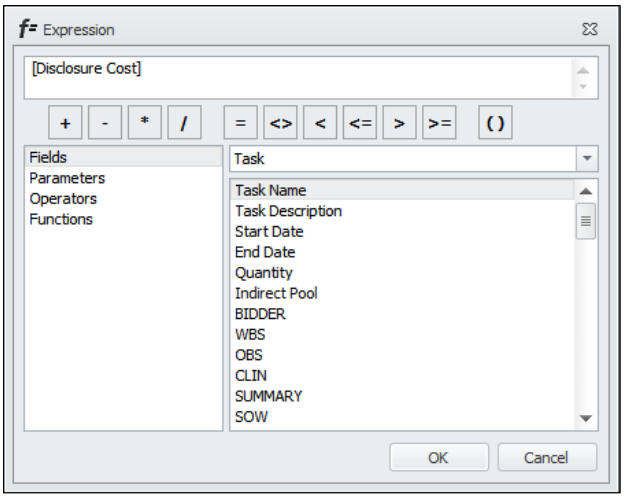
Add a Field from a Parent Group in a Child Group

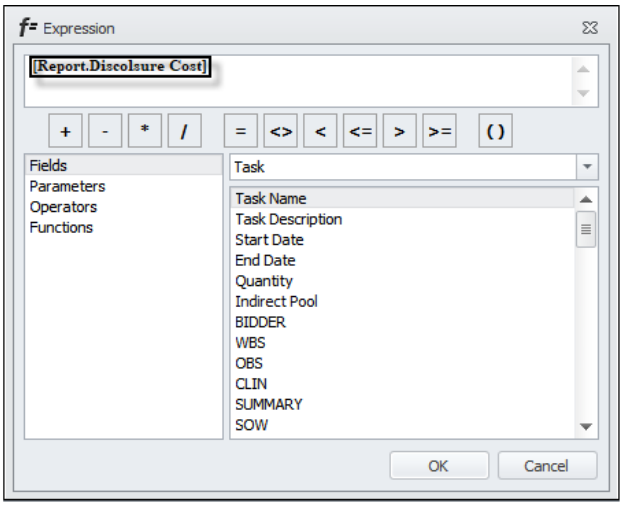
1. Select the section in which you want to place the field.
2. Select the parent group in the **Fields** panel.
3. Select the field and drag it into the **Layout** area.

This method works with fields that are not Multi-Context fields. However, Multi-Context fields show the calculated values (for example, Hours, Cost, Units) of the section in which they are placed. Even if you change the group to a parent group in the **Fields** panel and drag one of these fields into the child group, it will still print the calculated value from the child group. The only way you can print a value from a parent group in a child group is to modify the expression.

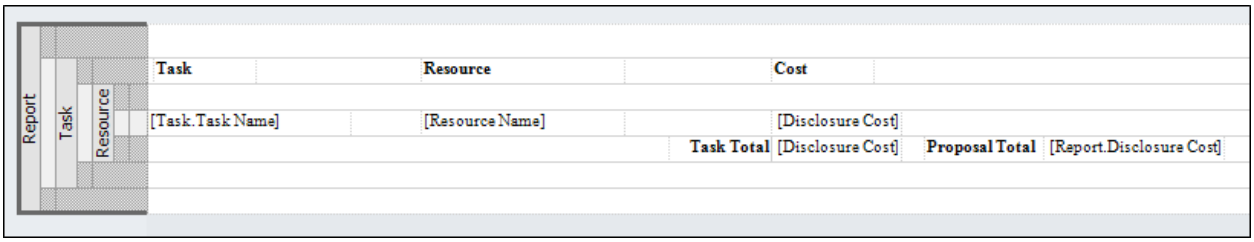
For example, if we want to show the total cost of the items in the report (which may or may not be the total cost of the proposal) next to every task total, we will need to modify the expression of the **Disclosure Cost** field by adding "Report." before "Disclosure Cost" within the expression. To do this:

1. Add a blank field to the right of the **[Disclosure Cost]** field in the **Footer** section of the **Resource** group.
2. Double-click the design element, and then type "Proposal Total".
3. Hold the **Ctrl** key and drag the **Disclosure Cost** field to the right of **Proposal Total**.
4. Right-click the **Disclosure Cost** design element, and then click **Expression**.
5. Type "Report." before "Disclosure Cost".
6. Click **OK**.





The Layout looks like this:

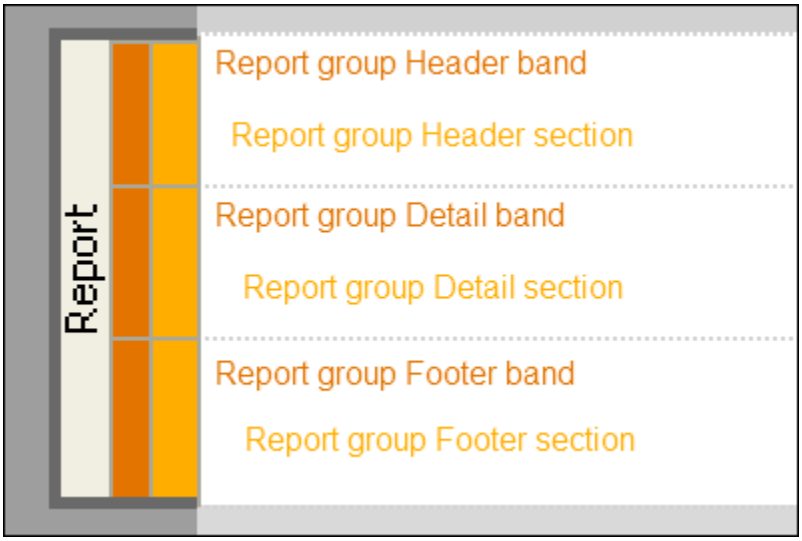


The report looks like this:

Task	Resource		Cost		
TANK 001 01	Engineering Aide		1,146,068		
TANK 001 01	IntDiv Xfr @ Cost		50,000		
TANK 001 01	Program Manager		685,585		
		Task Total	1,881,653	**Proposal Total**	55,766,845
TANK 001 02	Engineering Aide		495,495		
TANK 001 02	IntDiv Xfr @ Cost		30,000		
TANK 001 02	Program Manager		180,180		
		Task Total	705,675	**Proposal Total**	55,766,845

Add a Group

Groups provide the Header, Detail, and Footer bands and sections of the report, as well as define the fields and parameters you can use.



There are two ways you can add a group to a report: you can embed it or append it. Embedding inserts one group inside another. The Detail band of the parent group will consist of the Header, Detail, and Footer bands and sections of the child group. You can embed groups vertically and horizontally. Appending is adding a group at the same level as another group. The data from appended groups print independently. You can also append groups vertically or horizontally.

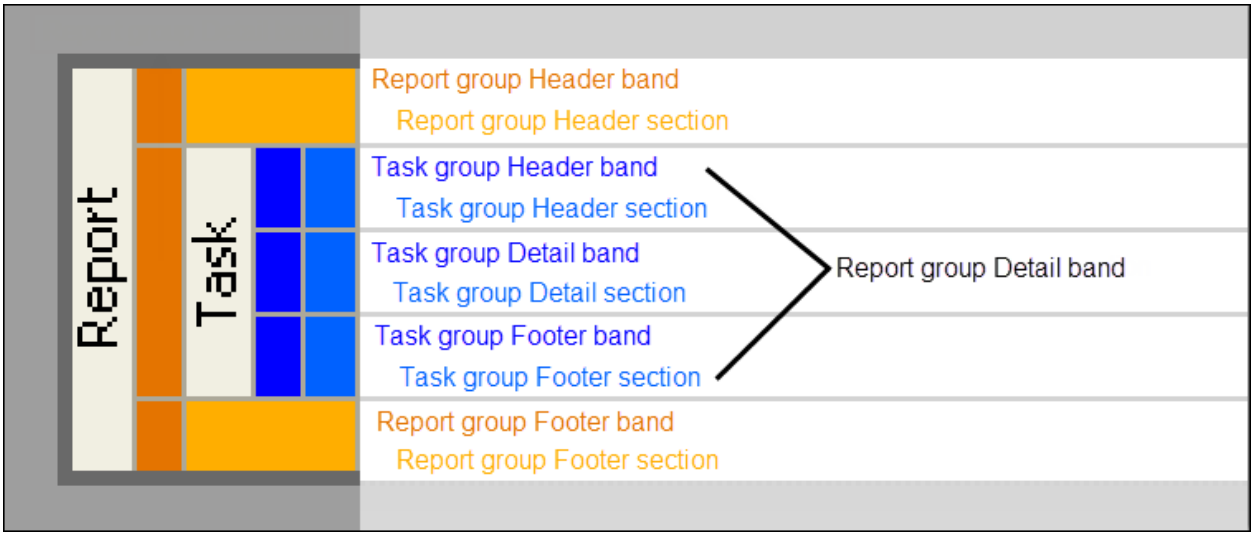
The Report group is the primary group of every report. All embedding and appending start in the Detail band of this group. Once you have embedded a group, you can then proceed to embed or append other groups.

Embed a Vertical Group

1. Right-click the **Detail** band of the group.
2. Point to **Add Child Group**.

3. Select the group you want.

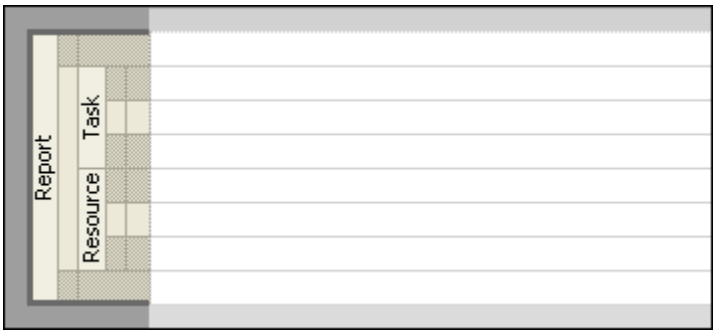
In this example, we embedded the **Task** group in the **Report** group. We enlarged the image and colored the bands and sections of both groups to show the bands and sections that were added.



Append a Vertical Group

1. Right-click the **Detail** band of the parent group.
2. Point to **Add Child Group**.
3. Select the group you want.

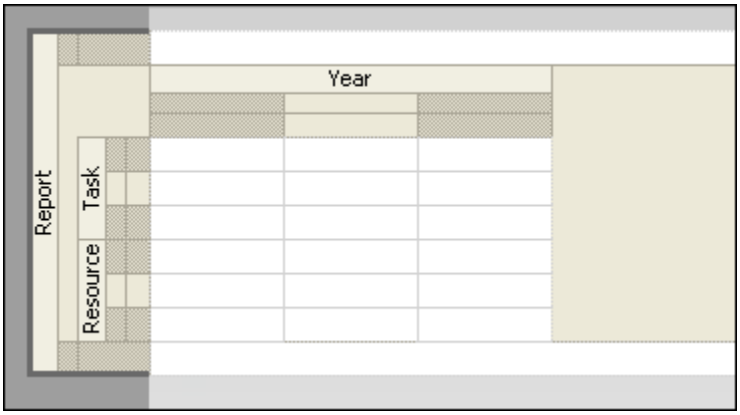
In this example, we appended the **Resource** group to the **Task** group:



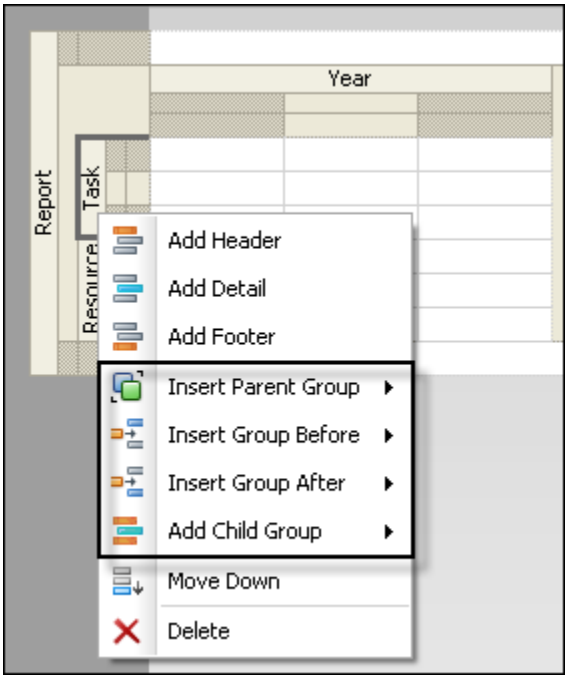
Embed a Horizontal Group to Create a Crosscut

1. Right-click the **Detail** band of the **Report** group.
2. Point to **Add Child Cross Group**.
3. Select the group you want.

In this example, we crossed the **Task** and **Resource** groups with the **Year** group:



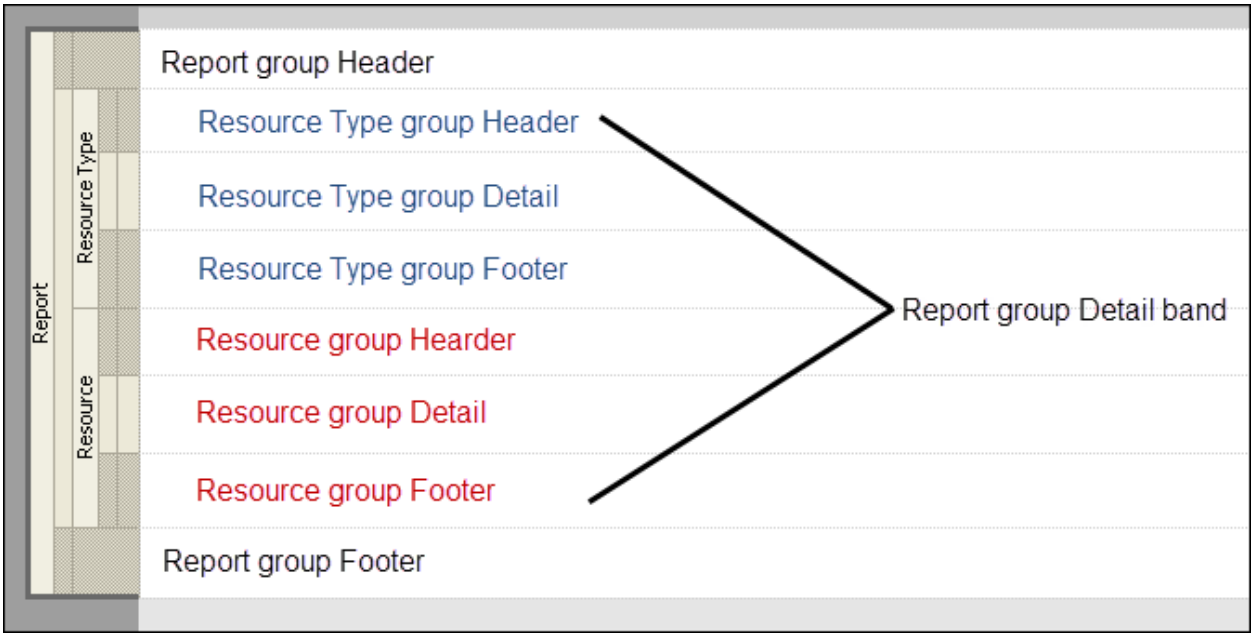
The shortcut menu that appears when you right-click a group has group options you can use any time during the design process. The options include: embed the group selected in a parent group, append a group before or after the group selected, and add a child group to the group selected.


Year
Report
Task
Add Header
Add Detail
Add Footer
Insert Parent Group
Insert Group Before
Insert Group After
Add Child Group
Move Down
Delete

Appending

Appending is adding a group at the same level as an existing group. Appended groups maintain a first-level ranking. They print independently; the data from one group does not depend on the data from the other group.

Appending occurs in the Detail band of an existing group. When you append a group, the Detail band of the parent group will show the Header, Detail, and Footer bands and sections of the appended groups.



Example

We want to create a Layout area that will show Hours and Cost by Resource Type and then by Resource.

Steps

1. Right-click the **Detail** band of the **Report** group, point to **Add Child Group**, and then click **Resource Type**.

2. Right-click the **Detail** band of the **Report** group, point to **Add Child Group**, and then click **Resource**. You can also right-click the **Resource Type** group, point to **Insert Group After**, and then click **Resource**.

3. Right-click the **Footer** section of the **Resource Type** and **Resource** groups, and then click **Insert Section After**. This will add a blank line between the sections.

4. Click the **Detail** section of the **Resource Type** group.

5. Drag the **Resource Type Name** field into the layout area.

6. Drag the **Hours** field to the right of the **Resource Type**. Moving the cursor down slightly into the **Footer** section of the **Resource Type** group will add a third **[Hours]** field, which is a total.

7. Drag the **Disclosure Cost** field to the right of the **Hours** field. Moving the cursor down slightly into the **Footer** section of the **Resource Type** group will add a third **[Cost]** field, which is a total.

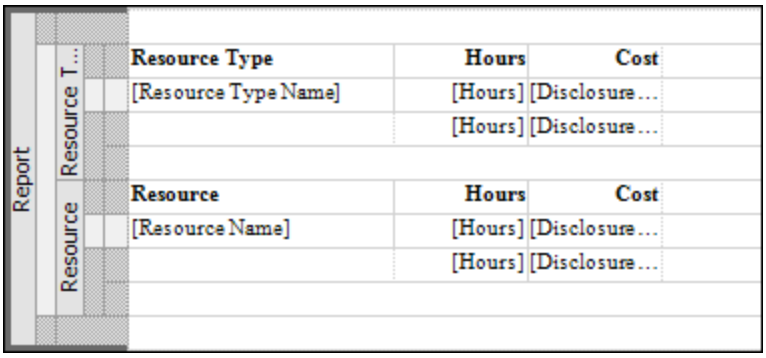
8. Click the **Detail** section of group **Resource**.

9. Drag the **Resource Name** field into the layout area.

10. Add the **Hours** and **Disclosure Cost** fields.

Layout Area

The Layout area will look like this:



Report

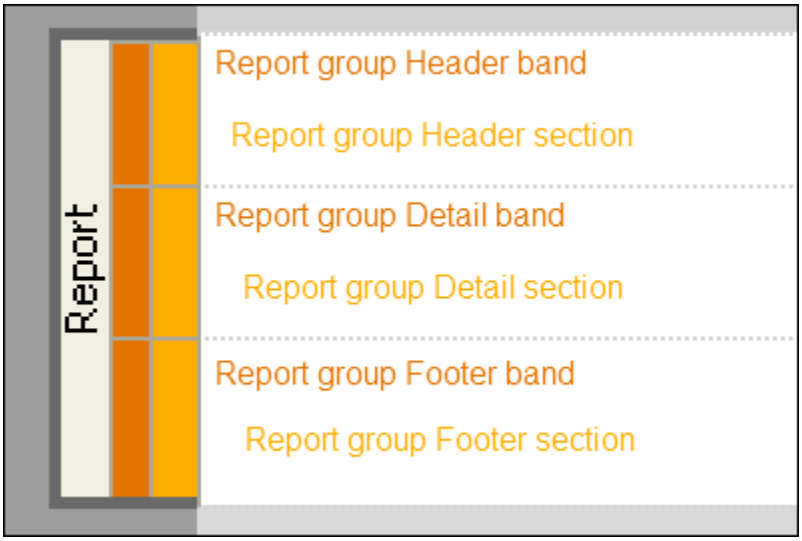
Run the report and print it to screen. Notice that each group is displayed as a whole and is not related to the other group.

Resource Type	Hours	Cost
Labor	1,787,248	40,960,159
Material		585,000
Subcontractor		13,274,892
Travel		492,794
Interdivisional		454,000
	1,787,248	55,766,845

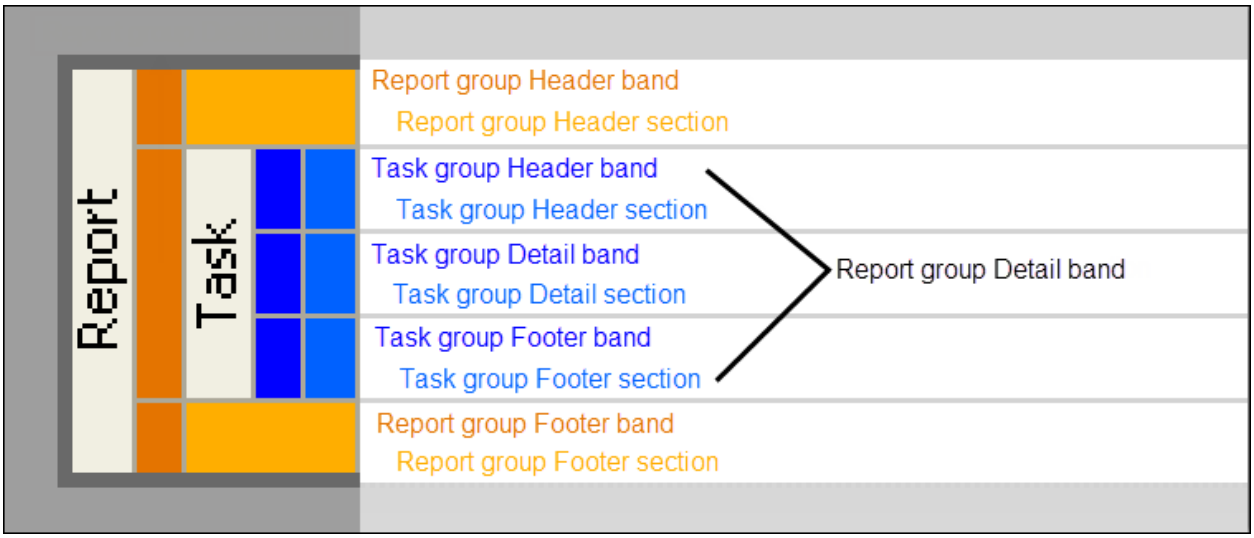
Resource	Hours	Cost
Assembly	428,450	6,548,750
Engineering Aide	497,320	11,829,729
Fabrication	384,200	8,370,001
IntDiv Xfr @ Cost		454,000
Junior Engineer	77,800	2,099,803
Metallurgist	72,000	4,063,332
Program Manager	77,875	3,372,775
Purchased Parts		560,000
Quality Assurance	3,600	96,209
Raw Materials		25,000
Senior Engineer	20,003	654,430
SUB--Assembly		4,796,808
Subcontract Assemblies		1,250,000
SUB--Fabrication		6,852,576
SUB--Purchased Parts		307,236
SUB--Raw Materials		68,272
Technical Writer	226,000	3,925,131
Travel		492,794
	1,787,248	55,766,845

Bands and Sections

Every group has a Header, Detail, and Footer band with a corresponding section. Groups are added to the bands. Fields are added to the sections.

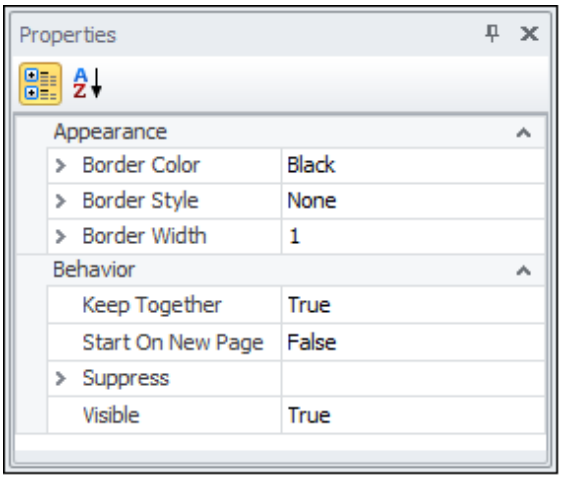


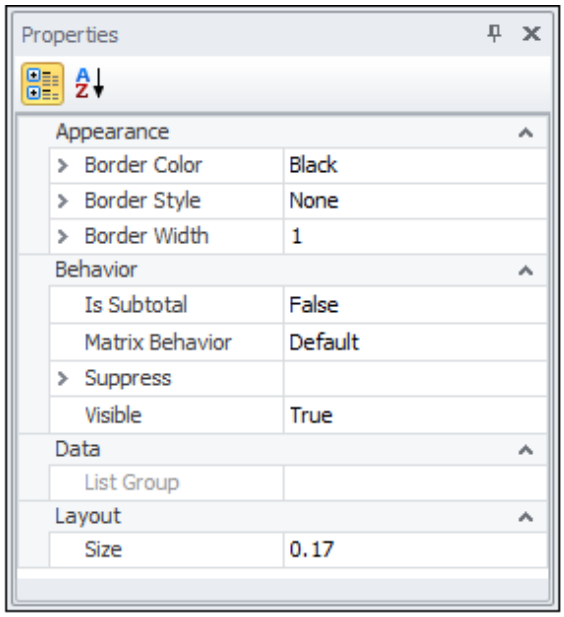
To add a child group to the Report group, you would right-click the Detail band, point to Add Child Group and then select the group you want. The child group adds Header, Detail, and Footer bands and sections to the Detail band of the parent group.



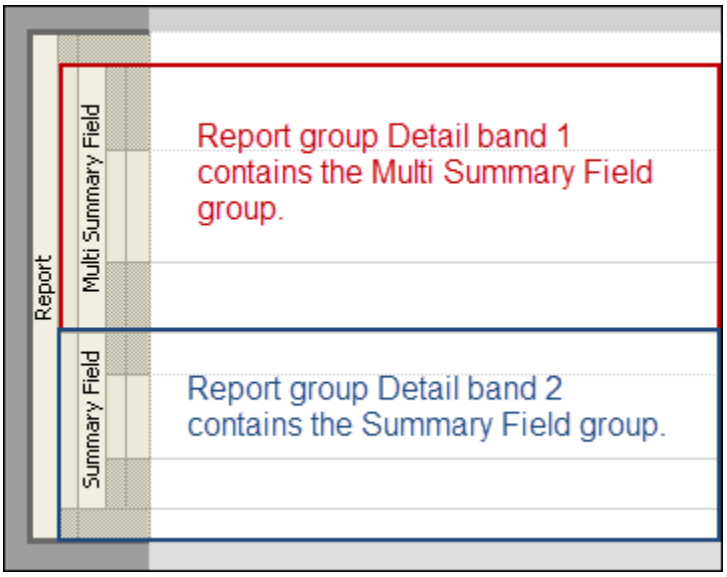
Bands regulate sections or groups, depending on the band selected. In the example above, the Task group Header band regulates the Task group Header section, while the

Report group Detail band regulates the Task group. Bands determine how the elements in a section or group will be reported (that is, the options in the Behavior section of the Properties panel for bands are different than the options available for sections).

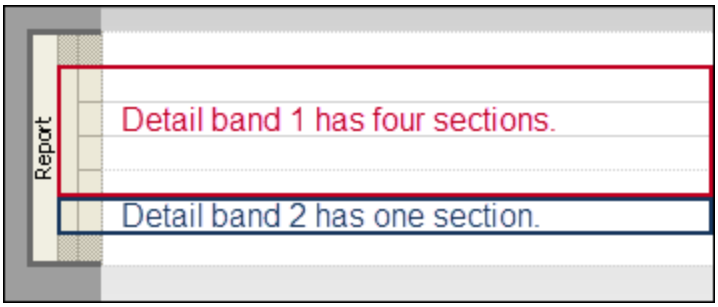




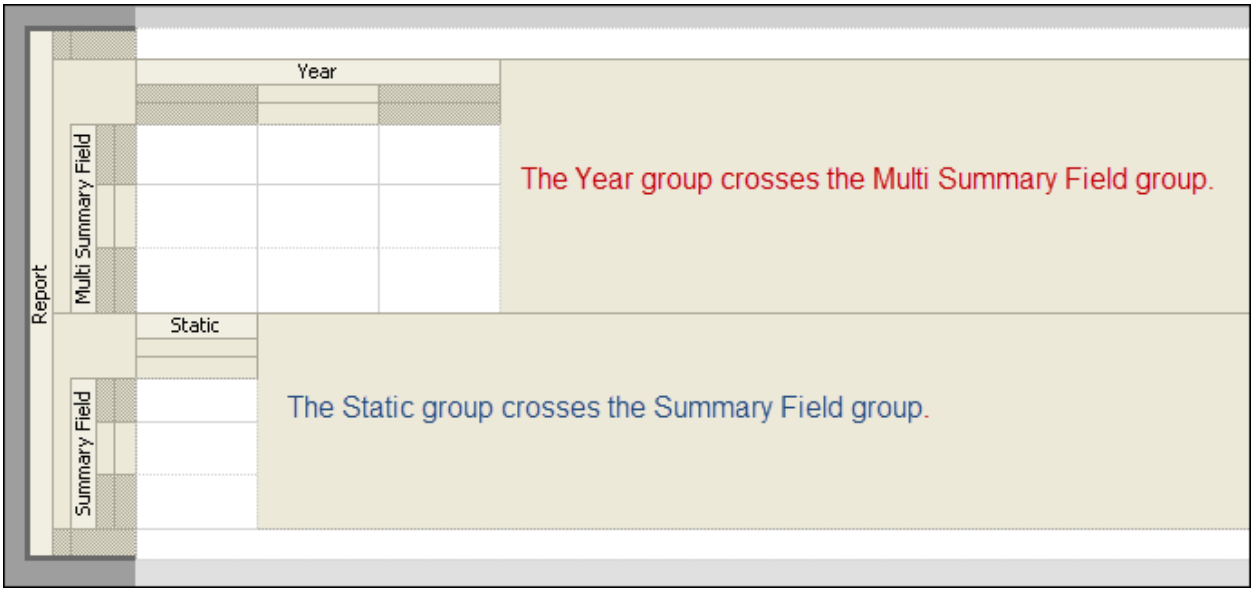
Bands provide flexibility in the design process. One band can have one or more groups:



Bands can have more than one section:

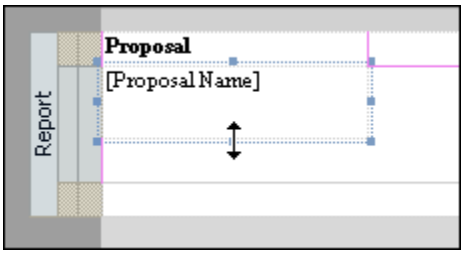


Bands can cross groups separately:



Change the Height of an Element

1. Click the element to select it.
2. Move the pointer until it changes to a double-headed arrow, and then drag the border to the desired size.

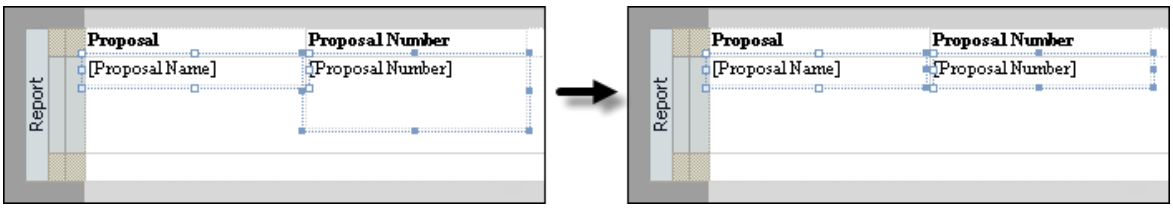


Change the Height of Several Elements Simultaneously

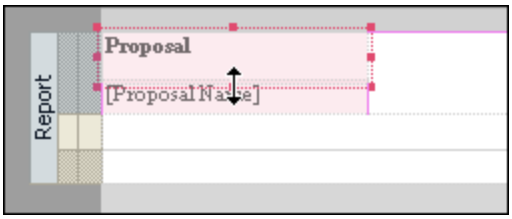
1. Click the first element.
2. Hold the **Ctrl** key and click the subsequent elements.
3. Drag the border of one of the elements to the desired size.

If you want the height of one element to be the same size as another, you can use the **Same Height** option in the **Layout** group on the **Report Designer** ribbon.

1. Click the element whose height you want the rest of the elements to change to.
2. Hold the **Ctrl** key and click the subsequent elements.
3. Click the **Same Height** button.

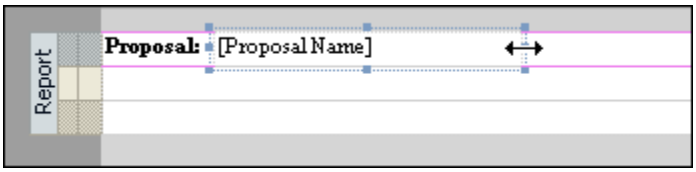


If you overlap elements, ProPricer will change their color and warn you of an overlap.


Report
Proposal
[ProposalName]

Change the Width of an Element

1. Click the element to select it.
2. Move the pointer until it changes to a double-headed arrow, and then drag the border to the desired size.



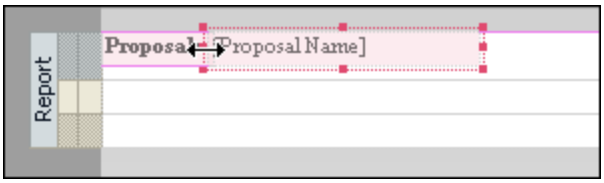
Change the Width of Several Elements Simultaneously

1. Click an element.
2. Hold the **Ctrl** key and click the subsequent elements.
3. Drag the border of one of the elements to the desired size.

If you want the width of one element to be the same size as another, you can use the **Same Width** option in the **Layout** group on the **Report Designer** ribbon.

1. Click the element whose width you want the rest of the elements to change to.
2. Hold the **Ctrl** key and click the subsequent elements.
3. Click the **Same Width** button.

If you overlap elements, ProPricer will change their color and warn you of an overlap.


Report
Proposal [Proposal Name]

Combining Groups

The skeleton of every custom report is made up of groups. How and when you add a group defines the appearance of the report. The following examples illustrate the results obtained with different combinations. Each report was run with a task selection that includes TANK 001 01 and TANK 001 02, and a resource selection that includes only resources of Type *Labor*. We also changed the font color of the tasks to red for easier identification.

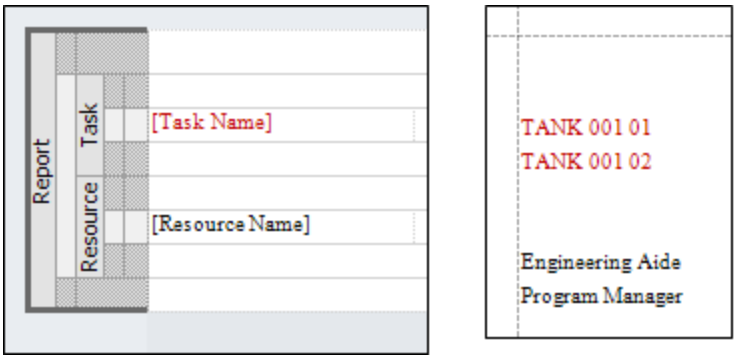
There are a few rules for combining groups:

- A group cannot be embedded in itself. This rule also applies to parent/child groups, for example, if you embed the Resource group in the Task group, you cannot embed the Task group in the Resource group.
- A group cannot be crossed with itself, for example, you cannot cross the Task group with the Task group.
- A group can be appended more than once in the same report.

Appended Groups

Appended groups print independently. All the elements from the first group will appear first, followed by the elements from the second group.

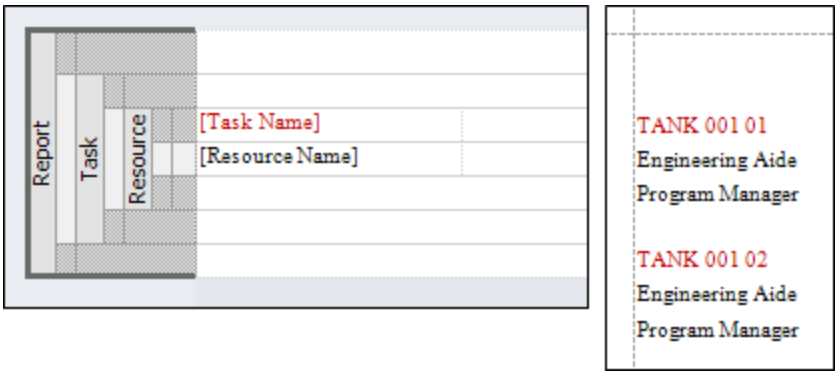
In this example, we added the Task group to the Report group first, and then appended the Resource group. Since the groups are appended, they do not interact with each other. The tasks appear first, and then the Resources follow.



Embedded Groups

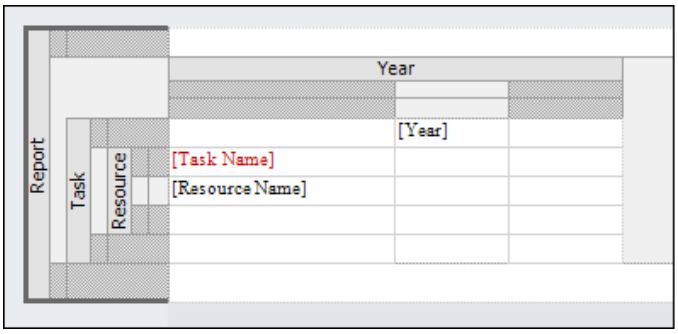
Embedded groups do not print independently. The first parent element and its children will appear first, followed by the second parent element and its children.

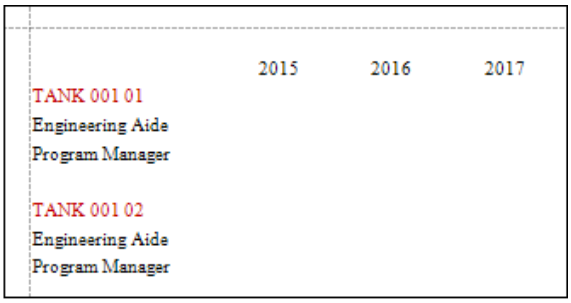
In this example, we added the Task group to the Report group first, and then embedded the Resource group in the Task group. The Task group is the parent of the Resource group. The first parent element TANK 001 01 appears first, followed by its children (the Resources used in the task: Engineering Aide and Program Manager). Then the second parent element TANK 001 02 appears, followed by its children (Resources Engineering Aide and Program Manager).



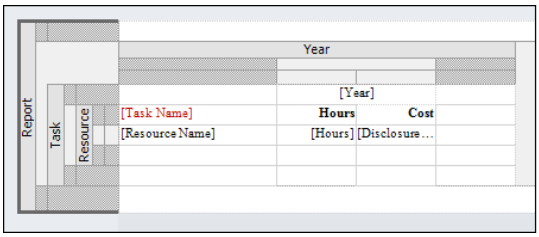
Crossed Groups

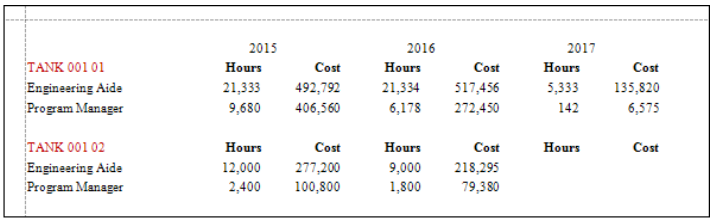
Crossed groups consist of embedding a horizontal group. To cross a group, you must embed a vertical group first. We will add the **Year** group as a crossed child group to the previous example.





We can add some other fields to the layout, like **Hours** and **Disclosure Cost**, to see the hours and cost per Resource per task by year.



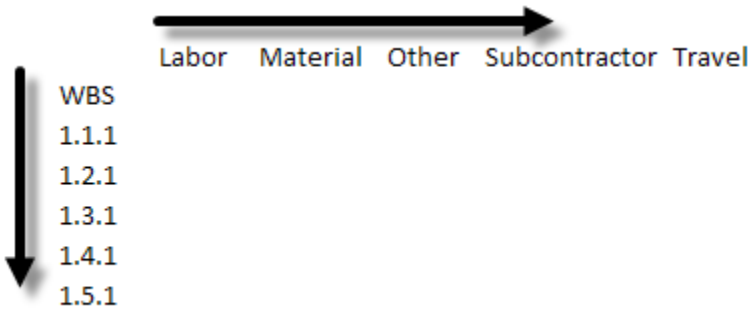


	2015		2016		2017	
TANK 001 01	**Hours**	**Cost**	**Hours**	**Cost**	**Hours**	**Cost**
Engineering Aide	21,333	492,792	21,334	517,456	5,333	135,820
Program Manager	9,680	406,560	6,178	272,450	142	6,575
TANK 001 02	**Hours**	**Cost**	**Hours**	**Cost**	**Hours**	**Cost**
Engineering Aide	12,000	277,200	9,000	218,295		
Program Manager	2,400	100,800	1,800	79,380		

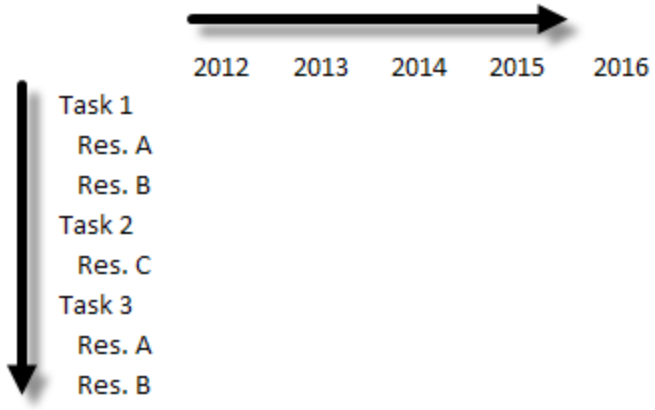
Crossing

Crossing is a variation of embedding. When you cross, a group is inserted at the top of the design area, so the data moves horizontally across the page. When you embed groups vertically, you create a cross section of the groups. Some combinations might include:

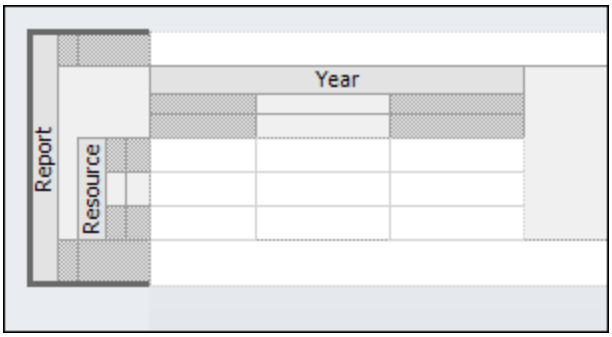
- Resource Types going across with a Summary Element going down.



- Years going across with Tasks and Resources going down.



Crossing occurs in the Detail band of an existing group. We embedded the Resource group in the Report group and then crossed it with the Year group. The Detail band of the Report group contains the Header, Detail and Footer bands and sections of the Resource group, as well as the Header, Detail and Footer bands and sections of the Year group.



Example

We want to show Hours, Rates, and Costs by Task and Resource per Year.

Steps

1. Right-click the **Detail** band of the Report group, point to **Add Child Group**, and then click **Task**.

2. Right-click the **Detail** band of the Task group, point to **Add Child Group**, and then click **Resource**.

3. Right-click the **Detail** band of the Report group, point to **Add Child Cross Group**, and then click **Year**.

4. Click the **Header** section of the Resource group crossed with the Header section of the Year group.

5. Open the lookup and select the **Task Name** field. Change the font to **Bold**.

6. Click the **Detail** section of the Resource group crossed with the Header section of the Year group.

7. Open the lookup and select the **Resource Name** field.

8. Expand the column to be able to read [Resource Name].

9. Click the **Header** section of the Resource group crossed with the Detail section of the Year group.

10. Drag the **Hours** field into the Layout area. The Target Indicator (+) will appear as you drag the field. Move the pointer around to see what happens. If you move the pointer slightly to the left, an additional column will appear to the right. If you move the pointer toward the center, no additional column will be added. If you move the pointer toward the right, an additional column will be added to the left of the Hours column.

11. Drag the **Rate** field to the right of the Hours column. Move the pointer toward the left to add an additional column.

12. Drag the **Disclosure Cost** field to the right of the Rate field, without adding an additional column.

13. Click the **Header** section of the Resource group crossed with the Footer section of the Year group.

14. Open the lookup and select **(Blank)**. Double-click the element and type the word *Totals*. Align it to the right.

15. Click the **Detail** section of the Resource group crossed with the Footer section of the Year group.

16. Open the lookup and select the Disclosure Cost field.

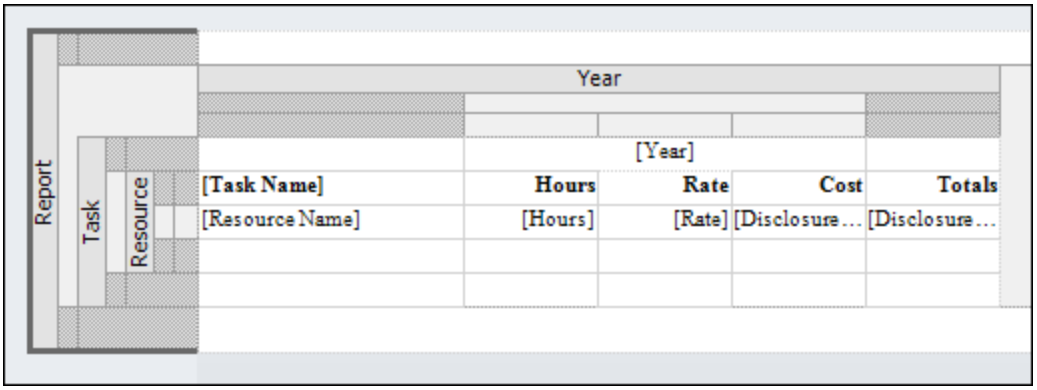
17. Click the **Header** section of the Task group crossed with the Detail section of the Year group.

18. Open the lookup and select the **Year** field. Make it bold.

19. Right-click the **Year** field, point to **Merge Cells Of**, and then click **Year Details**. Center the [Year] label.

Layout

The Layout area will look like this:



Report

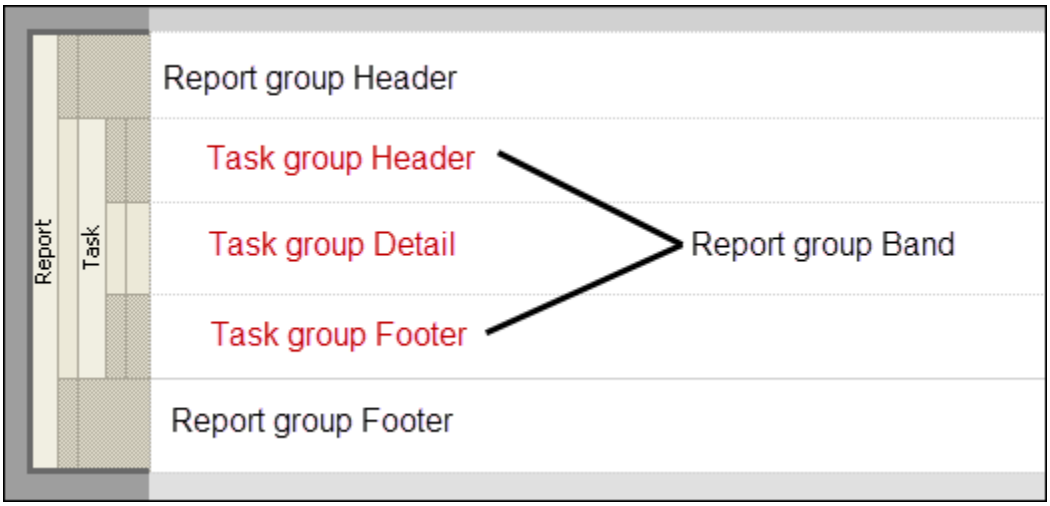
When we run the report, select the **Print Resource Rates** checkbox, and then print it to the screen. It looks like this:

	2015			2016			2017			
TANK 001 01	**Hours**	**Rate**	**Cost**	**Hours**	**Rate**	**Cost**	**Hours**	**Rate**	**Cost**	**Totals**
Engineering Aide	21,333	23.10	492,792	21,334	24.26	517,456	5,333	25.47	135,820	1,146,068
Program Manager	9,680	42.00	406,560	6,178	44.10	272,450	142	46.31	6,575	685,585
TANK 001 02	**Hours**	**Rate**	**Cost**	**Hours**	**Rate**	**Cost**	**Hours**	**Rate**	**Cost**	**Totals**
Engineering Aide	12,000	23.10	277,200	9,000	24.26	218,295				495,495
Program Manager	2,400	42.00	100,800	1,800	44.10	79,380				180,180

Embedding

Embedding occurs when you insert a group inside another one. It allows you to add greater detail to a report. After opening the Report Designer to create a new report, the only group you will see is the Report group. This group contains fields related to the report (Report Date, Report Footer Text, Company Address, Properties information, etc.). In order to report proposal data, you need to embed other groups in the Report group.

When you embed a group, the Detail band of the parent group will show the Header, Detail and Footer bands and sections of the child group. We embedded the Task group in the Report group. The fields available for the Detail section of the Task group pertain to the Task group. The fields available for the Header and Footer sections of the Task group pertain to the Report group. This is because the Header and Footer sections of a child group pertain to the Detail band of the parent group.



Example

We want to show Hours and Cost by Task.

Steps

1. Right-click the **Detail** band of the **Report** group, point to **Add Child Group**, and then click **Task**.

2. Click the **Detail** section of the **Task** group.

3. Drag the **Task Name** field into the layout area.

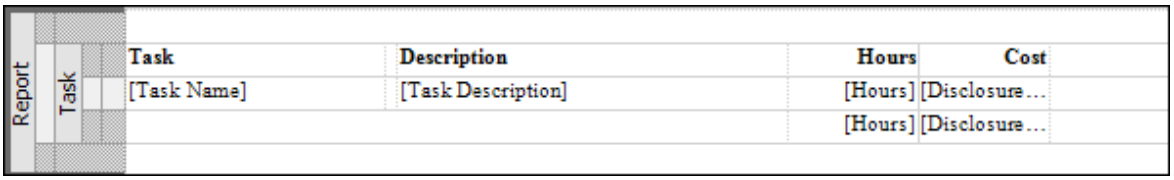
4. Drag the **Task Description** field to the right of the **Task Name** field.

5. Drag the **Hours** field to the right of the **Task Description** field. Moving the cursor down slightly into the **Footer** section of the **Task** group will add a third **[Hours]**, which is a total.

6. Drag the **Disclosure Cost** field to the right of the **Hours** field. Moving the cursor down slightly into the **Footer** section of the **Task** group will give you a third **[Cost]**, which is a total.

Layout

The Layout area will look like this:



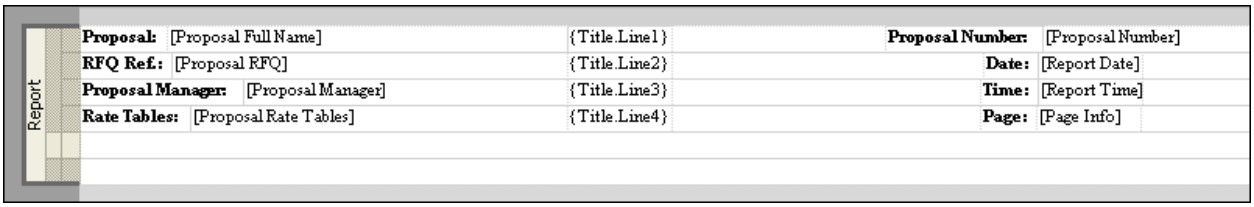
Report

When we run the report and print it to the screen, it looks like this:

Task	Description	Hours	Cost
TANK 001 01	Program Management	64,000	1,881,653
TANK 001 02	Financial Mangement	25,200	705,675
TANK 001 03	Planning & Scheduling	32,400	1,029,086
TANK 001 04	Contracts & Pricing	8,190	180,485
TANK 001 TR	Program Management Travel		35,294
TANK 001 WR	Program Warranty		
TANK 002 01	Software Planning	11,520	370,292
TANK 002 02	SW Implementation, Test and Doc	27,765	727,198
TANK 002 03	SW Deployment & Maintenance	5,000	177,189
TANK 003 01	Ergonomics	188,853	3,845,426
TANK 004 01	Prototype Destructive Test	39,440	979,180
TANK 004 02	Tabletop Development	101,800	2,782,867
TANK 005 01	Technical Publications	90,000	1,955,849
TANK 005 02	Engineering Data	135,000	3,076,802
TANK 005 03	Management Data	135,000	3,809,374
TANK 005 04	Support Data	273,600	5,001,024
TANK 005 05	User Manual	1,000	18,081
TANK 006 01	Cardboard Mockup	273,600	5,887,082
TANK 006 02	Clay Mockup		4,291,684
TANK 006 03	Scale Mockup		7,733,208
TANK 007 01	Destructive Mockup Test	145,440	4,426,499
TANK 008 01	Accelerated Aging Test & Evaluation	145,440	4,426,499
TANK 008 02	Wind Tunnel Testing	42,000	1,188,000
TANK 008 03	Sun Tunnel Testing	42,000	1,238,400
		1,787,248	55,766,845

Expand/Insert a Section

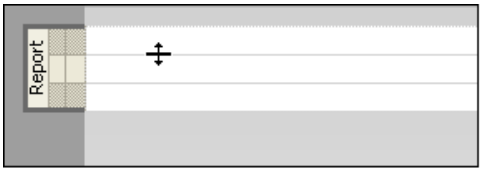
Expanding a section allows you to add more fields than the current size permits. The Header section of Group Report is a good example since it usually contains proposal information, company data, and report information.



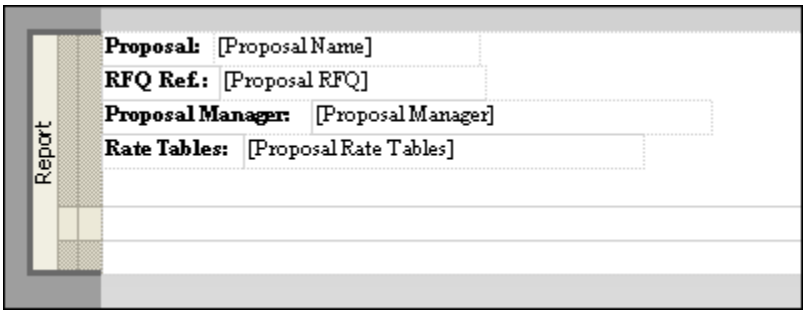
Three Methods to Expand a Section

Method 1

The first method is to drag the edge to the desired height.

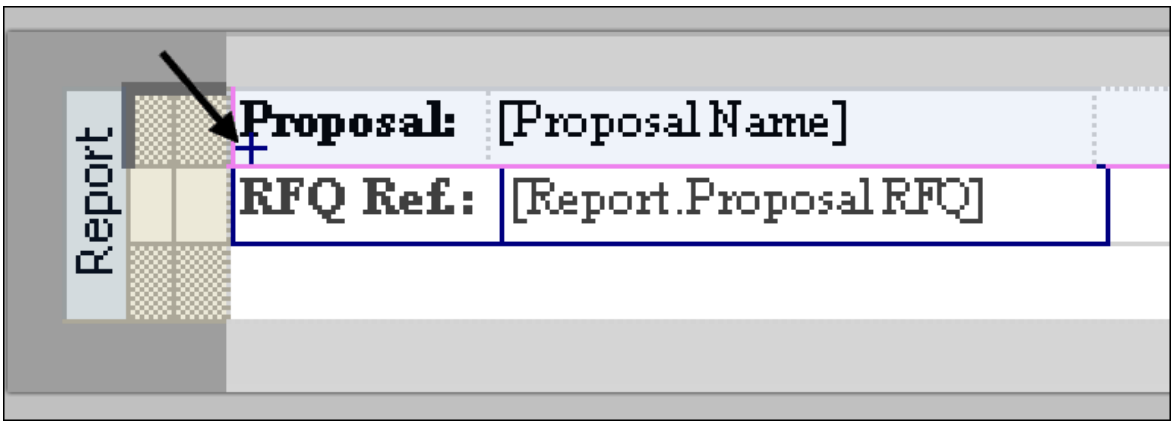


In this example, all the elements will appear in the same section.

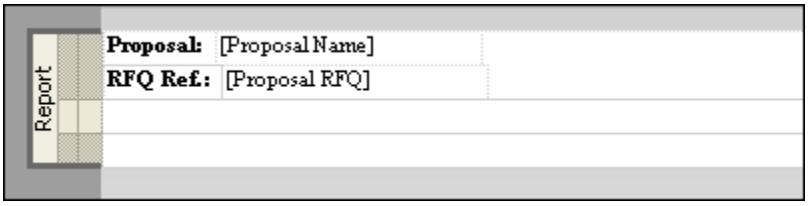


Method 2

Another way you can expand a section is with the Target Indicator when adding a field. As you drag the field into the Layout area, move the pointer slightly up until the Target Indicator is in the section you want to expand. We enlarged the following screenshot for clarity.

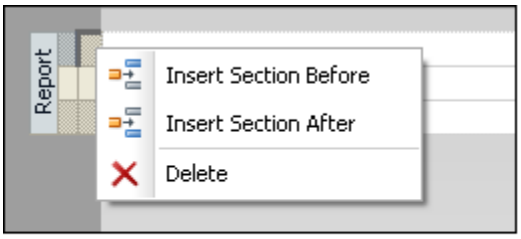


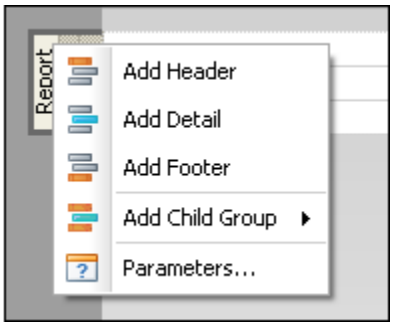
When you release the field, the Header section expands to accommodate the new field.



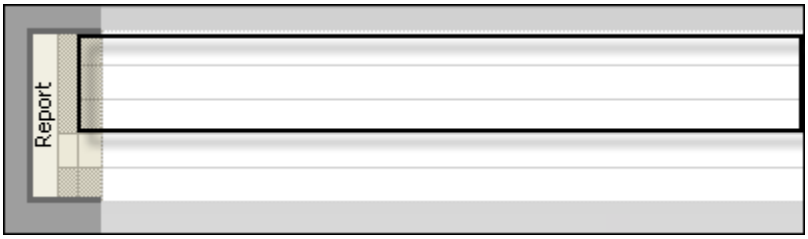
Method 3

You can also right-click a section and use the Insert Section Before or Insert Section After option, or right-click the group and use the Add Header, Add Detail or Add Footer options.





This will add separate sections within the Header, Detail, or Footer sections.



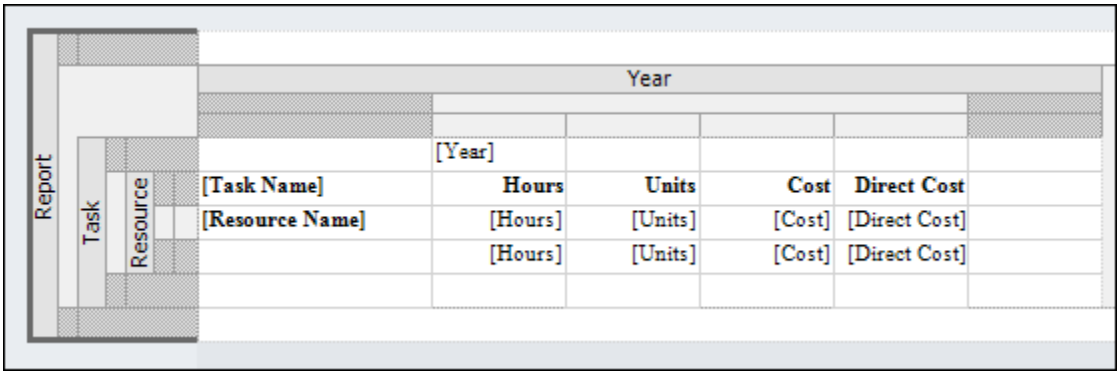
Whether you expand a section or insert a section is up to you. You might find it easier to copy/paste elements in an expanded section, but easier to move elements in an inserted section. You also might find it easier to suppress an inserted section if the elements you want to hide are in that section, rather than having to suppress the elements in an expanded section one by one. Suppressing a section hides the row, including the spacing of that row. Suppressing an element in an expanded section will hide the element, but the blank space will still be there.

Merging Cells

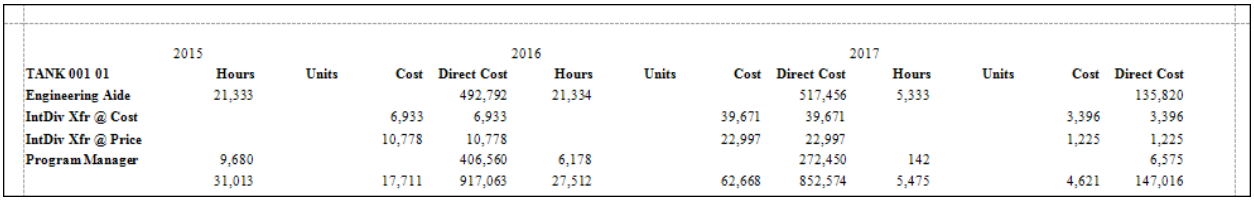
Merged cells allow you to combine the contents of multiple cells in a single merged cell. This is typically used in headings within crossed groups.

Example

We want to show the Hours, Units, Cost, Rate, and Disclosure Cost per resource by task per year. Our initial design looks like this:

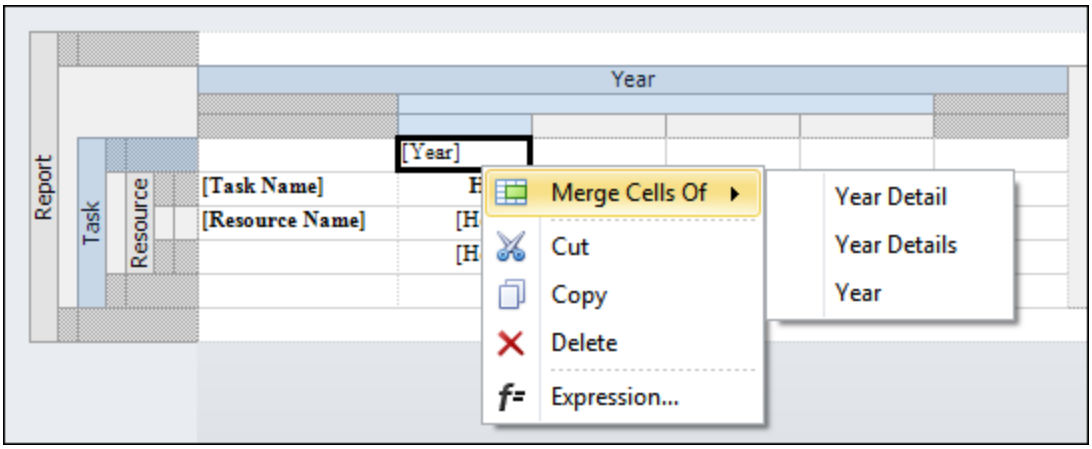


The report looks like this:



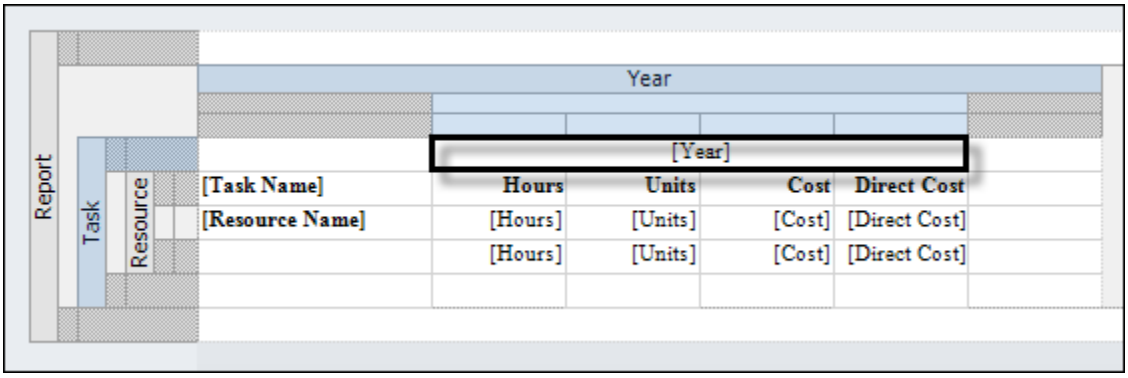
	2015				2016				2017			
TANK 001 01	Hours	Units	Cost	Direct Cost	Hours	Units	Cost	Direct Cost	Hours	Units	Cost	Direct Cost
Engineering Aide	21,333			492,792	21,334			517,456	5,333			135,820
IntDiv Xfr @ Cost			6,933	6,933			39,671	39,671			3,396	3,396
IntDiv Xfr @ Price			10,778	10,778			22,997	22,997			1,225	1,225
Program Manager	9,680			406,560	6,178			272,450	142			6,575
	31,013		17,711	917,063	27,512		62,668	852,574	5,475		4,621	147,016

It has the information we need, but it would be nice if each year encompassed their corresponding Hours, Units, Cost, and Direct Cost columns. We can achieve this by merging the Year Details cells. When we right-click the Year cell, we see three options: Year Detail, Year Details, and Year.

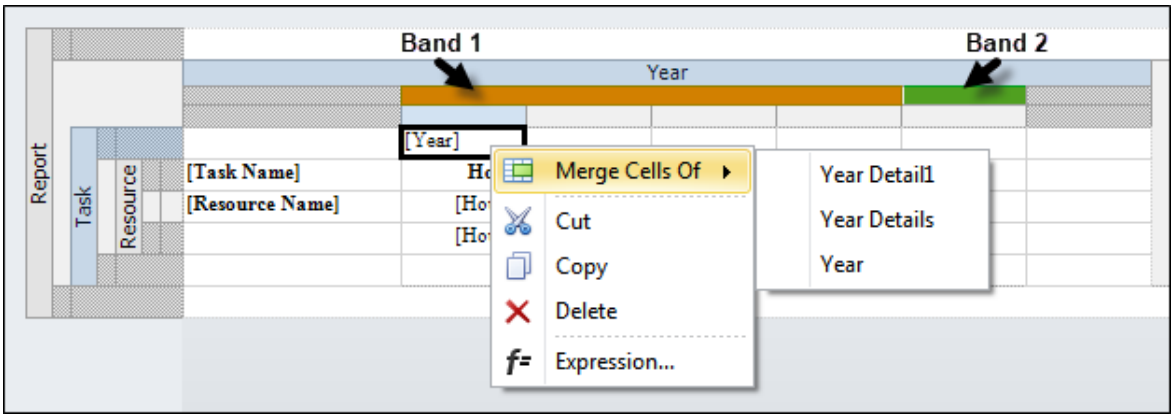


Year Detail

Merges the cells in all sections within the selected band.

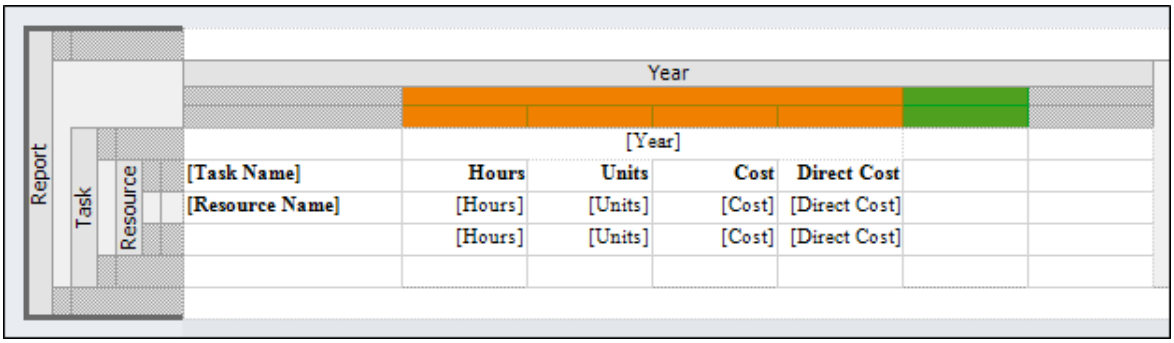


Note: If you have more than one band in the same section, you will see a number after the section that corresponds to the band.

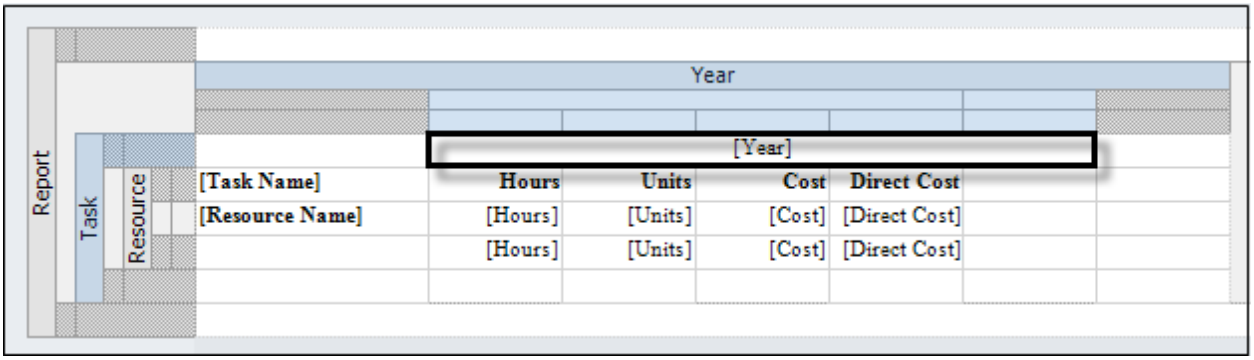


Year Details

Merges the cells of all sections contained in any band at the same level. The following screenshot shows the addition of another Detail band within the Year group.

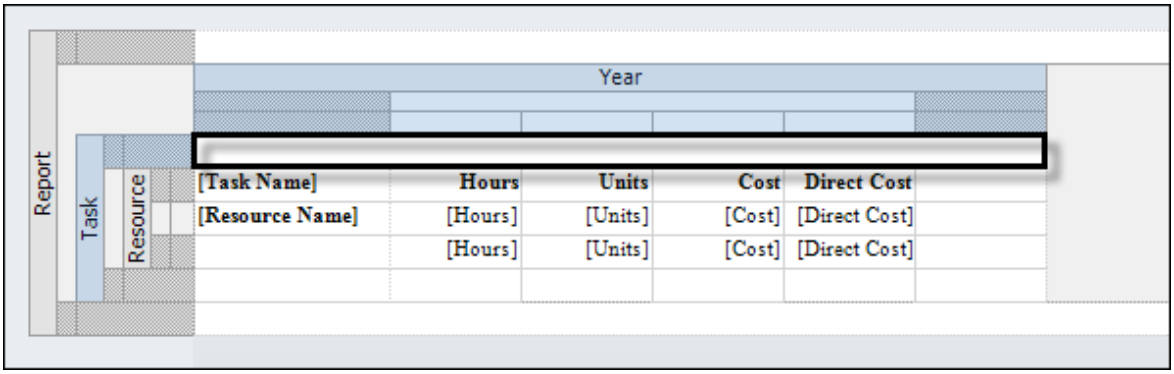


When we select the Merge Year Details, the Year field will now be centered between the cells of both Detail bands.

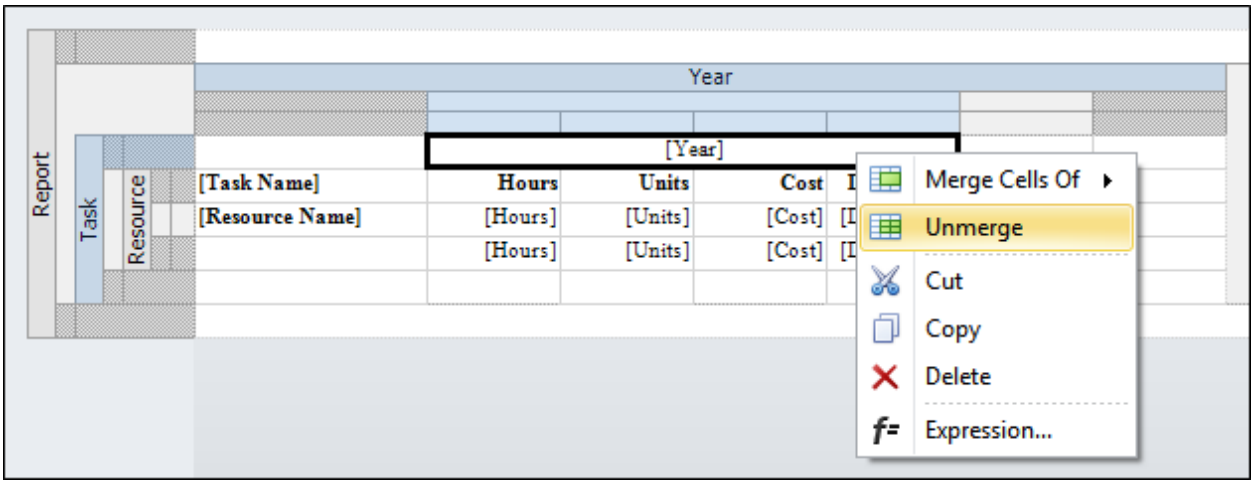


Year

Merges the cells of the Header, Detail, and Footer bands within the Year group. Note that the Year field disappeared. Since we merged all three bands, you can only add fields from the Report group.



To ungroup the merged cells, right-click the cell, and then click **Unmerge**.

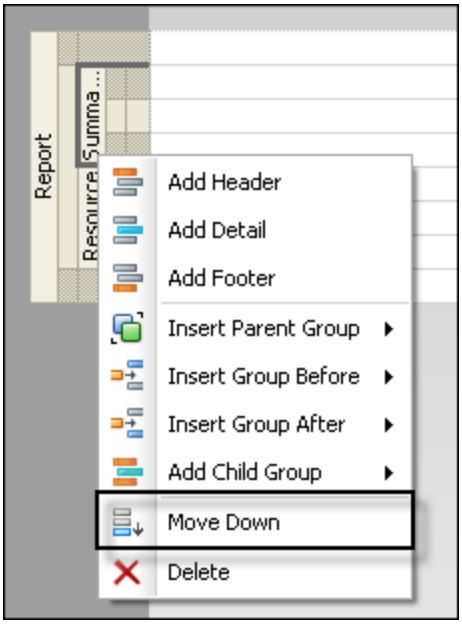


Move a Group

You can move groups that are at the same level (appended) after you have placed them in the Layout area. You do not need to delete them and start over again.

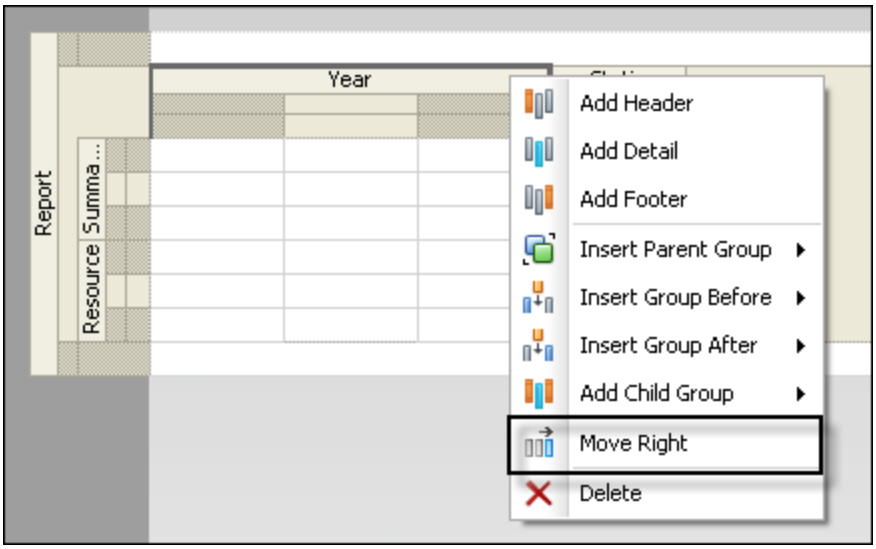
Move a Vertical Group

Right-click the group, and then click **Move Up** or **Move Down**.



Move a Horizontal Group

Right click the Group, and then click **Move Right** or **Move Left**.


Year
Report
Summa ...
Resource
Add Header
Add Detail
Add Footer
Insert Parent Group
Insert Group Before
Insert Group After
Add Child Group
Move Right
Delete

Move an Element

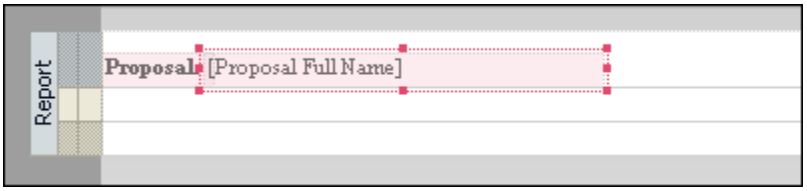
Before you can move an element, you must click it to select it. To select multiple elements, hold the **Ctrl** key and click the other elements you want to move. You can also hold the **Shift** key and use the mouse to select multiple elements. If you add a field/label combination and do not click anywhere else in the layout, you can move them simultaneously. If you click somewhere in the layout, the elements are now separate entities, and you will have to hold the **Ctrl** or **Shift** key to move them at the same time.

You can use your mouse to move elements. This is especially handy if you want to move the element to a different section.

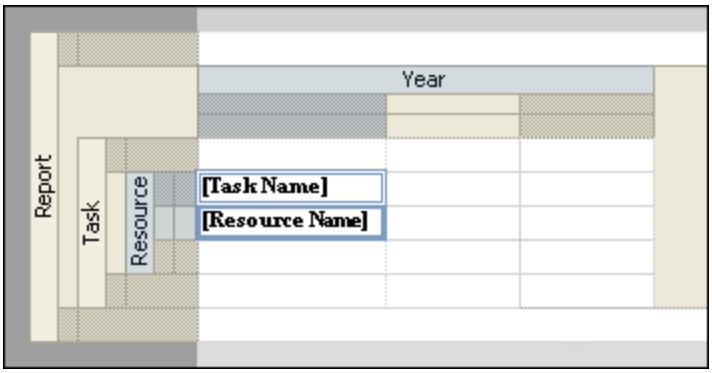
You can use the right/left and up/down arrow keys on your keyboard. Please note this option will not move an element to another section. The up arrow will only move the element to the top of the section. The down arrow will move it to the bottom and expand the section each time you press the down arrow key.

You can also use the **Ctrl** key plus the **Arrow** keys. This works the same as using the arrow keys by themselves, but the space they move is smaller.

If you move an element on top of another one, ProPricer will change the color of the elements and warn you of an overlap.



Fields placed in the intersection of crossed groups lose their 'field' identity and adopt the behavior of a cell in a matrix. This is easy to identify. The dotted outline with squares is replaced with a solid line.

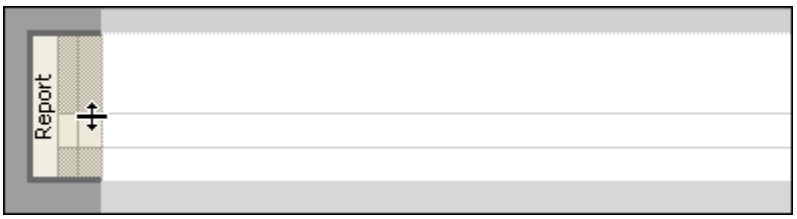


You can use your mouse to move an element in an intersection to a different section or cell, but the arrow keys will not work. This is because you cannot move a cell.

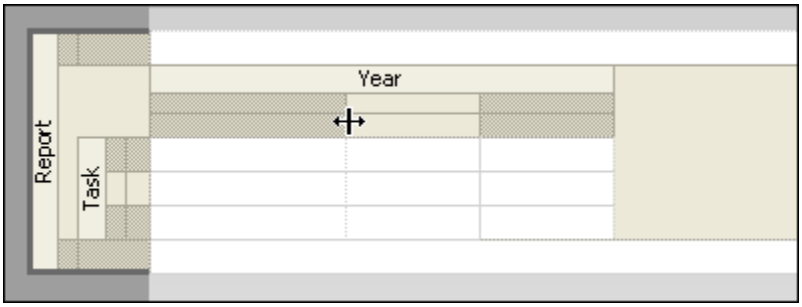
Resize a Section

You can expand the Header, Detail and Footer sections of Groups to make room for the fields you want to include in the report. There are two ways you can do this.

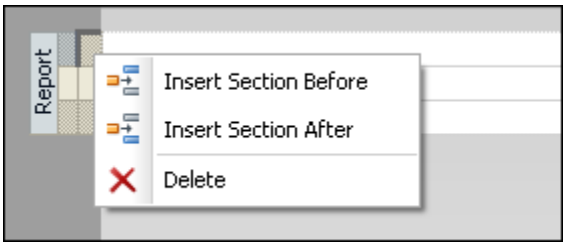
The first way is to move the pointer until it changes to a double-headed arrow, and then drag the section to the desired size.



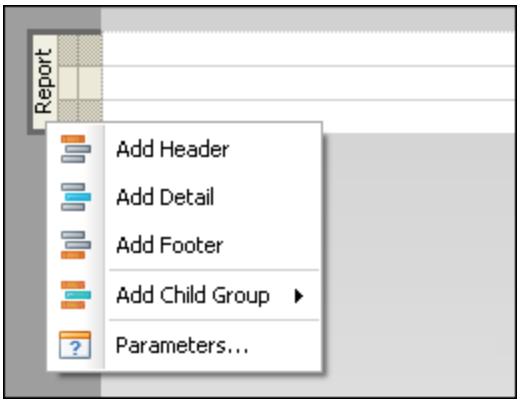
This is also true for horizontal crossed sections.



The second way to increase the size of a section is to add sections. You may find this method beneficial later on. Right-click the section, and then click **Insert Section Before** or **Insert Section After**.



You can also right-click the group, and then click appropriate option.

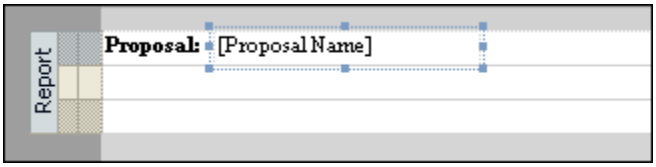

Report
Add Header
Add Detail
Add Footer
Add Child Group
Parameters...

Select an Element

Many of the operations, such as resizing, formatting, and deleting in Report Designer can be done simultaneously with several elements.

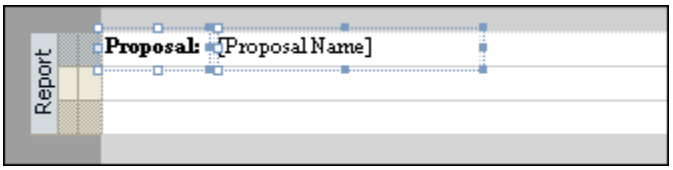
Select a Single Element

Click the element.



Select Several Elements

1. Click the first element.
2. Hold the **Ctrl** key while clicking the other elements.

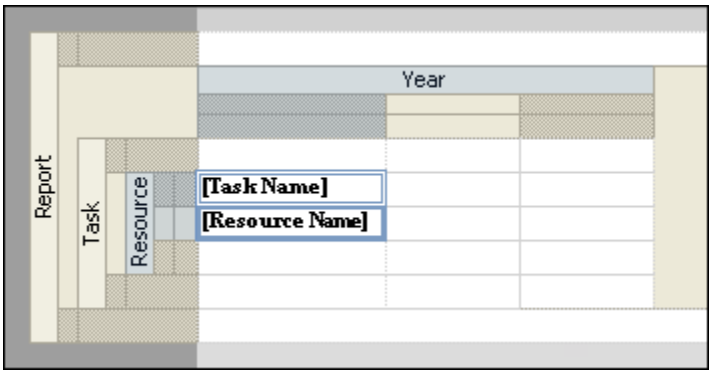


Notice the white-colored squares of the Proposal label, which is the first element we selected (Primary). This is important when formatting your elements, especially when you use the Same Format, Same Height, or Same Width options in the **Layout** group on the **Report Designer** ribbon. ProPricer will apply the formatting of the primary element to the subsequent elements selected.

Cancel a Selection of Elements

Click anywhere in the Layout area, or press the **Esc** key.

Note: Crossed groups affect elements. Elements placed in the intersection of crossed groups lose their field identity and adopt the behavior of a cell in a matrix. When this happens, the dotted outline with squares is replaced with a solid line.



Show Cost Analysis

Indirect and Subtotal Cost Analysis is not automatically shown on your custom report. You can manually drag indirect or subtotal fields into the layout, or you can use the Cost Analysis options in the **Properties** panel so that the Reports Engine adds and formats the analysis for you automatically.

Cost Analysis Options

Detail

The Detail Cost Analysis option will show Cost Analysis data within the Detail section of the report, if you use the Cost Level report option. When you change the Cost Level, the Cost Analysis data will include totals up to the selected level within the Detail section.

Summary

The Summary Cost Analysis option automatically inserts the Cost Analysis section after all the records in the Detail section have printed. This is seen on system reports where the Cost Analysis at the end of all Tasks or Resources, for example, Detail Cost Breakdown.

Both

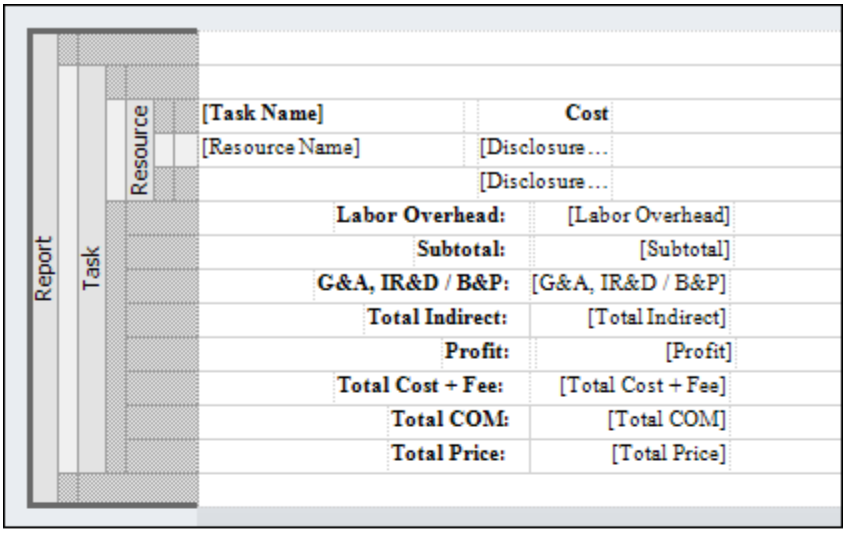
Both is the most commonly used Cost Analysis option. Some reports may require Cost Analysis information at the bottom only (Fiscal Year Summary or Elements of Cost) so Summary would be selected. For all other reports where Cost Analysis is desired, Both is recommended since you have the option of selecting a Cost Level if needed.

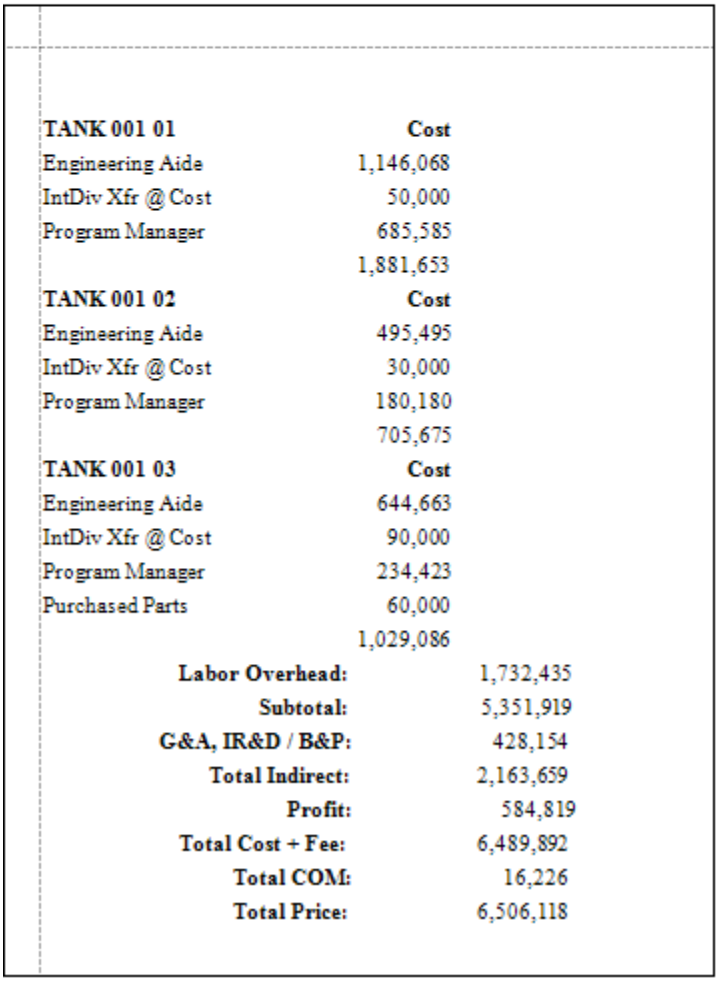
Examples

The following examples show how you can add Cost Analysis information at the parent level or at the child level. In all examples, we added group **Task** and then embedded group **Resource**. We also used a task selection that contains just the first two tasks.

Example 1

This example shows what it would look like if you manually drag indirect and subtotal fields into the layout. Notice that there are no total lines. We would need to add those to the fields ourselves.

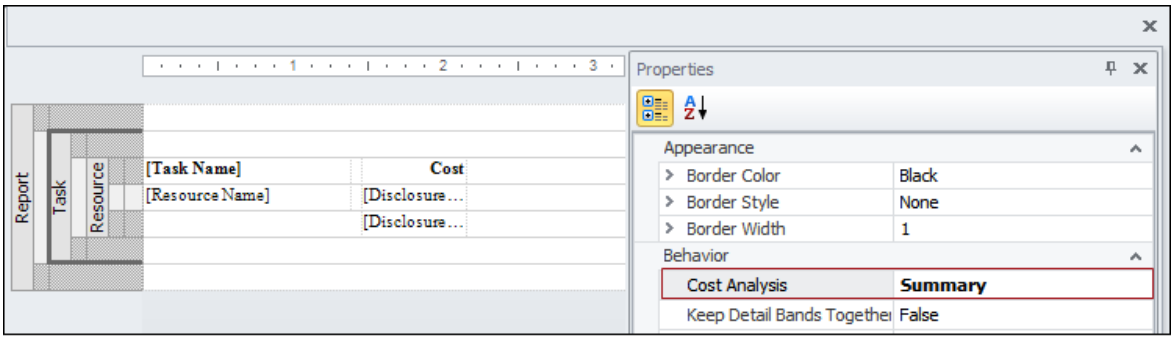




TANK 001 01	Cost	
Engineering Aide	1,146,068	
IntDiv Xfr @ Cost	50,000	
Program Manager	685,585	
	1,881,653	
TANK 001 02	**Cost**	
Engineering Aide	495,495	
IntDiv Xfr @ Cost	30,000	
Program Manager	180,180	
	705,675	
TANK 001 03	**Cost**	
Engineering Aide	644,663	
IntDiv Xfr @ Cost	90,000	
Program Manager	234,423	
Purchased Parts	60,000	
	1,029,086	
Labor Overhead:		1,732,435
Subtotal:		5,351,919
G&A, IR&D / B&P:		428,154
Total Indirect:		2,163,659
Profit:		584,819
Total Cost + Fee:		6,489,892
Total COM:		16,226
Total Price:		6,506,118

Example 2

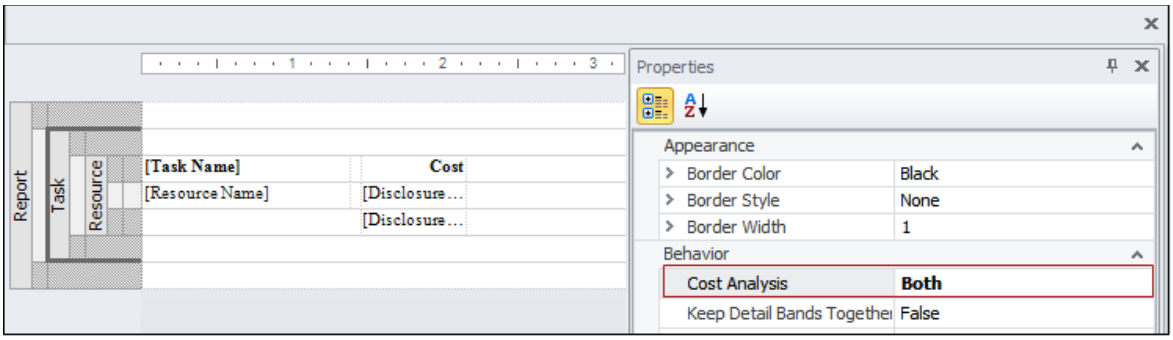
In this example, we selected the **Summary** Cost Analysis option for group **Task**. All the cost analysis is at the end of the report.



TANK 001 01	Cost
Engineering Aide	1,146,068
IntDiv Xfr @ Cost	50,000
Program Manager	685,585
	1,881,653
TANK 001 02	**Cost**
Engineering Aide	495,495
IntDiv Xfr @ Cost	30,000
Program Manager	180,180
	705,675
Direct Cost	2,587,328
Labor Overhead	1,282,617
Total Overhead	1,282,617
Subtotal	3,869,945
G&A, IR&D / B&P	309,596
Total Indirect	1,592,213
Estimated Cost	4,179,541
Profit	417,954
IntDiv Xfr @ Price	35,000
Total Cost + Fee	4,632,495
G&A Cost of Money	11,610
Interdivisional Transfer F…	80
Total COM	11,690
Total Price	4,644,185

Example 3

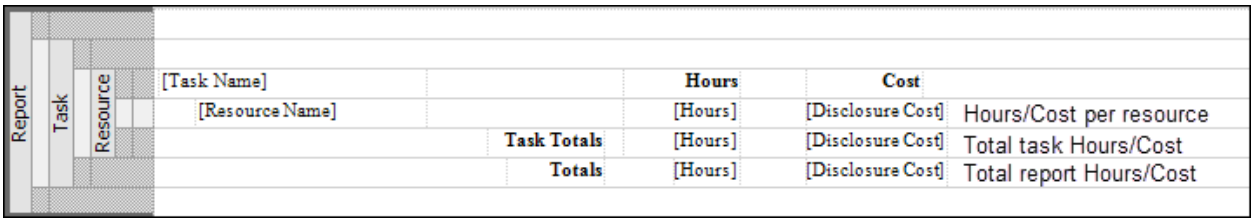
In this example, we selected the **Both** Cost Analysis option for group **Task** and for group **Resource**. The cost analysis appears after each task and at the end of the report.

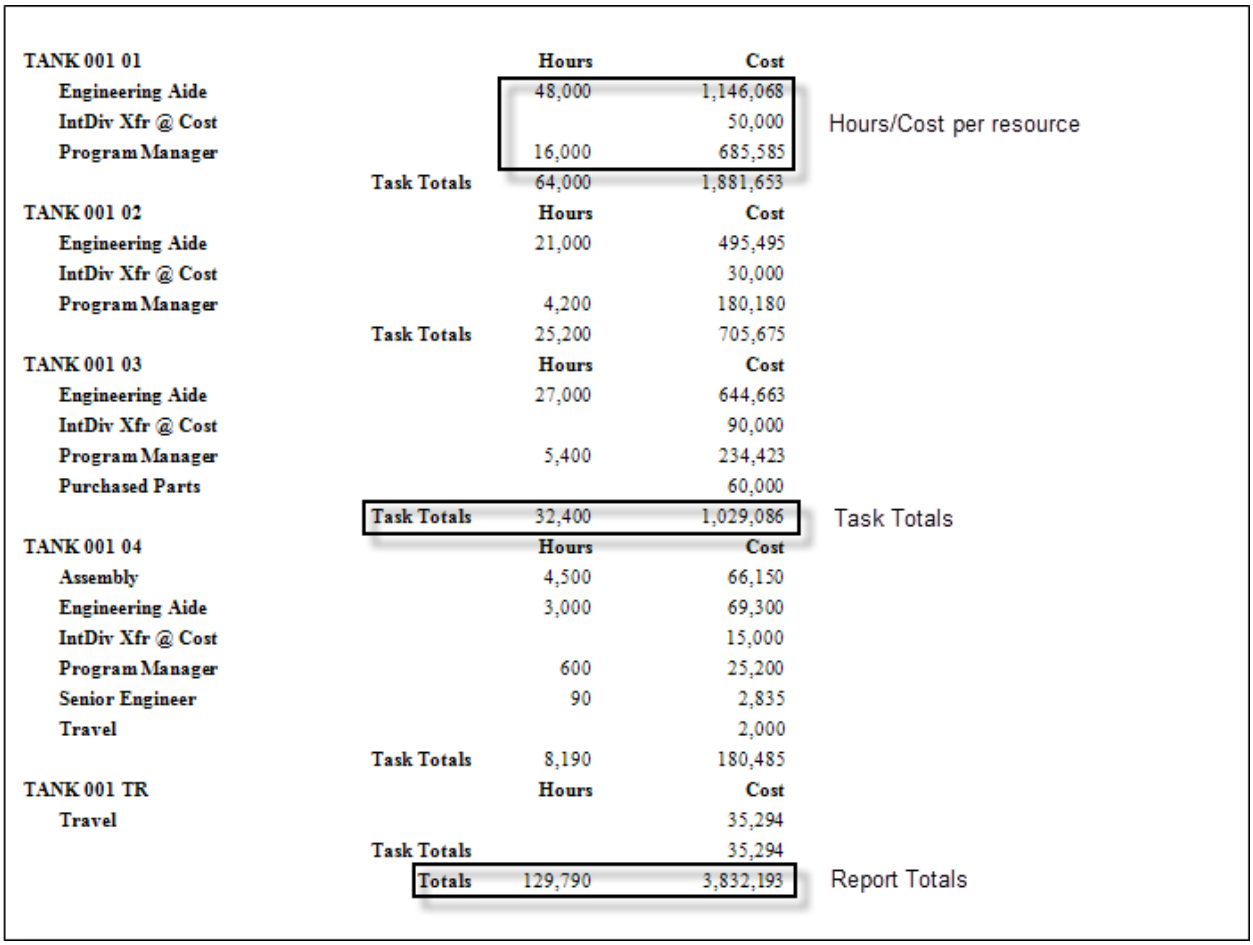


TANK 001 01	Cost
Engineering Aide	1,146,068
IntDiv Xfr @ Cost	50,000
Program Manager	685,585
	1,881,653
Direct Cost	1,881,653
Labor Overhead	937,049
Total Overhead	937,049
Subtotal	2,818,703
G&A, IR&D / B&P	225,496
Total Indirect	1,162,546
Estimated Cost	3,044,199
Profit	304,420
IntDiv Xfr @ Price	35,000
Total Cost + Fee	3,383,619
G&A Cost of Money	8,456
Interdivisional Transfer F...	50
Total COM	8,506
Total Price	3,392,125
TANK 001 02	**Cost**
Engineering Aide	495,495
IntDiv Xfr @ Cost	30,000
Program Manager	180,180
	705,675
Direct Cost	705,675
Labor Overhead	345,568
Total Overhead	345,568
Subtotal	1,051,243
G&A, IR&D / B&P	84,099
Total Indirect	429,667
Estimated Cost	1,135,342
Profit	113,534
Total Cost + Fee	1,248,876
G&A Cost of Money	3,154
Interdivisional Transfer F...	30
Total COM	3,184
Total Price	1,252,060
Direct Cost	2,587,328
Labor Overhead	1,282,617
Total Overhead	1,282,617
Subtotal	3,869,945
G&A, IR&D / B&P	309,596
Total Indirect	1,592,213
Estimated Cost	4,179,541
Profit	417,954
IntDiv Xfr @ Price	35,000
Total Cost + Fee	4,632,495
G&A Cost of Money	11,610
Interdivisional Transfer F...	80
Total COM	11,690
Total Price	4,644,185

Totals in Report Designer

Where you place the Multi-Context fields Hours, Units, or Cost in the Layout area dictates the total that will be printed. The following layout will print Hours/Cost by resource by task, the total Hours/Cost per task and the total Hours/Cost of the proposal or of the report if Filter Report Options were entered at run-time.





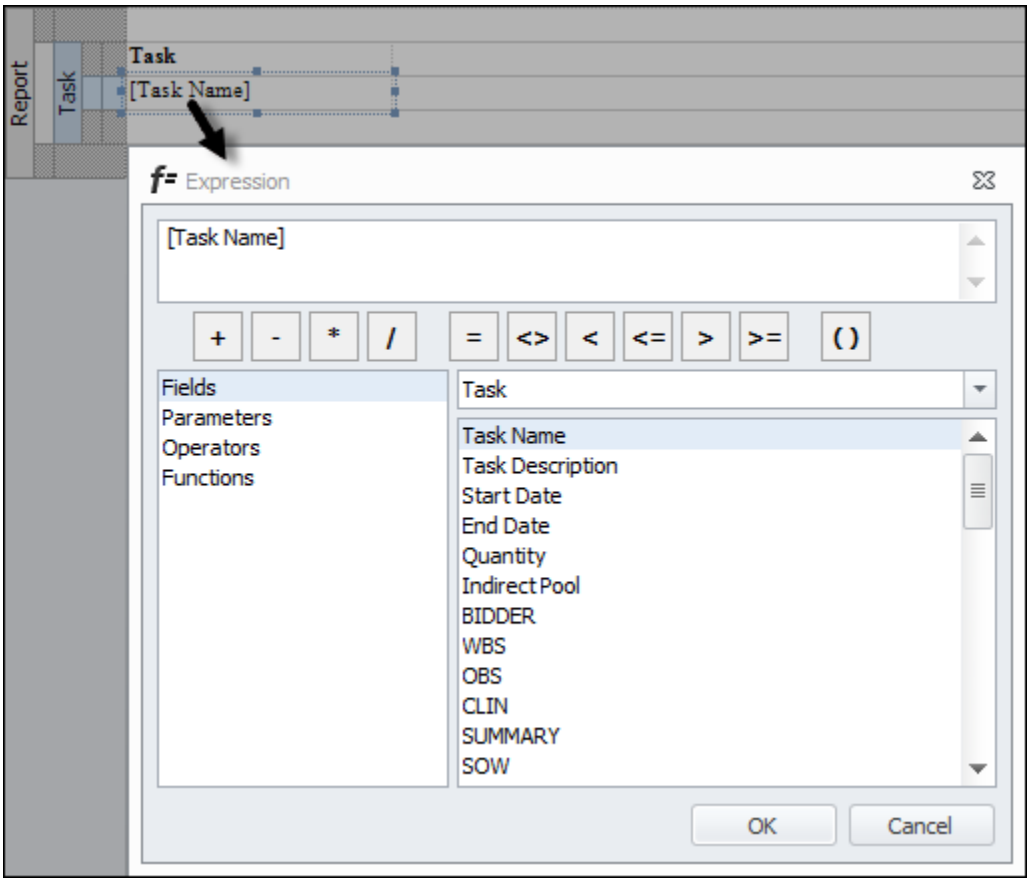
The Hours and Cost fields in the Footer section of the Resource group will print a total for each task. This is because a total placed in the Footer section of a child prints a total

of the parent. The Hours and Cost fields in the Footer section of the Task group will print a total for all elements at the end the report.

Expressions

Expressions are the text (user defined), parameter (shown in braces **{ }**), or field (shown in brackets **[ ]**) of a text box in the Layout. Expressions can also be mathematical operations or conditions.

In the following example we right-clicked the text box and then selected Expression. The Expression Editor shows [Task Name], which is a field.



Note: You can also look at Source in the Properties panel to see the expression of a text box.

Example

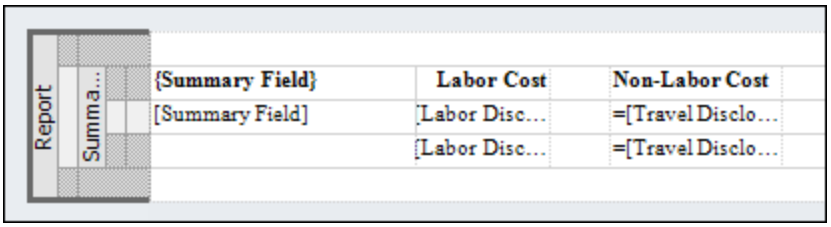
We want to separate our costs into Labor Costs and Non-Labor Costs (Material, Subcontractor, Travel, and Other).

Steps

1. Add the **Summary Field** group to the layout.
2. Add the **Summary Field** field to the **Detail** section.
3. Click the drop-down box in the **Summary Field** header.
4. Click the **Parameters** tab, and then click **Summary Field**.
5. Add the **Labor Disclosure Cost** field to the right of **Summary Field**. Move the pointer into the **Footer** section so that **Labor Disclosure Cost** appears in the footer. This will give us a total.
6. Add a blank field in the **Header** section to the right of **Labor Cost**, and type *Non-Labor Cost*.
7. Add a blank field in the **Detail** section, and then right-click the field to open the Expression Editor.
8. Use the **Operators** and **Fields** to enter this:
   =[Travel Disclosure Cost]+[Material Disclosure Cost]+[Subcontractor Disclosure Cost]+[Other Disclosure Cost]
9. Copy that field to the **Footer** section.

Layout

The layout will look like this:



Report

This is the printed report ran with the default report options:

TASK ID	Labor Cost	Non-Labor Cost
TANK 001 01	1,831,653	
TANK 001 02	675,675	
TANK 001 03	879,086	60,000.00
TANK 001 04	163,485	2,000.00
TANK 001 TR		35,294.00
TANK 001 WR		
TANK 002 01	288,792	72,500.00
TANK 002 02	635,198	62,000.00
TANK 002 03	177,189	
TANK 003 01	3,530,426	315,000.00
TANK 004 01	873,180	106,000.00
TANK 004 02	1,957,867	775,000.00
TANK 005 01	1,855,849	100,000.00
TANK 005 02	3,076,802	
TANK 005 03	3,809,374	
TANK 005 04	5,001,024	
TANK 005 05	18,081	
TANK 006 01	5,587,082	200,000.00
TANK 006 02		4,291,684.00
TANK 006 03		7,733,208.00
TANK 007 01	4,266,499	120,000.00
TANK 008 01	4,266,499	120,000.00
TANK 008 02	1,008,000	180,000.00
TANK 008 03	1,058,400	180,000.00
	40,960,159	14,352,686.00

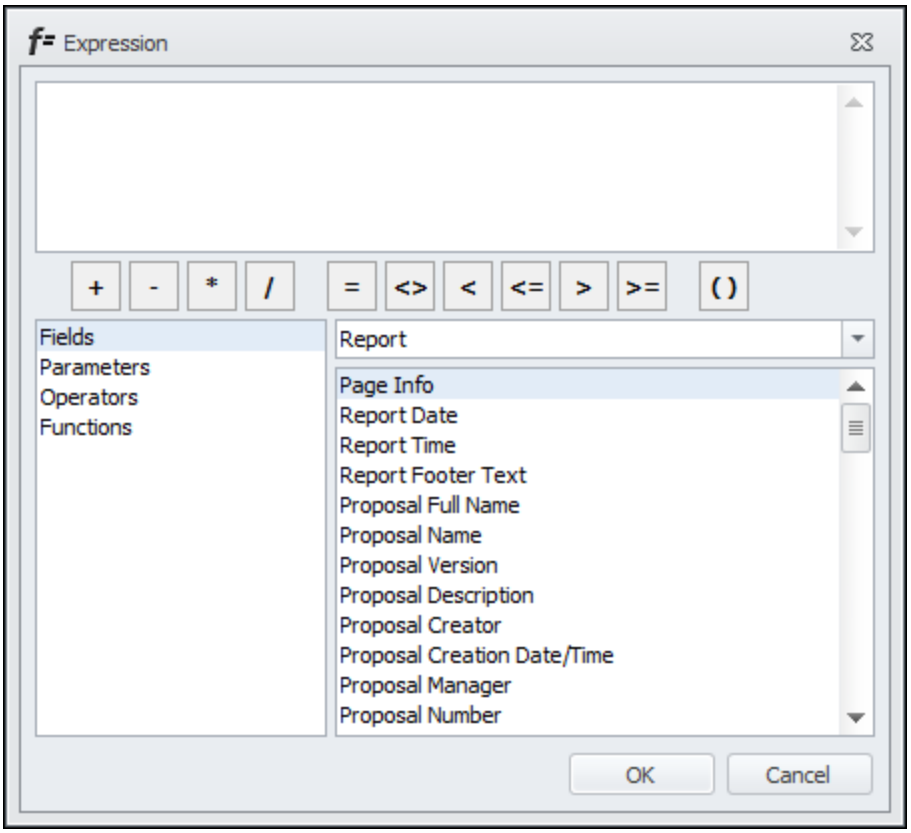
Create an Expression

1. Do one of the following:
   - Right-click the field or parameter in the layout to open the Expression Editor.
   - Click the ellipsis next to Source in the Properties panel.
2. In the Expression Editor, enter the fields/parameters and operators/functions to complete the expression.
3. Click **OK**.

Expression Editor

The Expression Editor opens when you right-click a text box in the layout, and then click **Expression** on the shortcut menu, or by clicking the ellipsis next to **Source** in the **Properties** panel. The top part of the editor will show where the data comes from: [field], {parameter}, expression, or simple text.

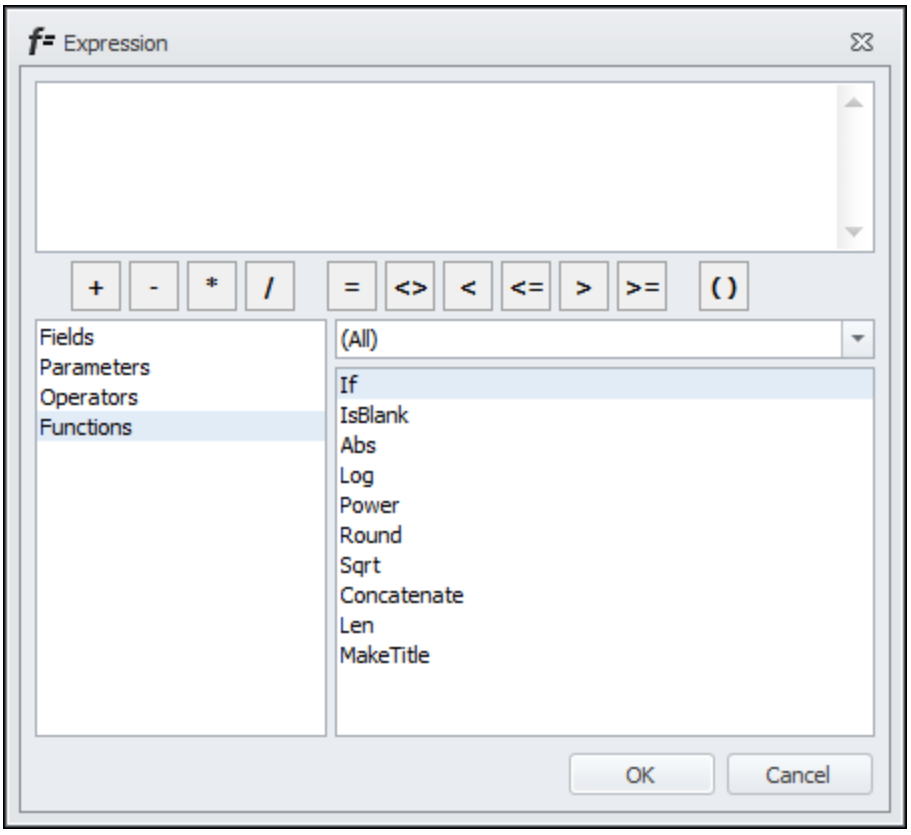
The Expression Editor allows you to change the field or parameter, as well as create a mathematical operation or condition. Clicking **Fields** and **Parameters** on the left will show a list of the available items on the right. Clicking **Operators** and **Functions** will show a list of the items you can use in an expression.



We've provided some examples of how you might use the Operators and Functions.

Expression Editor Functions

Expression Editor Functions are very similar to functions you may know from other applications. They allow you to combine elements and perform mathematical operations to include or exclude data.



Examples

The following examples demonstrate how Expression Editor Functions can be used.

Function	Syntax	Example Expression	Expression Explanation
If	If(logical_test,value_if_true, [value_if_false]	=If({Print Resource Description},'Resource	This expression

		-Description','Resource')	states that if the Print Resource Description option is selected, then print Resource - Description on the report. If the option is not selected, then print just Resource.
IsBlank	ISBLANK(value)	=IsBlank({Task Selection})	This expression is most commonly used in a Suppress Condition. The field is turned off (suppressed) in the event that a Task Selection is not defined at run-time.

			For example, you have added the {Task Selection} parameter to the layout to show the reader if a Task Selection is used during report generation. In the event that one has not been used, you may wish to turn the label and parameter value off, so they do not show as blank in the generated report.
Abs	ABS(number)	=Abs([Profit/Fee])	This expression prints the

			absolute value of the number generated by the field. The number is presented without a positive or negative sign.
Log	LOG(number,base)	=Log(1000,10)	This expression prints the logarithm of a number to the base specified. In this instance the value is 3.
Power	POWER(number,power)	=Power(3, 3)	This expression prints the result of a number raised to a power. In this instance the value is 81.
Round RoundUp RoundDown	ROUND(number,num_digits)	=Round([Hours], 2)	This expression will round the

			given hour's value to 2 decimal places. Even if you use a value of "0", the number of decimal places shown on the report is set by the Decimal Places property. To always round up or down, use the RoundUp or RoundDown function instead, respectively.
Sqrt	SQRT(number)	=Sqrt([Hours])	This expression will print the square root of the number or value.

Concatenate	CONCATENATE (TEXT1,[TEXT2],)	=Concatenate([Resource Name],‘- ‘,[Resource Description])	This expression joins the Resource Name and Resource Description with a hyphen (with a space before and after) in the layout. In most cases, Concatenate is no longer used. The Expression Editor has been enhanced to allow you to type only [Resource Name] – [Resource Description] rather than the full

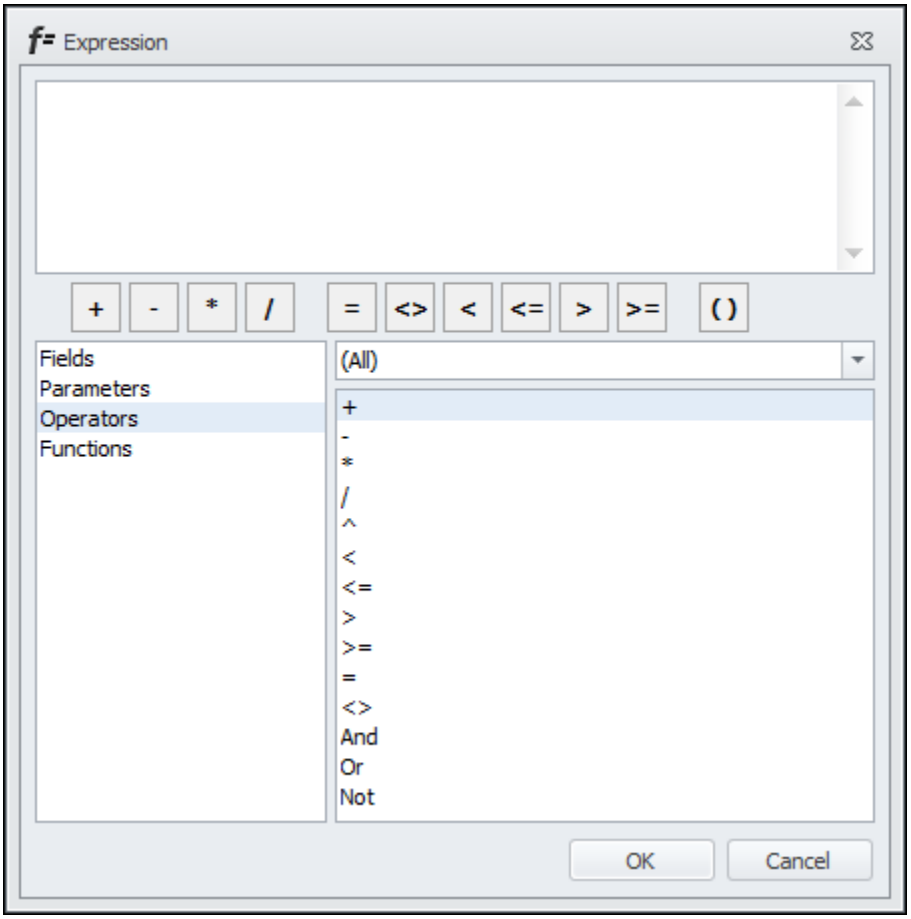
			concatenate formula.
Len	LEN(text)	=Len(0)	This expression is similar to IsBlank and is commonly used in a suppress condition. It allows you to specify when to suppress a field only, in this case, you have more control. The Task Selection example from IsBlank could also use the =Len(0) formula for suppression. However,

			there may be other instances where a length suppress condition could be 2 or some other number.
MakeTitle	MakeTitle(textexpr1, textexpr2)	=MakeTitle([Summary Field],[Summary Field Description])	This expression will join the Summary Field and Summary Field Description with a hyphen (with a space before and after). For example, **T0010 - Program Office**. If the second text expression is

			empty, ProPricer will only print the first text expression and will omit the hyphen.

Expression Editor Operators

The Expression Editor Operators are standard mathematical symbols, as well as And, Or, and Not.



Examples

The following examples demonstrate how Expression Editor Operators can be used.

Operator	Example Expression	Expression Explanation
+ (add)	=[Total Cost]+[Profit/Fee]	This example shows how to add different numbers or fields together.

- (subtract)	=[Total Cost]-[G&A]	This example shows how to present a base by subtracting data from another field.
* (multiply)	=[Labor Cost]*[Quantity]	This example multiplies a value by another.
/ (divide)	=[Grand Total Price]/[Quantity]	This example sets the unit price based on the quantity.
^ (exponent)	=3^3	This expression allows you to set the exponent of a given number.
< (less than)	=If([Hours]<1, 1, [Hours])	This expression tells the report to print a 1 for any Hours value that is less than 1, but print the original Hours value if it is greater than 1.
<= (less than or equal to)	=If([Hours] <=1, 1, [Hours])	This expression tells the report to print a 1 for any Hours value that is less than or equal to 1, but print the original Hours value if it is greater than 1.
> (greater than)	=If([Hours] > 0, [Hours], 0)	This expression tells the report to print the original Hours value if it is greater than 0, but print a 0 for any Hours value that is less than 0.
>= (greater than or equal to)	=If([Hours] >= 0, [Hours], 0)	This expression tells the report to print the original Hours value if it is greater than or equal to 0, but print a 0 for any Hours value that is less than 0.
= (equals)	*Not applicable*	This operation is used at the beginning of an expression to denote that the result will be a number and have the Number Format options appear in the Properties panel.
<> (not equal to)	=If([Hours]<>0, [Cost]/[Hours], 0)	This expression can be used to calculate and print a rate. If the Hours value does not equal

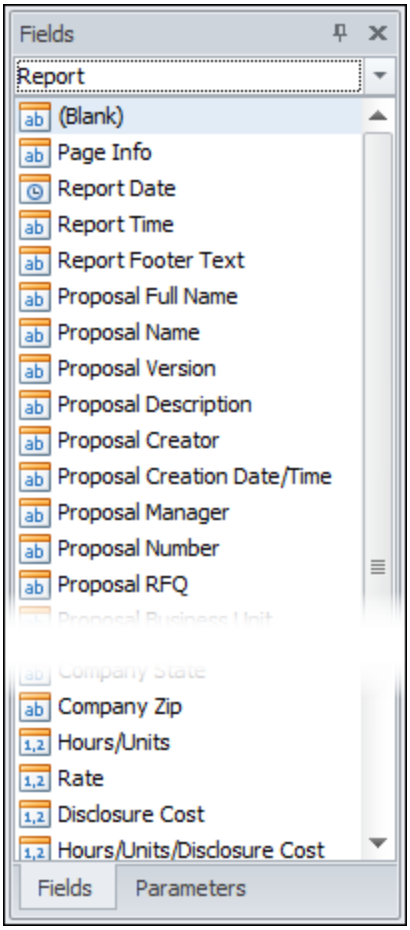
		0, divide the Cost value by the Hours value and print the quotient, otherwise print 0.
And	Not{Print Resource Hours} AND Not{Print Resource Units}	Most commonly used in Suppress Conditions, Boolean “And” allows you to set a joined condition. In this case, an Hours/Units field can be suppressed if BOTH Print Resource Hours AND Print Resource Units are disabled.
Or	Not{Print Resource Hours} OR {Timescale.IsAnnual}	Most commonly used in Suppress Conditions, this example allows you to suppress a Resource Hours column in a Yearly Total footer section when the report is run by year to keep from showing two yearly Hour totals.
Not	Not{Print Resource Description}	Most commonly used in Suppress Conditions, this example allows you to suppress the Resource Description field when the parameter is not selected. Syntaxes of “Not{Parameter}” and “{Parameter}=False” are the same in expressions.

Fields Panel

The Fields panel shows the predefined text boxes available for a specific group. The fields you can drag into the Layout area are determined by groups and sections. Groups provide the fields and sections determine which ones you can use.

The Fields panel has the AutoHide pin, which allows you to hide the panel when you move the mouse to another area. If the pin is in the horizontal position, AutoHide is enabled. If AutoHide is not enabled, you can dock the panel to the area of your choice. You can also close the panel completely by clicking the Close button. To open the panel again, you will have to click **Show** on the ribbon, and then select **Fields**.

The screenshot shows the fields available for the Report group.



Formatting Rules

Formatting Rules combine a set of format properties with a condition that allow you to modify the format of a text box when the condition is met. The format properties you can modify include: Style, Alignment, Background Color, Border Color, Border Style, Border Width, Font, Indent, Line Alignment, and Text Color. The Fields and Parameters you can use in the Condition depend on the Group from which the text box was added to the layout.

Example

We want to change the text color of any Cost that exceeds $100,000 to red.

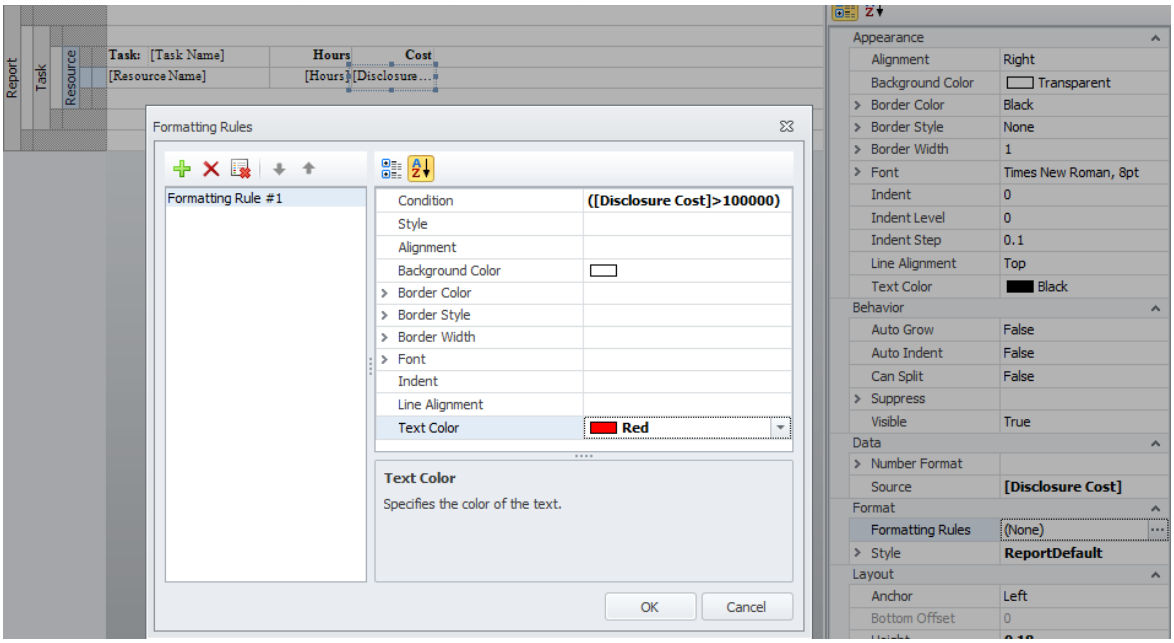
Steps

1. In the layout, we selected the **Disclosure Cost** field and then clicked in the **Formatting Rules** field.

2. We added a **Formatting Rule** and then clicked in the **Condition** field.

3. In the **Expression Editor**, we typed **=([Disclosure Cost]>100000)**, and then clicked **OK**.

4. We changed the **Text Color** to red, and then clicked **OK**.



Report

The following shows an excerpt of the report. Note the red color of the costs greater than $100,000.

Task: T0010	Hours	Cost
ENG01	1,000	33,020
PRGMGR	12,240	538,615
SUPV	1,324	72,819
TRAVEL		963
Task: T0011	**Hours**	**Cost**
ENG01	4,800	158,674
SUB1		240,000
SUPV	480	26,403
Task: T0020	**Hours**	**Cost**
QA	880	17,710
SUPV	88	4,446
TRAVEL		1,200
Task: T0021	**Hours**	**Cost**
ASSEM	1,000	12,128
SUB1		250,000
SUPV	100	5,221
TRAVEL		4,980
Task: T0022	**Hours**	**Cost**
QA	750	16,068
SUPV	75	4,174

You can define as many Formatting Rules as needed for a specific text box. ProPricer will apply every rule as the corresponding conditions are met. When you create multiple Formatting Rules for the same text box, ProPricer names them Rule #1, Rule #2, and so on. The last rule entered is applied first (Rule #2 is applied before Rule #1 if the conditions of both rules are met). You can change the order of the rules by clicking the up/down arrows to move them to the appropriate position.

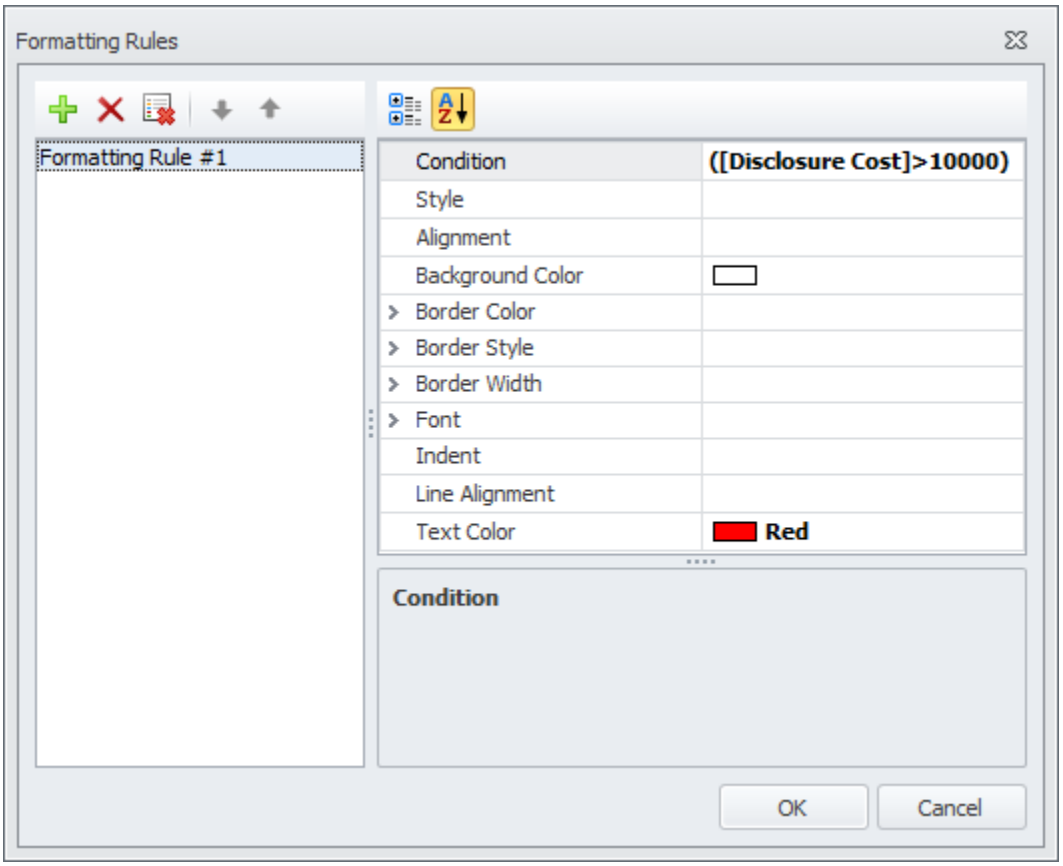
Create a Formatting Rule

Formatting Rules allow you to modify the format of a text box by combining a property override with a condition. It is a convenient way to identify specific data that meets the condition defined.

1. In the layout, select the text box for which you want to define a rule.
2. Click in the **Formatting Rules** field.
3. Add a formatting rule.
4. Click in the **Condition** field.
5. Create the expression in the Expression Editor, and then click **OK**.
6. Modify the property, and then click **OK**.

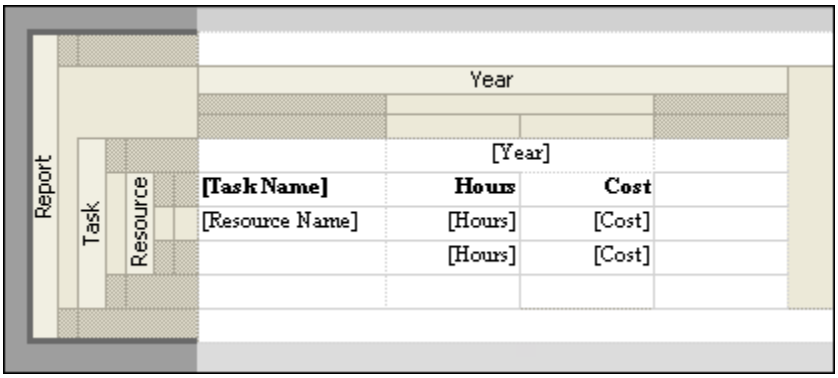
Formatting Rules Dialog Box

Formatting Rules allow you to modify the format of a text box by combining a property override with a condition. It is a convenient way to identify specific data that meets the condition defined. The following rule tells ProPricer to print any cost greater than $10,000 in red.



Layout Area

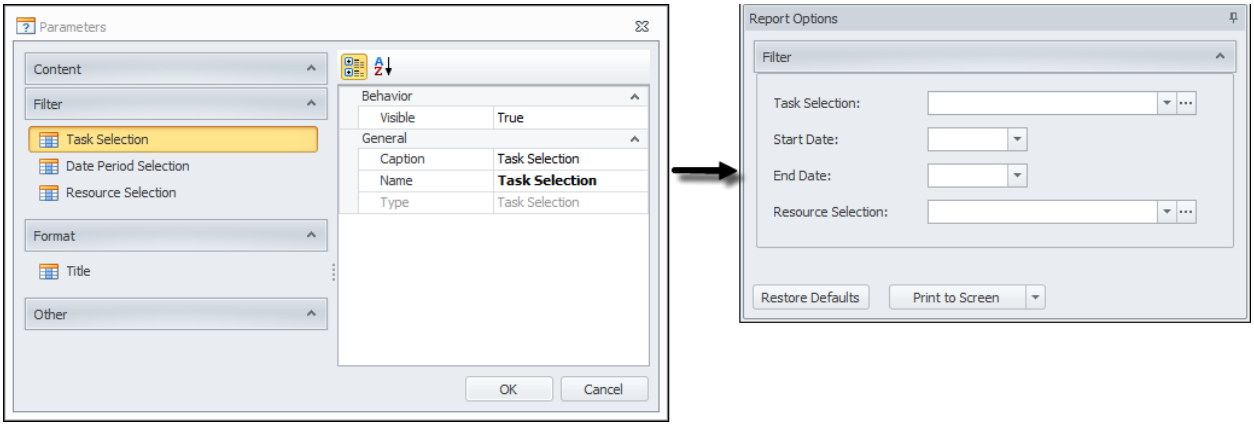
The Layout area is where you design the report. First you add groups to the Report group and then drag the fields/parameters you want the report to print.



Parameters

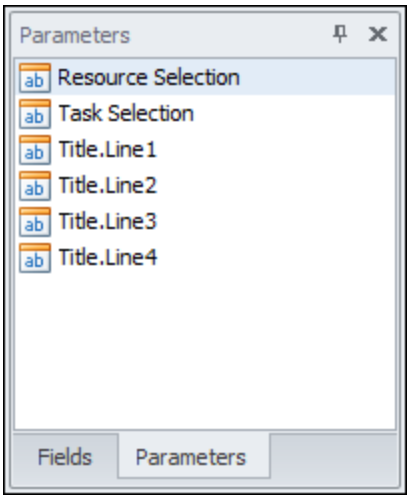
Parameters, like fields, print information on your report, but they are also tied into the Report Options that appear when you click Run. Parameters differ from fields in that fields print information from the database (for example, Task Name, Resource Name) while parameters print information that is determined at run-time (for example, Disclosure Format, Task Selection).

Every report has default parameters. You can see the default parameters by creating a new report, selecting the Report Group, and then opening the Parameters (Collection) in the Miscellaneous category in the Properties panel. These parameters determine the Report Options you will see when you click Run.

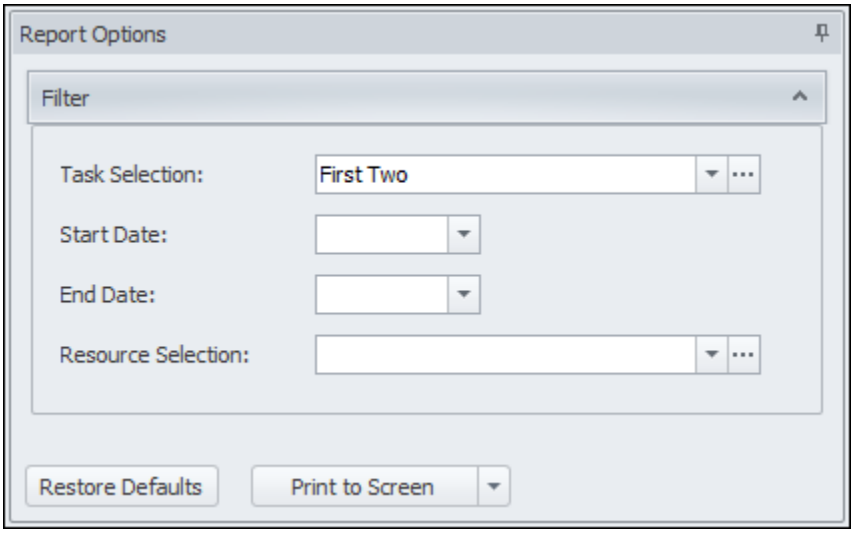


The Parameters panel shows the parameters available for a specific category. Adding a parameter to the Layout area will print the label of the parameter and corresponding data on the report and, in some cases, add a Report Option. Parameters are enclosed in braces { }. Fields are enclosed in brackets [ ].

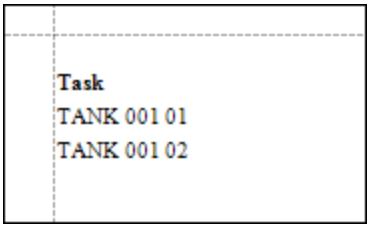
In the following example, we added the Task group to the Report group, and then placed the Task Name field in the layout. These are the parameters available for the Report group, but we did not add any to the layout at this time.



We then clicked Run and entered a task selection that only includes the first two tasks. We were able to do this because task selection is one of the default parameters.

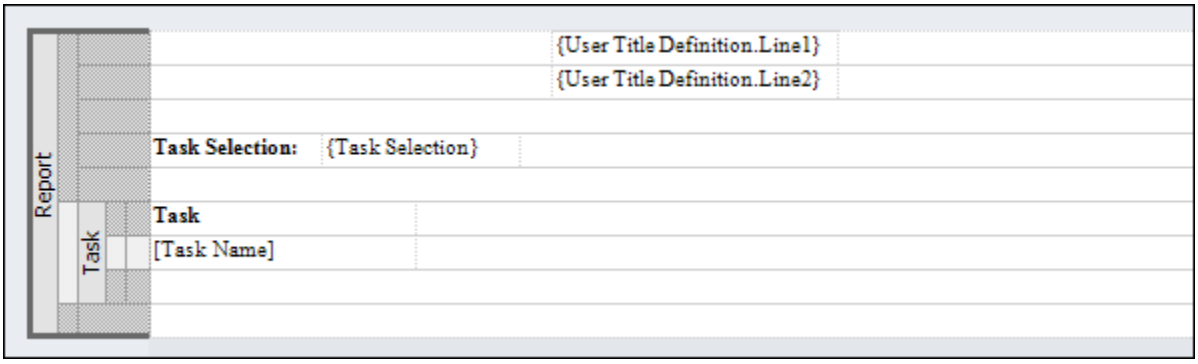


The printed report looks like this:

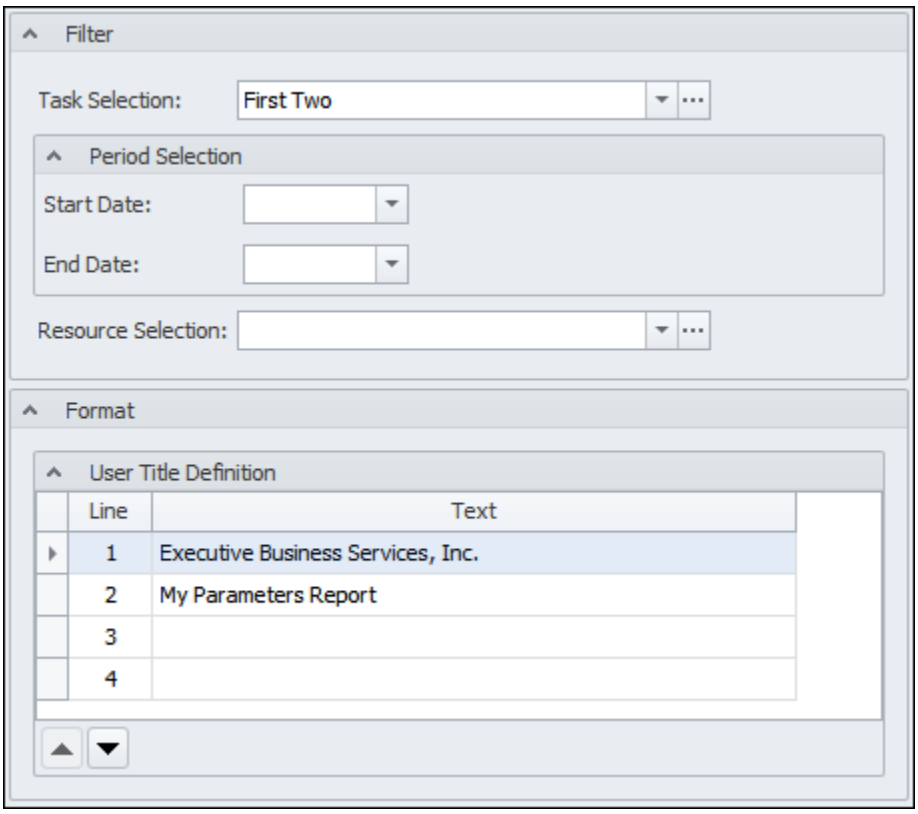


The report is showing the appropriate information, but since we did not add the Task Selection parameter in the layout, the report did not print the name of the Task Selection used.

We will now add some parameters to the layout: {User Title Definition.Line1}, {User Title Definition.Line2} and the {Task Selection} parameter and label.

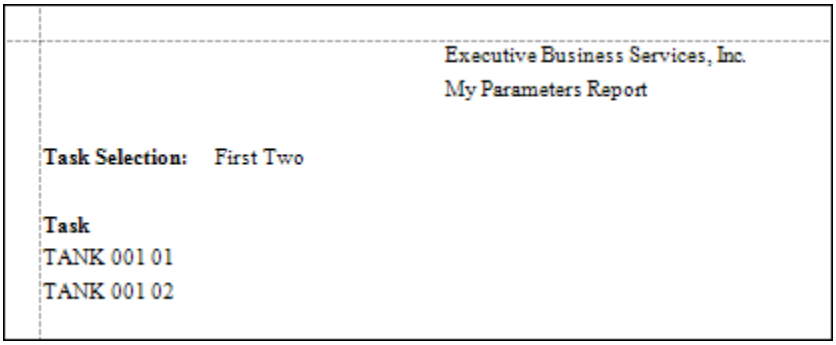


The **Report Options** dialog box looks like this:



Notice that User Title Definition now appears in the Report Options. Even though Title is a default parameter, the Report Option did not appear until we added {Title.Line1} and {Title.Line2} to the layout.

Our printed report looks like this:


Executive Business Services, Inc.
My Parameters Report

Task Selection: First Two

Task
TANK 001 01
TANK 001 02

Two title lines appear in the Header, as well as the name of the Task Selection used to run the report.

Create a Parameter

You can create your own parameters to use in your custom reports. There are three different types: Boolean, Number, and Text.

Boolean parameters allow you to set True/False Report Options. These options will be presented as checkboxes in the Report Options at run-time. Examples include Print Resources, Print Hours/Units, or Print Cost. Selecting the checkbox will set the value to True and the conditions associated with the parameter will be enabled.

Number parameters allow you to type in a number at run-time. This number can be used in expressions or conditions within the report, as defined in the layout or properties. An example of the number type is the Quantity option of the Unit Cost Breakdown Report. The Quantity option allows you to type a number at run-time, which is then used in mathematical operations of fields within the layout in conjunction with other options set within the report.

Text parameters allow you type text at run-time, and have that information appear in the report. The most common Text parameters are the {Title.Line} values. When you type text in the User Title Definition at run-time, the values are passed to the layout of the output report when printed.

Text and Number parameters will appear in the Parameters panel for you to add to the layout. Boolean parameters will appear in the Report Options.

Follow these steps to create a parameter:

1. Open the **Parameters (Collection)** in the **Properties** panel. The **Parameters** dialog box will open.
2. Right-click the **Heading** of the appropriate category, and then click **Add** on the shortcut menu. If you right-click one of the parameters, you will see Insert.
3. Select **Boolean**, **Number**, or **Text**.

4. Make the necessary changes to the properties. For example, change the **Caption** and **Name**.

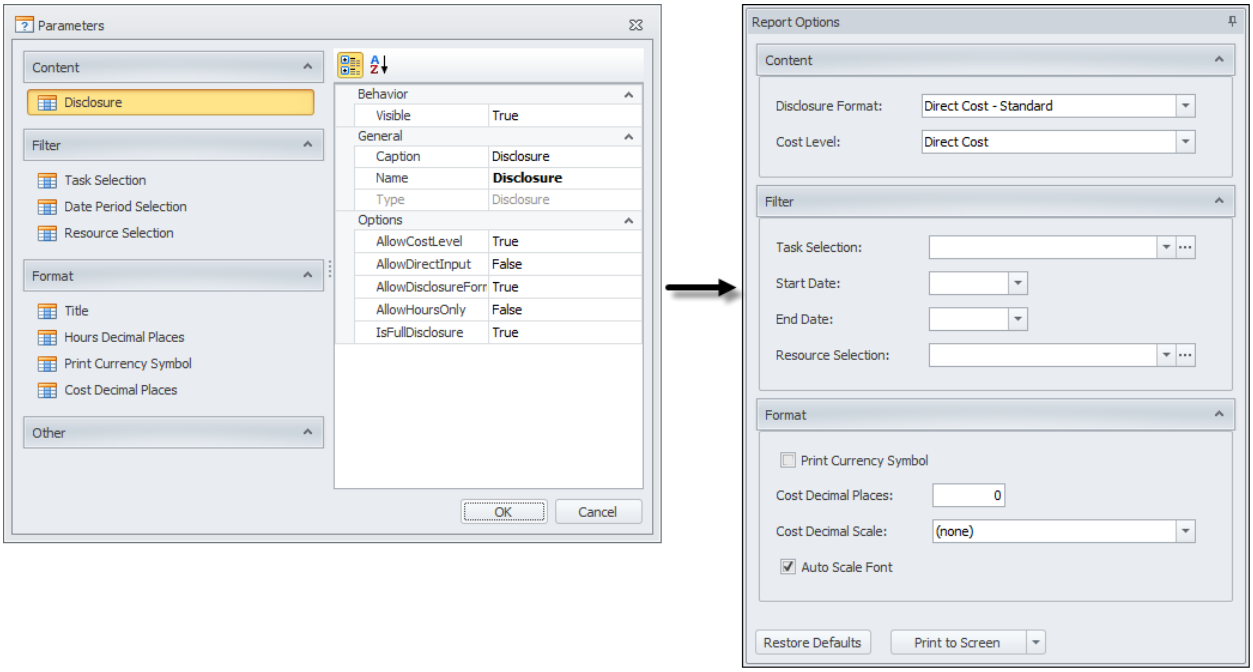
5. Click **OK**.

If you want to change the order of your parameters within a category, select the parameter and then drag it to the place you want.

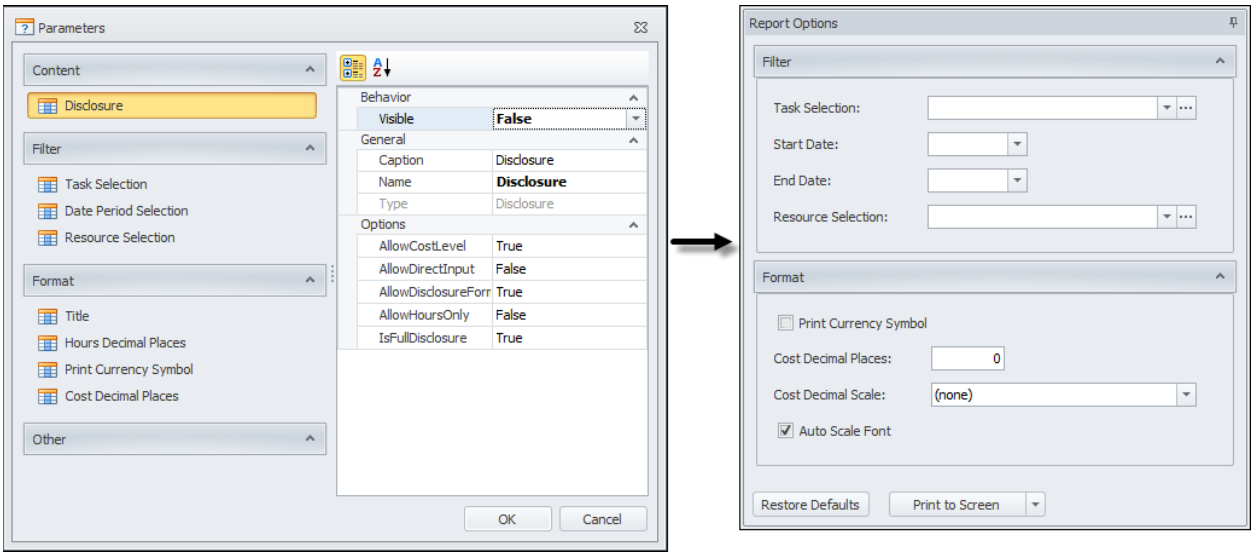
Parameters Dialog Box

The **Parameters** dialog box shows the parameters available for the report and their corresponding properties. These parameters regulate the Report Options you will see when you run a report. Some parameters automatically add the corresponding option to the Report Options, while others require you to add a parameter to the layout in order for the option to appear in the Report Options. The Title parameter, for example, will not add the User Title Definition to the Report Options unless you add one of the {Title.Line} parameters from the Parameters panel to the layout.

The left side of the **Parameters** dialog box is divided into four categories: Content, Filter, Format, and Other. The first three categories and their parameters correspond to the categories and parameters in the Report Options. The Other category is a container for any parameter you create that might not fit into one of the other predetermined categories. By default, this category is suppressed unless you add parameters to it in the Parameters Collection. The right side of the dialog box shows the properties of the parameters. You can choose to list the properties in alphabetical order or separated by category.

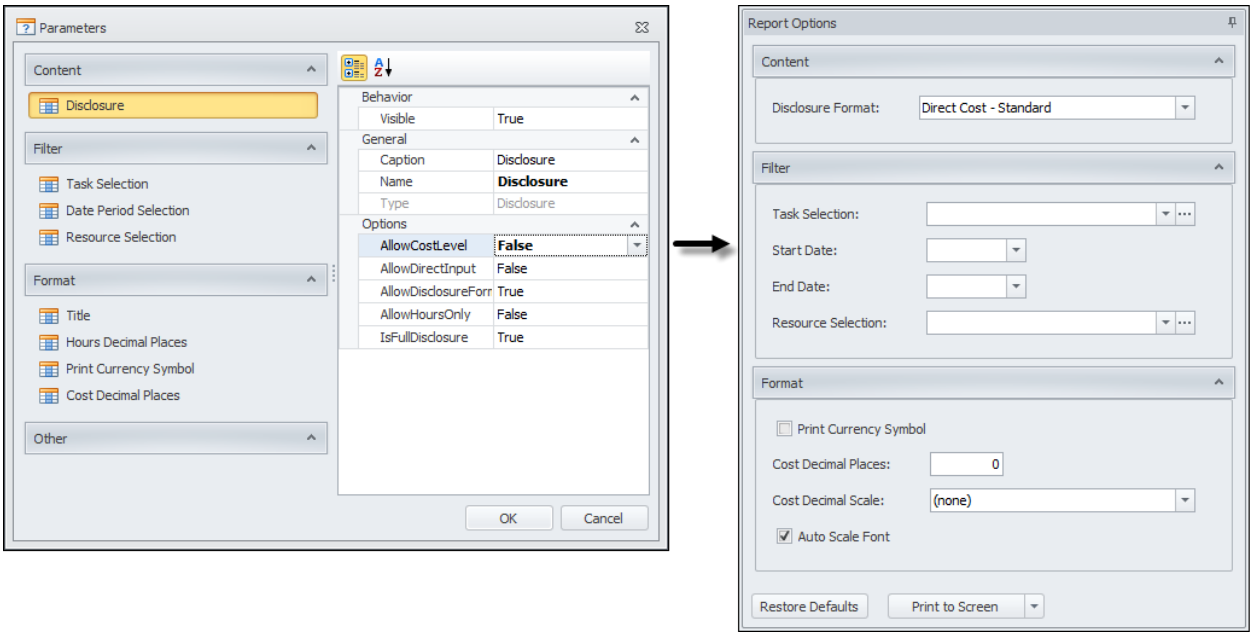


You can change the properties of the parameters to suit your needs. If you do not want the Disclosure Format option to appear in the Report Options, change the Visible property of the Disclosure parameter to False.

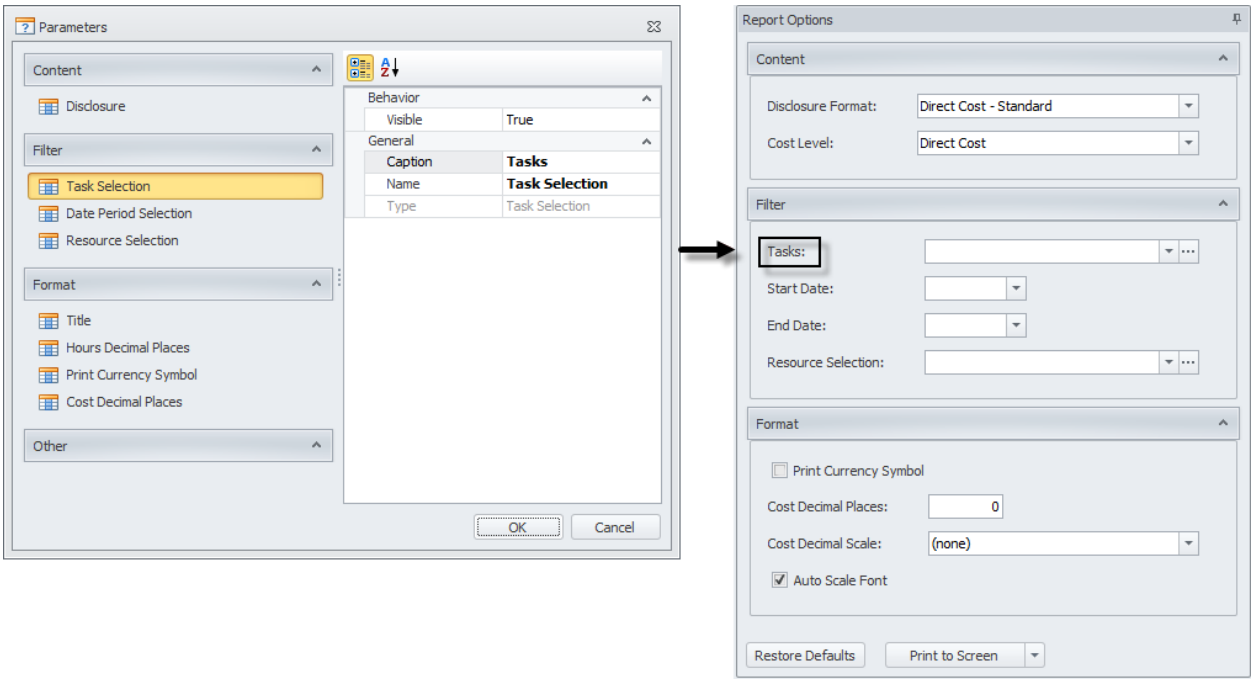


Notice the entire Content category was removed from the Report Options since that was the only parameter available.

If you want to remove the Cost Level option from the Report Options, change the AllowCostLevel of the Disclosure parameter to False.



You can also change the name of the option that will appear in the Report Options. In the following example we changed the Caption of Task Selection to Tasks.

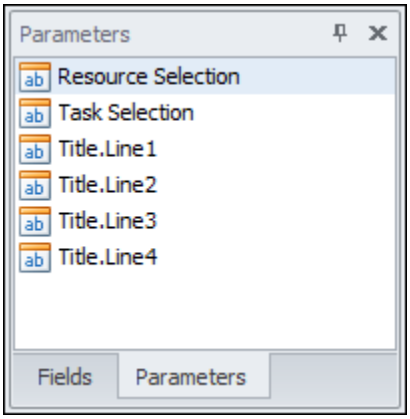


Parameters Panel

The Parameters panel shows the predefined text boxes available for a specific group. Adding a parameter to the Layout area will print the label of the parameter and corresponding data on the report and, in some cases, add a Report Option. Parameters are enclosed in braces { }.

The Parameters panel has the AutoHide pin, which allows you to hide the panel when you move the mouse to another area. If the pin is in the horizontal position, AutoHide is enabled. If AutoHide is not enabled, you can dock the panel to the area of your choice. You can also close the panel completely by clicking the Close button. To open the panel again, you will have to click **Show** on the ribbon, and then select Parameters.

The screenshot shows the default parameters of the Report group.



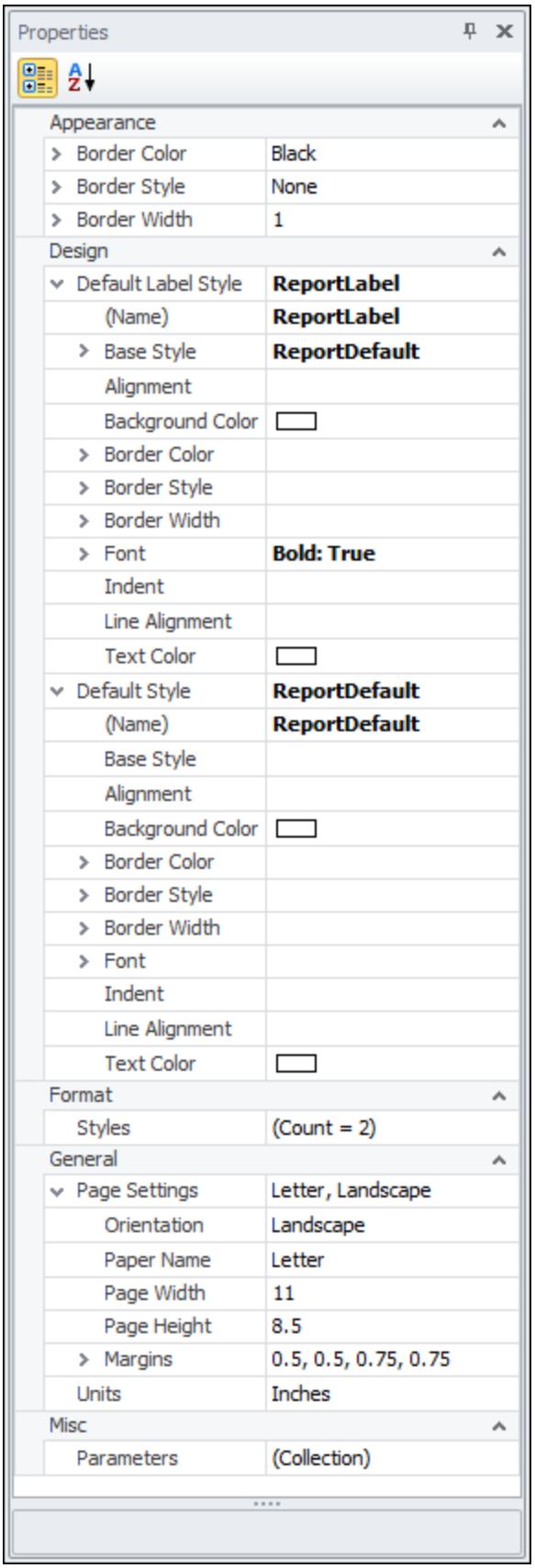
Properties Panel

The Properties panel is where you define the appearance of the report: Font, Borders, whether a section appears on all pages, can be split between pages, etc. The options available depend on the item selected (a field, group, Header band or section, Detail band or section, etc.).

The panel allows you to separate the options by category or list them alphabetically without categories. Click the button to select the one that best suits your needs.

The Properties panel has the AutoHide pin, which allows you to hide the panel when you move the mouse to another area. If the pin is in the horizontal position, AutoHide is enabled. If AutoHide is not enabled, you can dock the panel to the area of your choice. You can also close the panel completely by clicking the Close button. To open the panel again, you will have to click Show on the ribbon, and then select Properties.

The screenshot shows the Properties available for the Report group.


Properties
Appearance
Border Color
Black
Border Style
None
Border Width
1
Design
Default Label Style
ReportLabel
(Name)
ReportLabel
Base Style
ReportDefault
Alignment
Background Color
Border Color
Border Style
Border Width
Font
Bold: True
Indent
Line Alignment
Text Color
Default Style
ReportDefault
(Name)
ReportDefault
Base Style
Alignment
Background Color
Border Color
Border Style
Border Width
Font
Indent
Line Alignment
Text Color
Format
Styles
(Count = 2)
General
Page Settings
Letter, Landscape
Orientation
Landscape
Paper Name
Letter
Page Width
11
Page Height
8.5
Margins
0.5, 0.5, 0.75, 0.75
Units
Inches
Misc
Parameters
(Collection)

Report Designer Fields

Fields create the body of the report. When you add a field to the layout, you are really adding a text box. The Fields panel shows the text boxes we have predefined for your convenience. The text box contains an expression that can be text (user defined), a parameter (shown in braces { }), a field (shown in brackets [ ]), or a combination of all types using the operators and/or functions located in the Expression Editor.

The fields you will be able to use in a report are determined by groups and sections. Groups provide the fields and sections determine which ones you can use. There are some fields (Multi-Context) that are common to most groups. These fields print calculated values, based on the section in which they are placed. See Default Fields for more information.

Label fields (Blank) are common to all groups. They are text boxes in which you can type text.

Default Fields

The default fields are Multi-Context fields that print calculated values, based on the section in which they are placed. They may also add report options. The Multi-Context fields are listed below. Click the field to see an example of the information printed.

- Hours/Units
- Rate
- Disclosure Cost
- Hours/Units/Disclosure Cost
- Hours
- Units
- Cost
- Equivalent Heads
- Accounting Calendar Hours
- Average Equivalent Heads
- Labor Disclosure Cost
- Material Disclosure Cost
- Subcontractor Disclosure Cost
- Other Disclosure Cost
- Travel Disclosure Cost
- Interdivisional Disclosure Cost
- Direct Cost
- Total Price Element
- Total Price Element (Bid)

There are fields for the indirect-related information in your company's Algorithm. The Tank Algo Algorithm includes:

- Labor Overhead Base
- Labor Overhead Rate
- Labor Overhead
- Material Handling OH Base
- Material Handling OH Rate
- Material Handling OH
- Subtotal
- G&A, IR&D / B&P Base
- G&A, IR&D / B&P Rate
- G&A, IR&D / B&P
- Total Indirect
- Estimated Cost
- Profit Base
- Profit Rate
- Profit
- Total Cost + Fee
- Mfg Cost of Money Base
- Mfg Cost of Money Rate
- Mfg Cost of Money
- G&A Cost of Money Base
- G&A Cost of Money Rate
- G&A Cost of Money

- Interdivisional Transfer FCCOM Base
- Interdivisional Transfer FCCOM Rate
- Interdivisional Transfer FCCOM
- Total COM
- Total Price

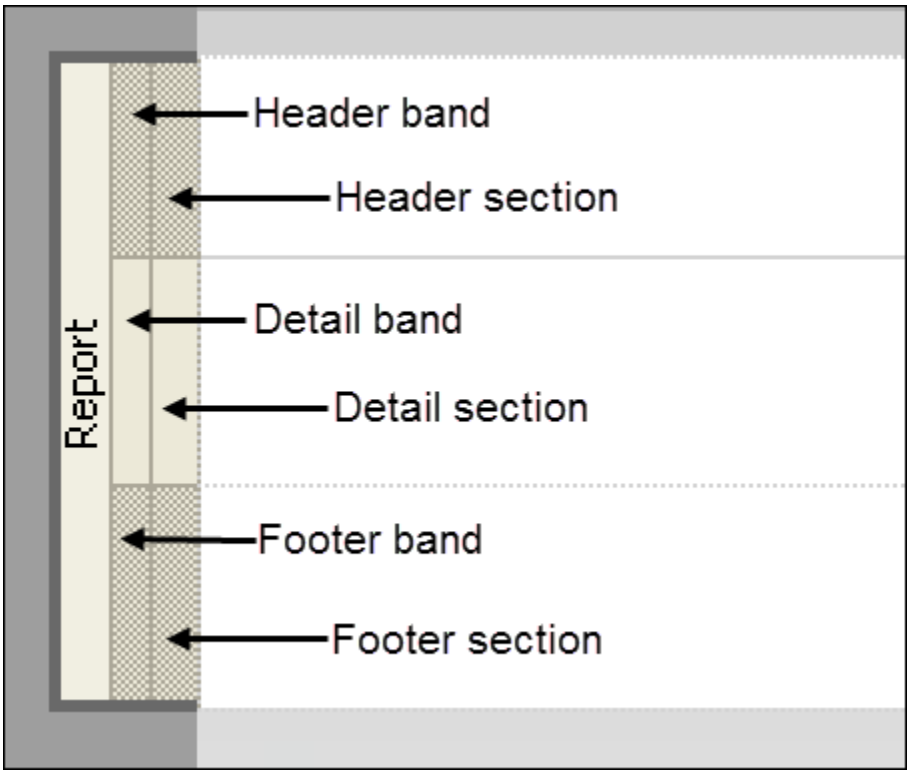
Label fields (Blank) are common to all groups. They are text boxes in which you can type text.

Field Placement

The design process consists of deciding what fields you need to place in the Layout, as well as where you should place them. Where you place the field determines how often it will print in the report. This topic explains the basic principles. We did not change any of the default Behavior Parameters regarding suppression or repetition.

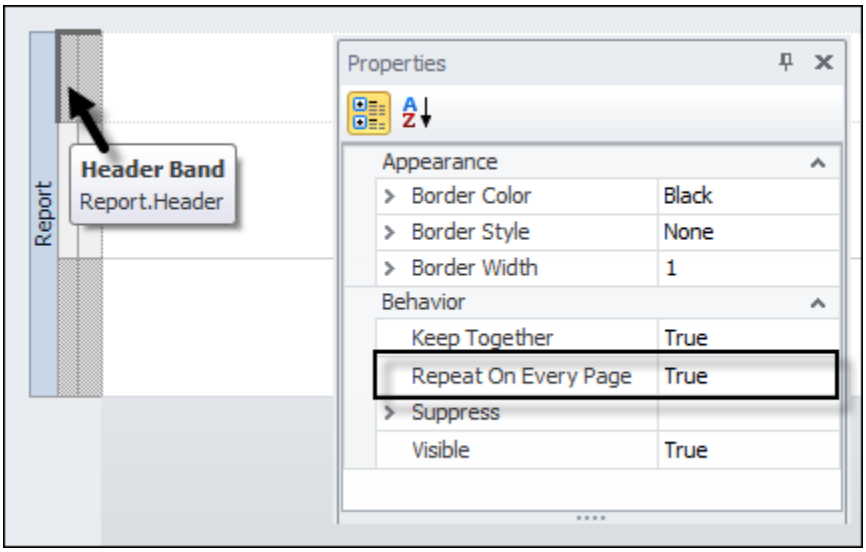
Report Group

The Report group is where all custom reports begin. The fields you can choose from correspond to information from Properties. As with all groups, it consists of the Header, Detail and Footer bands and the corresponding Header, Detail and Footer sections.

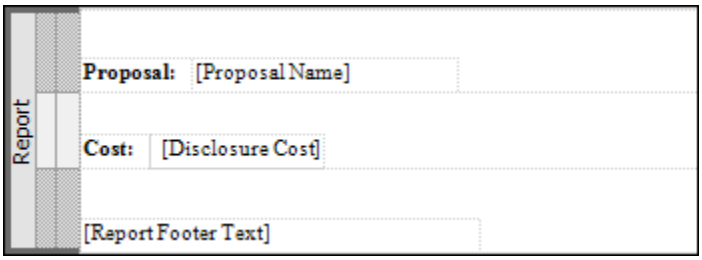


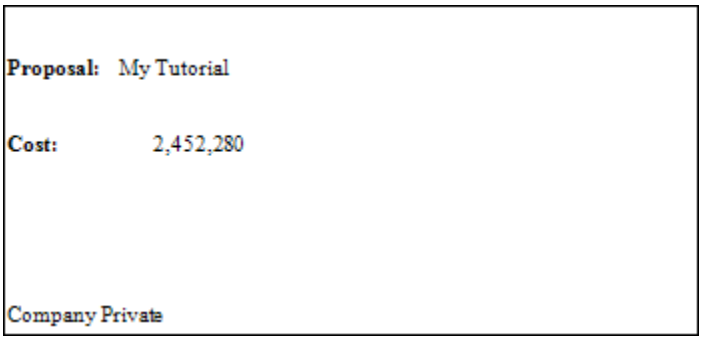
Fields placed in the Header and Footer sections will print on every page of the report in the header and footer unless you change the parameters of the band. Even though fields are placed in sections, bands regulate sections.

The screenshot shows the options available in the Properties panel for the Header band for the Report group.



The Detail band of the Report group is where you add additional groups to the report. If you were to add a field to the Detail section, Cost for example, it would represent the total direct cost of the proposal, or of the report if any Filter Report Options were entered at run-time, and print once.

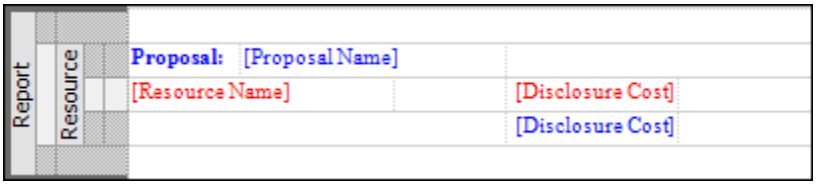


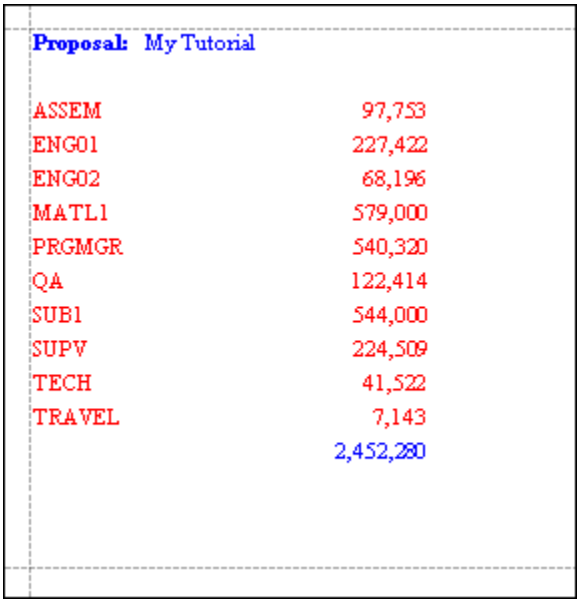


The previous screenshots show an important aspect of Report Designer: what you see in the layout is what you will get on the report. We made the Header, Detail and Footer sections of the Report group bigger. The extra space between Proposal and the top of the page and between Cost and Proposal also appeared in the printed report.

Embedded Groups

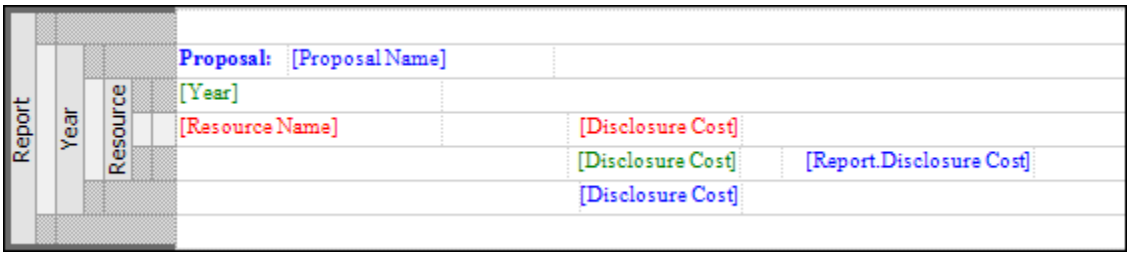
When you embed a group, the Detail band of the parent group will contain the Header, Detail and Footer bands and sections of the child group. The fields you add in the Header and Footer sections of the child group can only be fields from the parent group. They will print for every element from the parent group, before the first and after the last element of the child group(s). The fields you add to the Detail section of the child group can be fields from the child group or from the parent group. They print for every element of the child group. In the following example we embedded the Resource group in the Report group. The elements with blue font are from the Report group, while the elements with red font are from the Resource group.

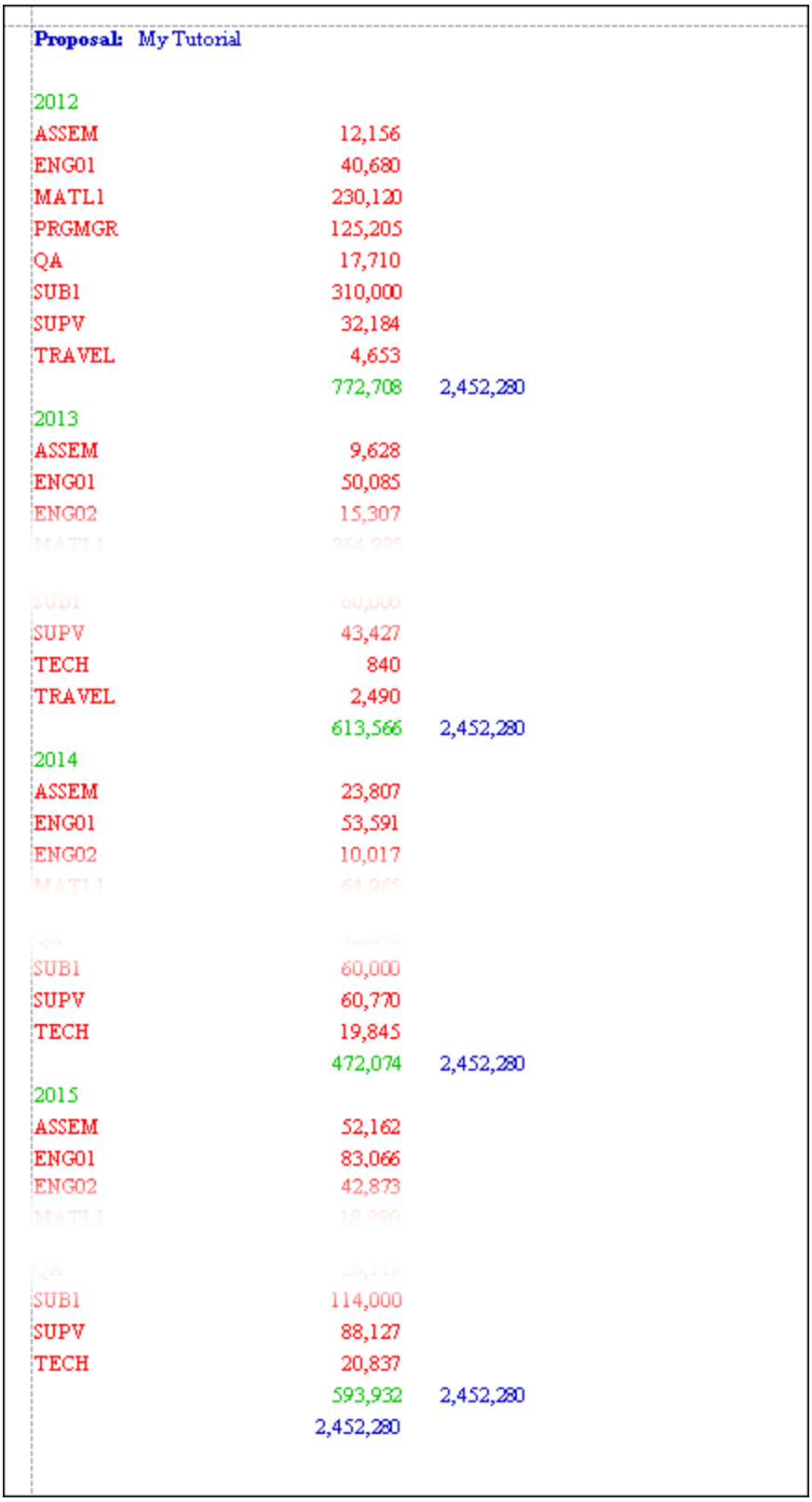




It is easy to see which group corresponds to each section and, therefore, what information the elements will print. When you click a section, the corresponding Group and Fields will appear in the Fields panel.

In the following example, we embedded the Year group in the Report group, and then the Resource group in the Year group. We also changed an expression so the report would print information from a parent group in a section of a child group: [Report.Disclosure Cost]. Elements with blue font are from the Report group. Elements with green font are from the Year group. Elements with red font are from the Resource group.





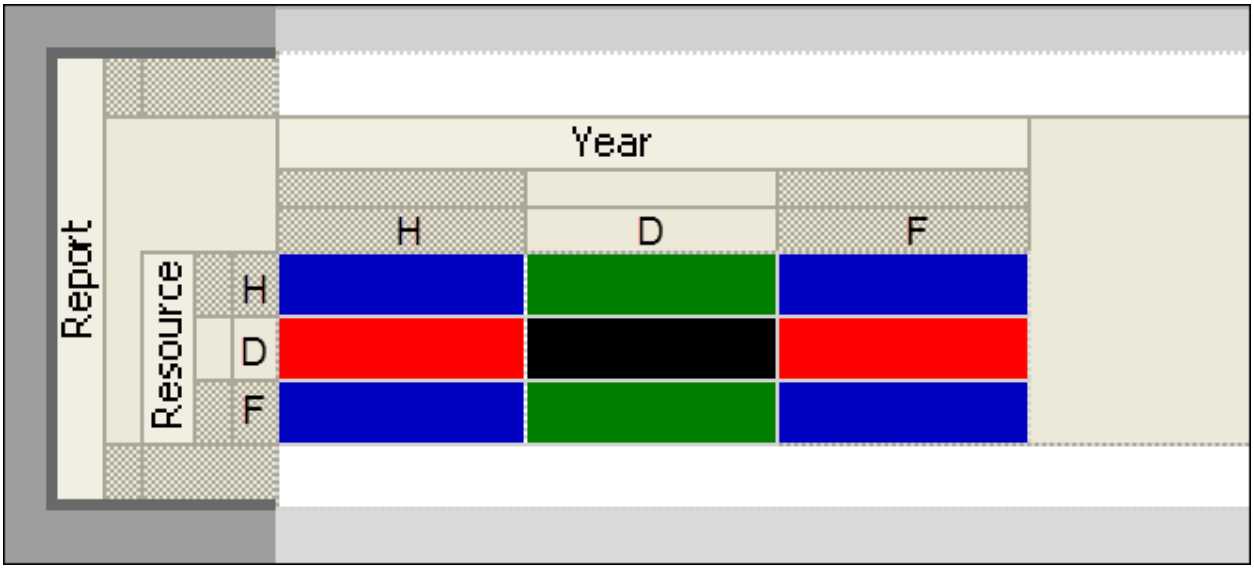
Proposal: My Tutorial

2012		
ASSEM	12,156	
ENG01	40,680	
MATL1	230,120	
PRGMGR	125,205	
QA	17,710	
SUB1	310,000	
SUPV	32,184	
TRAVEL	4,653	
	772,708	2,452,280
2013		
ASSEM	9,628	
ENG01	50,085	
ENG02	15,307	
MATL1	264,935	
SUB1	60,000	
SUPV	43,427	
TECH	840	
TRAVEL	2,490	
	613,566	2,452,280
2014		
ASSEM	23,807	
ENG01	53,591	
ENG02	10,017	
MATL1	64,965	
QA	42,540	
SUB1	60,000	
SUPV	60,770	
TECH	19,845	
	472,074	2,452,280
2015		
ASSEM	52,162	
ENG01	83,066	
ENG02	42,873	
MATL1	19,080	
QA	46,142	
SUB1	114,000	
SUPV	88,127	
TECH	20,837	
	593,932	2,452,280
	2,452,280	

Proposal Name, placed in the Header section of the Report group, will print on every page. Disclosure Cost, placed in the Footer section of the Year group, will print at the end of the report. Year and Disclosure Cost, placed in the Header and Footer sections of the Resource group, print once for every year. Year comes before the Resources and Cost after the Resources. Resource Name and Disclosure Cost, placed in the Detail section of the Resource group, print once for every resource used in a year. Cost shows the direct cost of the resource per year. [Disclosure Cost] should print a year total. However, since we changed the expression, it prints the total direct cost of the proposal (if no Filter Report Options were used) next to each year total.

Crossed Groups

Crossed groups are a variation of embedded groups. They are inserted at the top of the design area, so the data moves horizontally across the page, and they create cross sections with the vertical groups. The following explains what data will print when a field is placed in a specific section:



Blue cells

Intersection of the Header and Footer sections of the vertical and horizontal groups: Elements placed here print data from the parent group, once for every element from that group.

Green cells

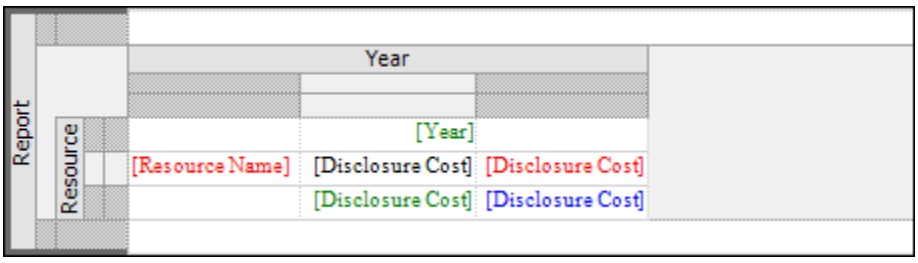
Intersection of the Header and Footer section of the vertical group with the Detail section of the horizontal group: Elements placed here print once for every element from the horizontal group. These cells form the columns.

Red cells

Intersection of the Detail section of the vertical group with the Header and Footer sections of the Horizontal group: Elements placed here print once for every element from the vertical group. These cells form the rows.

Black cell

Intersection of the Detail section of the vertical group and of the horizontal group: Elements placed here print once for every element from the vertical group that interacts with an element from the horizontal group.



In this example, the Resource group is added vertically, and Year group is added horizontally. Elements with blue font are from the Report group. Elements with green font are from the Year group. Elements with red font are from the Resource group.

	2012	2013	2014	2015	
ASSEM	12,156	9,628	23,807	52,162	97,753
ENG01	40,680	50,085	53,591	83,066	227,422
ENG02		15,307	10,017	42,873	68,196
MATL1	230,120	264,935	64,965	18,980	579,000
PRGMGR	125,205	133,117	136,231	145,767	540,320
QA	17,710	33,737	42,848	28,119	122,414
SUB1	310,000	60,000	60,000	114,000	544,000
SUPV	32,184	43,427	60,770	88,127	224,509
TECH		840	19,845	20,837	41,522
TRAVEL	4,653	2,490			7,143
	772,708	613,566	472,074	593,932	2,452,280

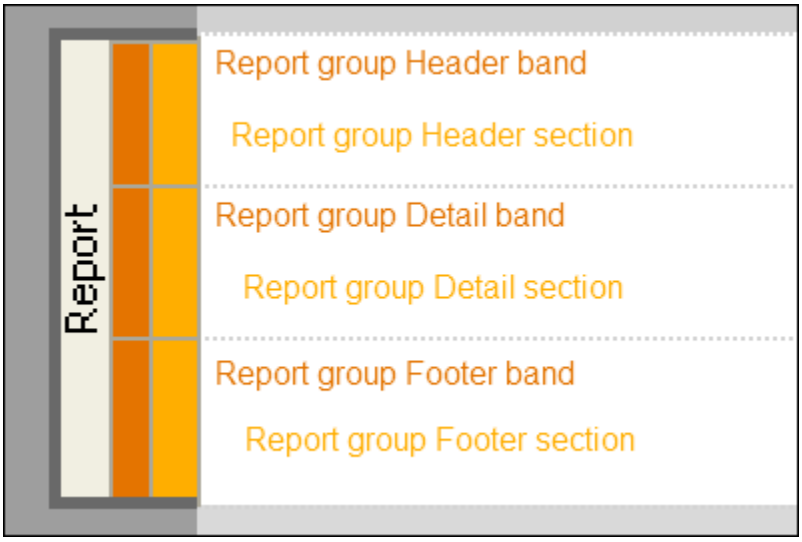
Cost, placed in the intersection of the Footer section of the Year and Resource groups, print once at end of the report, and show proposal-level data. Year and Cost, placed in the intersection of the Detail section of the Year group and the Header and Footer sections of the Resource group, form the columns and print once for every year. Resource Name and Cost, placed in the intersection of the Detail section of the Resource group with the Header and Footer sections of the Year group, form rows and print once for every resource used in the proposal. Cost, placed in the intersection of the Detail section of both groups, prints for very resource and year and shows the annual direct cost per resource.

Report Designer Groups

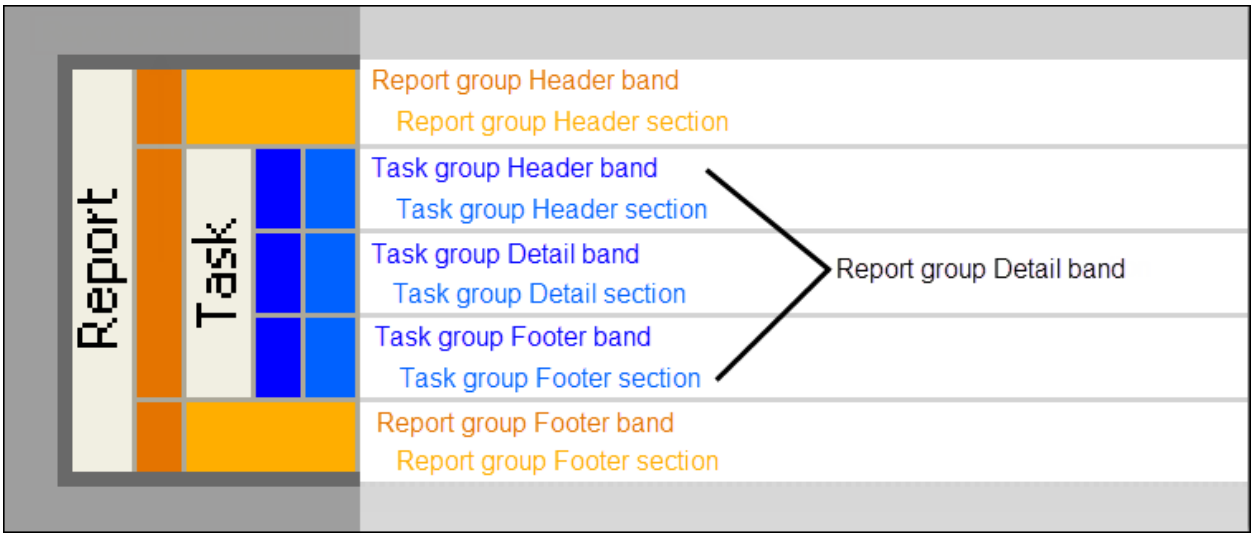
Groups are made up of ProPricer components that provide the framework for a report. Each group has a number of predefined text boxes sorted into Fields and Parameters that can be added to the layout to create the body of the report. The text box contains an expression that can be text (user defined), a parameter (shown in braces { }), a field (shown in brackets [ ]), or a combination of all types using the operators and/or functions located in the Expression Editor.

Groups can be added vertically or horizontally. Vertical groups position the data down the report, while horizontal groups position the data across the report. Groups can be embedded, crossed, and appended in the layout. The way you combine the groups defines how the data will be reported.

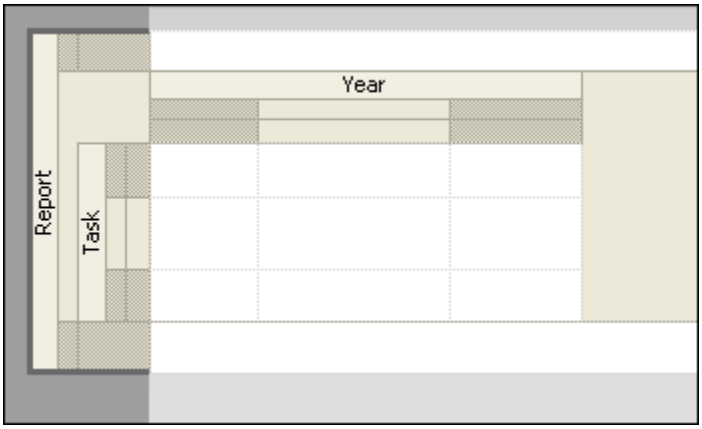
Once you add a group in the layout, you will see three bands: Header, Detail and Footer, with its corresponding section. Bands regulate the sections or groups, depending on the band selected. They determine how the fields in a section/group will be reported. For example: you have Hours/Units, Rate and Cost columns in the Footer section of a parent group and there is a page break, by setting the Keep Together Property for the band to True, these three columns will move to the next page as one.



When you embed a group, the Detail band of the parent group will contain the Header, Detail and Footer bands and sections of the child group.



Crossing occurs in the Detail band of an existing group. In the following example, the Detail band of the Report group contains the Header, Detail and Footer bands and sections of the Task and Year groups.



ProPricer currently offers the following Groups with their specific fields and/or parameters:

- Activities
- Ad Hoc
- Base Currency

- Comparison Proposal
- Date
- Formula
- Indirect Pool
- Month
- Multi Summary Field
- Period
- Phase
- Quarter
- Rate Band
- Report
- Resource
- Resource Assignment
- Resource Class
- Resource Field
- Resource Table
- Resource Type
- Source Type
- Static
- Summary Field
- Task
- Timescaled Period
- Year

There are also list groups that are slightly different in that they are assigned to groups, not embedded. Once you assign a list group, it cannot be reassigned or deleted. When you select the list group section in the layout, the Data section of the Properties panel will show in read-only format: ListSource followed by the name of the list group.

The list groups include:

- Indirect Element List
- Resource Field List
- Summary Field List

Activities

The fields come from the Activities tab.

The fields include:

- Activity ID
- Activities
- Start Date
- End Date
- Default Fields

The parameters include:

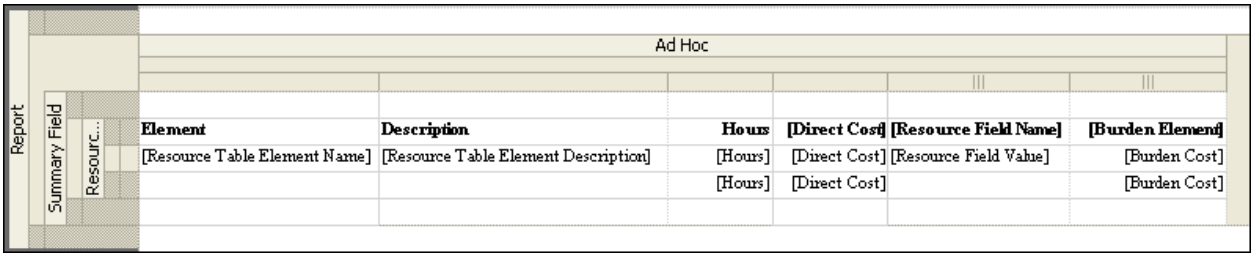
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Ad Hoc

This group adds ad hoc flexibility to your custom report. Once it is added to the layout, the Parameters panel will show Ad Hoc Layout. It does not add new fields. This parameter will add the Ad Hoc Layout Report Option at run-time, which allows you to select the Ad Hoc Layout you want to use. You must save your custom report to be able to select an Ad Hoc Layout.

Ad Hoc groups can only cross existing groups. When you place it in the layout, it will only add a Detail section (column) by default. A new column will be created for every field you drag into the layout.

You cannot embed groups in the Ad Hoc group, but you can assign the following list groups: Summary Field List, Resource Field List, and Indirect Element List.



You can use the Visible option on the Properties panel to define the fields that will appear automatically in the (Default) Ad Hoc layout. True means they will appear in the layout. False means they will appear in the Available Fields list, but not in the layout.

Base Currency

The fields come from the Exchange Rate Table assigned to the proposal.

The fields include:

- Currency Name
- Currency Description
- Default Fields

The parameters include:

- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Comparison Proposal

This groups allows you to compare different proposals.

The fields include:

- Proposal Full Name
- Default Fields

The parameters include:

- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Date

The fields come from the Period of Performance.

The fields include:

- Date
- Default Fields

The Parameters include:

- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Formula

The fields come from the Formula tab.

The fields include:

- Formula Name
- Formula Description
- Formula
- Result
- Justification
- Justification Attachment
- Default Fields

The parameters include:

- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Indirect Pool

The fields come from the Direct Rate Table assigned to the proposal.

The fields include:

- Indirect Pool Name
- Indirect Pool Description
- Effective Date
- Default Fields

The parameters include:

- Group Sorting
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

List Groups

List groups differ from regular groups in that they are assigned to groups, not embedded. When you select the list group section, the Data section of the Properties panel will show in read-only format: ListSource followed by the name of the list group.

Once you assign a list group, it cannot be reassigned or deleted.

The list groups include:

- Indirect Element List
- Resource Field List
- Summary Field List

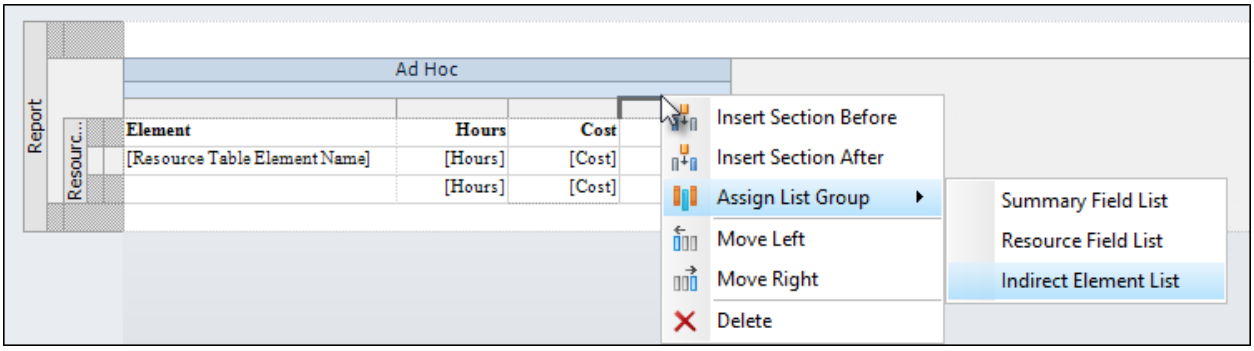
Indirect Element List

This list is enabled if the Ad Hoc group or Static group is used in the layout. It can only be assigned as a list group. If it is assigned to the Ad Hoc group, for example, the list adds indirect elements to the Ad Hoc Layout.

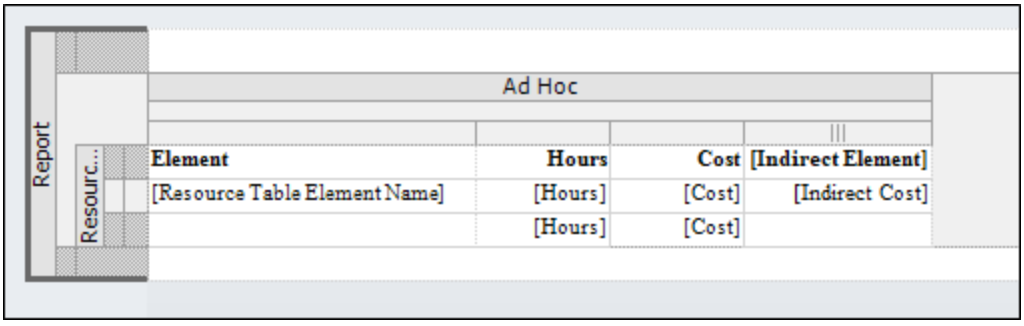
The Fields include:

- Indirect Element
- Indirect Cost

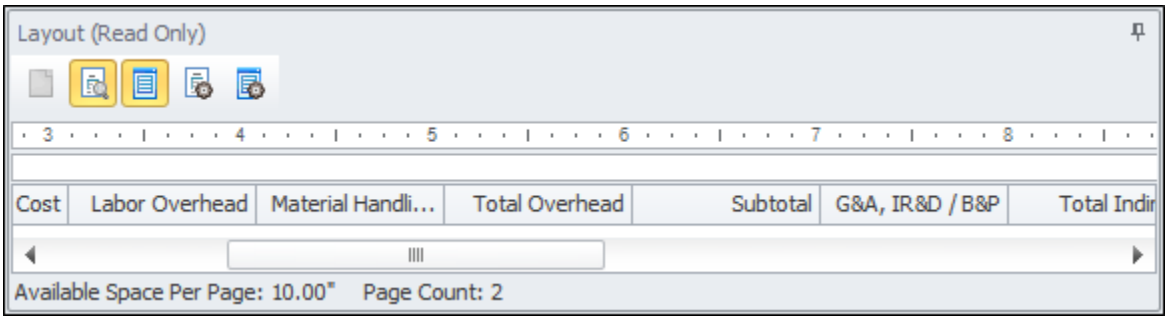
In the following example, we added the **Resource Table** group to the **Report** group, and then crossed it with the **Ad Hoc** group. We added the **Resource Table Element Name** field to the layout and changed the label to **Element**. We added the **Hours** field, followed by the **Direct Cost** field. We then inserted another section after this one and assigned the **Indirect Element List** to this column.



We added the **Indirect Element** field to the **Header** section and made it bold. Then we added the **Indirect Cost** field to the **Detail** section.



When we run the report and open the **(Default) Ad Hoc** layout, we see that indirect elements have been added.



The printed report shows the indirect elements and their values.

Element	Hours	Cost	Labor Overhead	G&A, IR&D / B&P	Total Indirect	Estimated Cost
Labor						
Assembly	428,450		7,322,090	1,109,667	8,431,757	14,980,507
Engineering Aide	497,320		6,052,217	1,430,556	7,482,773	19,312,501
Fabrication	384,200		9,354,449	1,417,956	10,772,405	19,142,406
Junior Engineer	77,800		1,074,215	253,921	1,328,136	3,427,939
Metallurgist	72,000		4,538,276	688,129	5,226,404	9,289,736
Program Manager	77,875		1,725,643	407,873	2,133,517	5,506,292
Quality Assurance	3,600		107,954	16,333	124,287	220,495
Senior Engineer	20,003		334,927	79,149	414,076	1,068,505
Technical Writer	226,000		2,008,459	474,687	2,483,147	6,408,278
Total Labor	1,787,248		32,518,230	5,878,271	38,396,502	79,356,660
Material						
Purchased Parts		560,000	0	47,092	75,745	635,745
Raw Materials			0	2,102	3,382	28,382
Total Material		560,000	0	49,195	79,127	664,127
Subcontractor						
SUB--Assembly		4,796,808	0	0	0	4,796,808
Subcontract Assemblies		1,250,000	0	100,000	100,000	1,350,000
SUB--Fabrication		6,852,576	0	0	0	6,852,576
SUB--Purchased Parts		307,236	0	0	0	307,236
SUB--Raw Materials		68,272	0	0	0	68,272
Total Subcontractor		13,274,892	0	100,000	100,000	13,374,892
Other						
Warranty		4,065,217				
Total Other		4,065,217				
Travel						
Travel		492,794	0	39,424	39,424	532,218
Total Travel		492,794	0	39,424	39,424	532,218
Interdivisional						
IntDiv Xfr @ Cost		454,000	0	36,320	36,320	490,320
IntDiv Xfr @ Price		435,000				
Total Interdivisional		889,000	0	36,320	36,320	490,320
	1,787,248	19,281,903				

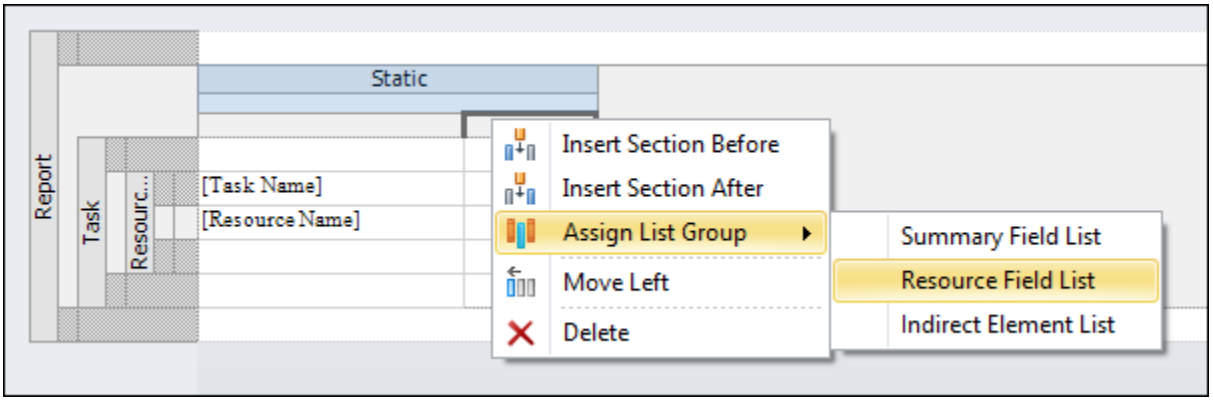
Resource Field List

This list is enabled if the Resource Assignment group or Resource Table group is used in the layout. It can only be assigned as a list group. The elements in the list refer to the resource fields defined in Proposal Properties and the values assigned to a resource when adding it to a task.

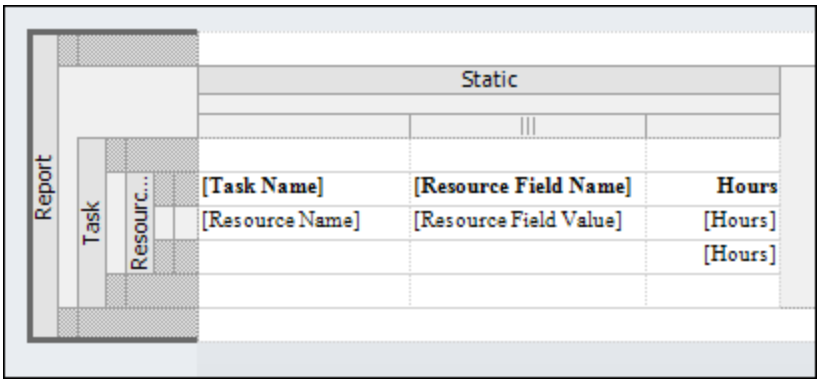
The Fields include:

- Resource Field Name
- Resource Field Value

In the following example we added the Task group to the Report group and then embedded the Resource Assignment group in the Task group. We crossed both groups with the Static group. We added the Task Name field to the Header section and Resource Name field to the Detail section. We then inserted another Static section (column) and assigned the Resource Field List to it.



We added the Resource Field Name field in the Header section and the Resource Field value in the Detail section. We added another Static section, and then dragged the Hours field to the right of the Resource Field section. We applied Bold formatting to the Task Name and Resource Field Name fields.



The report will print the resources by task, followed by the resource Field value entered for each resource and then the hours each resource is used in the task, and a total hours per task.

TANK 001 01	**Department**	**Hours**
Engineering Aide	Admin	48,000
IntDiv Xfr @ Cost	Misc	
IntDiv Xfr @ Price	Misc	
Program Manager	Admin	16,000
		64,000
TANK 001 02	**Department**	**Hours**
Engineering Aide	Finance	21,000
IntDiv Xfr @ Cost	Misc	
Program Manager	Finance	4,200
		25,200
TANK 001 03	**Department**	**Hours**
Engineering Aide	Admin	27,000
IntDiv Xfr @ Cost	Misc	
IntDiv Xfr @ Price	Misc	
Program Manager	Admin	5,400
Purchased Parts	P & H	
		32,400

Summary Field List

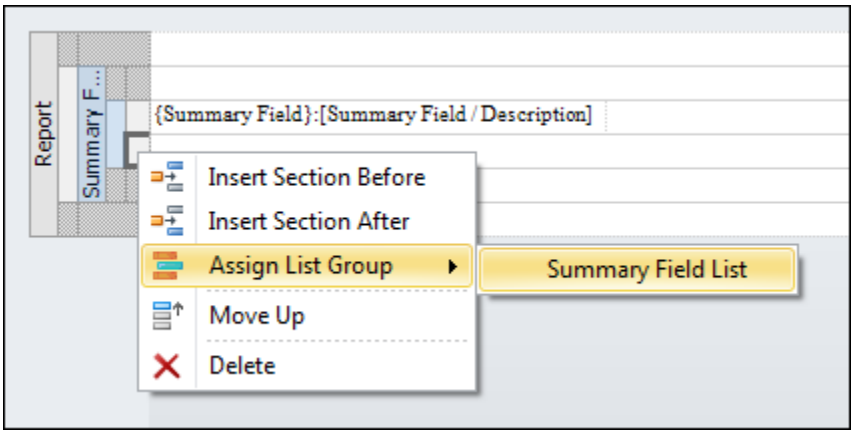
This list is enabled if the Task, Summary Field, Ad Hoc or Static groups are used in the layout. It can only be assigned as a list group. The elements in the list refer to the summary fields defined in Proposal Properties and the values assigned to them in tasks.

The Fields include:

- Summary Field Name
- Summary Field Value

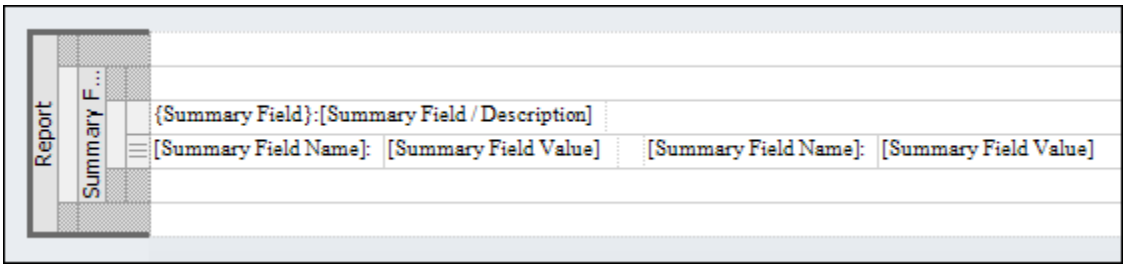
Example

The following is a simple example that uses the Summary Field list. We embedded the Summary Field group in the Report Group and added the Summary Field parameter to the Detail section. We modified the expression to read {Summary Field}: [Summary Field / Description], which will print Summary Field: Summary Field Description. We added another Detail section, and then assigned the Summary Field list to it.

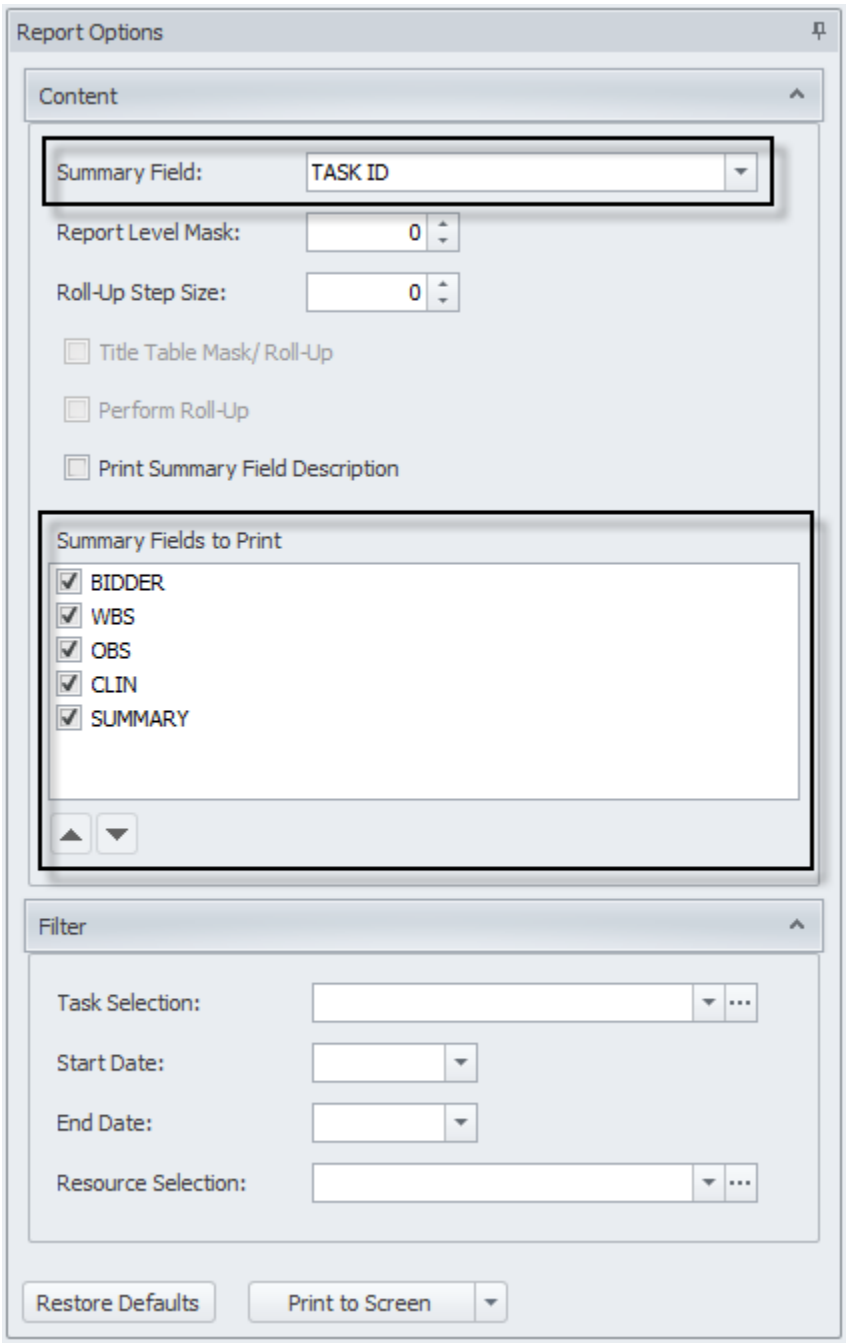


We added the Summary Field Name and Summary Field Value fields twice. If we had only added the fields once, the report would print a list of the summary fields. Adding

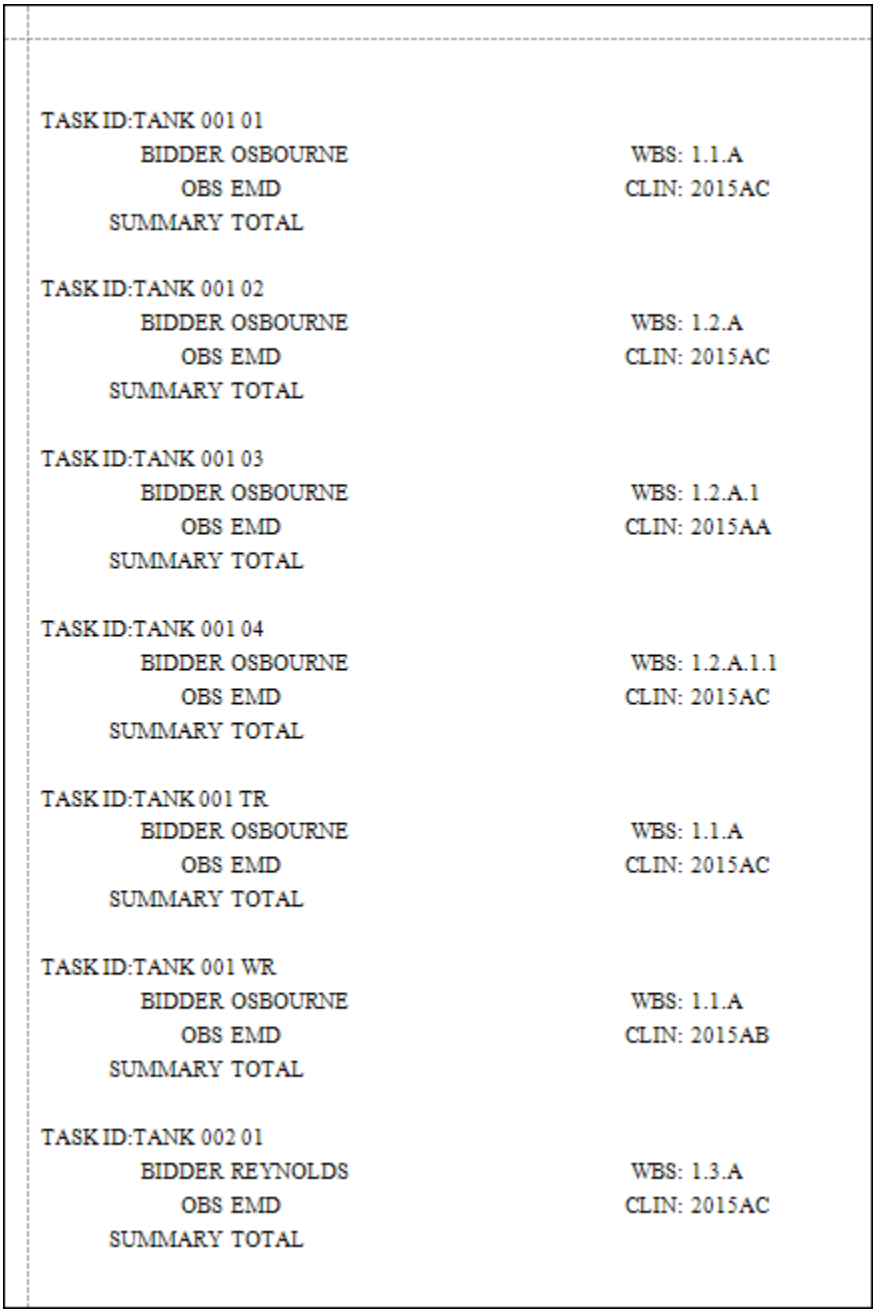
the second set of fields breaks up the list (creating two columns similar to Bid Cost Worksheet). We also added a colon to Summary Field Name and aligned it to the right.



Look at the Content section of the Report Options when we run the report. Adding the Summary Field parameter to the Summary Field group added the Summary Field option and adding the Summary Field Name field to the Field List section added the Summary Fields to Print option.



The report shows the summary field TASK ID: followed by the name of the task and the corresponding summary fields and their values (notice two columns of Summary Field Names and Values):



TASK ID:TANK 001 01
BIDDER OSBOURNE WBS: 1.1.A
OBS EMD CLIN: 2015AC
SUMMARY TOTAL

TASK ID:TANK 001 02
BIDDER OSBOURNE WBS: 1.2.A
OBS EMD CLIN: 2015AC
SUMMARY TOTAL

TASK ID:TANK 001 03
BIDDER OSBOURNE WBS: 1.2.A.1
OBS EMD CLIN: 2015AA
SUMMARY TOTAL

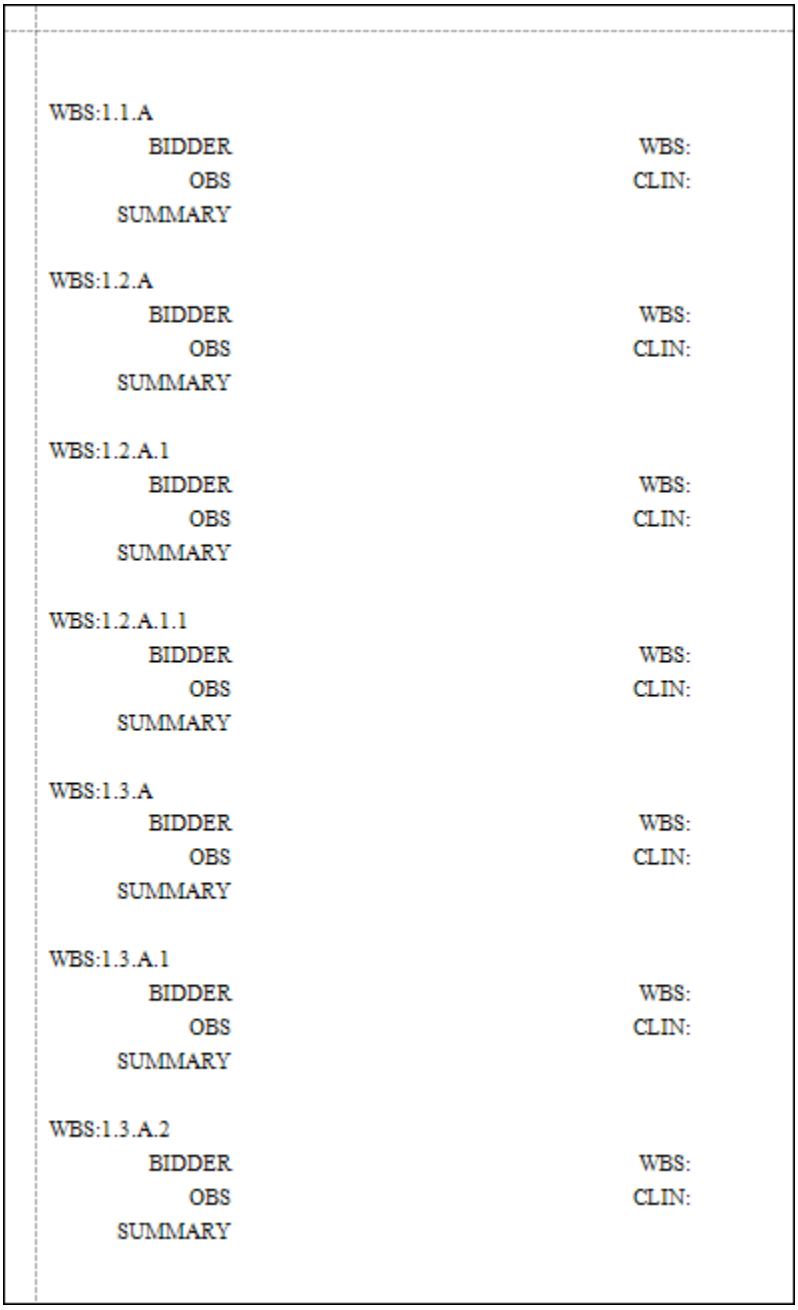
TASK ID:TANK 001 04
BIDDER OSBOURNE WBS: 1.2.A.1.1
OBS EMD CLIN: 2015AC
SUMMARY TOTAL

TASK ID:TANK 001 TR
BIDDER OSBOURNE WBS: 1.1.A
OBS EMD CLIN: 2015AC
SUMMARY TOTAL

TASK ID:TANK 001 WR
BIDDER OSBOURNE WBS: 1.1.A
OBS EMD CLIN: 2015AB
SUMMARY TOTAL

TASK ID:TANK 002 01
BIDDER REYNOLDS WBS: 1.3.A
OBS EMD CLIN: 2015AC
SUMMARY TOTAL

It is important to note that if we run this report for a summary field other than TASK ID, the report will show the Summary Field selected and the Summary Field Names, but it will not print the values. The following shows the report generated for summary field WBS:


WBS:1.1.A
BIDDER
WBS:
OBS
CLIN:
SUMMARY
WBS:1.2.A
BIDDER
WBS:
OBS
CLIN:
SUMMARY
WBS:1.2.A.1
BIDDER
WBS:
OBS
CLIN:
SUMMARY
WBS:1.2.A.1.1
BIDDER
WBS:
OBS
CLIN:
SUMMARY
WBS:1.3.A
BIDDER
WBS:
OBS
CLIN:
SUMMARY
WBS:1.3.A.1
BIDDER
WBS:
OBS
CLIN:
SUMMARY
WBS:1.3.A.2
BIDDER
WBS:
OBS
CLIN:
SUMMARY

Month

The fields come from the Period of Performance.

The fields include:

- Month
- Default Fields

The parameters include:

- Fiscal Year Period
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Multi Summary Field

The fields come from the properties of the proposal. Selecting this group will include the **Summary Fields** grid in the report options, allowing you to run the report by more than one summary field.

The fields include:

- Summary Field Label
- Summary Field
- Summary Field Description
- Summary Field / Description
- Start Date
- End Date
- Quantity
- Indirect Pool
- SOW
- BOE
- BOE Attachments
- SOW Attachments
- BIDDER
- WBS
- OBS
- CLIN
- SUMMARY
- Default Fields

The parameters include:

- Multi Summary Field
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Period

The fields come from the Period of Performance. If you want to run your report by year/month or year/quarter, you need to add the Year group as a vertical group first, and then embed the Period group.

The fields include:

- Period
- Default Fields

The parameters include:

- Fiscal Year Period
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Phase

The fields come from the **Phases** page in the **Reports** folder of **Proposal Properties**.

The fields include:

- Phase Name
- Default Fields

The parameters include:

- Fiscal Year Period
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Quarter

The fields come from the Period of Performance.

The fields include:

- Quarter
- Default Fields

The parameters include:

- Fiscal Year Period
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Rate Band

The fields come from the Rate Band Table assigned to the proposal.

The fields include:

- Rate Band Name
- Rate Band Description
- Effective Date
- Default Fields

The parameters include:

- Group Sorting
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Report

The Report group is where all custom reports begin. The fields in this group come from Proposal Properties. You will most likely use these fields in the Header section of the Report group.

The fields include:

- Page Info
- Report Date
- Report Time
- Report Footer Text
- Report Currency
- Bid Currency Exchange Rate
- Proposal Full Name
- Proposal Name
- Proposal Version
- Proposal Description
- Proposal Creator
- Proposal Creation Date/Time
- Proposal Manager
- Proposal Number
- Proposal RFQ
- Proposal Business Unit
- Proposal Contract Type
- Period of Performance
- Period of Performance Years

- Period of Performance Start Date
- Period of Performance end date
- Proposal Due Date
- Proposal Start Date
- Proposal End Date
- Proposal Rate Tables
- Direct Rate Table Name
- Indirect Rate Table Name
- Scheduled Rate Table Name
- Travel Rate Table Name
- CER Factor Table Name
- Exchange Rate Table Name
- Probability of Award
- Proposal Target Price
- Task Label
- Activity ID Label
- Proposal Notes
- Proposal Notes Attachments
- Proposal Currency
- Proposal Multi-Currency
- Workflow Enabled
- Company Name
- Company Address
- Company Address Second Line

- Company City
- Company State
- Company Zip
- Default Fields

The parameters include:

- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Resource

The fields come from the resource input tabs of the proposal.

The fields include:

- Resource Name
- Resource Description
- Resource Type Name
- Accounting Calendar Name
- Rate Type
- Resource Class Name
- Indirect Pool Name
- Rate Band Name
- Currency
- Effective Date
- Default Fields

The parameters include:

- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Resource Assignment

The fields come from the resource input tabs of the proposal.

The fields include:

- Resource Name
- Resource Description
- Resource Comment
- Scheduled Rate Name
- Scheduled Rate Description
- Discount
- Resource Field Name
- Curve Name
- Start Date
- End Date
- Default Fields

The parameters include:

- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Resource Class

The fields refer to the class that can be assigned to the resource in a rate table: ADMIN, ENGR, MATL, MFG, ODC, and SUBS.

The fields include:

- Resource Class Name
- Resource Class Description
- Default Fields

The parameters include:

- Group Sorting
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Resource Field

The fields refer to the Resource Fields defined in Proposal Properties.

The fields include:

- Resource Field Name
- Resource Field Description
- Default Fields

The parameters include:

- Resource Field
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Resource Table

The fields come from the Resource Table that defines the display format of the resources.

The fields include:

- Resource Table Element Name
- Resource Table Element Description
- Scheduled Rate Name
- Scheduled Rate Description
- Discount
- Resource Field Name
- Default Fields

The parameters include:

- Resource Selection
- Resource Table
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Resource Type

The fields refer to the type that can be assigned to the resource in the Resource Library: Labor, Material, Other, Subcontractor, and Travel.

The fields include:

- Resource Type Name
- Default Fields

The parameters include:

- Group Sorting
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Source Type

The fields refer to how the resource was added to the task. Source types include: CER, Direct, Formula, Material, Resource Set, or Travel.

The fields include:

- Source Type
- Default Fields

The Parameters include:

- Group Sorting
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Static

Static groups are unique in that they do not add more fields or parameters to a report. Most groups are dynamic in that the Detail sections are duplicated as many times as needed at run-time. For example: If you add the Task group to the layout and you have ten tasks in your proposal, the Detail section will be duplicated ten times, one per task. If you embed the Resource group in the Task group, the Detail section of the Task group will generate one Header and Footer from the Resource group for each task plus one Detail section for every resource used in the task. The more groups you add, the more detail your report will have. Static groups do not add more detail to the report. The Detail section of a Static Group follows the Detail section of the parent. If you add the Task group to the layout and then embed a Static group, the Fields panel of the Detail section of the Static group will show Task.

Static groups are often used in creating tabular reports, with columns that cross the Header, Detail and Footer sections of one or more groups. Static groups make it easier to modify (resize, reorder, delete, insert) the columns, as well as the fields you place in the cells.

Static groups are also an easy way to apply properties to a section or group as a whole. With suppression, for example, you would create one condition for the entire group, instead of one for each element. You could apply the Keep Together property to a group when it contains information that should not split between pages (Period, for example).

Summary Field

The fields come from the properties of the proposal.

The fields include:

- Summary Field
- Summary Field Description
- Summary Field / Description
- Start Date
- End Date
- Quantity
- Indirect Pool
- Workflow Status
- Workflow Due Date
- SOW
- BOE
- BOE Attachments
- SOW Attachments
- BIDDER
- WBS
- OBS
- CLIN
- SUMMARY
- Default Fields

The parameters include:

- Resource Selection

- Summary Field
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Task

The fields come from Task View.

The fields include:

- Task Name
- Task Description
- Start Date
- End Date
- Quantity
- Indirect Pool
- BIDDER
- WBS
- OBS
- CLIN
- SUMMARY
- SOW
- BOE
- SOW Attachments
- BOE Attachments
- Notes Attachments
- Workflow Status
- Workflow Due Date
- Default Fields

The parameters include:

- Resource Selection

- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Timescaled Period

The fields come from the Period of Performance.

The fields include:

- Period
- Default Fields

The parameters include:

- Fiscal Year Period
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Year

The fields come from the Period of Performance.

The Fields include:

- Year
- Default Fields

The Parameters include:

- Fiscal Year Period
- Resource Selection
- Task Selection
- User Title Definition Line 1
- User Title Definition Line 2
- User Title Definition Line 3
- User Title Definition Line 4

Report Designer Properties

Properties allow you to define the appearance of the report. When you add fields and parameters to the layout, they become design elements with specific properties. The options you see in the Properties panel depend on the design element selected (for example, a text box, group, band, or section).

The panel allows you to separate the options by category or list them alphabetically without categories. Click the button to select the one that best suits your needs.

The properties are grouped into eight categories: Appearance, Behavior, Data, Design, Format, General, Layout, and Misc (miscellaneous).

Appearance

Property	Description
Alignment	Specifies the horizontal alignment of the text.
Background Color	Specifies the background color of the element.
Borders	**Color**: specifies the color of the entire border or the individual border lines.
	Style: specifies the border styles of the entire border or the individual border styles.
	Width: specifies the border width of the entire border or the individual border widths. It is measured in pixels.

Font	**Name**: specifies the name of the font.
	Size: specifies the size of the font.
	Color: specifies the color of the font.
	Bold: specifies if the text is bold.
	Italic: specifies if the text is italicized.
	Underline: specifies if the text is underlined.
	Strikethrough: specifies if the text is struck through.
Indent	**Indent Level**: specifies the change in the hierarchy.
	Indent Step: specifies how much the indent will grow with every new level.
Line Alignment	Specifies the vertical alignment of the text within the item.

Behavior

Property	Description
Align to Page	Specifies if the sections after the one selected should move.
Auto Grow	Specifies if an element can grow vertically.
Auto Indent	Specifies if an element will be automatically indented.
Can Split	Specifies if an element can split between pages.
Cost Analysis	Specifies what type of cost analysis will be shown.

Is Subtotal	Specifies if a section should be compared with the first indirect element during the Cost Analysis process.
Keep Detail Bands Together	Specifies if the Detail sections in a band will keep together on one page.
Keep Together	Specifies if the sections in a band will keep together on one page.
Matrix Behavior	Specifies the behavior of the section when it is part of a matrix. The section will be crossed with Default, or not crossed with NoCross.
Repeat on Every Page	Specifies if the sections in a band should be repeated on every page.
Start Each Record on New Page	Specifies if the record will start on a new page.
Start on New Page	Specifies if the group will start on a new page.
Suppress	Specifies when an item should not be printed. Suppression is tied in with Visible. If Visible is set to False, Suppress will not have any effect.
	If: Shows the If expression that determines when an item should not be printed.
	If Not: Shows the If Not expression that determines when an item should not be printed.
	Auto: Specifies if a section will suppress automatically if it does not contain relevant data.

Visible	Specifies if something will appear in the report. Visible is also used with Ad Hoc groups to specify if a design element should appear in the (Default) layout automatically. If it is set to True, the element will appear in the layout. If it is set to False, the element will appear in the Available Fields list, but not in the layout. Visible is tied in with Suppress. If Visible it is set to False, Suppress will not have any effect.

Data

Property	Description
Determining Parameter	Specifies the parameter that is bound to the group, for example, you cannot run a report that has the Summary Element group without the Summary Element parameter.
Group	Shows the name of the Group.
Name	Specifies the name of the Group. You can change the name if needed.
Number Format	**Type**: Numeric, Currency, Percent.
	Decimal Places: Specifies how many digits appear after a decimal.
	Scale: Will print Dollars K/M/B.
	Show Currency Symbol: Displays the currency symbol in front of any monetary value.
Source	Specifies the expression of the design element.

Design

Property	Description
Default Label Style	Specifies the default formatting of the labels.
	(Name): Shows the name of the style.
	Base Style: Shows the style on which this style is based.
	Alignment
	Background Color
	Border Color
	Border Style
	Border Width
	Font
	Indent
	Line Alignment
	Text Color
Default Style	Specifies the default formatting of the fields.
	(Name): Shows the name of the style.
	Base Style: Shows the style on which this style is based.
	Alignment
	Background Color

	Border Color
	Border Style
	Border Width
	Font
	Indent
	Line Alignment
	Text Color

Format

Property	Description
Formatting Rules	Show the name of the rule. Click ... to open the **Formatting Rules** dialog box to modify an existing rule or create a new one.
Styles	At the Report group level, this shows the number of styles available. Click ... to open the **Styles** dialog box to modify an existing style or create a new one. At the text box level, this shows the style applied.

General

Property	Description
Margins	Specifies the margins of the page.
	Specifies the type, size, and orientation of the page.

Page Settings	**Orientation**: Landscape or Portrait.
	Page Name: the types of paper available.
	Page Width: the width of the page.
	Page Height: the height of the page.
Units	Specifies if the size-related or position-related property is measured in inches or centimeters.

Layout

Property	Description
Anchor	These properties are used in tandem with Offset. They specify if the element will maintain the same distance from the left/right, top/bottom margins of the container.
	Anchor Left / Left Offset: If the width of the container changes, the element is not affected.
	Anchor Right / Right Offset: If the width of the container changes, the element will move.
	Anchor Both / Left and Right Offset: If the width of the container changes, the element will move.
	Vertical Anchor Top / Top Offset: If the height of the container changes, the element is not affected.
	Vertical Anchor Bottom / Bottom Offset: If the height of the container changes, the element will move.

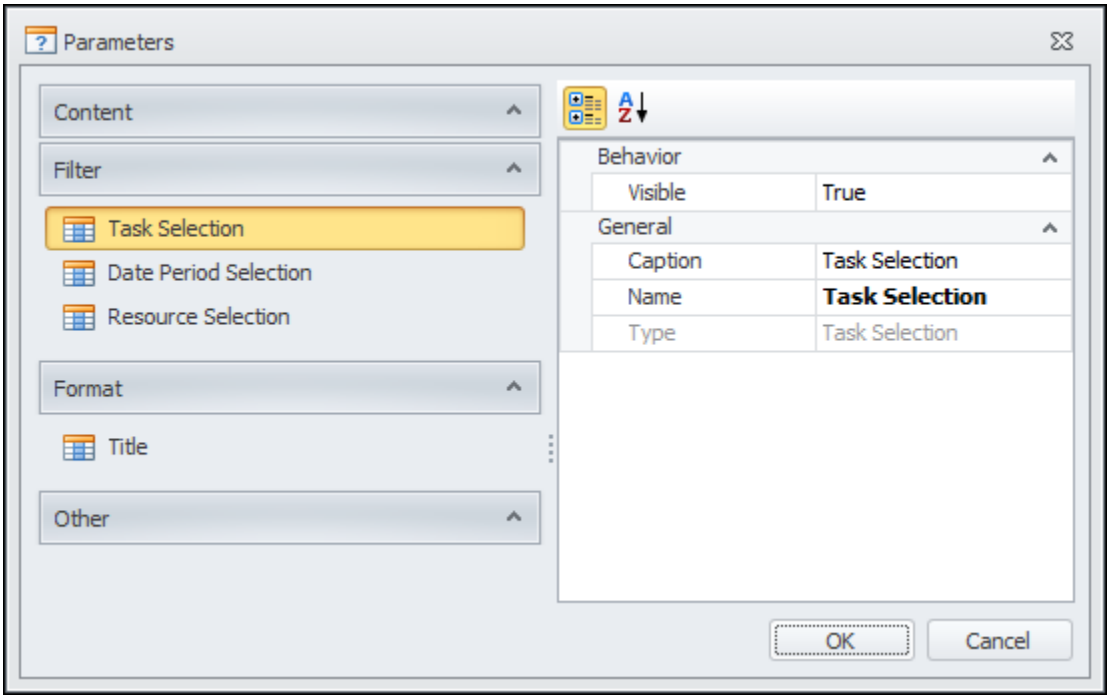
	Vertical Anchor Both / Top and Bottom Offset: If the height of the container changes, the element will resize.
Height	Specifies the height of the element.
Margins	Specifies the margins of the element.
Offset	These properties are used in tandem with Anchor. They specify the offset from the margins of the container.
Size	Specifies the size of the section.
Width	Specifies the width of the element.

Misc

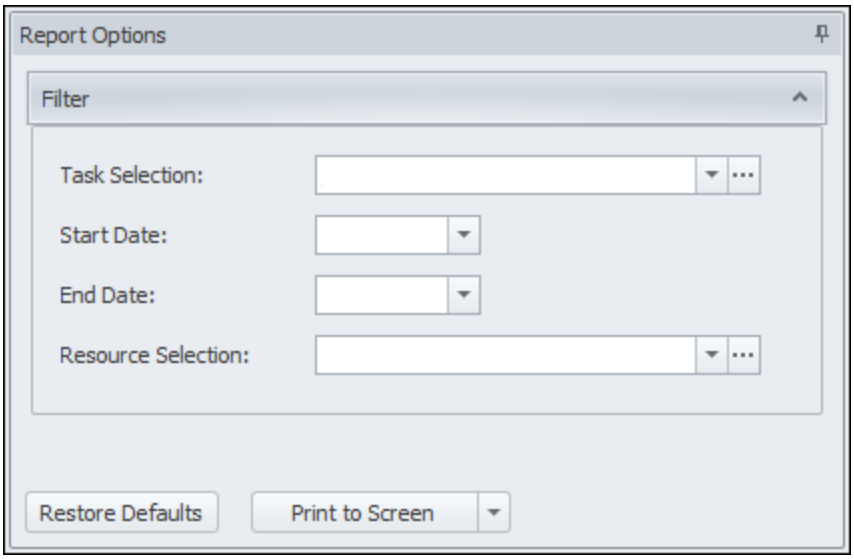
Property	Description
Parameters	Click next to (Collection) to open the Parameters dialog box to see the parameters used in the report. You can also create new parameters if needed.

Report Designer Report Options

There are three factors that determine the Report Options you will see when running a custom report: the groups you use in the report, the parameters you add to the layout, and the parameters you create and use in the layout or properties of the report. Every report has default parameters that regulate some of the Report Options. You can see the default parameters by creating a new report, selecting the Report group, and then opening the Parameters (Collection) in the Miscellaneous category in the Properties panel.

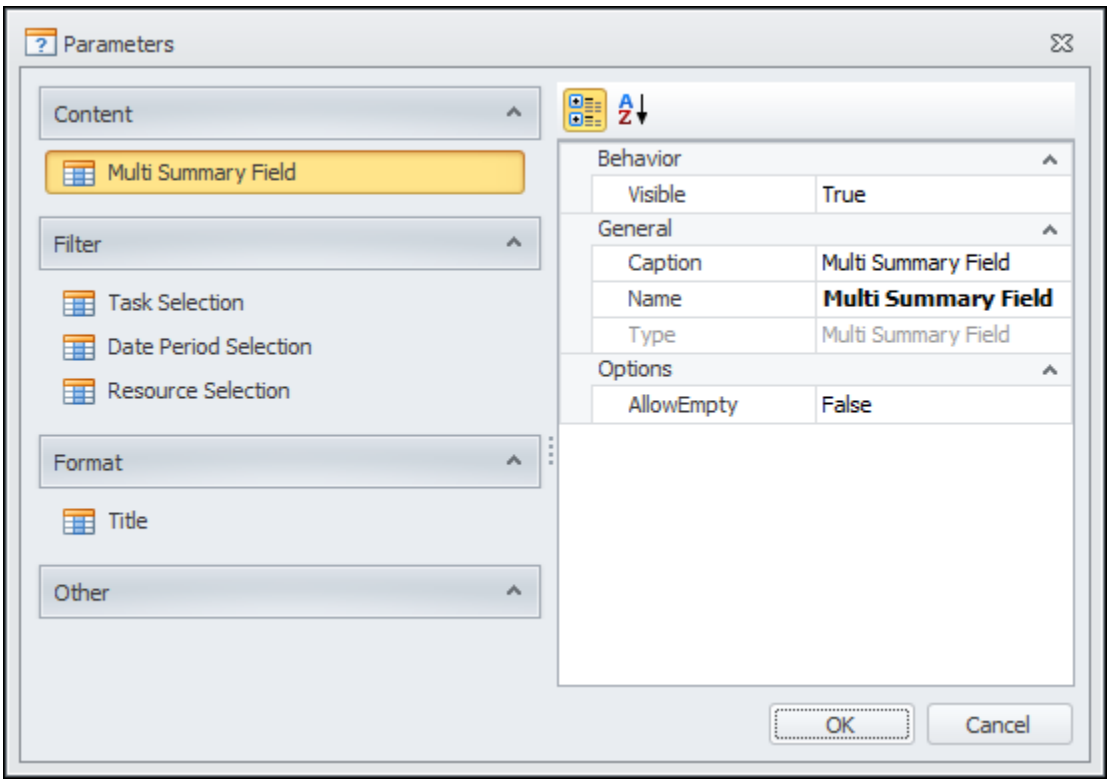


The default parameters regulate the following Report Options:

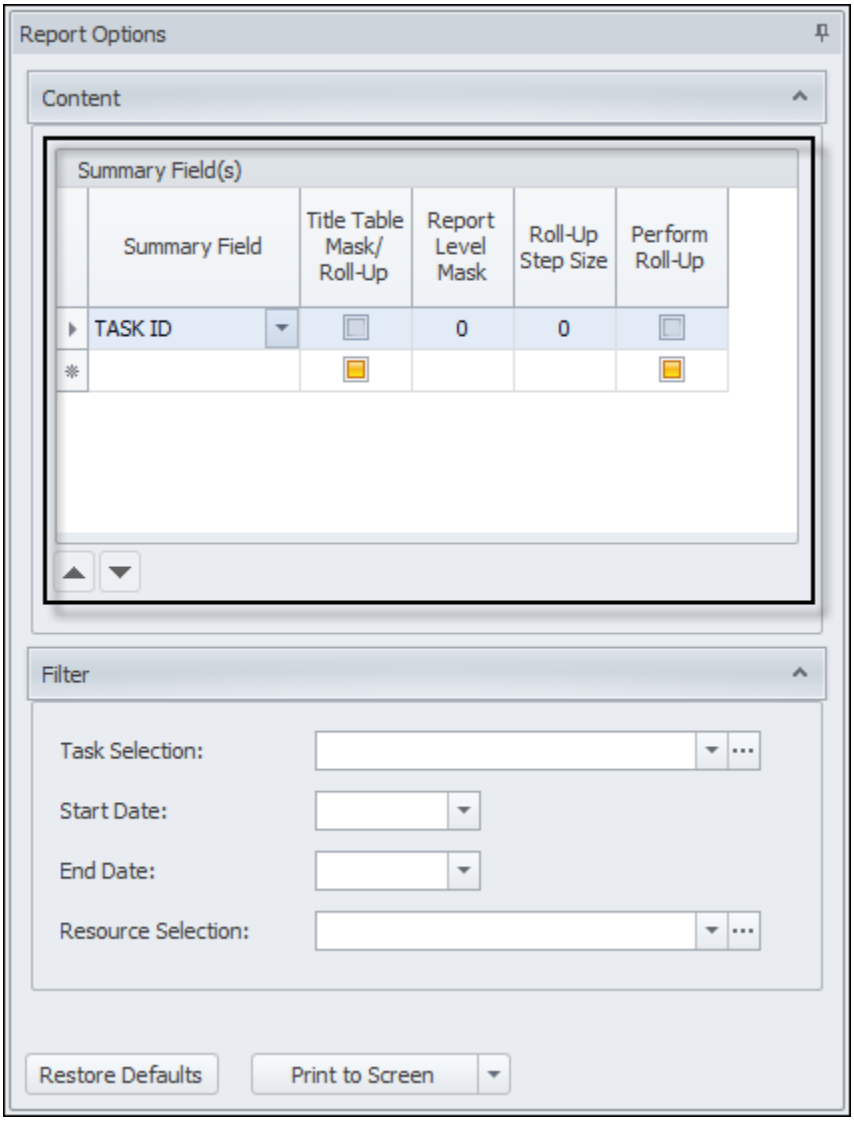


It is very important to note that your report will print the correct information if you change a Content option or enter a Filter option, but it will not print the label field nor the name of the corresponding parameter unless you drag the parameter from the Parameters panel into the layout. For example, if you want **Task Selection:** Name of Selection to print on the report, you need to drag Task Selection from the Parameters panel into the layout.

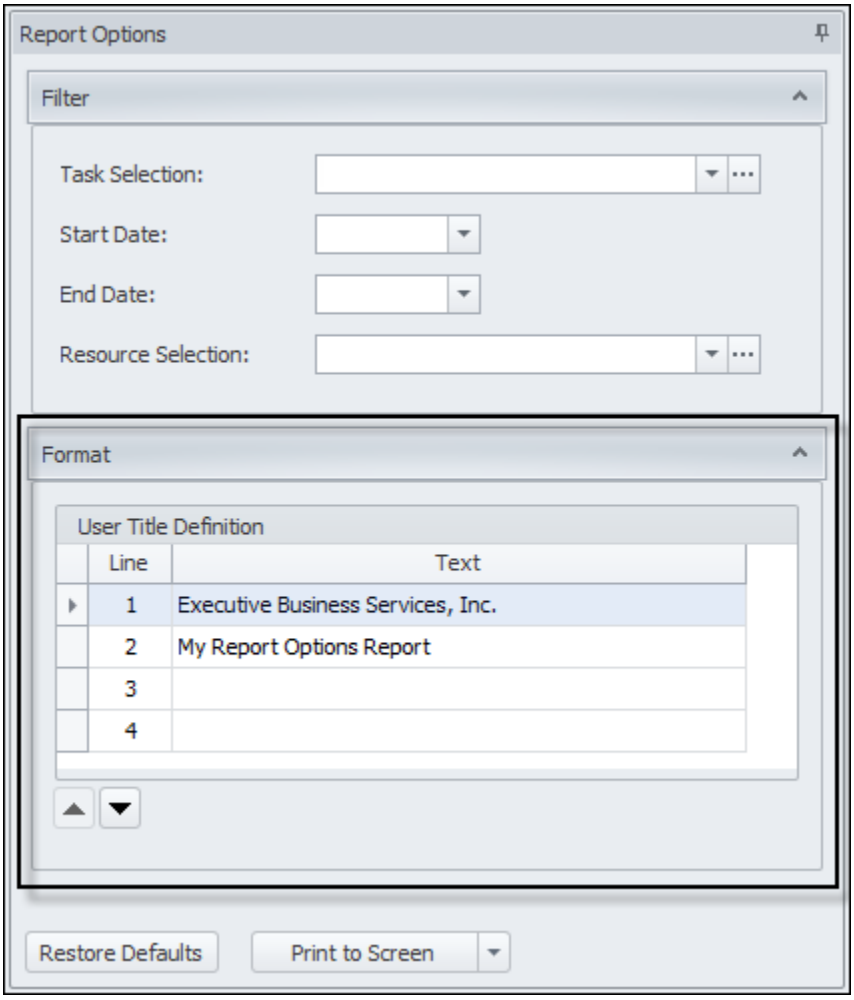
Adding a group to a report can also add a parameter to the Parameters Collection and corresponding Report Option. Notice what happens when we add the Multi Summary Field group to the layout. The Multi Summary Field appears in the Content category:



The Summary Field(s) grid also appears in the Content category of the Report Options:

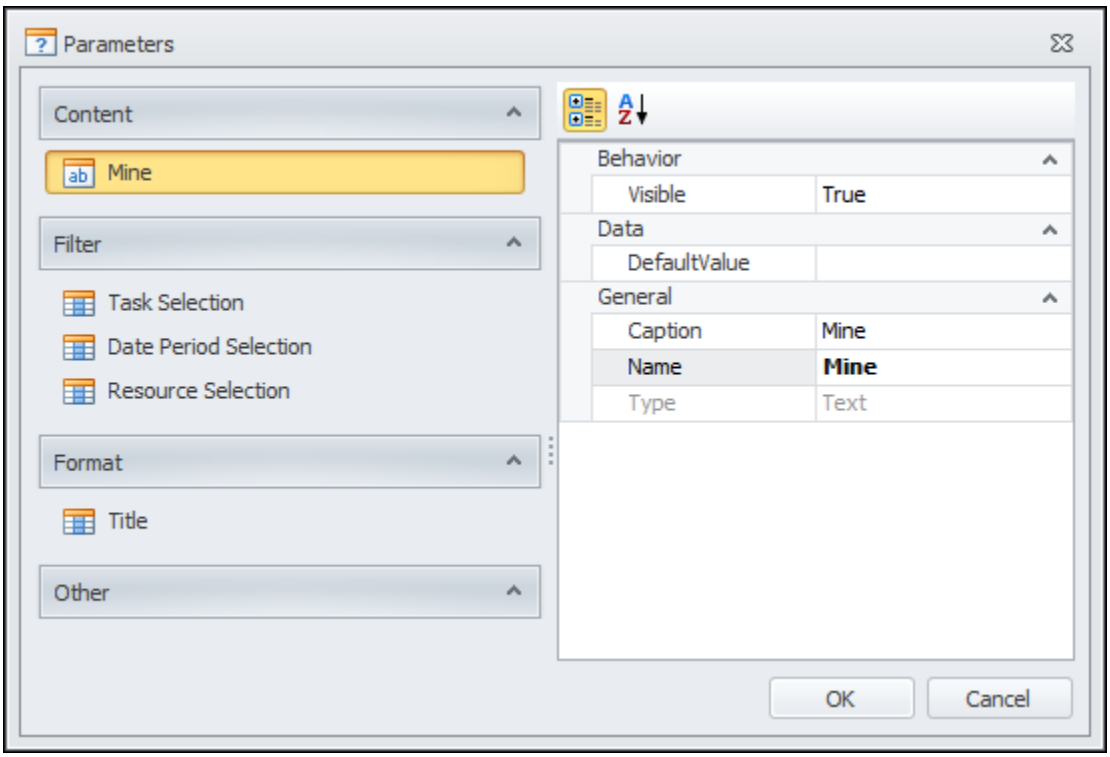


Adding a parameter from the Parameters panel that corresponds to one of the default parameters will not change the Parameters Collection, but it will add a Report Option. Notice what happens when we add the Title.Line1 parameter to the layout.

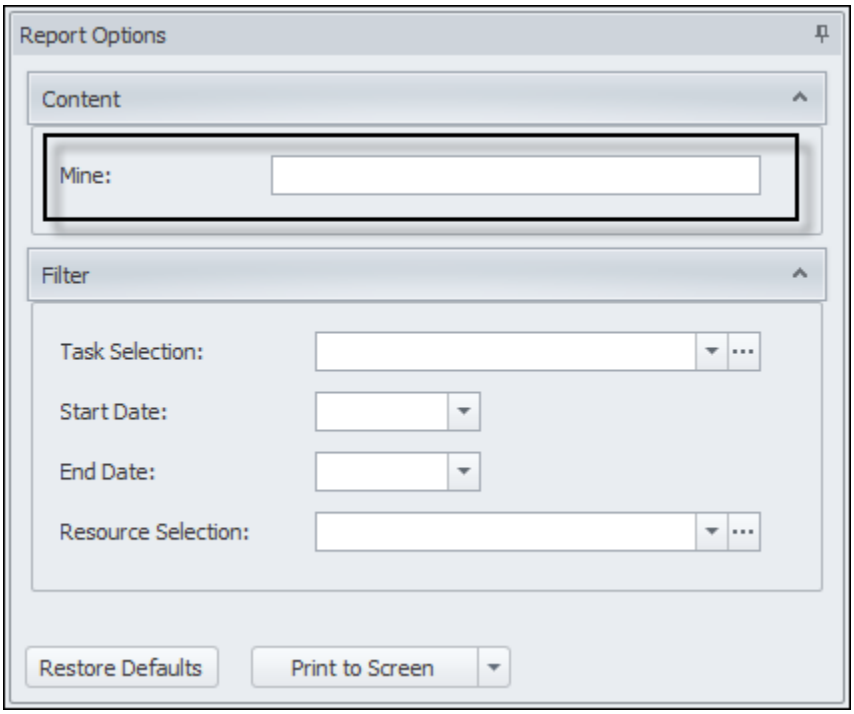


The Format category was added, as well as User Title Definition to the Report Options.

Creating your own parameter will add it to the Parameters Collection. Notice that the categories the parameters are sorted in are the same as those in the Report Options at run-time. You can drag and drop parameters into different categories or change their order within the Parameter Collection.

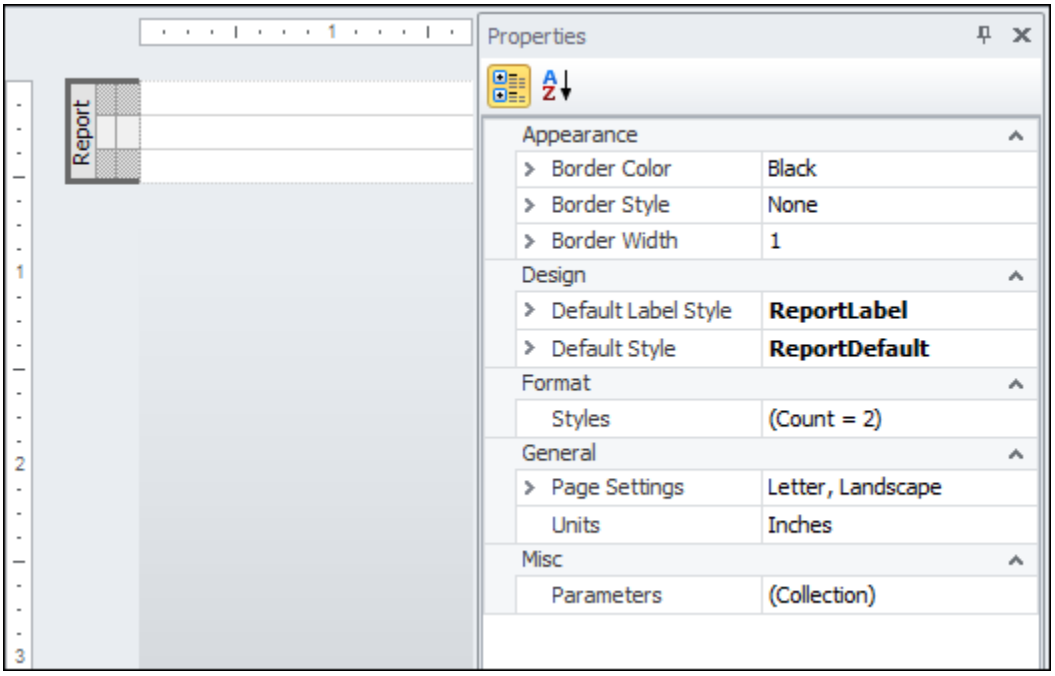


Adding your parameter to the layout will also add it to the Report Options.

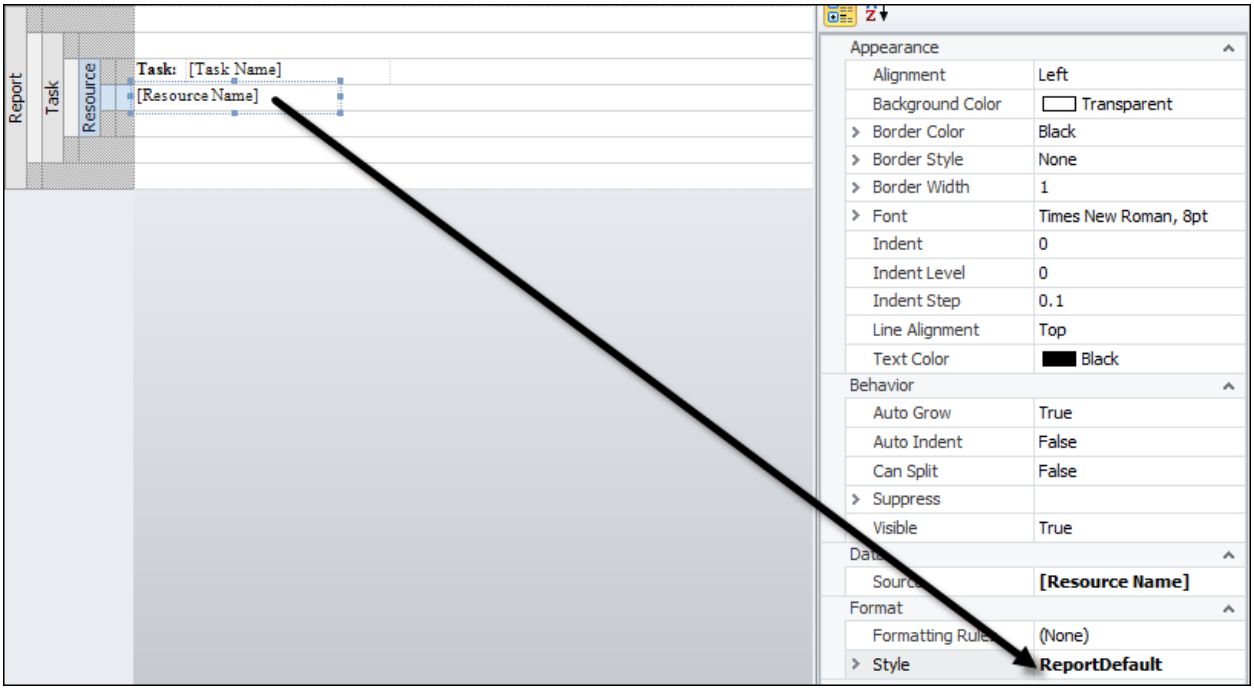


Report Designer Styles

Styles are sets of formatting attributes (font, border color, line alignment, text color, etc.) that provide a consistent look to your reports. Report Designer has two default styles: ReportLabel and ReportDefault that are automatically entered in the Default Label Style field and the Default Style field in the Properties Panel when you create a new report. The styles entered in these two fields regulate the report's labels and text boxes. The following screenshot shows the Properties Panel for the Report group. It shows ReportLabel as the Default Label Style and ReportDefault as the Default Style.



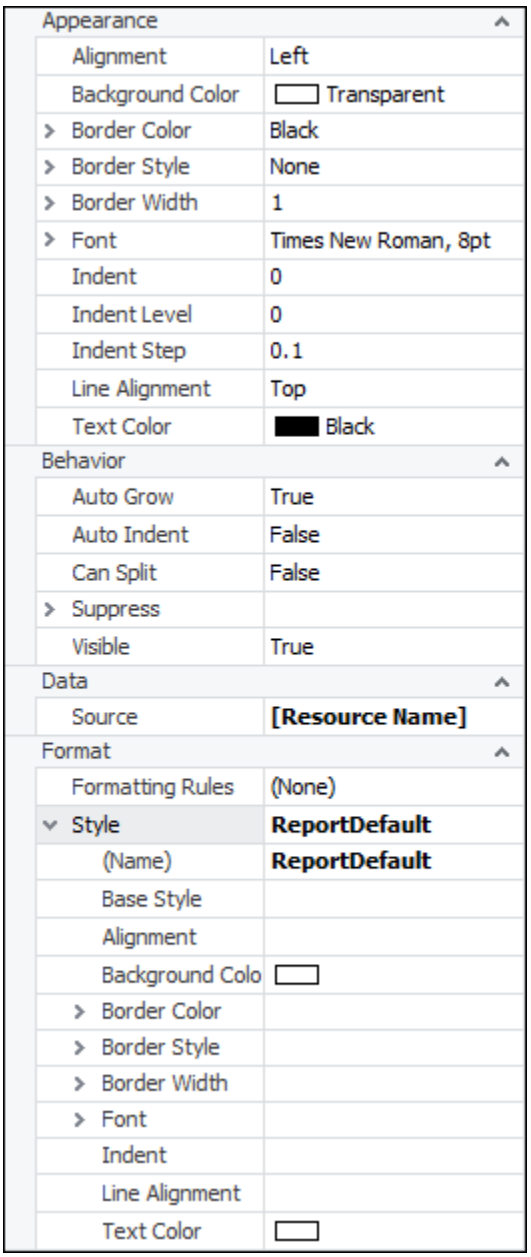
When you add a label to the layout, ReportLabel will appear in the Style field in the Properties Panel and will provide the default formatting of the label. Likewise, when you add a field or parameter to the layout, ReportDefault will appear in the Style field and will provide the default formatting of the field.



You can create your own styles by clicking ... in the Styles field with the Report group selected in the layout. You can assign the new style as the Default Label Style or the Default Style, depending on the formatting properties defined. You can also assign it to specific text boxes to override the default style of that text box.

You can base the new style on another style with the Base Style property. The new style will inherit the properties from the base style and allow you to add additional formatting. If you want the new style to be a default style for the report, we recommend you create it and assign it to the Report group before adding labels and fields to the layout. If you create it after adding elements to the layout, you will have to assign it to the text boxes you want to use that style.

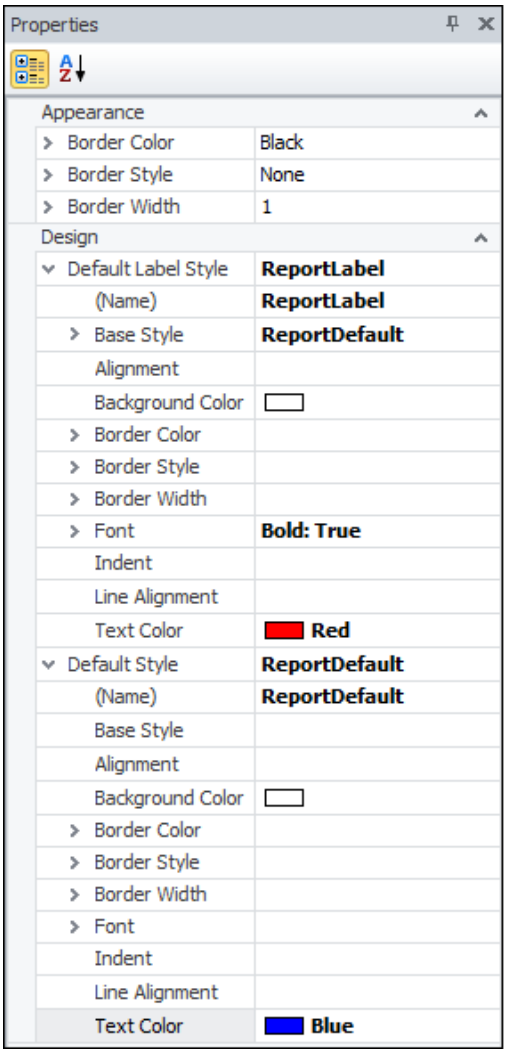
The following screenshot shows the properties in the Appearance section and in the Style section after we added a field. The Style field shows ReportDefault. You will notice that the properties in both sections are the same, but the Appearance section shows the details of the properties. Style properties can be empty, which allows you to force a specific format override without having to specify the rest of the properties. For example, you can apply Bold formatting without having to enter a specific font or size. If a property is not overridden, it will use the default setting.

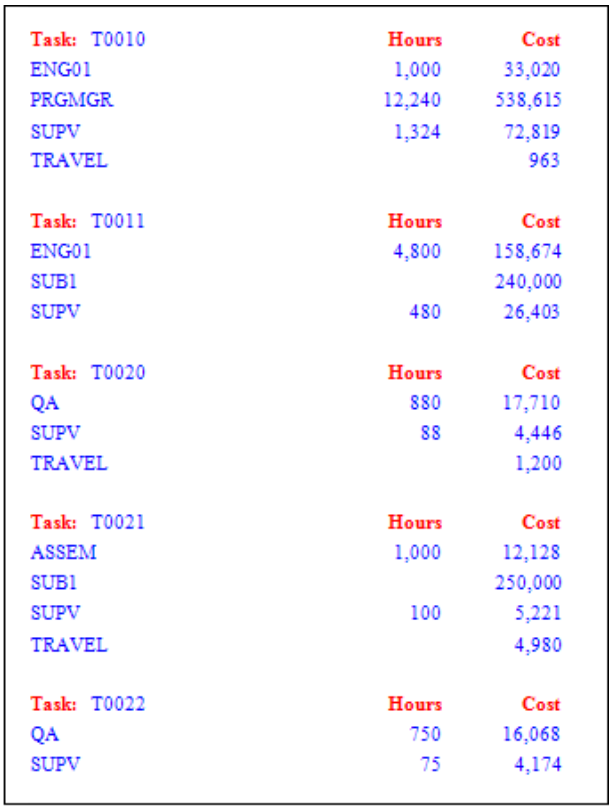


The following shows an excerpt of a report we created with the default ReportLabel and ReportDefault styles:

Task: T0010	Hours	Cost
ENG01	1,000	33,020
PRGMGR	12,240	538,615
SUPV	1,324	72,819
TRAVEL		963
Task: T0011	**Hours**	**Cost**
ENG01	4,800	158,674
SUB1		240,000
SUPV	480	26,403
Task: T0020	**Hours**	**Cost**
QA	880	17,710
SUPV	88	4,446
TRAVEL		1,200
Task: T0021	**Hours**	**Cost**
ASSEM	1,000	12,128
SUB1		250,000
SUPV	100	5,221
TRAVEL		4,980
Task: T0022	**Hours**	**Cost**
QA	750	16,068
SUPV	75	4,174

You can modify any style, including the default styles. When you modify a property in the Style section, the change applies to the style and will affect every text box in the layout that uses that style. If you use the direct formatting options on the ribbon or in the Appearance section of the Properties Panel, the change will only affect the text box highlighted. The following shows the printed report after we changed the Text Color of ReportLabel to red and the Text Color of ReportDefault to blue.





Task: T0010	Hours	Cost
ENG01	1,000	33,020
PRGMGR	12,240	538,615
SUPV	1,324	72,819
TRAVEL		963
Task: T0011	**Hours**	**Cost**
ENG01	4,800	158,674
SUB1		240,000
SUPV	480	26,403
Task: T0020	**Hours**	**Cost**
QA	880	17,710
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Task: T0021	**Hours**	**Cost**
ASSEM	1,000	12,128
SUB1		250,000
SUPV	100	5,221
TRAVEL		4,980
Task: T0022	**Hours**	**Cost**
QA	750	16,068
SUPV	75	4,174

If you want to remove an override, right-click the property, and then click **Reset**.

Please note that styles are report specific. The modifications you make to a style pertain to the current report, as well as any new styles you create.

Create a Style

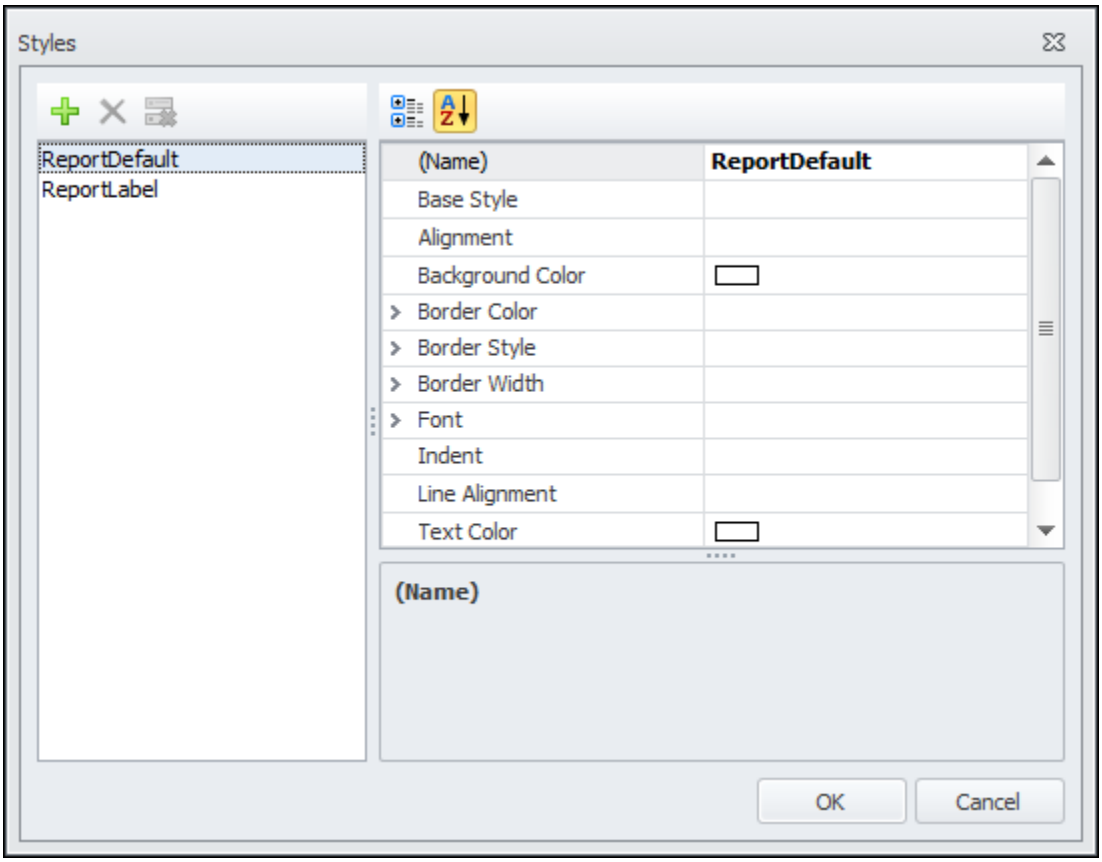
Styles are sets of formatting attributes (font, border color, line alignment, text color, etc.) that provide a consistent look to your reports.

1. Select the **Report** group in the layout.
2. Click in the Styles field.
3. Click the **Add** icon in the Styles dialog box.
4. Change the default name in the (Name) field.
5. Select a **Base Style** if you want the new style to inherit the formatting properties of the Base Style.
6. Select the formatting properties.
7. Click **OK**.

Once the style is created you can assign it to a report as the default style, or you can assign it to individual text boxes to override the default.

Styles Dialog Box

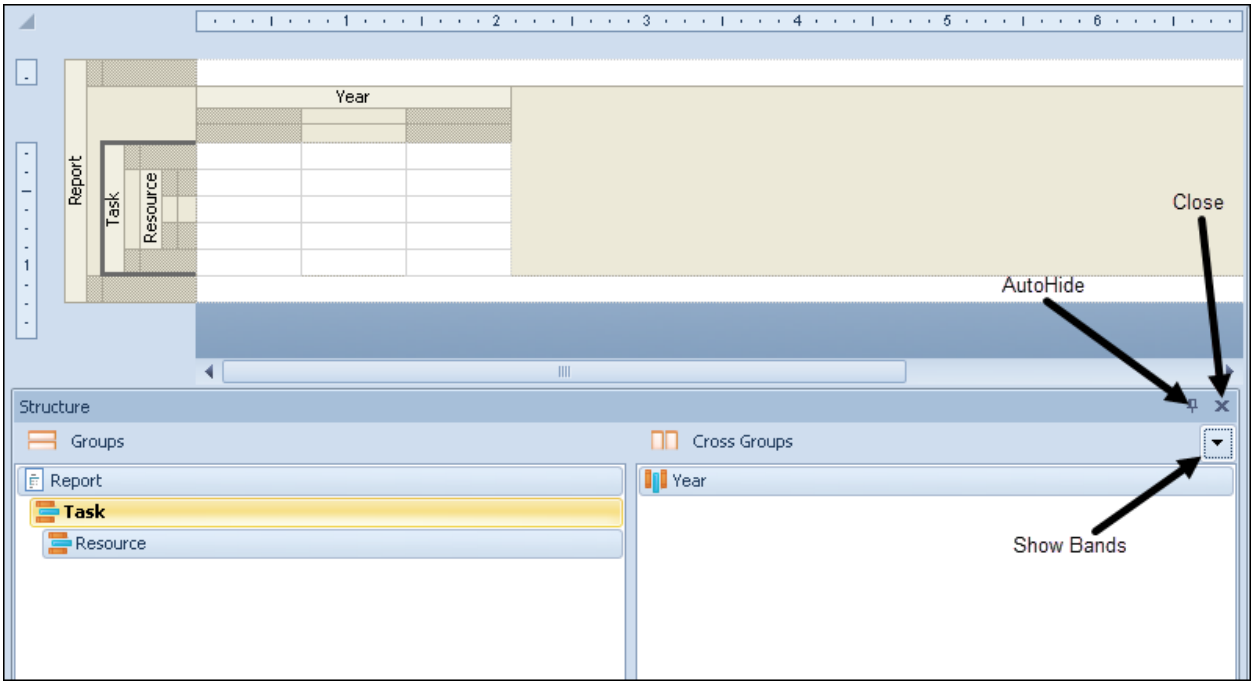
Here you modify the styles or create new ones. The properties include: Alignment, Background color, Border Color, Border Width, Font, Indent, Line Alignment, and Text Color. Base Style can be used when you create a new style. The new style will inherit the properties from the base style and allow you to add additional formatting.



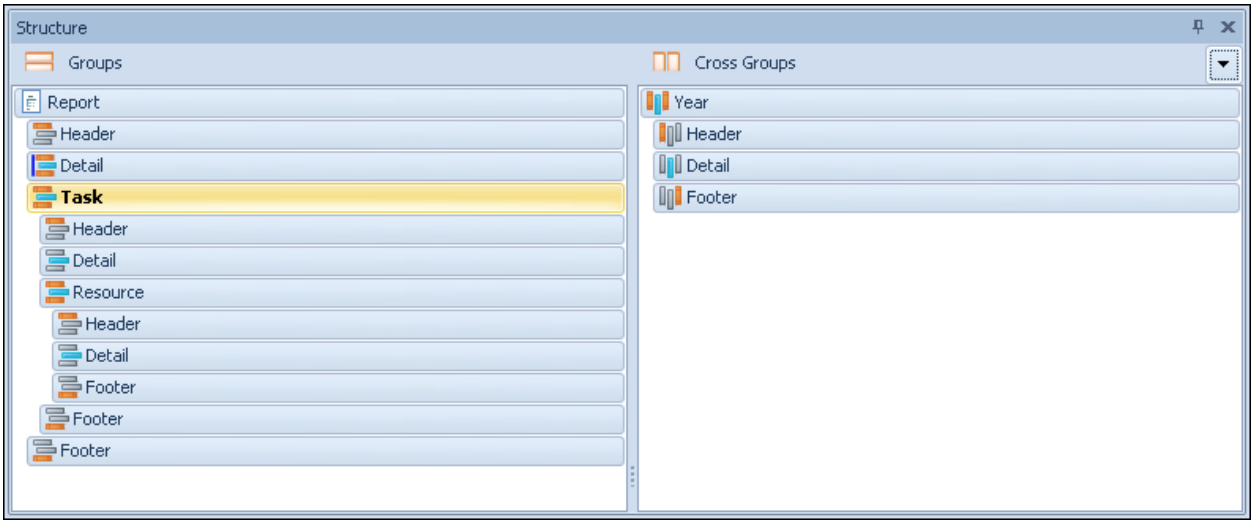
Structure Panel

The Structure panel lists the groups you have added to the layout. It does not show any fields/parameters. The top part of the screenshot shows the Layout area with the Task and Resource groups crossed by the Year group. The Structure panel lists the same groups. The Layout area and Structure panel mirror each other in that the group selected in one area is also selected in the other.

The Structure panel has the AutoHide pin, which allows you to hide the panel when you move the mouse to another area. If the pin is in the horizontal position, AutoHide is enabled. If AutoHide is not enabled, you can dock the panel to the area of your choice. You can also close the panel completely by clicking the Close button. To open the panel again, you will have to click Show on the ribbon, and then select Structure.



The Show Bands button allows you to see the Header, Detail and Footer bands of each Group.


Structure
Groups
Cross Groups
Report
Header
Detail
Task
Header
Detail
Resource
Header
Detail
Footer
Footer
Footer
Year
Header
Detail
Footer

Report Favorites

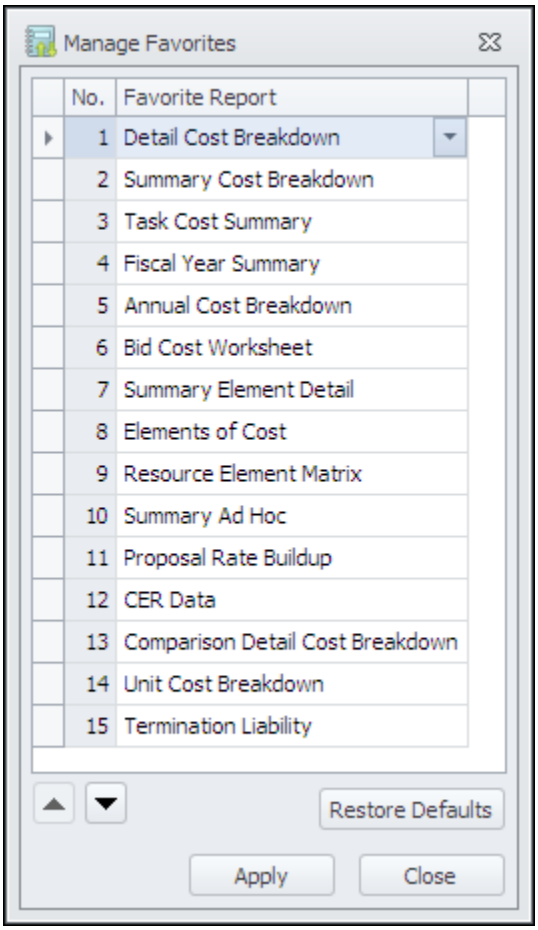
With Report Favorites, you can quickly run your frequently used reports from the ribbon and Quick Access Toolbar. Up to 15 system or custom reports can be set as a favorite, and they can be arranged in any order using the **Manage Favorites** dialog box. The most popular reports in ProPricer are set as default favorites.

Change Report Favorites

1. On the **Reports** ribbon, in the **Favorites** group, click **Manage Favorites**.
2. In the **Favorite Report** column, enter a system or custom report name.
3. Click the up and down arrows below the grid to rearrange the order of your reports.
4. Click **Apply**.

Manage Favorites Dialog Box

The **Manage Favorites** dialog box shows the name and order of your favorite reports, which you can change at any time.



No.

This column displays the order of the reports. The values cannot be edited, but you can rearrange the order with the up and down arrows below the grid.

Favorite Report

This column shows the names of the reports. Click the down arrow next to a report name to select a favorite from a drop-down menu of all system and custom reports. Alternatively, you can type a report name to set it as a favorite.

Up/Down Arrows

Click to rearrange the order of the reports.

Restore Defaults

Click to populate the grid with the default reports in the default order.

Apply

Click to save your changes.

Close

Click to exit the dialog box.

Report Features

Cost Levels

Setting the Cost Level for a report allows you to specify the amount of detail shown for the indirect costs in your proposal.

Cost levels allow you to:

- Isolate and analyze indirect costs for each category.
- Show specific indirect rates within those categories. (For example, material handling could be shown in material, but not labor.)
- Improve report readability by breaking down the indirect cost for each category instead of showing it as a total.

Your proposal's Algorithm provides the indirect expenses and pricing formula that determine how indirect costs are calculated. Individual cost levels are designated in this Algorithm by setting an element's type to *Cost Level*. These types of elements should sum the totals of other elements, and they should be printable in reports.

In the Cost Breakdown reports of ProPricer, the available cost levels are limited by the disclosure format selected. The Disclosure Format report option hides indirect costs up to a specified level, while the Cost Level option shows indirect cost details up to a specified level.

Note: *If you have not been granted access to see indirect information, the only Cost Level options available are* ***Direct Cost****,* ***Direct Input Only****, and* ***Hours Only****.*

Example

Click here to see the details of an example Algorithm named *Tank Algo*. When *Tank Algo* is used in a proposal, the following Cost Level options are available:

Direct Cost

Only direct costs appear after the resources. The indirect costs are listed after the direct costs.

Total Overhead

The sum of *Labor Overhead* and *Material Handling Overhead* appears after the resources.

Subtotal

The sum of *Total Overhead* and *Direct Cost* appears after the resources.

Total Indirect

The sum of *Total Overhead* and *G&A, IR&D / B&P* appears after the resources.

Estimated Cost

The sum of *Subtotal* and *G&A, IR&D / B&P* appears after the resources.

Total Cost + Fee

The sum of *Estimated Cost* and *Profit* appears after the resources.

Total COM

The sum of *Manufacturing Cost of Money*, *G&A Cost of Money*, and *Interdivisional Transfer FCCOM* appears after the resources.

Total Price

The sum of *Total Cost + Fee* and *Total COM* appears after the direct costs.

Disclosure Format

The different disclosure formats let you configure how much of the cost data will be shown on a report. You can:

- Run the report at *Total Price* to see all the costs summarized.
- Run the report at an intermediate level to hide specific indirect elements while showing others to the customer. For example, you could hide G&A, IR&D / B&P, but show Profit.
- Run the report showing inputs but no costs (sanitized) to prevent the discovery of indirect rates.

The disclosure formats available depend on the pricing Algorithm of your proposal. When you select a format below *Direct Cost - Standard*, the direct and indirect costs are combined in the totals. The examples that follow show excerpts of the Annual Cost Breakdown Report generated with the disclosure formats defined in an Algorithm named *Tank Algo*.

Hours Only

The report will only show the input resource hours. No cost values are shown.

Direct Input Only

The report will only show the input resource hours and/or units. No cost values are shown.

*Note: When this format is selected in Cost Breakdown reports, the **Cost Level** option will be unavailable.*

Direct Cost - Standard

This format shows the most detailed information. In Cost Breakdown reports, direct costs and indirect costs are shown separately. Below the last direct cost total, all associated indirect costs are shown separately.

Burdened through Labor Overhead

This format displays the indirect costs below Total Overhead. Example

Burdened through Material Handling Overhead

This format displays the indirect costs below Total Overhead.

Burdened through G&A, IR&D / B&P

This format displays the indirect costs below Total Indirect.

Burdened through Profit

This format displays the indirect costs below Total Cost + Fee.

Burdened through Manufacturing Cost of Money

This format displays the indirect costs below Total COM.

Burdened through G&A Cost of Money

This format displays the indirect costs below Total COM.

Burdened through Interdivisional Transfer FCCOM

This format displays the indirect costs below Total COM.

Export Full Pricing

The **Export Full Pricing** option on the **Print to Excel** dialog box allows you to create an Excel file that contains the complete pricing information of the proposal. This may be the complete proposal, or part of the proposal if any report options were selected in the **Filter** section. You can summarize the values by month, quarter, or year depending on the proposal's timescale.

The information includes the following items that will appear as separate worksheets in the .xlsx file.

- **Accounting Calendars** - This worksheet shows the accounting calendar hours per month. If your proposal is using a Work Schedule Table, the worksheet shows the total hours per year entered for each calendar in the table.
- **Cap Factors** - This worksheet shows the capped indirect element amounts compared to the total indirect expenses calculated for each resource that has been spread.
- **CER Factors** - This worksheet will appear if a CER Factor Table is used in the proposal. It shows the CER factor and corresponding rates.
- **CERs** - This worksheet will appear if CERs are used in the proposal. It shows CER assignments per task, the derivative resources, factor values, and hours/units/cost spread for the derivative resources.
- **Direct Rates** - This worksheet shows the rates of the resources.
- **Exchange Rates** - This worksheet will appear if you generate the report for a specific Bid Currency. It shows all the currencies and exchange rates.
- **Formula** - This worksheet shows the formulas used to spread resources, including the amount spread, the percentage allotted to each resource and the monthly values.
- **Formula Split (F)** - This worksheet will only appear when the formulas exceed Excel's limits.

- **Indirect Caps** - This worksheet shows the capped indirect element amounts by indirect pool.
- **Indirect Rates** - This worksheet shows the indirect pools and corresponding rates.
- **Material** - This worksheet will appear if material has been assigned to tasks. It shows the material assignments per task, and material expenses.
- **Pricing (P)** - This worksheet shows the complete pricing information.
- **Pricing (P) Base** - This worksheet shows the complete pricing information with no caps applied to Indirect Elements.
- **Pricing (P) Best** - This worksheet will appear if Three-Point Estimating is enabled in the proposal. It shows the complete Best Case pricing information.
- **Pricing (P) Expected** - This worksheet will appear if Three-Point Estimating is enabled in the proposal. It shows the complete Expected pricing information.
- **Pricing (P) Worst** - This worksheet will appear if Three-Point Estimating is enabled in the proposal. It shows the complete Worst Case pricing information.
- **Rate Bands** - This worksheet will appear if a Rate Band Table has been assigned to the Direct Rate Table. It shows the rate bands assigned to the resources and corresponding rates.
- **Rate Card** - This worksheet shows Rate Card data for the resources and labor categories assigned to tasks in the proposal.
- **Resource Allocations** - This worksheet shows the resource allocations task per month.
- **Scheduled Rates** - This worksheet shows the scheduled rates and corresponding Discount and rates.
- **TPE Factors** - This worksheet will appear if Three-Point Estimating is enabled in the proposal. It shows the default and custom factor definitions, including the Expected factor.

- **Travel** - This worksheet will appear if trips have been assigned to tasks. It shows the travel assignments per task, the number of people and days per trip, the travel expenses, and per diem rate factors.
- The last worksheet in the Excel file is the complete report.

The names of the worksheets are predefined, but you can change them.

You can alter the data on the worksheets, but be careful not to overwrite cells with formulas. You can change without risk:

- The rates on the **Rate Bands**, **Direct Rates**, **Indirect Rates**, and **Exchange Rates** worksheets.
- The number of trips, quantities, and rates of the travel expenses on the **Travel** worksheet.
- The factor values on the **CER Factors** worksheet.
- The derivative resource, and factor values used to calculate the hours/units/cost of derivative resources of a CER on the **CERs** worksheet.
- The hours, units, and cost of the direct resources on the **P** worksheet.

If you change these values, the results will be recalculated.

The worksheets can contain empty cells because no data was entered for the respective element or date. You can type values in the empty cells, but they will not be incorporated in the formulas.

Change the Default Names of Excel Worksheets

When you click the **Print to Excel** option for a report and the **Export Full Pricing** checkbox is selected, the Excel worksheet is generated with a default name.

1. On the **Setup** ribbon, in the **Preferences** group, click **Report Defaults**.
2. Click the **Worksheet Names** page.
3. Enter the new name in the **Worksheet Name** column.
4. Click **OK**.

Override Indicators

Override indicators are a quick and easy way to see if your reports are using overridden direct rate or indirect rate data. The indicator appears between the names of the rate tables in the report header. A | (pipe) indicates no overrides. The top part of the / (slash mark) and \ (backslash) points to the table that has overrides. A - (dash) indicates overrides on both tables. For example:

When	Character	Example
No overrides	|	DIRRATES | BURRATES
BURRATES overrides	/	DIRRATES / BURRATES
DIRRATES overrides	\	DIRRATES \ BURRATES
Overrides on both	-	DIRRATES - BURRATES

These indicators also apply to overrides on Scheduled Rate Tables in the Scheduled Rate Summary Report and Audit Report. They show the Scheduled Rate Table after the Indirect Rate Table. For example:

When	Example
No overrides	DIRRATES | BURRATES |SCHEDRATES
DIRRATES and SCHEDRATES overrides	DIRRATES \ BURRATES / SCHEDRATES
BURRATES overrides	DIRRATES / BURRATES \ SCHEDRATES
BURRATES and SCHEDRATES overrides	DIRRATES / BURRATES - SCHEDRATES

Resource Rate Types and Reports

The rate type of a resource plays an important role in reports. ProPricer will print the hours/units and the rates (if the **Print Resource Rates** report option is selected) of resources with a rate type of **Hours** or **Units**, but it will not print this information for resources with a rate type of **Cost**.

We created three resources whose names indicate their Rate Type: *Cost Resource*, *Hours Resource*, and *Units Resource*. We added the resources to a task, and then we ran the Summary Cost Breakdown Report. In the Report Options, we used the system Resource Table named **(By Resource)**, and we selected the **Print Resource Rates** checkbox.

TASK ID:	**Task 1**		**TOTAL**	
Resource	**Hrs/Units**	**Cost**	**Hrs/Units**	**Cost**
Cost Resource		550		550
Hours Resource	10	650	10	650
Rate		65.00		65.00
Units Resource	10	750	10	750
Rate		75.00		75.00

Notice the **Hrs/Units** and **Rate** values for *Hours Resource* and *Units Resource*. There is only a **Cost** value for *Cost Resource*.

Roll-Up and Mask

The Roll-Up and Mask options allow you to group, summarize, and report items that are thought of as belonging together. Roll-Up summarizes the items from right to left. Mask summarizes the items from left to right.

Roll-Up

Roll-Up allows you to summarize data and report it at a level higher than the one it was entered in. The roll-up process can occur on several levels, thus creating a hierarchical structure between items that belong to different levels. Depending on the Roll-Up Step Size entered, the report can print low, intermediate, or high level totals.

The sort order for the summary field could be alphabetic or numeric, and it affects how the roll-up will be performed. If the sort order is alphabetic, for example, the elements are treated as strings of characters that are sorted based on the order of the letters.

The following table compares the subtotals for 1.1.1 using step sizes of 1 and 2 for an alphabetic and a numeric sort order.

Roll-Up Step Size	1		2	
Sort Order	Alphabetic	Numeric	Alphabetic	Numeric
	1	1	1	1
	1.	1.1	1.1	1.1.1
	1.1	1.1.1	1.1.1	
	1.1.			
	1.1.1			

In the alphabetic sort order, the period is treated like any other number or letter. In the numeric sort order, the elements are treated as segmented strings, separated by a period. For example, 1.1.1 has three segmented strings: 1, 1, and 1.

Roll-Up uses the elements in the summary fields. The hierarchical structure created can be based on the characters in the elements, or it can be predefined in a Title Table or in the summary field value list.

Character Roll-Up

Character Roll-Up is performed by entering a number between 0 and 255 in the **Roll-Up Step Size** field. The process is as follows:

1. The names of all the elements are compared, and the costs of the elements with matching names are added together.

2. The last *n* characters of the names are removed.

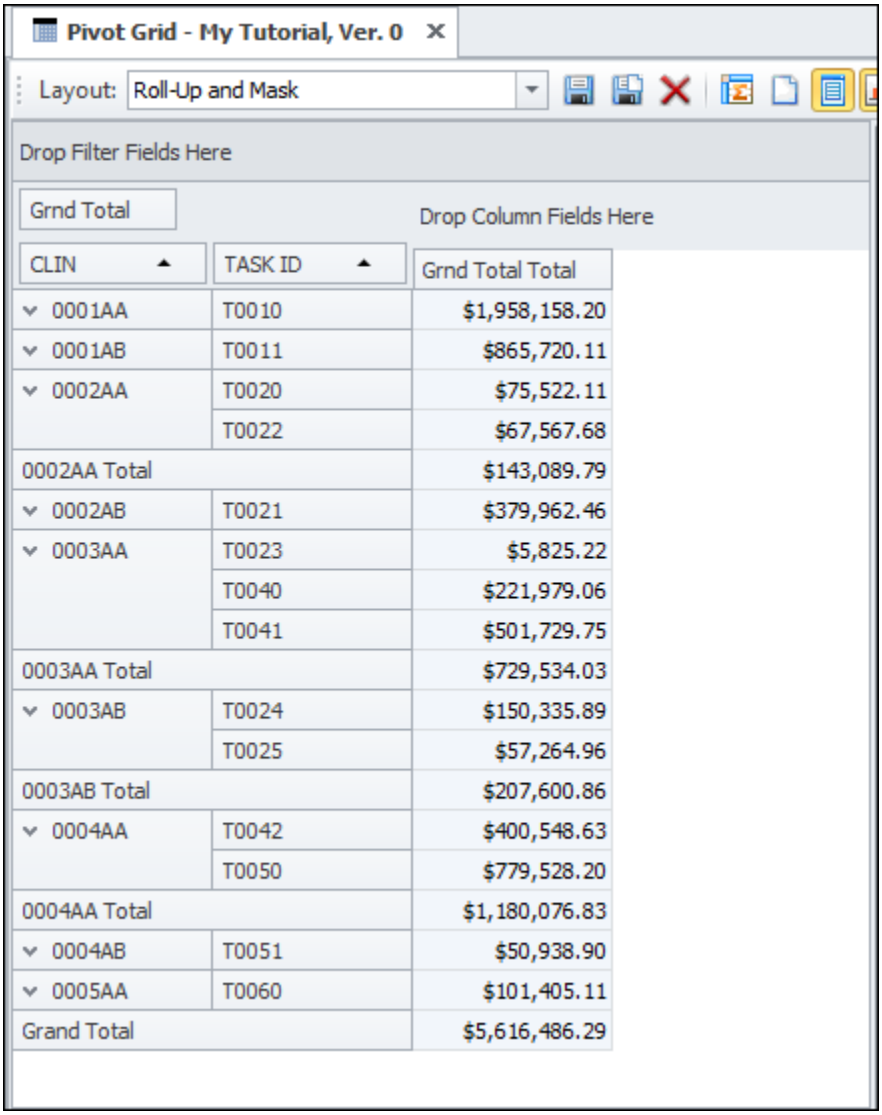
3. The resulting names are compared, and the matching elements are added together in a new level.

4. The last *n* characters of the names are removed again.

5. The resulting names are compared, and the matching elements are added together in a new level.

6. The roll-up process ends when the number of characters in all the names is smaller than the size of the step.

We ran the Summary Ad Hoc Report for summary field **CLIN** with a step size of **2**. The sort order is **Alphabetic**. The following data was used:



CLIN	TASK ID	Grnd Total Total
0001AA	T0010	$1,958,158.20
0001AB	T0011	$865,720.11
0002AA	T0020	$75,522.11
	T0022	$67,567.68
0002AA Total		$143,089.79
0002AB	T0021	$379,962.46
0003AA	T0023	$5,825.22
	T0040	$221,979.06
	T0041	$501,729.75
0003AA Total		$729,534.03
0003AB	T0024	$150,335.89
	T0025	$57,264.96
0003AB Total		$207,600.86
0004AA	T0042	$400,548.63
	T0050	$779,528.20
0004AA Total		$1,180,076.83
0004AB	T0051	$50,938.90
0005AA	T0060	$101,405.11
Grand Total		$5,616,486.29

Notice that CLINs **0002AA**, **0003AA**, **0003AB**, and **0004AA** are assigned to more than one task.

The following screenshot shows the report.

CLIN	Grand Total Price	
00	5,616,486	
0001	2,823,878	
0001AA	1,958,158	
0001AB	865,720	
0002	523,052	
0002AA	143,090	The sum of tasks T0020 and T0022.
0002AB	379,962	
0003	937,135	
0003AA	729,534	The sum of tasks T0023, T0040, and T0041
0003AB	207,601	The sum of tasks T0024 and T0025.
0004	1,231,016	
0004AA	1,180,077	The sum of tasks T0042 and T0050.
0004AB	50,939	
0005	101,405	
0005AA	101,405	
TOTALS	5,616,486	

The first thing ProPricer did was to add the costs of all tasks with the same CLIN. Then it removed the last two characters **AA** and **AB** from all elements. This created a new level of **0001**, which is the sum of **0001AA** and **0001AB**. Then it removed the last two characters from **0001**. This created a new level of **00**, which is the sum of **0001**, **0002**, **0003**, **0004**, and **0005**.

Hierarchical Roll-Up

Title Tables and summary field value lists can establish parent-child relationships among the elements in a summary field. This allows you to report proposal data based on the hierarchy you set up in a table or list. With a hierarchy in place, you can name the values anything and still roll data up in a logical way (for example, 1.2.1 could roll up to ABC). When you select the **Hierarchical Mask/Roll-Up** option for a report, all children will be summarized to their parent defined in the summary field's Title Table or value list.

We created the following Title Table to use with the Summary Ad Hoc Report. It is based on the summary field **CLIN**, has a step size of **2**, and an **Alphabetic** sort order.

Title Table - CLIN

Element	Description	Parent
00	Proposal Effort	
0001	Management	00
0001AA	Program Office	0001
0001AB	Program Office Support	0001
0002	Engineering	00
0002AA	Design Prototype	0002
0002AB	Build Prototype	0002
0003	Production	00
0003AA	Quality Control	0003
0003AB	Testing	0003
0004	Materials	00
0004AA	Tooling & Rework	0004
0004AB	Shipping & Receiving	0004
0005	Deliverables	00
0005AA	Deliverables	0005

Record 1 of 15

We assigned the Title Table to summary field **CLIN** and ran the Summary Ad Hoc Report without selecting the **Hierarchical Mask/Roll-Up** nor **Perform Roll-Up** checkboxes. The report shows the costs for each CLIN. Notice we were able to print the descriptions entered for the CLINs in the Title Table.

CLIN	Description	Grand Total Price
0001AA	Program Office	1,958,158
0001AB	Program Office Support	865,720
0002AA	Design Prototype	143,090
0002AB	Build Prototype	379,962
0003AA	Quality Control	729,534
0003AB	Testing	207,601
0004AA	Tooling & Rework	1,180,077
0004AB	Shipping & Receiving	50,939
0005AA	Deliverables	101,405
TOTALS		5,616,486

We ran the report again, but this time we selected the **Hierarchical Mask/Roll-Up** and **Perform Roll-Up** checkboxes.

CLIN	Description	Grand Total Price
00	Proposal Effort	5,616,486
0001	Management	2,823,878
0001AA	Program Office	1,958,158
0001AB	Program Office Support	865,720
0002	Engineering	523,052
0002AA	Design Prototype	143,090
0002AB	Build Prototype	379,962
0003	Production	937,135
0003AA	Quality Control	729,534
0003AB	Testing	207,601
0004	Materials	1,231,016
0004AA	Tooling & Rework	1,180,077
0004AB	Shipping & Receiving	50,939
0005	Deliverables	101,405
0005AA	Deliverables	101,405
TOTALS		5,616,486

Mask

Mask acts as a filter to group and summarize similar summary field elements. It allows you to report data at a different level from how it was entered in the proposal by summarizing lower levels into higher levels. The number that you enter is used as the number of characters in the summary field elements that will be summarized together. Mask groups the elements from left to right, and like the Roll-Up feature, Mask has two cases: Character Mask and Hierarchical Mask.

Character Mask

In the case of Character Mask, the hierarchical structure is based on the characters in the selected summary field. A simple Character Mask shows the number of characters of every element that will be used for the particular report. When a mask is applied, the first *n* characters of all elements are compared moving from left to right, and the elements with matching characters are put together in new elements. The report lists only the resulting (new) elements.

The following screenshot is of the Summary Ad Hoc Report generated with the WBS summary field without a mask.

WBS	Description	Grand Total Price
1.1.1	Program Office	1,958,158
1.1.2	Program Office Support	865,720
1.2.1	Design System	75,522
1.2.2	Test System	67,568
1.2.3	Enhance System	5,825
1.2.4	Evaluation	207,601
1.2.5	Quality Control	501,730
1.3.1	Build Prototype	379,962
1.3.2	Production	221,979
1.3.3	Tooling & Rework	400,549
1.4.2	Materials	779,528
1.4.3	Shipping & Receiving	50,939
1.5.1	Deliverables	101,405
TOTALS		5,616,486

We ran the Summary Ad Hoc Report again, but this time entered a mask of **2**. The first two characters of the WBS elements are compared. WBS **1.1.1** and **1.1.2** are combined in **1.1**. WBS **1.2.1**, **1.2.2**, **1.2.3**, **1.2.4**, and **1.2.5** are combined in **1.2**, and so on.

WBS	Description	Grand Total Price
1.1	Management	2,823,878
1.2	Engineering	858,246
1.3	Manufacturing	1,002,490
1.4	Materials & Subs	830,467
1.5	Deliverables	101,405
TOTALS		5,616,486

Hierarchical Mask

Hierarchical Mask is available only when a Title Table or summary field value list has an established hierarchy. Mask refers to the different levels defined by the parent-child relationships of the elements, and it determines which level will be displayed on the report. If you have a mask of *n*, where *n* is a number between 0 and 255, the report will summarize the elements to that level.

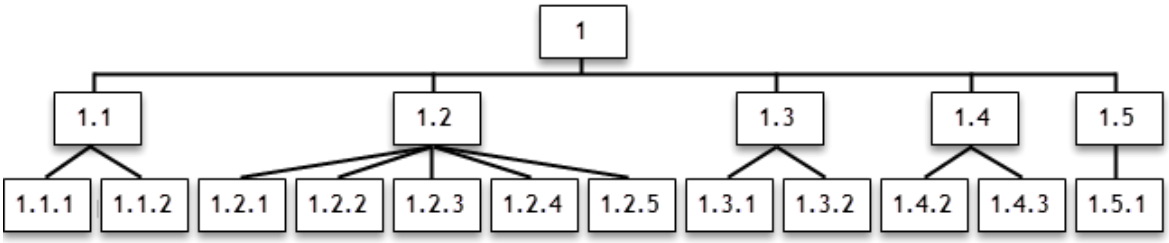
The following Title Table was built for the WBS elements in the proposal. There are three levels.

Title Table - WBS

Element	Description	Parent
1	Total Program	
1.1	Management	1
1.1.1	Program Office	1.1
1.1.2	Program Office Support	1.1
1.2	Engineering	1
1.2.1	Design System	1.2
1.2.2	Test System	1.2
1.2.3	Enhance System	1.2
1.2.4	Evaluation	1.2
1.2.5	Quality Control	1.2
1.3	Manufacturing	1
1.3.1	Build Prototype	1.3
1.3.2	Production	1.3
1.3.3	Tooling & Rework	1.3
1.4	Materials & Subs	1
1.4.2	Materials	1.4
1.4.3	Shipping & Receiving	1.4
1.5	Deliverables	1
1.5.1	Deliverables	1.5

Record 1 of 19

The diagram below shows an alternate view of the Title Table. The links between the elements show the parent-child relationships.



We assigned the Title Table to the **WBS** summary field and then ran the Summary Ad Hoc Report. We selected the **Hierarchical Mask/Roll-Up** checkbox and entered a Report Level Mask of **1**. The report only shows the element on level

one. Notice we were able to print the descriptions of the WBS elements in the Title Table.

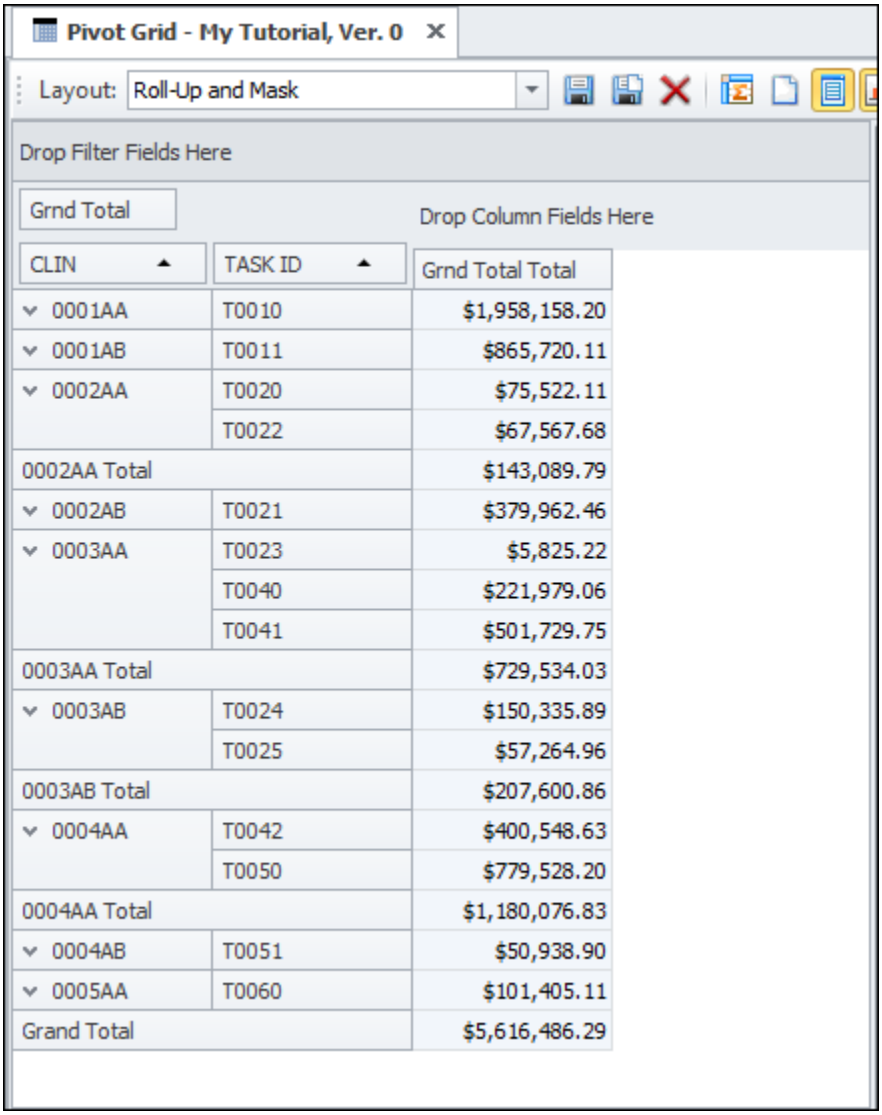
WBS	Description	Grand Total Price
1	Total Program	5,616,486
TOTALS		5,616,486

We ran the report again, but this time entered a Report Level Mask of **3**. The report shows the elements on level three.

WBS	Description	Grand Total Price
1.1.1	Program Office	1,958,158
1.1.2	Program Office Support	865,720
1.2.1	Design System	75,522
1.2.2	Test System	67,568
1.2.3	Enhance System	5,825
1.2.4	Evaluation	207,601
1.2.5	Quality Control	501,730
1.3.1	Build Prototype	379,962
1.3.2	Production	221,979
1.3.3	Tooling & Rework	400,549
1.4.2	Materials	779,528
1.4.3	Shipping & Receiving	50,939
1.5.1	Deliverables	101,405
TOTALS		5,616,486

If you use both roll-up and mask, then the mask will be applied first, and the resulting elements will be rolled up.

We used the following information to run the Summary Ad Hoc Report.



CLIN	TASK ID	Grnd Total Total
0001AA	T0010	$1,958,158.20
0001AB	T0011	$865,720.11
0002AA	T0020	$75,522.11
	T0022	$67,567.68
0002AA Total		$143,089.79
0002AB	T0021	$379,962.46
0003AA	T0023	$5,825.22
	T0040	$221,979.06
	T0041	$501,729.75
0003AA Total		$729,534.03
0003AB	T0024	$150,335.89
	T0025	$57,264.96
0003AB Total		$207,600.86
0004AA	T0042	$400,548.63
	T0050	$779,528.20
0004AA Total		$1,180,076.83
0004AB	T0051	$50,938.90
0005AA	T0060	$101,405.11
Grand Total		$5,616,486.29

The report was generated with summary field **CLIN**, a Report Level Mask of **4**, and a Roll-Up Step Size of **3**. The elements were summarized first to the four characters: **0001**, **0002**, **0003**, **0004**, and **0005**, which were then rolled up to **0**.

CLIN	Description	Grand Total Price
0		5,616,486
0001	Management	2,823,878
0002	Engineering	523,052
0003	Production	937,135
0004	Materials	1,231,016
0005	Deliverables	101,405
TOTALS		5,616,486

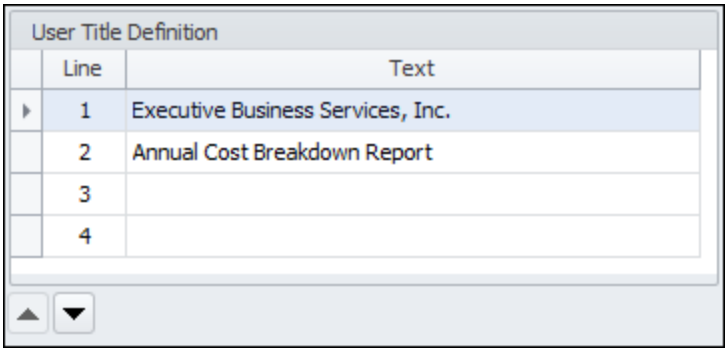
We ran the report again, but this time we used the **CLIN** Title Table described above. We selected the **Hierarchical Mask/Roll-Up** and **Perform Roll-Up** checkboxes and entered a Report Level Mask of **2**. The elements were summarized first to the level II elements of the Title Table: **0001**, **0002**, **0003**, **0004**, and **0005**, which were then rolled up to their parent **00** in the Title Table. Notice we were able to print the descriptions entered for the CLINs in the Title Table.

CLIN	Description	Grand Total Price
00	Proposal Effort	5,616,486
0001	Management	2,823,878
0002	Engineering	523,052
0003	Production	937,135
0004	Materials	1,231,016
0005	Deliverables	101,405
TOTALS		5,616,486

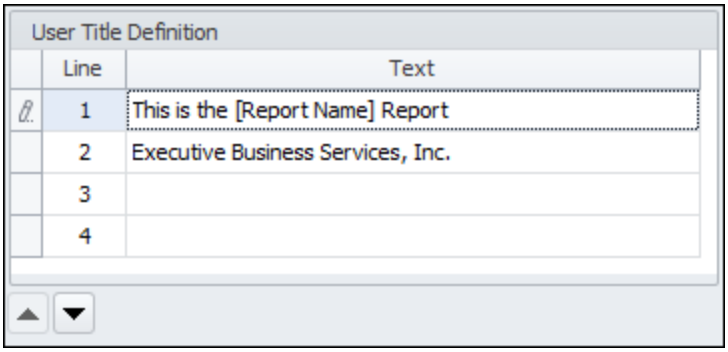
User Title Definition

The User Title Definition shows the text that will appear in the header of the report. It consists of four lines. By default the first two lines show the text entered on the **Title Definitions** page in the **Reports** folder in **Proposal Properties** for reports that show proposal data and the text entered on the **Title Definitions** page of **Report Defaults** for reports that show only global data. You can enter up to 255 characters per line.

There are two variables available in the User Title Definition: [Company Name] and [Report Name]. These variables tell ProPricer to print the name of your company and the name of the report, respectively. By default, these variables occupy lines 1 and 2. The default User Title Definition looks like this in the **Report Options** grid:



The variables can be used by themselves or with text you enter. To insert a variable, right-click the position you want the text to appear, point to **Insert Variable** and then click the variable.



In this example we used the arrow buttons to move the [Company Name] variable to line 2, and added the text "This is the" before the [Report Name] variable in line 1. When we remove the focus from line 1, the User Title Definition will look like this:

Line	Text
1	This is the Annual Cost Breakdown Report
2	Executive Business Services, Inc.
3	
4	

To run the report with the default User Title Definition, click the **Restore Defaults** button.

Report List

On the **Reports** ribbon, click **Report List** to see all the available reports.

The Report List is where you choose the report you want to run. Since it is in a grid format, you can sort the reports by clicking the columns or using the AutoFilter Row feature. The Report List contains the following elements:

Name

This column shows the name of the report.

Description

This column shows a brief description of the report.

Category

This column shows the category to which the report belongs.

Type

This column indicates if the report is a standard report or a batch report.

Source

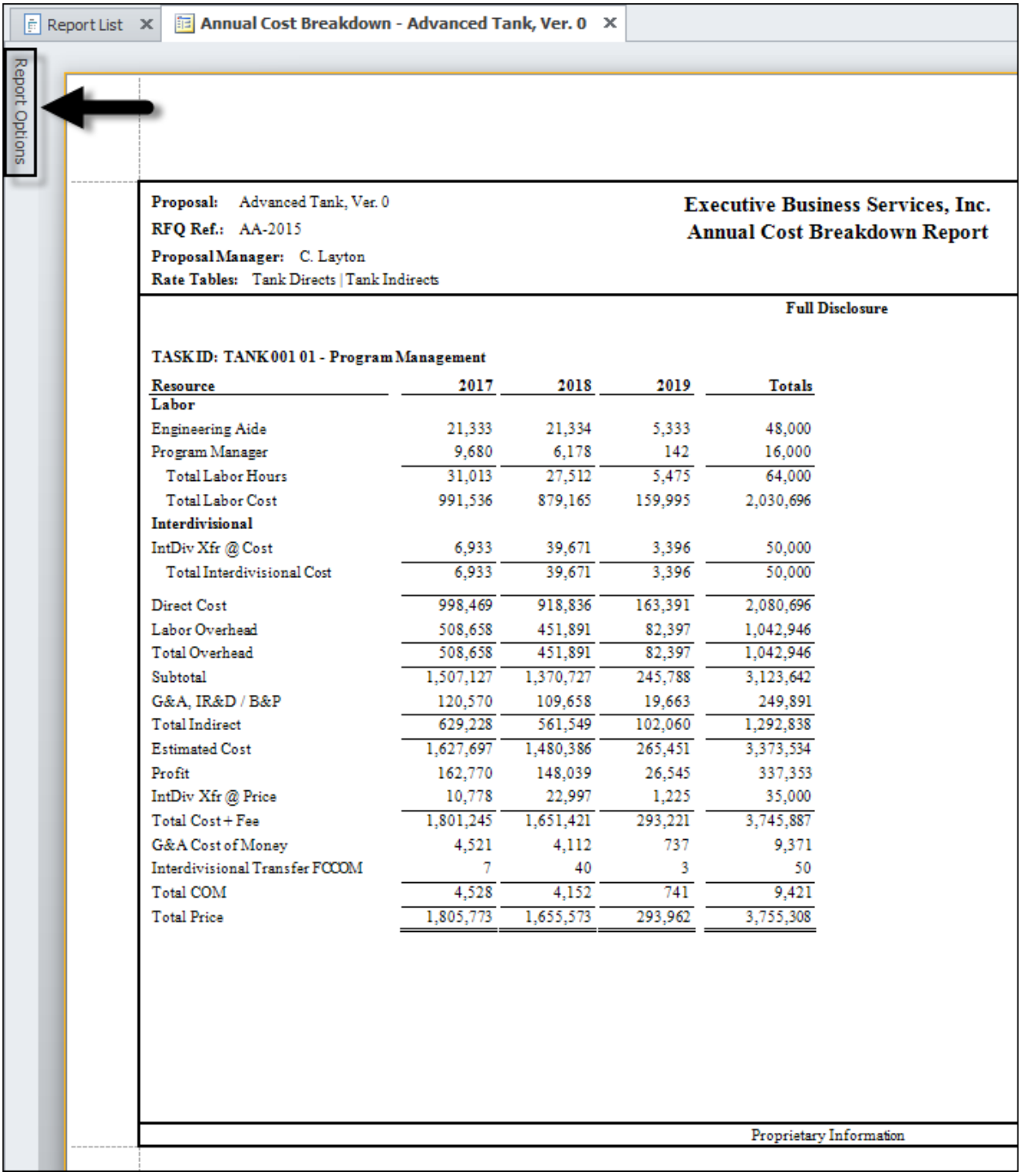
This column indicates if the report is a system or custom report.

Run

Click to generate the report selected.

Report Options Tab

The **Report Options** tab will appear and then hide automatically once you print a report to your screen. It will appear to the left of the report.



Proposal: Advanced Tank, Ver. 0
RFQ Ref.: AA-2015
Proposal Manager: C. Layton
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Breakdown Report

Full Disclosure

TASK ID: TANK 001 01 - Program Management

Resource	2017	2018	2019	Totals
Labor				
Engineering Aide	21,333	21,334	5,333	48,000
Program Manager	9,680	6,178	142	16,000
Total Labor Hours	31,013	27,512	5,475	64,000
Total Labor Cost	991,536	879,165	159,995	2,030,696
Interdivisional				
IntDiv Xfr @ Cost	6,933	39,671	3,396	50,000
Total Interdivisional Cost	6,933	39,671	3,396	50,000
Direct Cost	998,469	918,836	163,391	2,080,696
Labor Overhead	508,658	451,891	82,397	1,042,946
Total Overhead	508,658	451,891	82,397	1,042,946
Subtotal	1,507,127	1,370,727	245,788	3,123,642
G&A, IR&D / B&P	120,570	109,658	19,663	249,891
Total Indirect	629,228	561,549	102,060	1,292,838
Estimated Cost	1,627,697	1,480,386	265,451	3,373,534
Profit	162,770	148,039	26,545	337,353
IntDiv Xfr @ Price	10,778	22,997	1,225	35,000
Total Cost + Fee	1,801,245	1,651,421	293,221	3,745,887
G&A Cost of Money	4,521	4,112	737	9,371
Interdivisional Transfer FCCOM	7	40	3	50
Total COM	4,528	4,152	741	9,421
Total Price	1,805,773	1,655,573	293,962	3,755,308

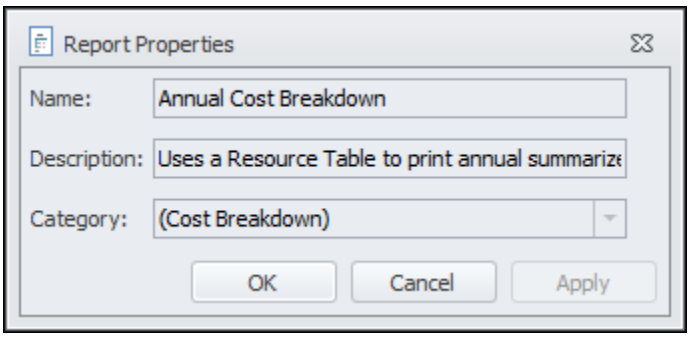
Proprietary Information

Click the tab to display the options. The tab has an AutoHide pin, which allows you to hide the it when you move the cursor to another area. The pin is located in the top right corner. If the pin is in the horizontal position, AutoHide is enabled. If the pin is in the vertical position, the tab will not hide when you move the cursor to another area. When AutoHide is not enabled you can dock the tab to the area of your choice.

If you change any of the report options, you will need to print the report to your screen again.

Report Properties Dialog Box

The **Report Properties** dialog box shows the general information of a report. It is also where you enter the general information of a custom report. It contains the following elements:



Name

Enter a name for the report or change the name of an existing custom report.

Description

Enter a description for the report or change an existing description.

Category

Select the category to which you want to add the report.

OK

Saves the changes and closes the dialog box.

Cancel

Closes the dialog box without saving the changes.

Apply

Saves the changes without closing the dialog box.

Reporting Proposal Data without Access to Cost Information

Revoking a user's right to see cost information affects many areas in ProPricer, and reports are no exception. The cost information a report prints is regulated by the user's Access Rights. There are two scenarios regarding access to cost information to consider:

- A user can see direct costs. In this scenario, he will be able to run/preview/print any report that shows direct and indirect cost information.
- A user cannot see direct costs. In this scenario, he will not be able to run a report that shows cost information unless the report offers Disclosure Formats: Direct Input Only or Hours Only.

We ran the Annual Cost Breakdown Report two times to illustrate the effects of hiding cost information. The first time we ran the report ran with access to direct cost information. The report shows both direct costs and indirect costs.

Proposal: My Tutorial, Ver. 0
RFQ Ref.: DCAA-000-000
Proposal Manager: Joe Shurance
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Breakdown Report

Full Disclosure

TASK ID: T0010 - Program Office

Resource	2012	2013	2014	2015	Totals
Labor					
ENG01	125	375	375	125	1,000
PRGMGR	3,060	3,060	3,060	3,060	12,240
SUPV	319	343	344	318	1,324
Total Labor Hours	3,504	3,778	3,779	3,503	14,564
Total Labor Cost	145,406	161,756	168,135	169,169	644,465
Travel					
TRAVEL	963				963
Total Travel Cost	963				963
Direct Cost	146,369	161,756	168,135	169,169	645,428
Overhead	203,568	226,458	235,388	236,836	902,251
Subtotal	349,937	388,215	403,523	406,005	1,547,679
General & Admin	52,491	58,232	60,528	60,901	232,152
Total Cost	402,427	446,447	464,051	466,906	1,779,831
Profit/Fee	40,247	44,645	46,405	46,691	177,987
Total Cost + Fee	442,674	491,091	510,456	513,596	1,957,818
Total COM	85	94	98	98	374
Grand Total Price	442,759	491,185	510,554	513,694	1,958,193

The second time we ran the report without access to any cost information. The report shows only hours.

Proposal: My Tutorial, Ver. 0
RFQ Ref.: DCAA-000-000
Proposal Manager: Joe Shurance
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Breakdown Report

Direct Input Only

TASK ID: T0010 - Program Office

Resource	2012	2013	2014	2015	Totals
Labor					
ENG01	125	375	375	125	1,000
PRGMGR	3,060	3,060	3,060	3,060	12,240
SUPV	319	343	344	318	1,324
Total Labor Hours	3,504	3,778	3,779	3,503	14,564
Travel					
TRAVEL	963				963

Resource Tables

Resource Tables help you customize your reports by defining the layout and format of the task resources. They allow you to:

- Group resources by Type, Class, Indirect Pool, Rate Band, Resource, Source Type, Resource Fields, or any combination of these groups.
- Select which resource you want to include in the report.
- Create custom groups within existing groups and combine any number of elements in them.
- Print all resources from a specific group as a single entry.
- Choose the order of the elements.
- Insert subtotals and totals in the report.
- Select display options for the totals.

There are two types of Resource Tables: System and User. System Resource Tables are predefined in ProPricer, while User Resource Tables are ones that you create. The System Resource Tables include:

- By Class
- By Indirect Pool
- By Resource
- By Source Type
- By Type (default)
- By Type, Indirect Pool
- By Type, Class
- By Type, Summarized Non-Labor

Note: A user's role has permissions that control the ability to view and use resource tables in reports.

Copy a Resource Table

1. On the **Reports** ribbon, in the **Tools** group, click **Resource Tables**.
2. Right-click the Resource Table you want to copy, and then click **Copy** on the shortcut menu.
3. Enter a name for the copy that will be created.
4. *(Optional)* Enter, edit, or delete the description.
5. Click **OK**.

Create a Resource Table

1. Click the **Reports** ribbon, and then **Resource Tables** in the **Tools** group.
2. Enter a name of up to 30 characters in the **Name** field.
3. *(Optional)* Enter a description.
4. In the **Grouping** section, right-click **Levels** and point to **Add Group** to select a group to include in your report. When selected, a subfolder with the group name is added to the **Levels** folder.
5. Repeat step 4 to add as many groups as you want. Every new group is positioned immediately below the group that was last added.
6. To insert a custom group, expand the group folder to display the elements in that group. Right-click a group element and click **Insert Custom Group,** or click on the toolbar in the **Grouping** section.
7. Insert elements in the (custom) group folder(s).
8. Select the report options in the three areas of the **Properties** section for the groups, including any custom groups, and for the group elements.
9. *(Optional)* Change the position of the groups and the group elements.
10. Press **Ctrl**+**S** or move to another row to save the Resource Table.

Note: To insert a group in a specific position, right-click the group above which you want to insert the group and select the group to be inserted.

Delete a Resource Table

1. Click the **Reports** ribbon, and then **Resource Tables** in the **Tools** group.
2. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

Note: You can only delete a Resource Table whose Type is User.

Edit a Resource Table

1. Click the **Reports** ribbon, and then **Resource Tables** in the **Tools** group.
2. Select the table you want to edit.
3. To add a new group, right-click **Levels** in the **Grouping** section, point to **Insert Group**, and select the group to be inserted.
4. To delete an existing group, right-click the group name and click **Delete Group**.
5. To add a custom group, right-click a group element and click **Insert Custom Group**.
6. To delete a custom group, right-click the custom group and click **Delete Custom Group**.
7. To edit the properties of a group, group element, or custom group, select it in the **Grouping** section and make the changes in the **Properties** section.
8. Press **Ctrl**+**S** or move to another row to save the Resource Table.

Note: System Resource Tables cannot be edited.

Resource Table Subtotals

When defining the format of a report using a Resource Table, you can select the manner in which ProPricer displays totals on your report. There are four types of subtotals to select from in the **Resource Table** dialog box for a group or a group element: None, Cost Only, Auto, and Auto/Heads.

The examples that follow show the differences in the totals displayed using the various types of subtotals. They are taken from an Annual Cost Breakdown Report generated with the summary element *TASK ID*, **Print Resource Rates** selected, and the Resource Table (*By Type*). We ran the report four times, changing the **Subtotal Type** field for the Group *Type*.

This screenshot shows the report generated with Subtotal Type *None*. Totals are not calculated for any of the resource types.

Proposal: My Tutorial, Ver. 0
RFQ Ref.: DCAA-000-000
Proposal Manager: Joe Shurance
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Breakdown Report
Subtotal Type = None

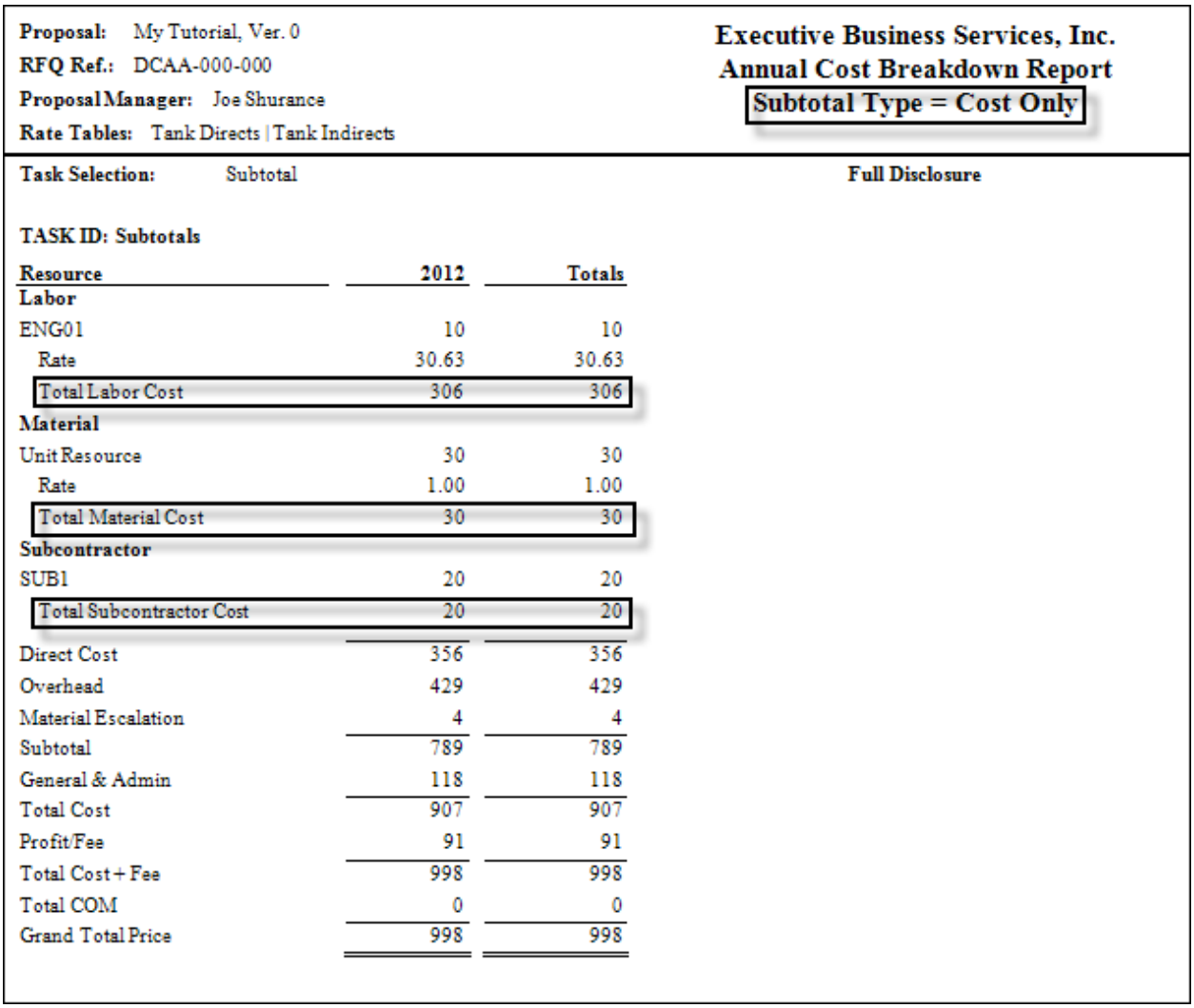
Task Selection: Subtotal

Full Disclosure

TASK ID: Subtotals

Resource	2012	Totals
Labor		
ENG01	10	10
Rate	30.63	30.63
Material		
Unit Resource	30	30
Rate	1.00	1.00
Subcontractor		
SUB1	20	20
Direct Cost	356	356
Overhead	429	429
Material Escalation	4	4
Subtotal	789	789
General & Admin	118	118
Total Cost	907	907
Profit/Fee	91	91
Total Cost + Fee	998	998
Total COM	0	0
Grand Total Price	998	998

This screenshot shows the report generated with Subtotal Type *Cost Only*. Cost totals are calculated for all resources regardless of their rate type.



Proposal: My Tutorial, Ver. 0
RFQ Ref.: DCAA-000-000
Proposal Manager: Joe Shurance
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Breakdown Report
Subtotal Type = Cost Only

Task Selection: Subtotal

Full Disclosure

TASK ID: Subtotals

Resource	2012	Totals
Labor		
ENG01	10	10
Rate	30.63	30.63
Total Labor Cost	306	306
Material		
Unit Resource	30	30
Rate	1.00	1.00
Total Material Cost	30	30
Subcontractor		
SUB1	20	20
Total Subcontractor Cost	20	20
Direct Cost	356	356
Overhead	429	429
Material Escalation	4	4
Subtotal	789	789
General & Admin	118	118
Total Cost	907	907
Profit/Fee	91	91
Total Cost + Fee	998	998
Total COM	0	0
Grand Total Price	998	998

This screenshot shows the report generated with Subtotal Type *Auto*. Cost totals are calculated for all resource types, as well as Total Labor Hours for ENG01 and Total Material Units for Unit Resource. This information does not print for SUB1, because its rate type is *Cost*.

Proposal: My Tutorial, Ver. 0
RFQ Ref.: DCAA-000-000
Proposal Manager: Joe Shurance
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Breakdown Report
Subtotal Type = Auto

Task Selection: Subtotal

Full Disclosure

TASK ID: Subtotals

Resource	2012	Totals
Labor		
ENG01	10	10
Rate	30.63	30.63
Total Labor Hours	10	10
Total Labor Cost	306	306
Material		
Unit Resource	30	30
Rate	1.00	1.00
Total Material Units	30	30
Total Material Cost	30	30
Subcontractor		
SUB1	20	20
Total Subcontractor Cost	20	20
Direct Cost	356	356
Overhead	429	429
Material Escalation	4	4
Subtotal	789	789
General & Admin	118	118
Total Cost	907	907
Profit/Fee	91	91
Total Cost + Fee	998	998
Total COM	0	0
Grand Total Price	998	998

This screenshot shows the report generated with Subtotal Type *Auto/Heads*. It is identical to the previous example with the addition of an equivalent heads total. This is a very easy way to view the decimal fraction of hours occupied per accounting month for resources with rate type *Hours*.

Proposal: My Tutorial, Ver. 0
RFQ Ref.: DCAA-000-000
Proposal Manager: Joe Shurance
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Breakdown Report
Subtotal Type = Auto/Heads

Task Selection: Subtotal

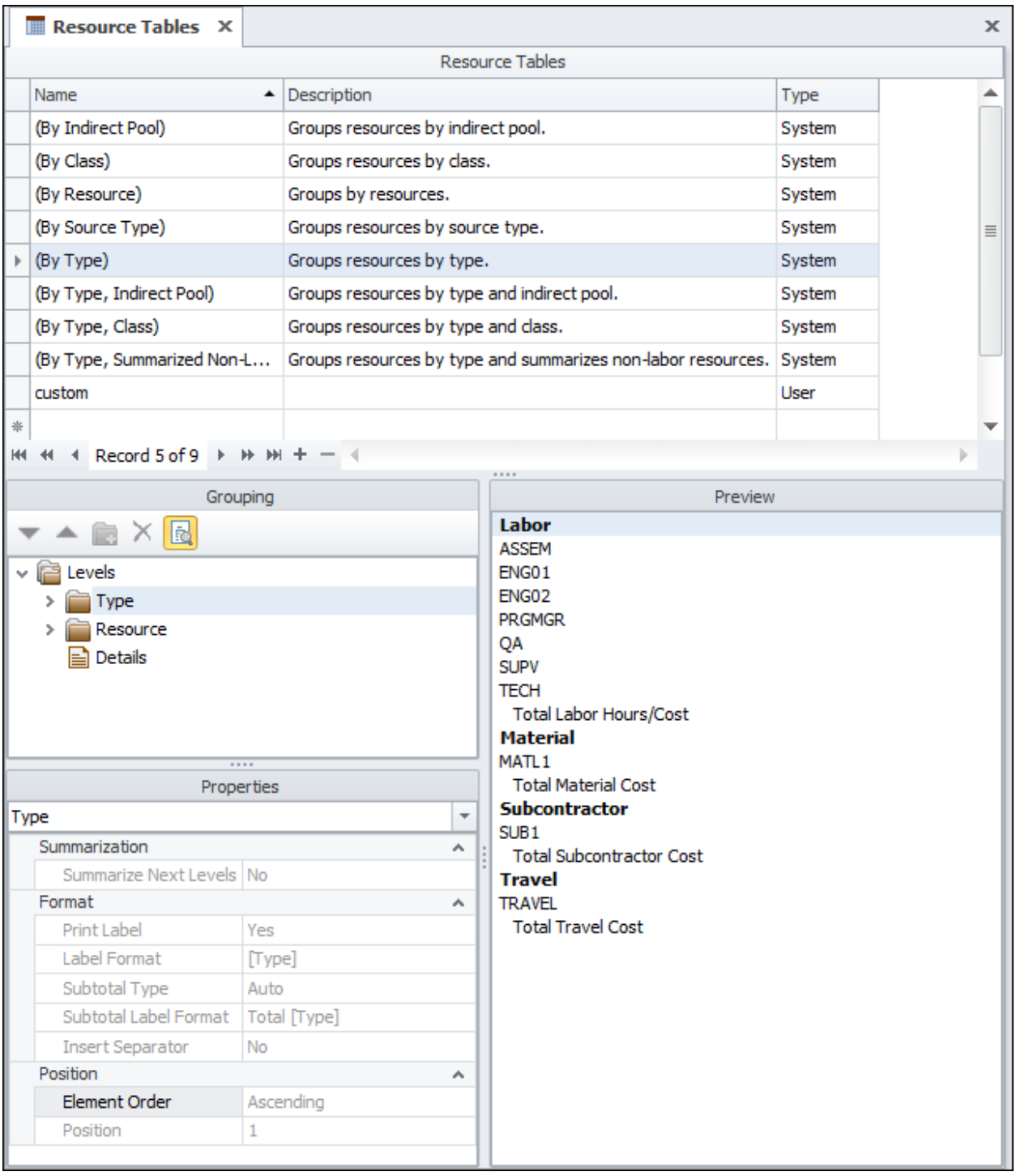
Full Disclosure

TASK ID: Subtotals

Resource	2012	Totals
Labor		
ENG01	10	10
Rate	30.63	30.63
Total Labor Hours	10	10
Total Labor Cost	306	306
Equivalent Heads	0.063	0.063
Material		
Unit Resource	30	30
Rate	1.00	1.00
Total Material Units	30	30
Total Material Cost	30	30
Subcontractor		
SUB1	20	20
Total Subcontractor Cost	20	20
Direct Cost	356	356
Overhead	429	429
Material Escalation	4	4
Subtotal	789	789
General & Admin	118	118
Total Cost	907	907
Profit/Fee	91	91
Total Cost + Fee	998	998
Total COM	0	0
Grand Total Price	998	998

Resource Table Maintenance

ProPricer allows you to customize your reports using Resource Tables. These tables allow you to group resources, choose summary options and sort order, add labels, define the format, and specify the totals and subtotals to be printed. You can create new Resource Tables, and edit, copy, or delete existing ones.



Resource Tables

This grid lists the Resource Tables.

Grouping

This section is where you select the groups to be used in the layout.

Properties

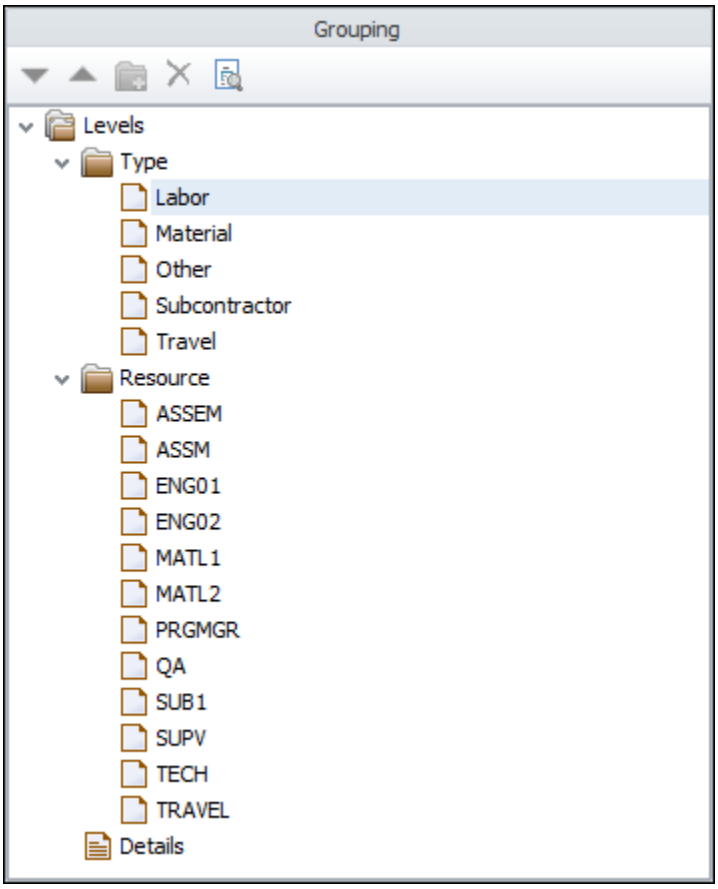
This section is where you select the options to be applied to each group and group element.

Preview

This section is where you view the results of your selections.

Resource Tables - Grouping Pane

The **Grouping** section displays the groups and the elements within the groups that will be included in your report. The resources can be grouped by Resource Type, Resource Class, Indirect Pool, Rate Band, Source Type, Resource Name, Resource Fields, or any combination of these elements.



You cannot add groups to System Resource Tables. To add a group to a User Resource Table, right-click the **Levels** folder, point to **Add Group** and select one from the groups available. When you select a group, it is placed as a subfolder of the **Levels** folder immediately below the last group selected. If you want to insert a group at a specific place in the list, right-click the group above which you want to position the new group, point to **Insert Group** and select the group to be inserted.

You can reposition a group within the groups, or reposition a group element within the group elements, in a number of different ways. After you select the group or group element that you want to move:

- Right-click the selection and click **Select**, move to the position where you want to put the group or group element, right-click and click **Move Before** or **Move After**.
- Use the mouse to drag and drop the selection in the position where you want it.
- Press **Ctrl** and the up or down arrow key on the keyboard to move the selection up or down within the list.
- Click the arrow keys on the **Grouping** toolbar to move the selection up or down within the list.
- Change the position number of the group or group element in the **Position** section of the **Properties** section to the position number to which you want to move the group or group element.

You can also reposition more than one group or group element at a time using either one of the first two options above. To select more than one group or group element that is nonadjacent, click a group or group element, press **Ctrl** and then click each additional group or group element to be included in the selection. To select adjacent groups or group elements, click the first group or group element in the sequence, press **Shift** and then click the last group or group element to be included in the selection. To remove a group or group element from the selection, press **Ctrl**, and then click the group or group element to be removed, or right-click the group or group element to be removed, and click **Deselect**.

To remove a group from a Resource Table, right-click the group and select **Delete Group**. Alternatively, select the group you want to remove and click ✕ on the **Grouping** toolbar or press the **Delete** key on the keyboard.

You can create custom groups with an indefinite number of elements. These groups are embedded within other groups and allow you to define a new level of detail for the reported data. To insert a custom group within a group, right-click any group element in

that group and select **Insert Custom Group**. Alternatively, click on the **Grouping** toolbar after selecting a group element. The custom group is placed immediately above the selected element and is given the name (custom).

There are a number of different ways to insert elements in a custom group. After you select the group element that you want to insert in the (custom) folder:

- Right-click the element, click **Select**, right-click the (custom) folder and select **Move Inside**
- Right-click the element, click **Select**, right-click an element already in the (custom) folder and select **Move Before** or **Move After**
- Use the mouse to drag and drop the selection in the (custom) folder.

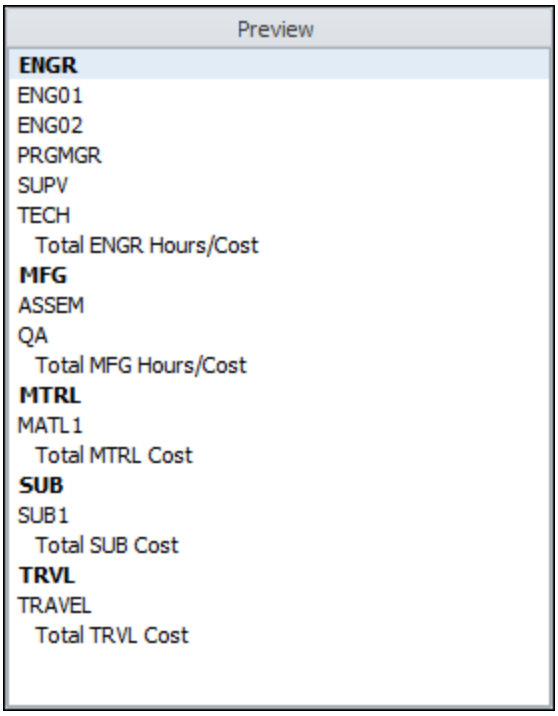
As with other groups, you can use the same methods to insert more than one group element at a time into a (custom) group or to remove an element from a (custom) folder.

An element named (empty) groups resources that are not assigned to a particular class, are not associated with a specific rate band or indirect pool, or do not have any entries in the selected resource field.

An element named (new) is created when the **Elements Order** field is changed to Manual. This allows you to choose the desired position for the resources, resource classes, indirect pools, rate bands, or resource fields created after the table properties were defined.

Resource Tables - Preview Pane

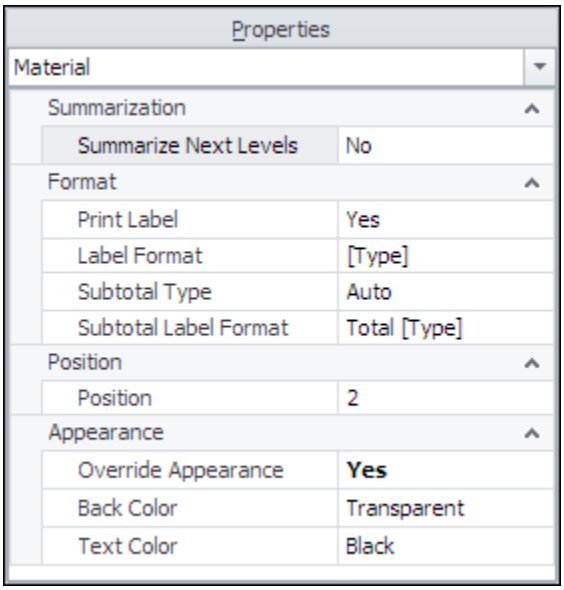
The **Preview** section allows you to view the results of your selections. Any changes you make in the **Grouping** and **Properties** will be applied to the data and shown here. Click the **Preview** button in the **Grouping** section to view your selections.



*Note: You cannot make changes directly in the **Preview** section.*

Resource Tables - Properties Pane

The **Properties** section shows the report options available for the group or group element selected in the **Grouping** section. In the **Properties** section, you can define various parameters and layout options. Any changes you make will appear in bold letters, indicating it is not the default program setting. If you want to restore the default setting, right-click the item, and then click **Reset** on the shortcut menu. This section is divided into four areas: **Summarization**, **Format**, **Position**, and **Appearance**.



*Note: The **Appearance** area is only available when a group element is selected in the **Grouping** section.*

Summarization

Summarize Next Levels

Select this option to summarize a group or a group element. This option allows you to summarize lower-level items into higher-level items. For example, if you group the proposal resources based on type and select the **Summarize Next Levels** option for the group, the report will summarize all resources of a given type

into a single resource named after that resource type instead of printing detailed information for each resource type. Example

Summarize Elements

Select to merge the resources of the custom group elements into the custom group. This option is available only when a custom group is selected in the **Grouping** section. Example

---

Format

Name Format and Description Format

The report will print only the names and descriptions of the resources assigned to the proposal. These options allow you to choose the combination of resource identification parameters that you want to print on the report. Right-click the field and click **Insert Variable** to select other resources to include in your report. For clarity, you can use a delimiter to separate the distinct elements. These options are available only when **Summarize Next Levels** or **Details** is selected.

Name

Enter a name for the custom group selected. This option is available only when a custom group is selected in the **Grouping** section.

Description

Enter a description for the custom group selected. This option is available only when a custom group is selected in the **Grouping** section.

Print Label

Select to print the name of the group or group element on the report. This option is not available when the **Summarize Next Levels** option is selected.

Label Format

Select the format of the group or group element label that will be printed on the report. Right-click the field, point to **Insert Variable** and select the option you want. Variables are surrounded by percent (%) symbols. This is available only when the **Print Label** option is selected.

Subtotal Type

Select the display format for the subtotal values you want to appear on the report from the following five options:

None

No total hours/cost values are printed on the report.

Hours/Cost

Both total hours and total cost values are shown below the reported elements.

Cost Only

Only total cost values are printed for the reported elements.

Auto

The total hours and/or total cost values are printed based on the rate type of the resource (hours, units, or cost) and on the format of the particular report. This is the default value for System Resource Tables.

Auto/Heads

Along with the total hours and/or total cost values, there is an addition total for equivalent heads.

Subtotal Label Format

Select the format you want for the label of the report subtotals. Right-click the **Subtotal Label Format** field, point to **Insert Variable**, and select the format.

Insert Separator

Select to insert a blank line below each reported group element. This option is only available when a group is selected in the **Grouping** section.

Position

Elements Order

Select the sort order for the group elements from the three available options: **Ascending**, **Descending**, and **Manual**. If you select **Ascending** or **Descending**, the elements are sorted in increasing or decreasing alphanumeric order, respectively. If you select **Manual**, an additional group element named *(new)* is added that allows you to choose the position for the resources, resource classes, indirect pools, rate bands, or resource fields created after the table properties were defined. This option is only available when a group is selected in the **Grouping** section.

*Note: If you reorder the group elements, the **Elements Order** automatically changes to **Manual**.*

Position

Enter the number of the position within the groups or group elements to which you want to move the group or the group element, respectively.

Appearance

Override Appearance

Select this option to customize the color scheme of a group element without altering the default appearance settings in the report layout.

Back Color

Select a background color for the group element.

Text Color

Select a text color for the group element.

Restore the Default Report Footer Text for a Proposal

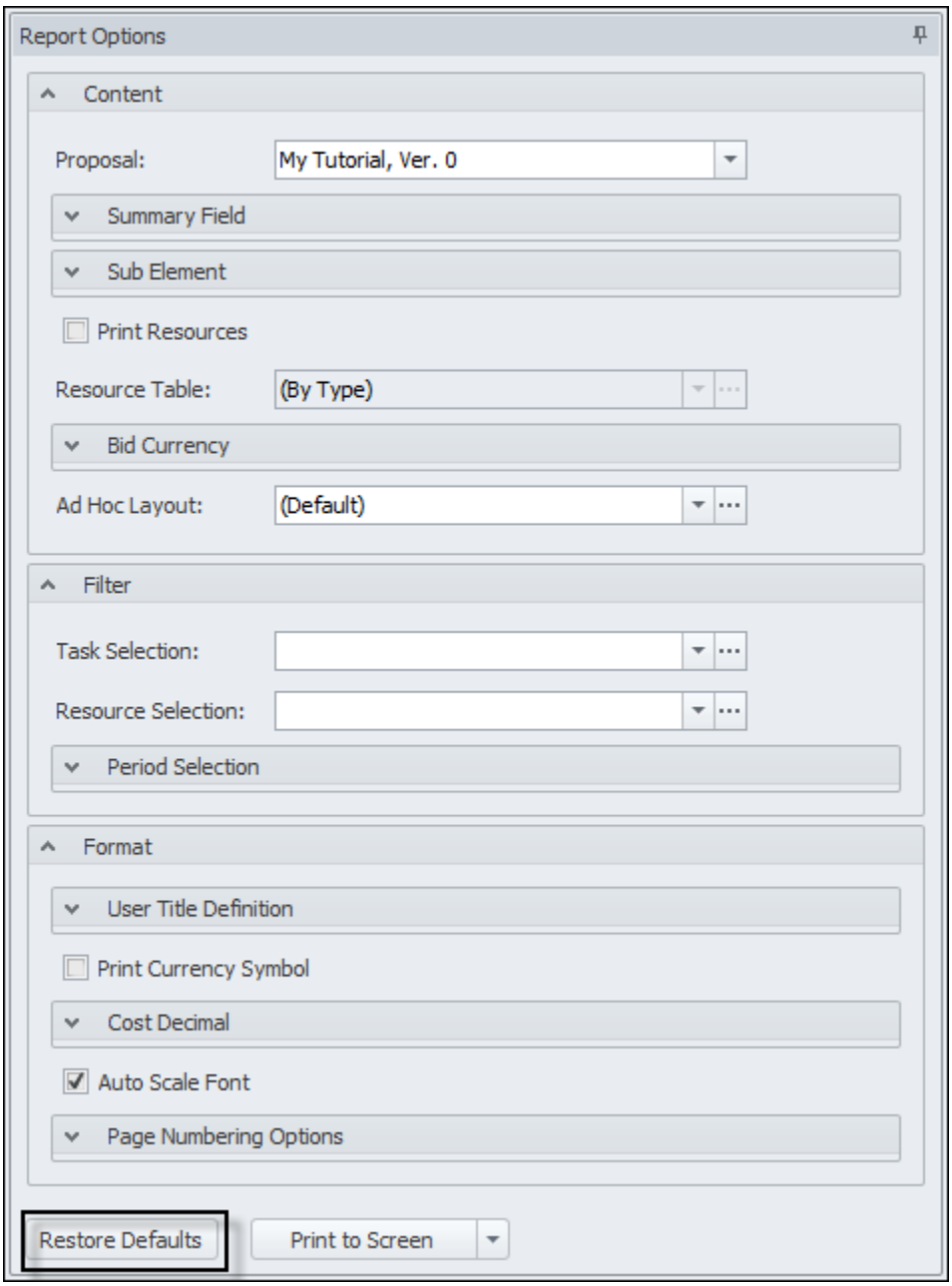
1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Footer** page in the **Reports** folder.
3. Click the **Restore Defaults** button.
4. Click **OK**.

Restore the Default Report Options

The first time you run a report, the options that appear are the system defaults. If you change an option and then run the report, your setting will remain the next time you run it. The Report Options always show the parameters used the last time the report was run. There are four different methods you can use to restore the options to the system defaults.

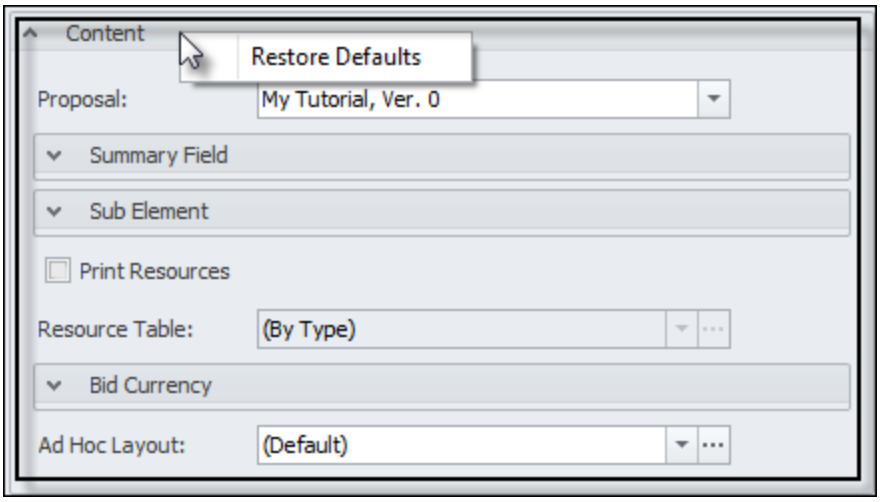
Method 1

Click the **Restore Defaults** button at the bottom. This restores all options.



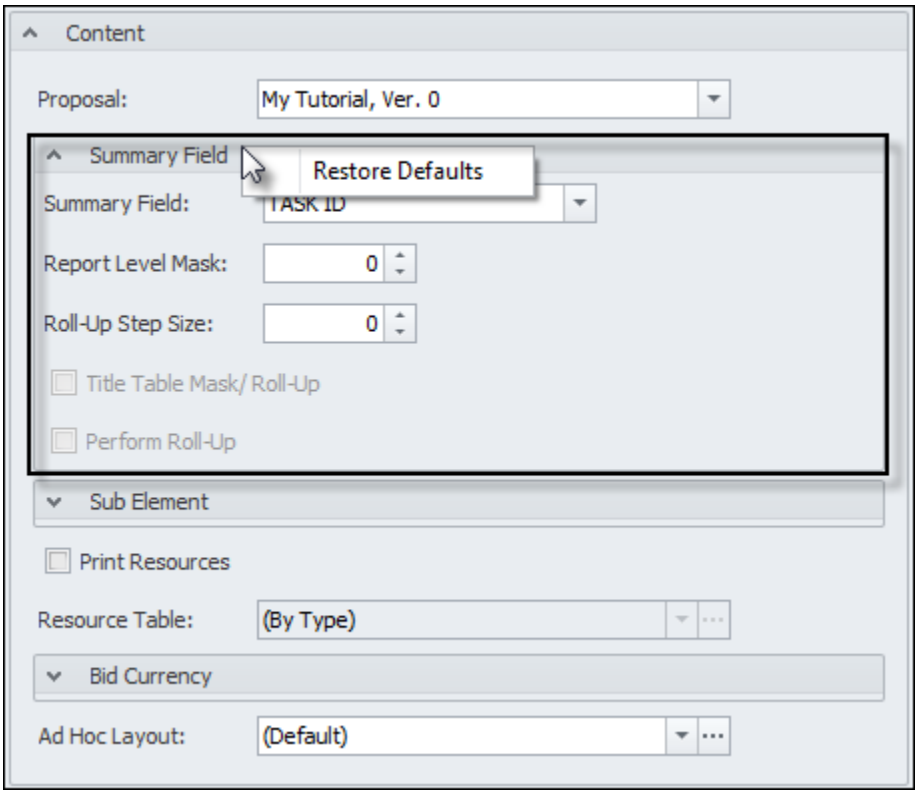
Method 2

Right-click the category, and then click **Restore Defaults**. This restores all options in that category.



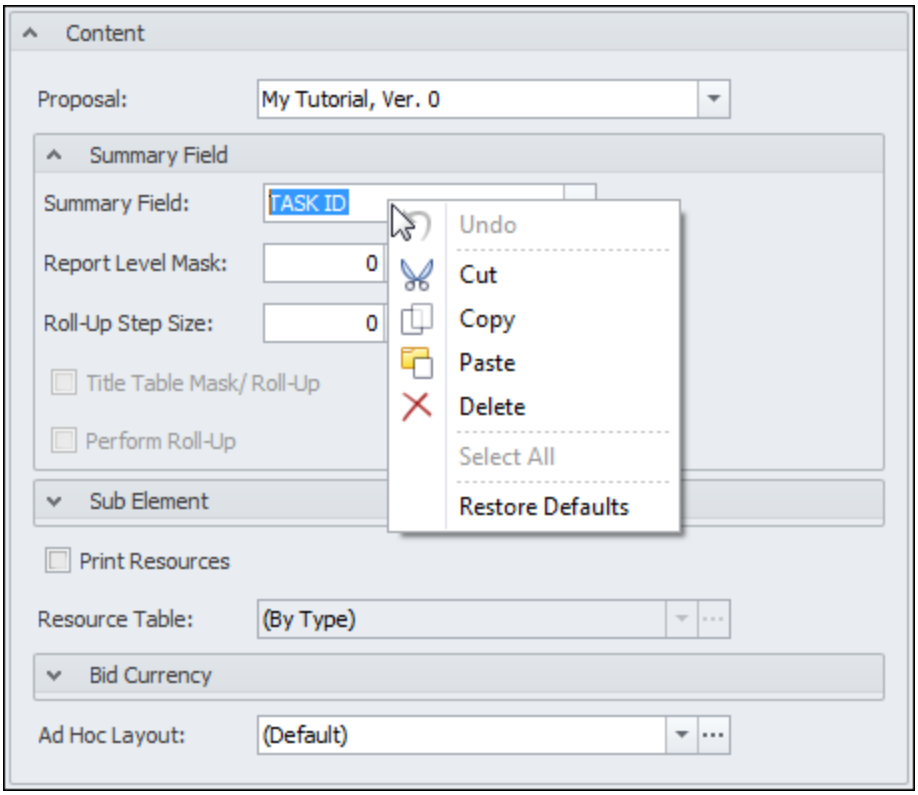
Method 3

Right-click a parameter, and then click **Restore Defaults**. This restores all options in that parameter.



Method 4

Right-click an option in a menu, and then click **Restore Defaults**. This restores the default option in that menu.



Restore the Default Standard Reports Title Definition for a Proposal

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Title Definitions** page in the **Reports** folder.
3. Right-click anywhere in the grid and then click **Restore Defaults**.
4. Click **OK**.

Restore the Default Worksheet Names

Default worksheet names are created when you select the **Print to File** option for a report and the **Export Full Pricing** checkbox is selected.

1. Click the **Setup** ribbon, and then **Report Defaults** in the **Preferences** group.
2. Click the **Worksheet Names** page.
3. Click the **Restore Defaults** button.
4. Click **OK**.

Run a Report

1. On the **Reports** ribbon, click **Report List**.
2. Do one of the following to open the report options:
   - Double-click anywhere in the row of the report.
   - Select the row of the report, and then press **Enter**.
   - Select the row of the report, and then click **Run** on the **Reports** ribbon.
3. Set the report options.
4. At the bottom of the report options, do one of the following to finish running the report:
   - Click **Print to Screen** to display the report on your screen.
   - Click the down arrow next to the **Print to Screen** button to use the **Print to Printer**, **Print to Word**, **Print to Excel**, and **Print to PDF** options.

Set the Report Footer Text

Report footer text is what will appear in the footer section of every report. There are two places you can set the footer text: Report Defaults and Proposal Properties. The footer text you enter in Report Defaults will be the default text for every new proposal you create. The footer text you enter in Proposal Properties is specific to that proposal, and overrides the text entered in Report Defaults.

Set the Default Report Footer Text

1. Click the **Setup** ribbon, and then **Report Defaults** in the **Preferences** group.
2. Click the **Footer** page.
3. Enter the text you want to appear in the footer of the reports.
4. Click **OK**.

Enter Report Footer Text for a Specific Proposal

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Footer** page in the **Reports** folder.
3. Enter the text you want to appear in the footer of the reports.
4. Click **OK**.

Set the Standard Reports Title Definition

The standard reports title definition is the text that will appear in the title of every report. There are two places you can set the title text: **Report Defaults** and **Proposal Properties**. The title text you enter in **Report Defaults** will be the default text for every new proposal you create. The title text you enter in **Proposal Properties** is specific to that proposal, and overrides the text entered in **Report Defaults**.

Set the Default Standard Reports Title Definition

1. Click the **Setup** ribbon, and then **Report Defaults** in the **Preferences** group.
2. Click the **Title Definitions** page.
3. Enter the text you want to appear in the header of the reports.
4. Click **OK**.

Enter the Title Text for a Specific Proposal

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Title Definitions** page in the **Reports** folder.
3. Enter the text you want to appear in the header of the reports.
4. Click **OK**.

Resource Actuals

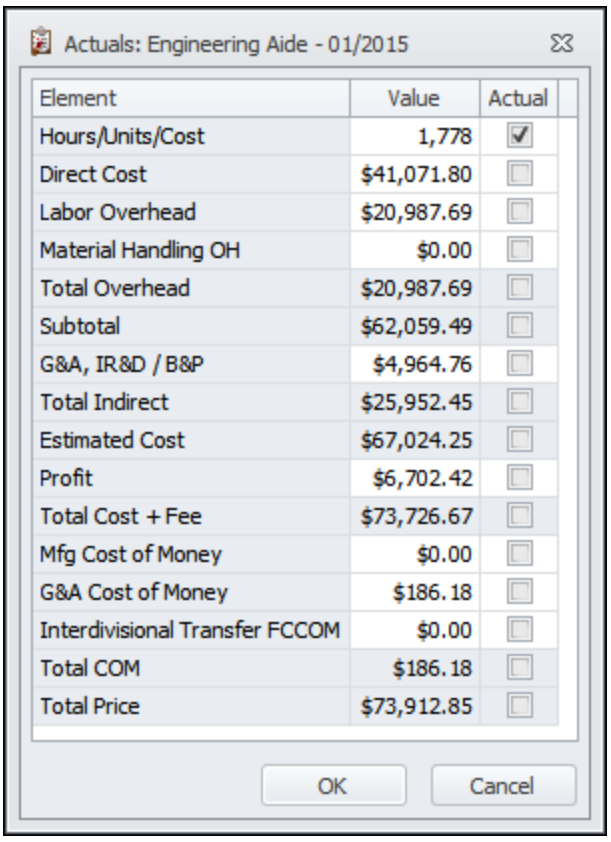
All expenses calculated by ProPricer are estimates. ProPricer recalculates all estimates if you change the input data (resource hours or rates). If you know that the expenses of a direct resource for a specific month have already been made, or you do not want them to change for another reason, you can turn the estimates into actuals. Actuals are fixed expenses that are not affected by changes in the input data.

We've created two specific examples:

- Hours/Units/Cost Actuals
- Direct Cost/Indirect Expense Actuals

Actuals Dialog Box

The **Actuals** dialog box shows expenses for the selected resource. The screenshot below shows we are editing the values for the resource Engineering Aide in January 2015.



Element

This column is for information only. It lists the hours/units/cost, indirect elements, subtotals, and totals in the order defined in your Algorithm.

Value

This column lists the hours/units/cost, direct cost, indirect costs, subtotals, and totals associated with the resource. You can change these values. Please note you cannot change subtotals nor totals into actuals. There are three possible scenarios when working with actuals:

- You can turn the hours/units/cost of a resource into actuals. The color of the value will change to blue.
- You can turn the direct cost or one or more indirect expenses into actuals. The color of the value will not change, but it will be underlined.
- You can turn the hours/units/cost, direct cost, or indirect expenses of a resource into actuals. The color of the value will change to blue, and it will also be underlined.

Actual

If this checkbox is selected, the expense for the selected month is an actual. If the checkbox is clear, the value is an estimate. When you turn an element into an actual, ProPricer will automatically perform the necessary calculations and changes in the rest of the direct or indirect values that are not marked as actuals.

OK

Saves the changes you have made and closes the dialog box.

Cancel

Closes the dialog box without saving the changes.

Define Resource Actuals

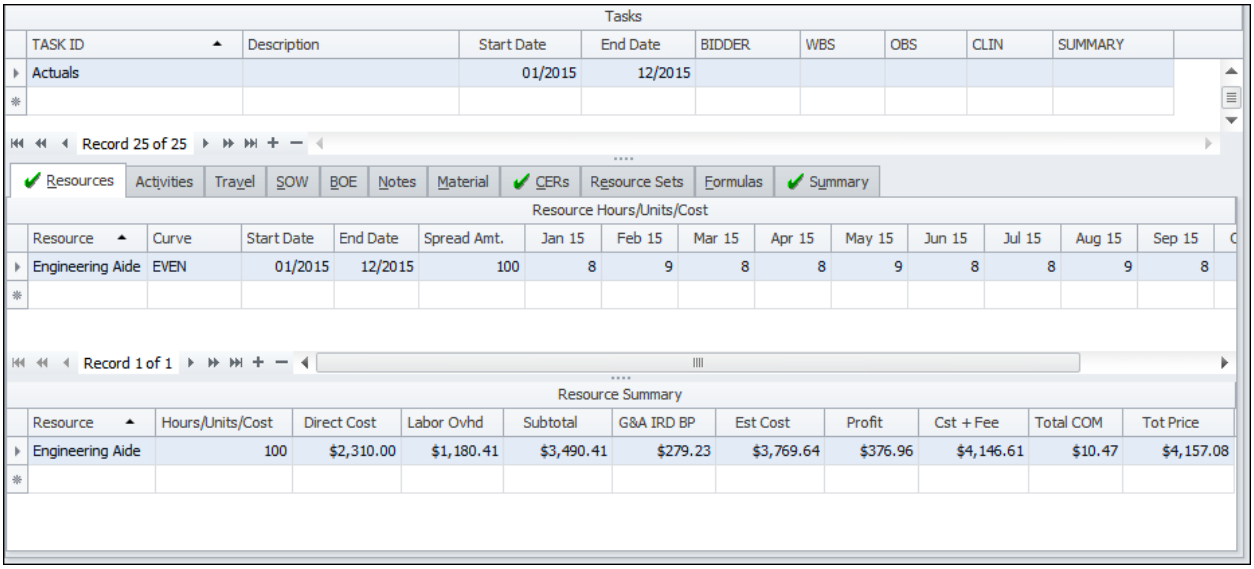
You can turn the hours/units/cost, direct cost, or any indirect expense of a direct resource into an actual. Actuals are fixed expenses that are not affected by changes to the input data.

1. On the **Resources** tab, select the direct resource you want to edit.
2. Right-click the month whose expenses you want to turn into an actual, and then click **Edit Actuals**.
3. Enter the actuals data, or select the **Actual** checkbox.
4. Click **OK** to save the changes and close the dialog box.

Note: When you turn an element into an actual, ProPricer automatically performs all the necessary calculations and changes in the rest of the direct or indirect values that are not marked as actuals.

Direct Cost/Indirect Expenses

This topic illustrates Direct Cost/Indirect Expense actuals. The following screenshot shows the **Resources** tab for an *Actuals* task we created.



Tasks

TASK ID	Description	Start Date	End Date	BIDDER	WBS	OBS	CLIN	SUMMARY
Actuals		01/2015	12/2015					

Record 25 of 25

Resources | Activities | Travel | SOW | BOE | Notes | Material | CERs | Resource Sets | Formulas | Summary

Resource Hours/Units/Cost

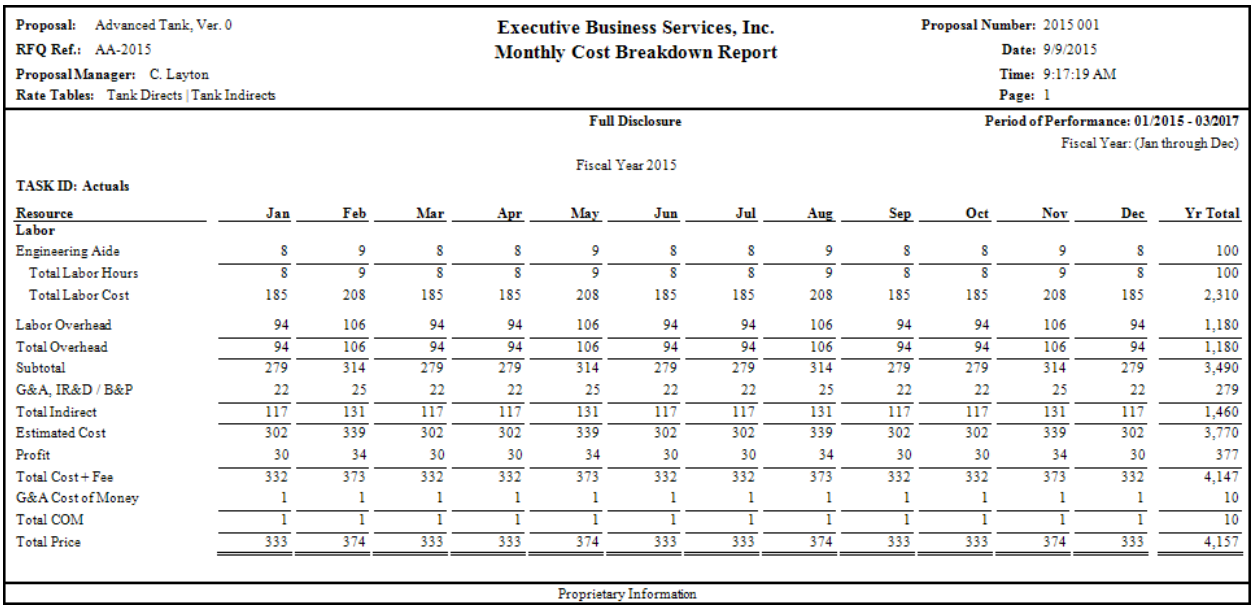
Resource	Curve	Start Date	End Date	Spread Amt.	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15
Engineering Aide	EVEN	01/2015	12/2015	100	8	9	8	8	9	8	8	9	8

Record 1 of 1

Resource Summary

Resource	Hours/Units/Cost	Direct Cost	Labor Ovhd	Subtotal	G&A IRD BP	Est Cost	Profit	Cst + Fee	Total COM	Tot Price
Engineering Aide	100	$2,310.00	$1,180.41	$3,490.41	$279.23	$3,769.64	$376.96	$4,146.61	$10.47	$4,157.08

We ran the Monthly Cost Breakdown Report.



Proposal: Advanced Tank, Ver. 0
RFQ Ref.: AA-2015
Proposal Manager: C. Layton
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Monthly Cost Breakdown Report

Proposal Number: 2015 001
Date: 9/9/2015
Time: 9:17:19 AM
Page: 1

Full Disclosure

Period of Performance: 01/2015 - 03/2017
Fiscal Year: (Jan through Dec)

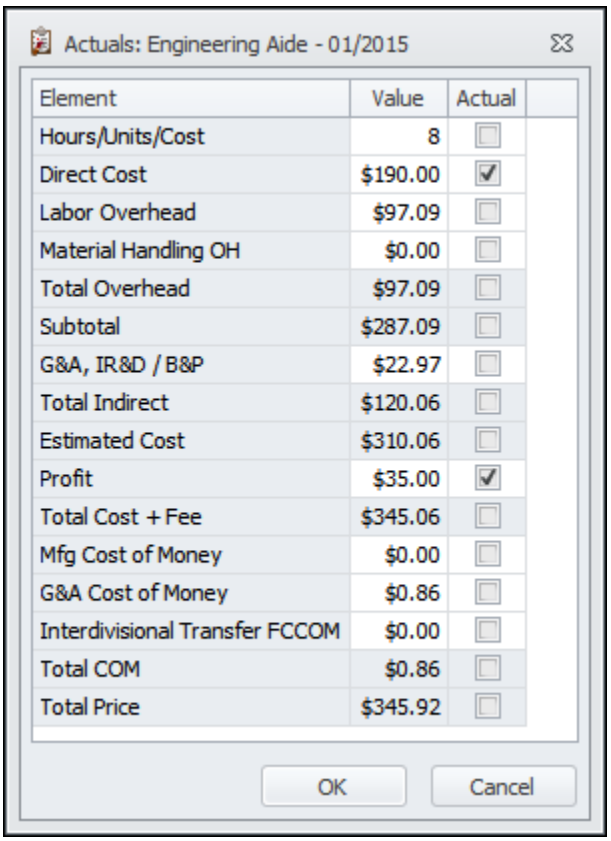
Fiscal Year 2015

TASK ID: Actuals

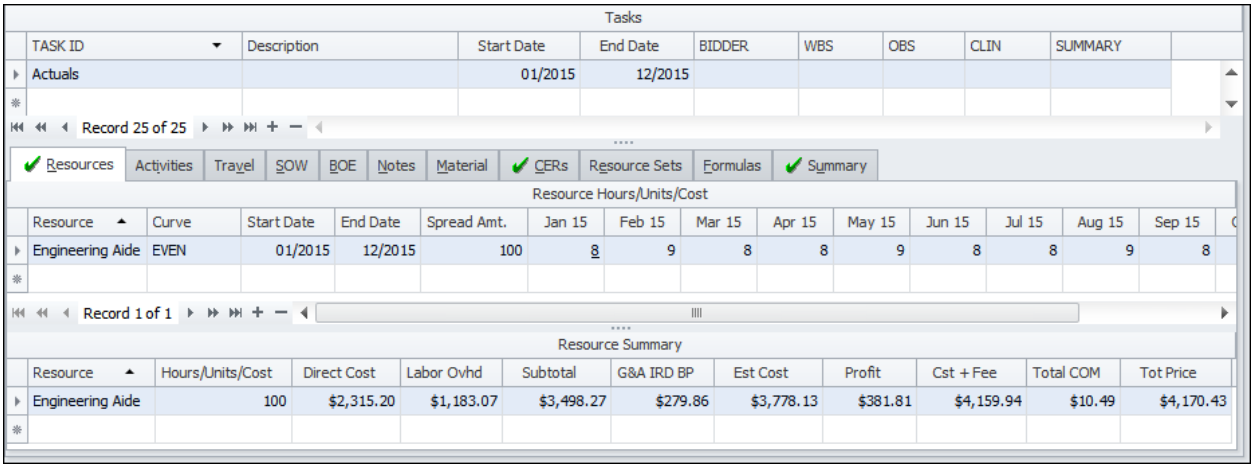
Resource	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yr Total
Labor													
Engineering Aide	8	9	8	8	9	8	8	9	8	8	9	8	100
Total Labor Hours	8	9	8	8	9	8	8	9	8	8	9	8	100
Total Labor Cost	185	208	185	185	208	185	185	208	185	185	208	185	2,310
Labor Overhead	94	106	94	94	106	94	94	106	94	94	106	94	1,180
Total Overhead	94	106	94	94	106	94	94	106	94	94	106	94	1,180
Subtotal	279	314	279	279	314	279	279	314	279	279	314	279	3,490
G&A, IR&D / B&P	22	25	22	22	25	22	22	25	22	22	25	22	279
Total Indirect	117	131	117	117	131	117	117	131	117	117	131	117	1,460
Estimated Cost	302	339	302	302	339	302	302	339	302	302	339	302	3,770
Profit	30	34	30	30	34	30	30	34	30	30	34	30	377
Total Cost + Fee	332	373	332	332	373	332	332	373	332	332	373	332	4,147
G&A Cost of Money	1	1	1	1	1	1	1	1	1	1	1	1	10
Total COM	1	1	1	1	1	1	1	1	1	1	1	1	10
Total Price	333	374	333	333	374	333	333	374	333	333	374	333	4,157

Proprietary Information

We entered Direct Cost and Profit/Fee actuals for January 2015. Please note you cannot turn Subtotals/Total into actuals.



Here is a screenshot of the **Resources** tab. Notice the value for January 2015 is underlined and the values in the **Resource Summary** grid from Direct Cost on have also changed. If we had also entered Hours/Units/Cost actuals, the value would appear blue and underlined.



We ran the Monthly Cost Breakdown Report again. The Total Labor Hours for January are the same in both reports, but the value of Total Labor Cost changed, thus affecting the values of Direct Cost through Total Price.

Proposal: Advanced Tank, Ver. 0
RFQ Ref.: AA-2015
Proposal Manager: C. Layton
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Monthly Cost Breakdown Report

Proposal Number: 2015 001
Date: 9/9/2015
Time: 9:32:07 AM
Page: 1

Full Disclosure

Period of Performance: 01/2015 - 03/2017
Fiscal Year: (Jan through Dec)

Fiscal Year 2015

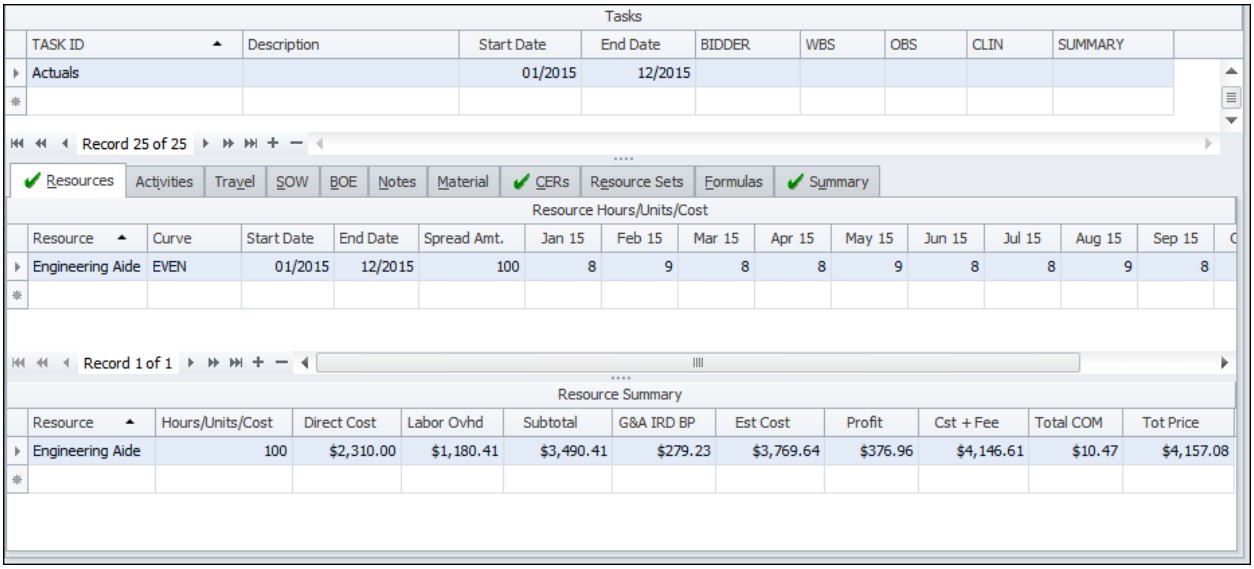
TASK ID: Actuals

Resource	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yr Total
Labor													
Engineering Aide	8	9	8	8	9	8	8	9	8	8	9	8	100
Total Labor Hours	8	9	8	8	9	8	8	9	8	8	9	8	100
Total Labor Cost	190	208	185	185	208	185	185	208	185	185	208	185	2,315
Labor Overhead	97	106	94	94	106	94	94	106	94	94	106	94	1,183
Total Overhead	97	106	94	94	106	94	94	106	94	94	106	94	1,183
Subtotal	287	314	279	279	314	279	279	314	279	279	314	279	3,498
G&A, IR&D / B&P	23	25	22	22	25	22	22	25	22	22	25	22	280
Total Indirect	120	131	117	117	131	117	117	131	117	117	131	117	1,463
Estimated Cost	310	339	302	302	339	302	302	339	302	302	339	302	3,778
Profit	35	34	30	30	34	30	30	34	30	30	34	30	382
Total Cost + Fee	345	373	332	332	373	332	332	373	332	332	373	332	4,160
G&A Cost of Money	1	1	1	1	1	1	1	1	1	1	1	1	10
Total COM	1	1	1	1	1	1	1	1	1	1	1	1	10
Total Price	346	374	333	333	374	333	333	374	333	333	374	333	4,170

Proprietary Information

Hours/Units/Cost

This topic illustrates Hours/Units/Cost actuals. The following screenshot shows the **Resources** tab for a task we created.



Tasks

TASK ID	Description	Start Date	End Date	BIDDER	WBS	OBS	CLIN	SUMMARY
Actuals		01/2015	12/2015					

Record 25 of 25

Resources | Activities | Travel | SOW | BOE | Notes | Material | CERs | Resource Sets | Formulas | Summary

Resource Hours/Units/Cost

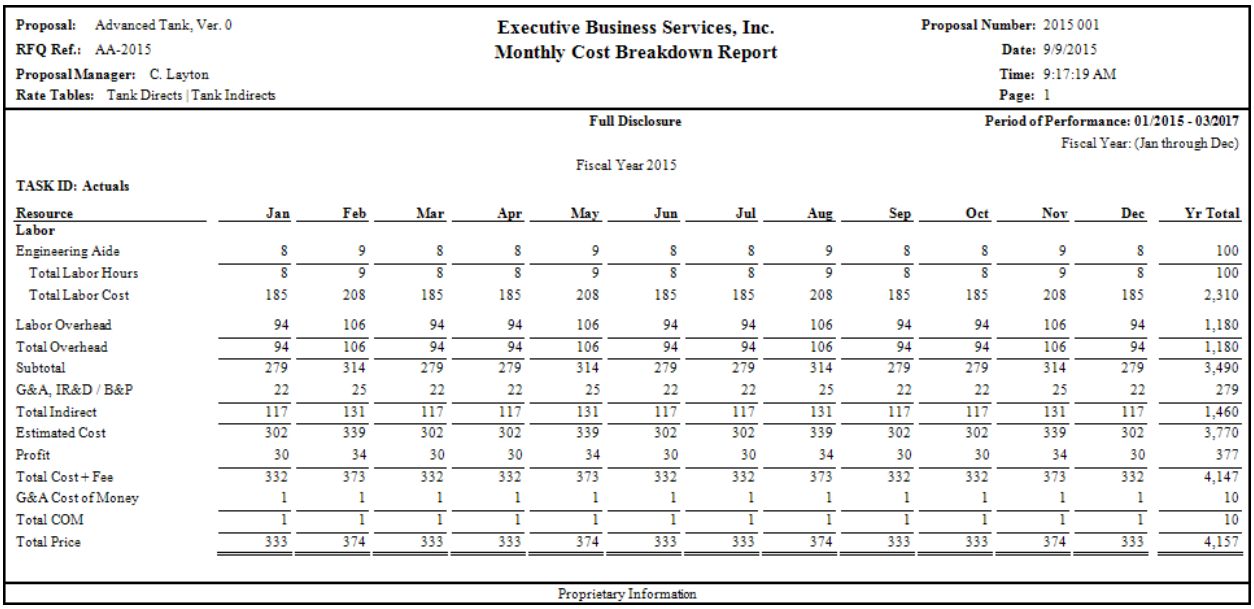
Resource	Curve	Start Date	End Date	Spread Amt.	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15
Engineering Aide	EVEN	01/2015	12/2015	100	8	9	8	8	9	8	8	9	8

Record 1 of 1

Resource Summary

Resource	Hours/Units/Cost	Direct Cost	Labor Ovhd	Subtotal	G&A IRD BP	Est Cost	Profit	Cst + Fee	Total COM	Tot Price
Engineering Aide	100	$2,310.00	$1,180.41	$3,490.41	$279.23	$3,769.64	$376.96	$4,146.61	$10.47	$4,157.08

We ran the Monthly Cost Breakdown Report.



Proposal: Advanced Tank, Ver. 0
RFQ Ref.: AA-2015
Proposal Manager: C. Layton
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Monthly Cost Breakdown Report

Proposal Number: 2015 001
Date: 9/9/2015
Time: 9:17:19 AM
Page: 1

Full Disclosure

Period of Performance: 01/2015 - 03/2017
Fiscal Year: (Jan through Dec)

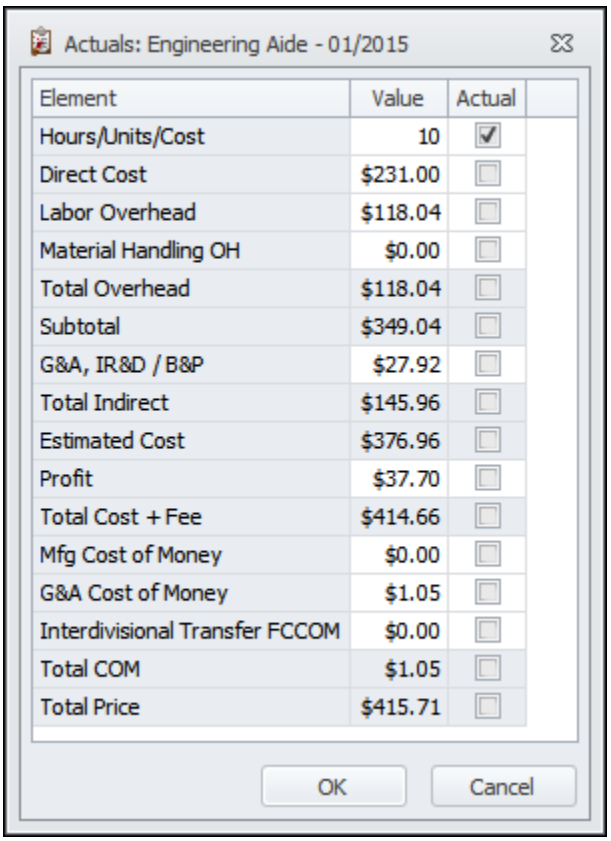
Fiscal Year 2015

TASK ID: Actuals

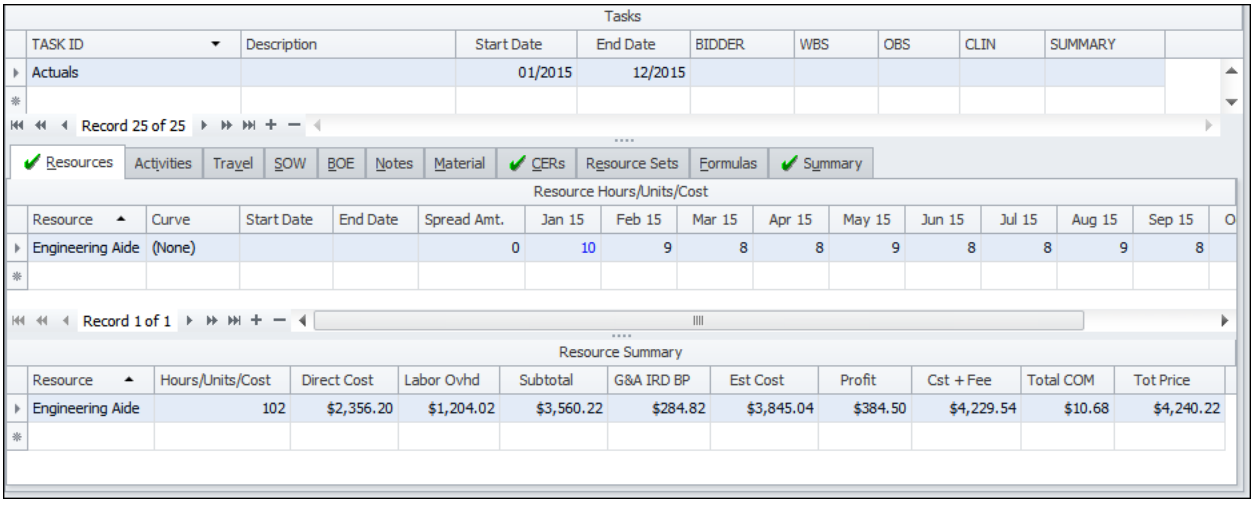
Resource	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yr Total
Labor													
Engineering Aide	8	9	8	8	9	8	8	9	8	8	9	8	100
Total Labor Hours	8	9	8	8	9	8	8	9	8	8	9	8	100
Total Labor Cost	185	208	185	185	208	185	185	208	185	185	208	185	2,310
Labor Overhead	94	106	94	94	106	94	94	106	94	94	106	94	1,180
Total Overhead	94	106	94	94	106	94	94	106	94	94	106	94	1,180
Subtotal	279	314	279	279	314	279	279	314	279	279	314	279	3,490
G&A, IR&D / B&P	22	25	22	22	25	22	22	25	22	22	25	22	279
Total Indirect	117	131	117	117	131	117	117	131	117	117	131	117	1,460
Estimated Cost	302	339	302	302	339	302	302	339	302	302	339	302	3,770
Profit	30	34	30	30	34	30	30	34	30	30	34	30	377
Total Cost + Fee	332	373	332	332	373	332	332	373	332	332	373	332	4,147
G&A Cost of Money	1	1	1	1	1	1	1	1	1	1	1	1	10
Total COM	1	1	1	1	1	1	1	1	1	1	1	1	10
Total Price	333	374	333	333	374	333	333	374	333	333	374	333	4,157

Proprietary Information

We entered Hours/Units/Cost actuals for January 2015.



Here is a screenshot of the **Resources** tab. Notice the curve has changed to **(None)**, and the value is blue. The values in the **Resource Summary** grid have also changed. If we had also entered Direct Cost or Indirect Expense actuals, the value would appear blue and underlined.



We ran the Monthly Cost Breakdown Report again. Note the values of the resource for January. The Total Labor Hours changed, thus affecting the values of Direct Cost through Total Price.

Proposal: Advanced Tank, Ver. 0
RFQ Ref.: AA-2015
Proposal Manager: C. Layton
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Monthly Cost Breakdown Report

Proposal Number: 2015 001
Date: 9/9/2015
Time: 9:49:32 AM
Page: 1

Full Disclosure

Period of Performance: 01/2015 - 03/2017
Fiscal Year: (Jan through Dec)

Fiscal Year 2015

TASK ID: Actuals

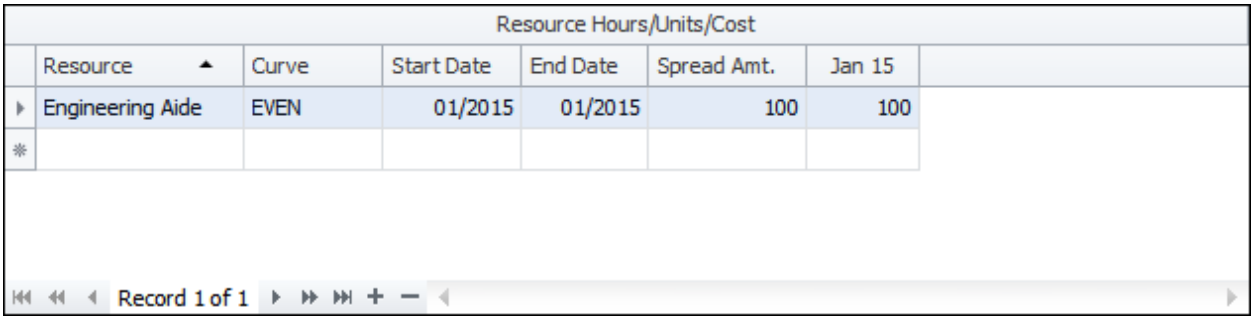
Resource	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Yr Total
Labor													
Engineering Aide	10	9	8	8	9	8	8	9	8	8	9	8	102
Total Labor Hours	10	9	8	8	9	8	8	9	8	8	9	8	102
Total Labor Cost	231	208	185	185	208	185	185	208	185	185	208	185	2,356
Labor Overhead	118	106	94	94	106	94	94	106	94	94	106	94	1,204
Total Overhead	118	106	94	94	106	94	94	106	94	94	106	94	1,204
Subtotal	349	314	279	279	314	279	279	314	279	279	314	279	3,560
G&A, IR&D / B&P	28	25	22	22	25	22	22	25	22	22	25	22	285
Total Indirect	146	131	117	117	131	117	117	131	117	117	131	117	1,489
Estimated Cost	377	339	302	302	339	302	302	339	302	302	339	302	3,845
Profit	38	34	30	30	34	30	30	34	30	30	34	30	385
Total Cost + Fee	415	373	332	332	373	332	332	373	332	332	373	332	4,230
G&A Cost of Money	1	1	1	1	1	1	1	1	1	1	1	1	11
Total COM	1	1	1	1	1	1	1	1	1	1	1	1	11
Total Price	416	374	333	333	374	333	333	374	333	333	374	333	4,240

Proprietary Information

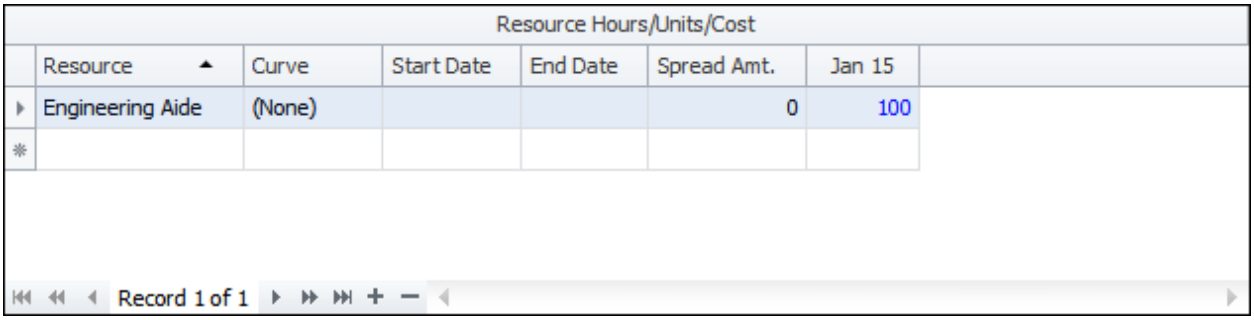
Resource Actuals and What-Ifs

Resource actuals are fixed expenses that are not affected by changes in the input data unless you run the Resource Switching or Flex/Shift what-if. In this instance, the actuals will be reverted to estimates. Before proceeding with either what-if, ProPricer will inform you that the actuals will be converted to estimates and ask you to confirm that you want to continue.

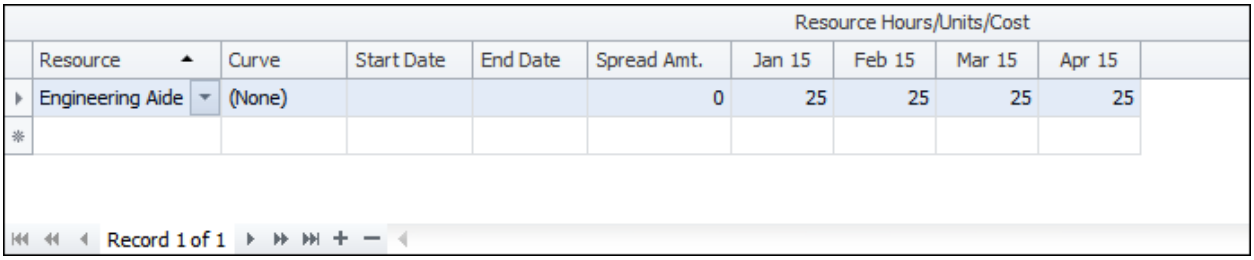
Below is a screenshot of the **Resources** tab of a task we created that lasts one month. We spread 100 hours for Engineering Aide.



We then marked the 100 hours as actuals. Note the color of the value changed to blue.



We ran the Flex/Shift what-if and extended the end date by three months.



The 100 hours are now divided between 1/15 and 4/15, and the color of the values changed to black, indicating estimates.

Resource Classes

Resource classes can be used to categorize your resources. They allow you to group resources that are different, and yet related. For example, resource class *Labor*, could include Engineering, Marketing, and Field Service resources. You can use resource classes to sort your resources for reporting purposes. This provides flexibility in data presentation since you can separate them out from the rest of the proposal and then report on them. Resource classes can also be used in some of the what-if scenarios. You assign a resource class to a resource in the Resource Library.

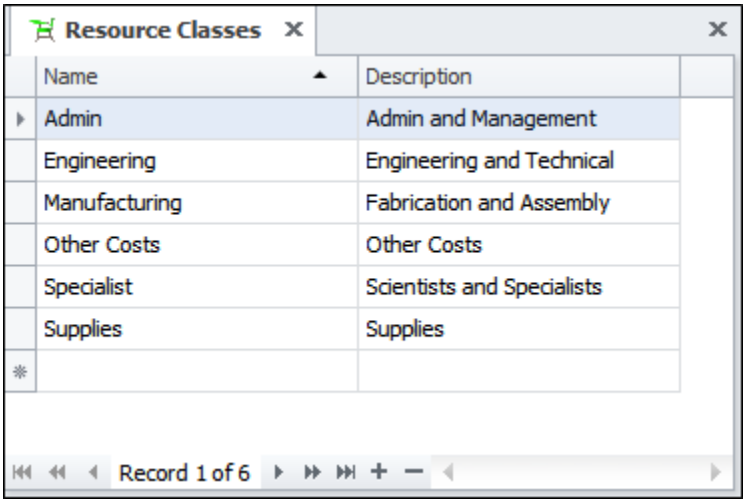
Assign a Resource Class to a Resource

1. In the Navigation Pane, click **Libraries**, and then double-click **Resources**.
2. Select the resource to which you want to assign a resource class.
3. In the **Resource Class** column, select a class to assign to the resource.
4. Press **Ctrl**+**S** or move to another row to save your work.

Resource Class Library

You can create classes for your resources in this library, and then assign them to resources globally in the Resource Library or a Direct Rate Table.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the resource class.

Description

Enter a description of the resource class.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Copy a Resource Class

1. Right-click the resource class you want to copy, and then click **Copy** on the shortcut menu.

2. Enter a name for the new resource class, and then click **OK**.

Create a Resource Class

1. Click the **Libraries** button and then double-click **Resource Classes**.
2. Enter a unique name for the resource class in the **Name** column.
3. Enter a short description for the resource class in the **Description** column.
4. Press **Ctrl**+**S** or move to another row to save your work.

Delete a Resource Class

1. Click the **Libraries** button and then double-click **Resources Classes**.
2. Right-click the resource class you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when prompted.

*Note: You can only delete resource classes that are not used anywhere in the system. If the resource class is used, ProPricer will display the **Item Usage Info** box instead.*

Resource Fields

Resource fields are custom fields for entering additional information about a resource. This information is useful in reports, and resource fields are needed for hours/units/cost modifiers and rate modifiers.

For example, you could create a resource field called *Department* (which will appear as a separate column during task input), then assign a resource to the task, and then enter a value (text or a number) in the **Department** column. When you assign the same resource to the task again, you could enter a different value in the **Department** column. As long as the resource field contains different data, you can repeatedly use the resource in the same task as many times as necessary.

There are global and proposal-specific resource fields. Both types create additional columns in your proposals. Global resource fields are created in the Resource Field Library and appear in all proposals. Proposal-specific resource fields are created Proposal Properties and only appear in that proposal. You can create up to 100 default resource fields and 100 proposal-specific resource fields.

After creating a global resource field, you can assign default values for that field to any resource in the Resource Library. If needed, you can then override those default values in Direct Rate Tables and proposals.

To simplify the task data entry process, you can map resource fields and values in Proposal Properties. Once mapped, ProPricer automatically filters the list of available values in a resource field based on the user's entry in the previous resource field.

Create a Resource Field

There are two types of resource fields: global and proposal-specific. Global resource fields are automatically added to all proposals, while proposal-level fields are created for the specific proposal.

Create a Global Resource Field

1. In the Navigation Pane, click the **Libraries** button, and then double-click **Resource Fields**.
2. Enter a name for the resource field.
3. Select the type of data that can be entered.
4. Specify the length or decimal values.
5. Select the **Value List** checkbox to enable and show the resource field's values, or clear the checkbox to disable and hide the values.
6. If the **Value List** checkbox is selected, you can type the values that will appear as acceptable options in the resource field.
7. Specify if you want the text entered in a resource field from any input grid to be automatically added to the value list for that field. You can also choose to be prompted by ProPricer before new text in the field is added to the value list.
8. Press **Ctrl**+**S** or move to another row to save the resource field.

Note: In the Resource Library, you can assign default values to resources for any of your global resource fields.

Create a Proposal-Specific Resource Field

1. In the Navigation Pane, click the **Proposals** button. Right-click a proposal, and then click **Properties** on the shortcut menu.
2. In the **Proposal** folder, open the **Resource Fields** subfolder, and then click the **General** page.
3. Enter a name for the resource field.
4. Select the type of data that can be entered.
5. Specify the character length or decimal values shown.
6. Select the **Value List** checkbox to enable and show the resource field's values, or clear the checkbox to disable and hide the values.
7. Select the **Required** checkbox to require a value in the resource field, or clear the checkbox to make the field optional.
8. If the **Value List** checkbox is selected, you can click the **Value List** button.
9. Type the values that will appear as acceptable options in the resource field.
10. *(Optional)* Enter a description for each value.
11. Specify if you want the text entered in a resource field from any input grid to be automatically added to the value list for that field. You can also choose to be prompted by ProPricer before new text in the field is added to the value list.
12. Click **OK**.

Delete a Resource Field

Delete a Default Resource Field

1. Click the **Libraries** button and then double-click **Resource Fields**.
2. Right-click the resource field you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when prompted.

Delete a Resource Field from a Proposal

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **Resource Fields** page in the **Proposal** folder.
3. Right-click the resource field you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when prompted.

*Note: You can only delete resource fields that are not used anywhere in the system. If the resource field is used, ProPricer will display the **Item Usage Info** box instead.*

Map Resource Fields and Values

Mapping resource fields and their values provides greater control over the resource input process. Your mapping tells ProPricer how to filter successive resource field values after a user enters a certain value in a base resource field. This helps prevent the user from entering incorrect values since ProPricer already filtered out the irrelevant ones.

The resource field mapping setup in the Proposal Properties is a two-part procedure. You start by mapping the fields, and then you can map the values of those correlated fields.

Map Resource Fields

1. In **Proposal Properties**, go to **Proposal** > **Resource Fields** > **Mapping**.
2. In the **Resource Info Mapping** section of the **Mapping** page, all fields that can be mapped will initially appear as base resource fields. Drop one of these fields over another to map it to that field. The mapped field will be a child of its base field.
3. Repeat step 2 as needed. You can drag and drop to any field in the mapping structure, including child fields that are already mapped to other fields.
4. To undo a mapping, drop the child resource field over **(Root)**. The field will move to the top level of the mapping structure and become a base field again.

Map Resource Field Values

1. In the **Resource Info Value Mapping** section of the **Mapping** page, expand a base resource field that has at least one other field mapped to it (that is, a base resource field with a child resource field).

2. Select the values that users will be allowed to enter in the base resource field during resource input.
3. Expand one of the base resource field values you just selected. The child fields mapped to the base will be listed, along with their values.
4. For each child field, select the values that will be available to users after they enter the base resource field value selected in step 3.
5. Repeat all steps as needed for any other parent field that has fields mapped to it.
6. Click **OK** or **Apply**.

Resource Field Library

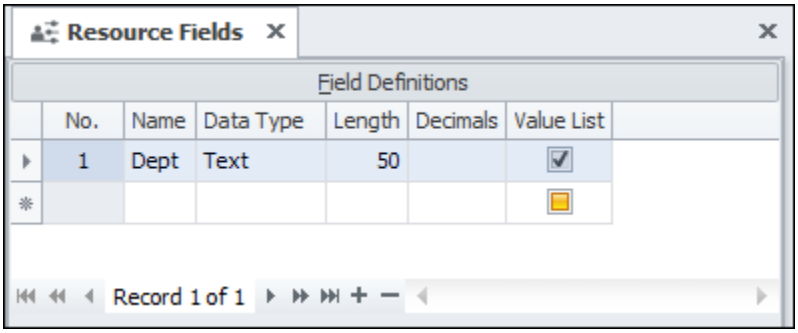
The Resource Field Library is where you create global resource fields. These fields appear as additional columns in rate tables and proposals.

The library is divided into three sections: Field Definitions, Values, and Data Entry Options.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Field Definitions

In this grid, you create the resource fields and determine the type of data that can be entered.



No.

Shows the order of the resource fields.

Name

Enter a name for the resource field.

Data Type

Select the type of data that can be entered in a resource field.

Number

A number must be entered.

Text

Text must be entered. This is the default setting.

After a text resource field has been created and used in a proposal, you can convert its text entries into a value list. Just change the field's data type from *Text* to *List*.

Length

If the data type of the resource field is *Text*, enter the maximum number of characters the resource field will accept. The default value is 50 characters, and the limit is 255 characters.

Decimals

If the data type of the resource field is *Number*, enter the number of digits you want displayed after the decimal point. The maximum number of decimal places you can enter for a resource field is 6. The default is 0.

Value List

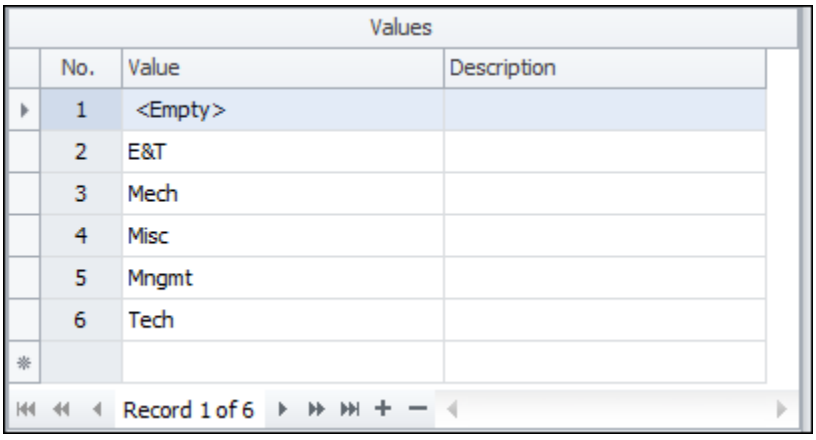
Select the checkbox to enable and show the predefined values of the resource field, or clear it to disable and hide the values.

When a resource field has a disabled value list:

- The resource field is not available for resource field mapping in a proposal.
- The resource field still appears in proposals and users can enter new values in them, but existing predefined values do not appear as options in the field.

Values

In this grid, you predefine the list of the values a resource field will accept. The values you enter here are what will appear in the drop-down list of the resource field.



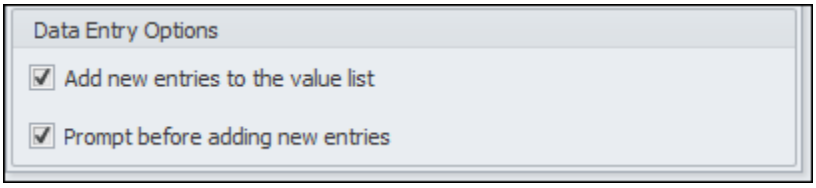
Value

Enter the value that will appear in the drop-down list of the resource field. In the Resource Library, you can set a default resource field value for any resource.

Description

Enter a description for the resource field value.

Data Entry Options



Add new entries to the value list

Select this checkbox if you want to be able to add new entries to the list during data entry.

Prompt before adding new entries

Select this checkbox if you want ProPricer to prompt you every time a new entry is detected in a resource field during data entry.

Set a Default Global Resource Field Value

Setting a default resource field value tells ProPricer to automatically fill the field with that value whenever a particular resource is used. You can set default values for global resource fields, but not for proposal-level resource fields.

A default value can be set for each resource in the Resource Library. The values created in the Resource Field Library will appear in the resource field's drop-down menu in the Resource Library.

1. In the Navigation Pane, click the **Libraries** button, and then double-click **Resources**.
2. Each global resource field appears as a separate column in the Resource Library. In the appropriate resource field for any resource, enter a default value.
3. Press **Ctrl**+**S** or move to another row to save your work.

Note: You can override default global resource field values in Direct Rate Tables and proposals.

Set Resource Field Values

Entering values for a resource field predefines the list of entries a resource field will accept. ProPricer offers you two places to set resource field values: the Resource Field Library and Proposal Properties.

Set Default Resource Field Values

1. In the Navigation Pane, click the **Libraries** button, and then double-click **Resource Fields**.
2. In the **Field Definitions** grid, select a resource field.
3. In the **Values** grid, create the resource field values. You can enter a description of each one.
4. In the **Data Entry Options** section, specify if you want ProPricer to automatically add the text entered in a resource field from any input grid to the options that appear in the drop-down list for that resource field, or prompt you if new text is detected.
5. Press **Ctrl**+**S** to save your work.

Set Resource Field Values for a Proposal

1. In the Navigation Pane, click the **Proposals** button. Right-click a proposal, and then click **Properties** on the shortcut menu.
2. In the **Proposal** folder, open the **Resource Fields** subfolder, and then click the **General** page.
3. Select a proposal-specific resource field.
4. Click the **Value List** button.

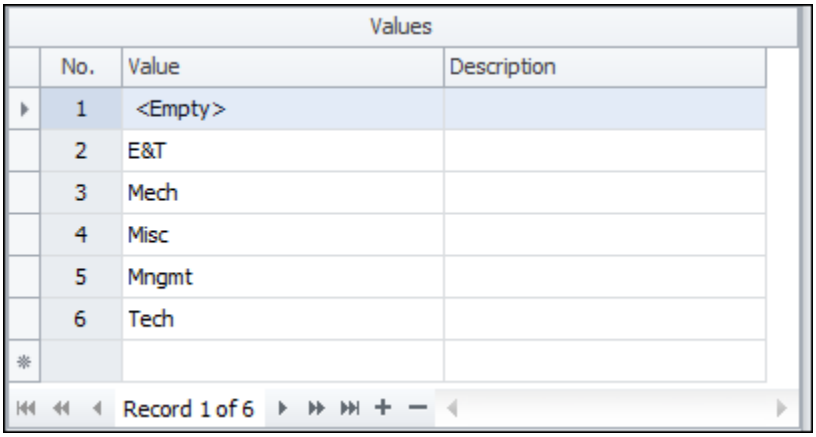
5. In the **Values** grid, create the resource field values. You can enter a description of each one.

6. In the **Data Entry Options** section, specify if you want ProPricer to automatically add the text entered in a resource field from any input grid to the options that appear in the drop-down list for that resource field, or prompt you if new text is detected.

7. Click **OK**.

Resource Field Values Dialog Box

When you create proposal-specific resource fields in the Proposal Properties, the **Values** dialog box is where you predefine the list of the entries a resource field will accept. The values you enter here are what will appear in the drop-down list of the resource field. The dialog box also has an option that will allow you to add new values to the list during data entry.



No.

Shows the order of the values. Cannot be edited.

Value

Type the entry you want to appear in the drop-down list of the resource field.

Description

Enter a description for the resource field value. You can enter up to 255 characters.

Data Entry Options

Add new entries to the value list

Select this checkbox if you want to be able to add new entries to the list during data entry.

Prompt before adding new entries

Select this checkbox if you want ProPricer to prompt you every time a new entry is detected in a resource field during data entry.

OK

Saves the changes you have made and closes the dialog box.

Cancel

Closes the dialog box without saving any changes.

Apply

Saves the changes without closing the dialog box.

Resource Sets

Resource sets allow you to create combinations of different resource hours, units, and cost to define a single unit of work (for example, a circuit board), which you can then assign to tasks as a single resource.

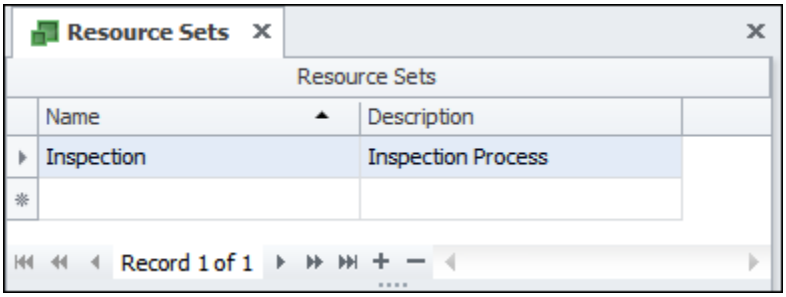
Resource sets are created in the Resource Set Library, and they are defined with elements in Resource Set Tables. For each resource in the resource set, the amount entered represents the hours/units/cost required of the resource to complete the unit of work. Resource sets can consist of labor and non-labor resources, as well as other resource sets.

After creating a Resource Set Table, assign it to a proposal to begin adding resource sets to your tasks.

Resource Set Library

The Resource Set Library is where resource sets are created. Once added to the library, you can define the elements of the resource set in a Resource Set Table.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the resource set.

Description

Enter a description for the resource set.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Copy a Resource Set

1. Right-click the resource set you want to copy, and then click **Copy** on the shortcut menu.

2. Enter a name for the new resource set, and then click **OK**.

Create a Resource Set

1. Click the **Libraries** button and then double-click **Resource Sets**.
2. In the **Resource Sets** grid, enter a name for the resource set.
3. Enter a description for the resource set.
4. In the **Elements** grid, select a category for the first element.
5. Enter an element.
6. Enter a resource field value.
7. Type the factor for the element.
8. Press **Ctrl**+**S** or move to another row to save your work.

Delete a Resource Set

Delete a Resource Set from the Library

1. Click the **Libraries** button and then double-click **Resource Sets**.
2. Right-click the resource set you want to delete, and then click **Delete** on the shortcut menu
3. Confirm the deletion when asked.

*Note: You can only delete resource sets that are not used anywhere in the system. If the resource set is used, ProPricer will display the **Item Usage Info** box instead.*

Delete a Resource Set from a Task

1. Select the task, and then click the **Resource Sets** tab.
2. Right-click the resource set you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when prompted.

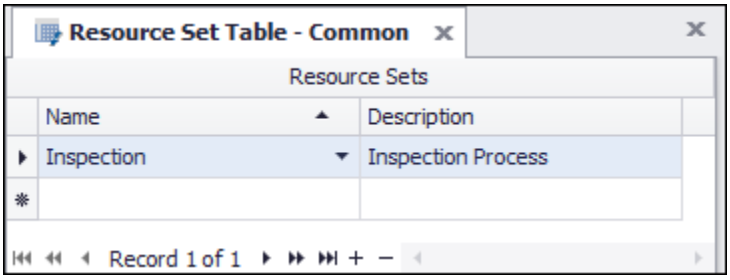
Resource Set Tables

In a Resource Set Table, you define and maintain the resource sets from the Resource Set Library. The table is divided into two grids: Resource Sets and Elements.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resource Sets

This grid displays all resource sets currently in the Resource Set Library. The data in the **Elements** grid corresponds to the resource set selected here.



Name

Select a resource set from the Resource Set Library, or type the name of a new resource set.

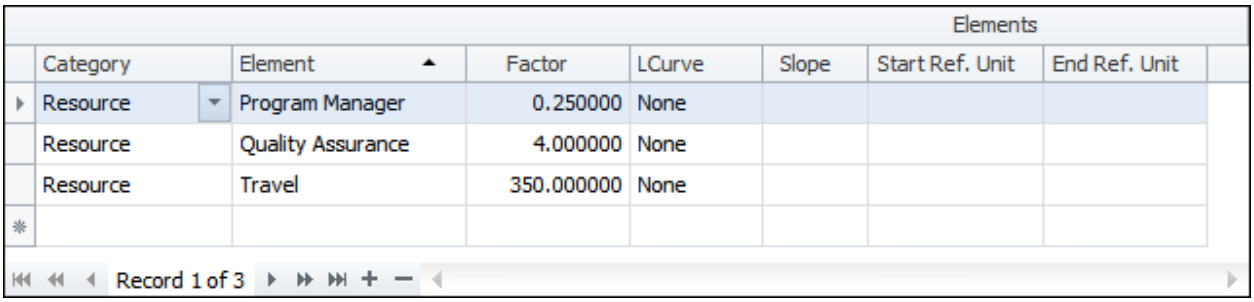
Description

Displays the description entered in the Resource Set Library. This field cannot be edited.

*Note: You can add new resource sets to the Resource Set Library directly from a Resource Set Table. Enter the name of the new resource set in the table, and then click **Yes** when prompted.*

Elements

Here you enter the resources that make up the resource set.



Category

There are two options you can choose from:

Resource

The element is a single resource.

Resource Set

The element is another resource set. Note that a resource set cannot be embedded in itself.

Element

Enter the resource or resource set.

Resource Fields

These columns only appear if there are resource fields defined in the library or for the proposal. Entering a resource tells ProPricer to spread hours/units/cost for the resource with the resource field value entered.

Amount

Enter an amount of hours/units/cost for the element. If the element is a labor resource, for example, enter the amount of hours the resource will work each time the resource set is used in a task.

LCurve

Select a learning curve type to apply to the hours/units/cost amount of each resource in the set.

Slope

Enter the slope percentage of the learning curve. The default value is 100, indicating that no learning will occur. The value entered in this field must be greater than 50, and less than or equal to 100.

Start Ref. Unit and End Ref. Unit

When a learning curve is used, the reference units determine the lot size for the total hours, units, or cost in the **Amount** column. Based on the starting unit, which is entered in tasks, ProPricer will calculate how much of the amount remains for that original lot. It also calculates what the new amount of hours, units, or cost would be, based on the slope and how many units have already been completed.

Assign a Resource Set Table to a Proposal

After you assign a Resource Set Table to a proposal, you can add any of the resource sets in the table to your tasks. Until a Resource Set Table is assigned, the **Resource Sets** input tab is inactive.

1. In the Navigation Pane, click the **Proposals** button.
2. Right-click the appropriate proposal, and then click **Properties**.
3. In the **Proposal** folder, click the **Pricing** page.
4. In the **Resource Set Table** field, enter the name of the Resource Set Table.
5. Click **OK** or **Apply**.

Note: To replace a proposal's Resource Set Table, the new table must contain all the resource set elements that are already being used in the proposal.

Copy a Resource Set Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following to view all existing Resource Set Tables:
   - Expand the **Resource Set Tables** folder.
   - Double-click the **Resource Set Tables** folder to open the Resource Set Tables List.
3. Right-click a Resource Set Table, and then click **Copy**.
4. In the **Location** field, click the ellipsis (...) button to choose the folder where the new Resource Set Table will be saved. Otherwise, leave the default location unchanged to save the table in the root folder.
5. Enter a name and description for the new table.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Create a Resource Set Table

1. Do one of the following:
   - In the Main Menu, click **New Resource Set Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Resource Set Tables** folder, then click **New Resource Set Table**.
2. Enter a name and description for the new table.
3. Click **OK**. The Resource Set Table will open in the Workspace.

Delete a Resource Set Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following to view all existing Resource Set Tables:
   - Expand the **Resource Set Tables** folder.
   - Double-click the **Resource Set Tables** folder to open the Resource Set Tables List.
3. Right-click a Resource Set Table, and then click **Delete**.
4. Click **Yes** when prompted to confirm the deletion.

*Note: You can only delete a Resource Set Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Resource Set Table Properties

The **Resource Set Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

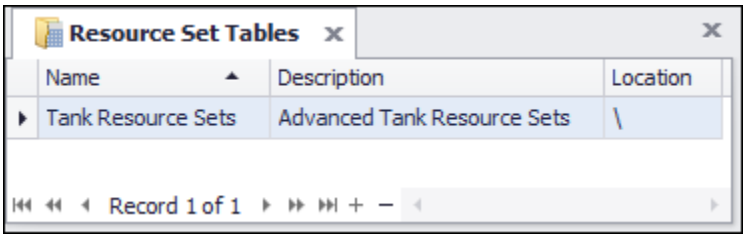
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Resource Set Tables List

The Resource Set Tables List shows all the existing Resource Set Tables. The Resource Set Tables List is also a convenient place to copy and delete tables.



Name

Displays the name of the table.

Description

Displays the description of the table.

Location

Displays the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Resource Set Tables** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Update Resource Sets

If changes are made to a resource set in a proposal's assigned Resource Set Table, and the resource set is used in the proposal, the changes will not be reflected in the tasks until you explicitly request it.

If there are tasks in which you made direct changes to a resource set on the **Resource Sets** tab that you do not want to be replaced with the definition from the Resource Set Table, you can apply the update on a task-by-task basis.

Incorporate the Changes to a Resource Set into a Proposal

1. Select the proposal in the Navigation Pane.
2. On the **Proposal** ribbon, in the **Update** group, click **Update Current Proposal**.
3. *(Optional)* Click the **Copy** button to duplicate the proposal before updating the resource sets. The updates will be applied to the copy unless you reopen the original proposal.
4. Select the **Update Resource Sets** checkbox.
5. Click **Process**.

Update a Single Resource Set in a Single Task

1. Select the task, and then click the **Resource Sets** tab.
2. Right-click the resource set you want to update, and then click **Update Resource Set** on the shortcut menu.

Resources

Resources are the people, material, travel, and subcontractors you use to fulfill the contract. The resources in the Resource Library are global and can be used in multiple rate tables and proposals.

After creating resources in the library, you can set up their direct rate information in a Direct Rate Table. The Direct Rate Table used in a proposal determines which resources you can add to tasks.

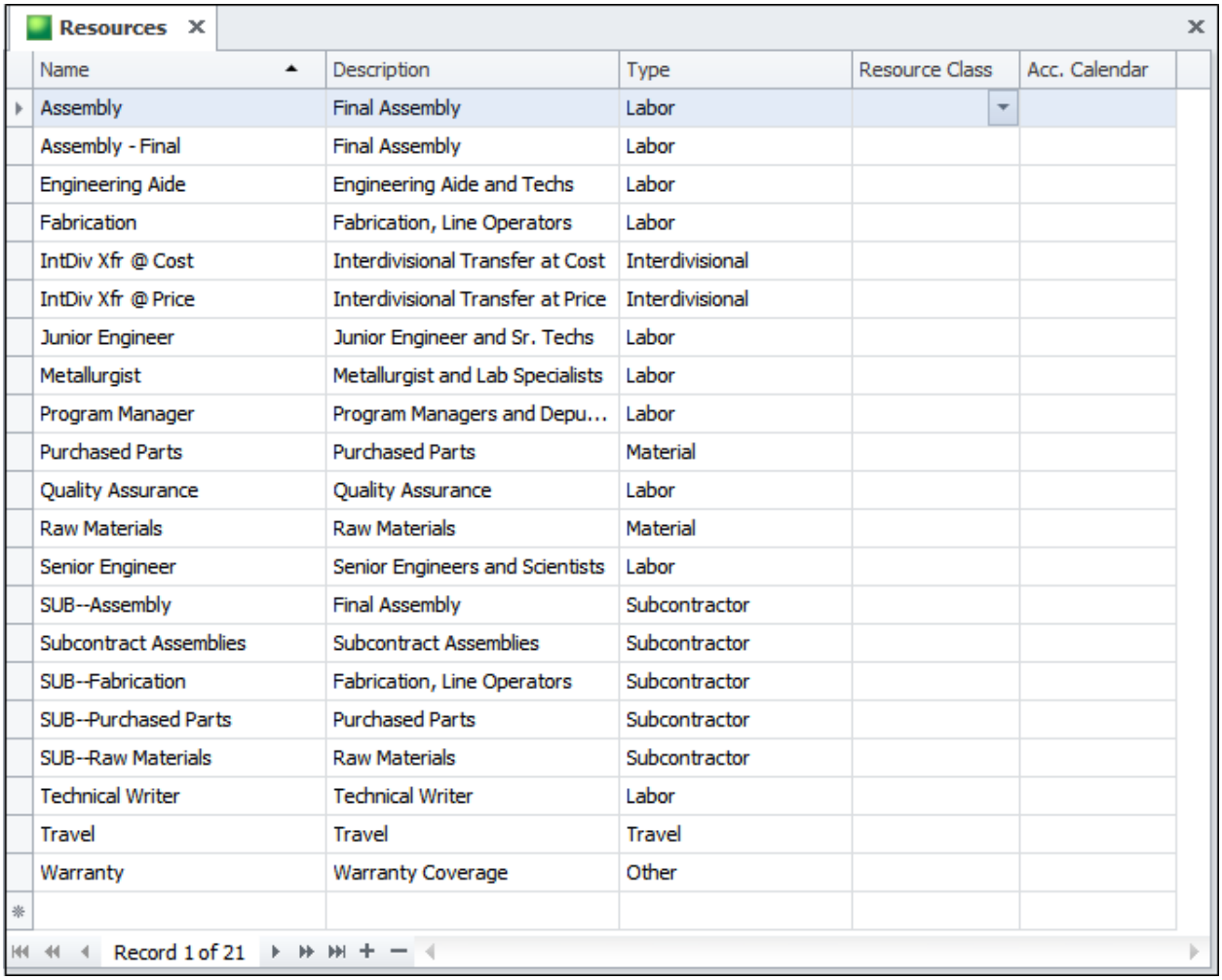
If you need to organize resources with your own custom categories, you can create resource fields and resource classes for them.

Resource Library

The Resource Library is where you create and maintain the resources you use in rate tables, which in turn provide resources for the tasks in a proposal.

If you created global resource fields in the Resource Field Library, you can assign a default value for each field to any resource in the Resource Library. The default values will appear automatically whenever you use the resource. If needed, you can override default resource field values in Direct Rate Tables and proposals.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the resource.

Description

Enter a description of the resource.

Type

Enter the resource type. There are six resource types in ProPricer: Labor, Material, Travel, Subcontractor, Other, and Interdivisional. Resource type is analogous with cost category, which determines how the input of the resource will be measured. The input of resources of type *Labor* is usually measured in hours. The input of the remaining types is usually measured in units or cost.

Resource Class

Enter one of the classes defined in the Resource Class Library. This will be the default class of the resource.

Accounting Calendar

Accounting calendars provide the monthly working hours for the resource. Assigning an accounting calendar to the resource is optional since ProPricer will use the calendar assigned to the proposal. If the resource does not follow the same calendar as a proposal, you can assign a different one to the resource here.

Note: The accounting calendar assigned in this global library can be overridden in a proposal, after adding the resource to a task.

Resource Fields

Any fields created in the Resource Field Library appear as individual columns. Enter a value to set it as the default for a specific resource.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Copy a Resource

1. In the Resource Library, right-click the resource, and then click **Copy** on the shortcut menu.

2. Enter a name for the new resource, and then click **OK**.

Create a Resource

1. In the Navigation Pane, click the **Libraries** button, and then double-click **Resources**.
2. Enter a unique name for the resource in the **Name** column.
3. Enter a short description for the resource in the **Description** column.
4. Select the resource type.
5. *(Optional)* You can enter more information about the resource in the remaining columns. If you have global resource fields, they will appear as additional columns.
6. Press **Ctrl**+**S** or move to another row to save your work.

Delete a Resource

1. Click the **Libraries** button and then double-click **Resources**.
2. Right-click the resource you want to delete, and then click **Delete** on the shortcut menu
3. When prompted, click **Yes** to confirm the deletion.

*Note: You can only delete resources that are not used anywhere in the system. If the resource is used, ProPricer will display the **Item Usage Info** box instead.*

Restore

The Restore feature allows you to reintegrate data in the program. Once the data is restored, you will be able to work with it like before.

You can restore global data, proposals, and proposal templates. The Restore process occurs in two stages. ProPricer extracts the data from the .zip file in the first stage and then consolidates it with the existing data in the second. You will be able to select the option you want to use when duplicate records are found.

If a proposal from BOE Pro is sent to you, you can restore it in your edition of ProPricer. The BOE information will be restored along with the estimates, and you will be able to view everything with no re-configuration or setup. To learn more about BOE Pro, visit **propricer.com**.

The ProPricer Server installation includes ProPricerRestorer.exe which is a command line application for restoring proposals. If you are a system administrator, running the application can help automate and optimize processes for managing and moving archived proposals.

Restore an Archived Proposal

Restore a Proposal

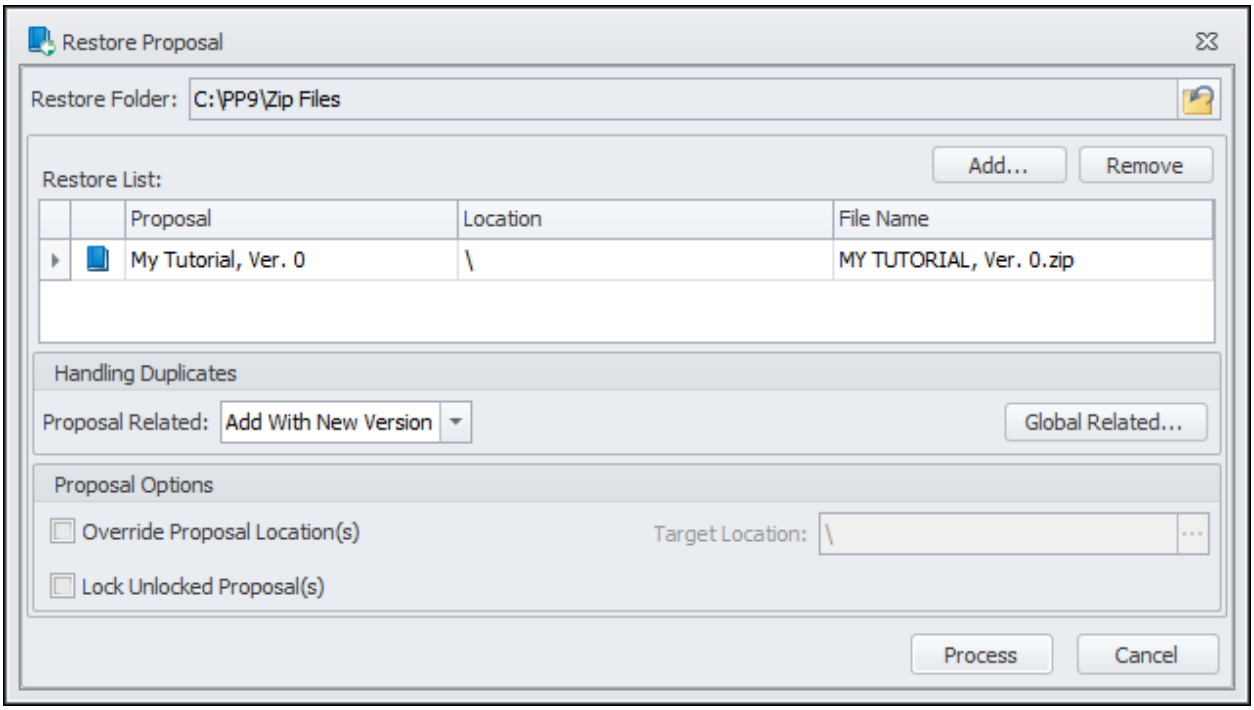
1. On the **External Data** ribbon, in the **Restore** group, Click **Proposal**.
2. Click the **Add** button to select the proposals to restore, or click the **Remove** button to remove a proposal from the list.
3. Set the remaining restore options.
4. Click **Process**.

Restore a Proposal Template

1. On the **External Data** ribbon, in the **Restore** group, Click **Proposal Template**.
2. Click the **Add** button to select the templates to restore, or click the **Remove** button to remove a template from the list.
3. Set the remaining restore options.
4. Click **Process**.

Restore Proposal or Template Dialog Box

The restore process and options are the same for proposals and proposal templates.



Restore Folder

Once you select the file you want to restore, this field will show the location of the .zip file. It may show the location of the last .zip file you restored. Click to clear the field.

Restore List

This box displays the list of items you have chosen to restore. It shows the items' names, save locations, and file names. Click the **Add** button to select more items, or click the **Remove** button to remove one from the list. You can also drag a file from Windows Explorer and drop it into the Restore List.

Handling Duplicates

Here you select the option you want to use when duplicate proposals, templates, and/or global data are found.

Proposal Related or Proposal Template Related

Select how you want to handle duplicate proposals or templates.

Skip

The item will not be restored.

Overwrite

The restored item will replace the existing item.

Add With New Version

The restored item will be added with a new version number.

Global Related

This lets you select different options for handling duplicate global data. These options are not proposal-specific or template-specific. The option you select pertains to all proposals or templates.

Components

This area lists all the items that will be restored. The records are organized in subfolders. A plus sign in front of a folder indicates that the folder contains subordinate items. Click the plus sign to expand the folder to see the items stored in it.

Handling Duplicates

Here you select the option you want to use when duplicate data is found. You can select a different option for the individual items.

Skip duplicates

The record will not be restored. This is the default option.

Overwrite duplicates

The restored record will replace the existing record.

Add with new name

You will be asked to enter a new name for the restored record.

Prompt on duplicates

Every time there is a duplicate record, you will be prompted to select how you want to handle it.

Proposal Options or Proposal Template Options

Override Proposal Location(s) or Proposal Template Location(s)

Select this checkbox to restore the item to a different location.

Target Location

Enter the folder where you want to restore the item. If you do not enter a specific folder, the item will be restored to the root folder.

Lock Unlocked Proposal(s) or Proposal Template(s)

Select this checkbox to lock proposals or templates after being restored.

Process

Click this button to start the restore process.

Cancel

Click this button to close the dialog box without restoring the data.

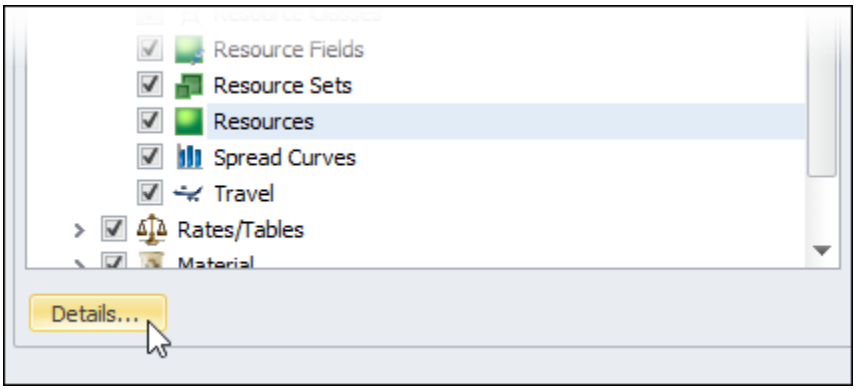
Restore Archived Global Data

Global data restoration can include a single table or the entire database.

1. Click the **External Data** ribbon and then click **Global** in the **Restore** group. The **Restore Global** dialog box will open.
2. Enter the name of the .zip that contains the global data you want to restore.
3. Select the checkboxes of the elements you want to restore.
4. Select how you want to handle duplicate data. You can select a different option for the individual items.
5. Click **Process**.

Details Dialog Box

At the bottom of the **Restore Global** dialog box, click **Details** to open the **Details** dialog box.



The **Details** dialog box shows the items contained in the specific library, table, or system component. It allows you to include or exclude specific items from the Restore process. You can also select a different option for handling duplicate data for different items. The dialog box contains the following:

Components

This area lists all the items in the library, table, or system item.

Include

Select this checkbox if you want to restore the item. Clear the checkbox if you do not want to restore the item.

Name

Shows the name of the item.

Description

Shows the description of the item.

Select All

Click this button select the **Include** checkbox of all the items. All items will be restored.

Clear All

Click this button to clear the **Include** checkbox of all the items. None of the items will be restored.

Handling Duplicates

Here you select the option you want to use when duplicate data is found. You can select a different option for each component.

Skip duplicates

The record will not be restored. This is the default option.

Overwrite duplicates

The restored record will replace the existing record.

Add with new name

You will be asked to enter a new name for the restored record.

Prompt on duplicates

Every time there is a duplicate record, you will be prompted to select how you want to handle it.

OK

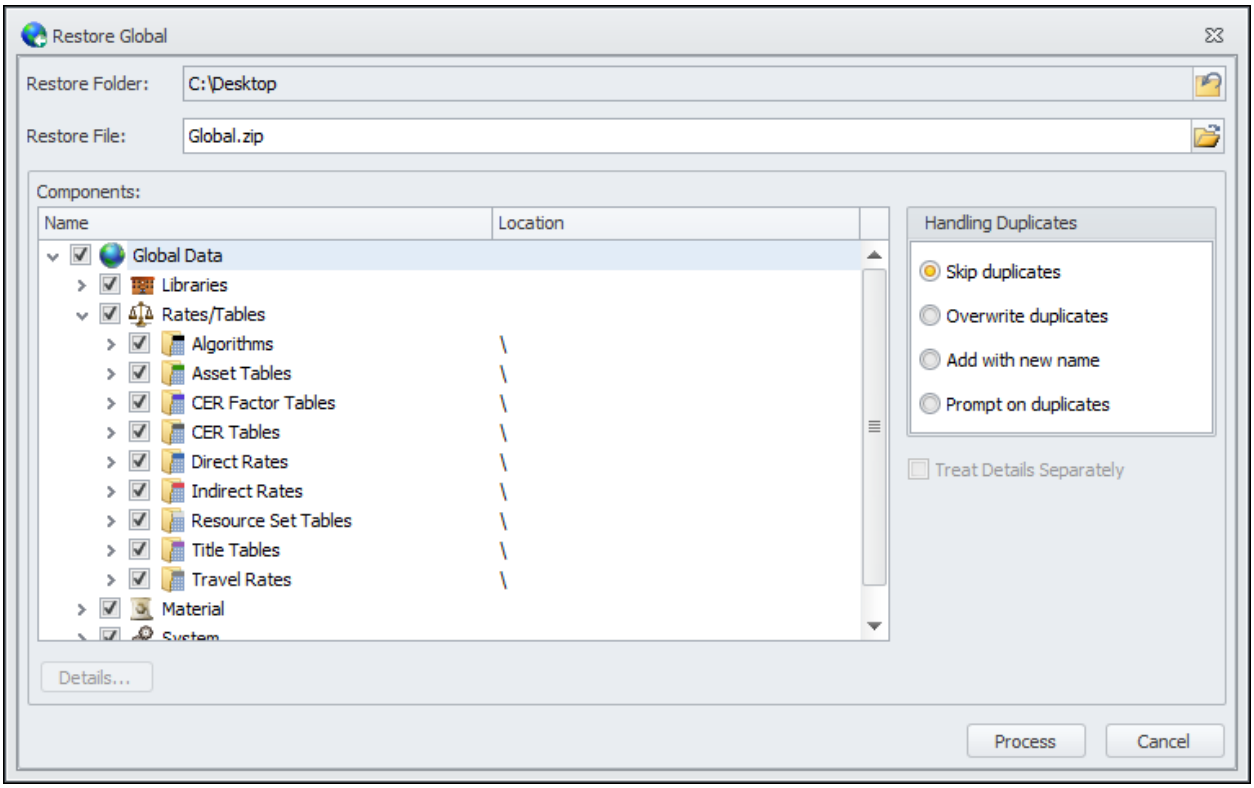
Saves the changes and closes the dialog box.

Cancel

Ignores the changes and closes the dialog box.

Restore Global Dialog Box

The **Restore Global** dialog box is where you select the global data you want to restore, as well as the option for handling duplicate records.



Restore Folder

Once you select the file you want to restore, this field will show the location of the .zip file. It may show the location of the last .zip file you restored. Click to clear the field.

Restore File

Enter the name of the .zip file that contains the global data you want to restore, or click to browse for it.

Components

This area lists the items contained in the file, and allows you to select the ones you want to restore. It is divided in two columns: **Name** and **Location**. The **Name**

column shows the global records. They are organized in separate folders, each of which provides access to several subfolders. A plus sign in front of a folder indicates that the folder has subordinate items. Click the plus sign to expand the folder to see the items stored in it. Selecting the checkbox to the left of a top-level folder tells ProPricer to select the checkboxes of all the elements within it. If you only want to restore specific data, expand the respective folder, and select the checkboxes of the individual elements. The **Location** column allows you to restore a table or product to a specific folder. If you do not enter a specific folder, the item will be restored to the root folder.

Handling Duplicates

Here you select the option you want to use when duplicate data is found. You can select a different option for each component.

Skip duplicates

The record will not be restored. This is the default option.

Overwrite duplicates

The restored record will replace the existing record.

Add with new name

You will be asked to enter a new name for the restored record.

Prompt on duplicates

Every time there is a duplicate record, you will be prompted to select how you want to handle it.

Treat Details Separately

Select this checkbox if you want to choose options for duplicate items that differ from that selected for the top-level component. This option is used in conjunction with the **Details** option, which allows you to select all or specific items from the table or library you want to restore.

Details

This button allows you to see the items in a library or table, and then select all or just specific items to be restored. If the **Treat Details Separately** checkbox is selected, you can also choose how you want to handle duplicate data on an item-by-item basis.

Process

Click this button to start the restore process.

Cancel

Click this button to close the dialog box without restoring the data.

Role Information

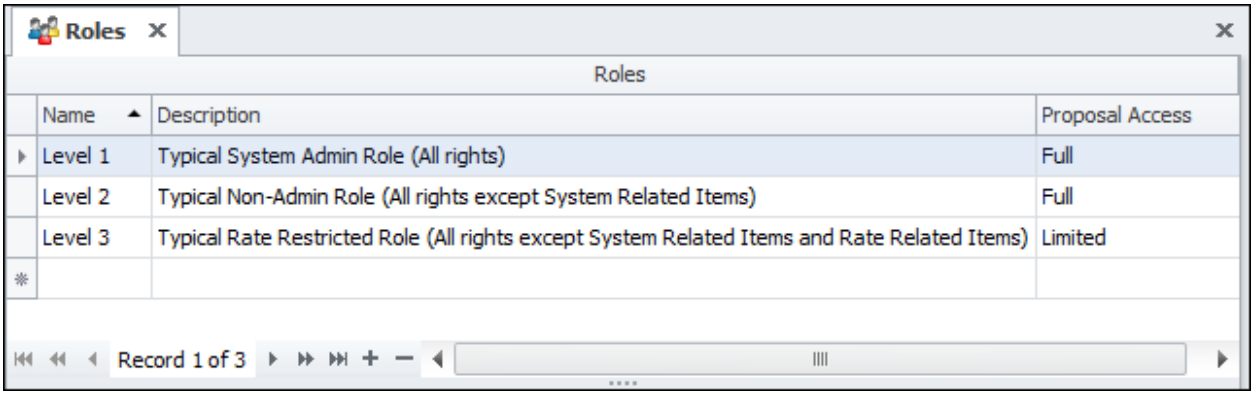
This is where you create the roles you will assign to the users, as well as set the Access Rights the role will have. For your convenience, we have provided three default roles with preassigned Access Rights. You can use them as they are, or change them to fit your needs. The roles are:

- Level 1 - Access to everything in ProPricer.
- Level 2 - Access to everything except System Related Options.
- Level 3 - Access to everything except System Related Options and Rate Related Options.

Role Information is divided into three grids: Roles, Associated Permissions, and Associated Users.

Roles

This grid is where you create the roles.



Name

Enter a name for the role.

Description

Enter a description for the role.

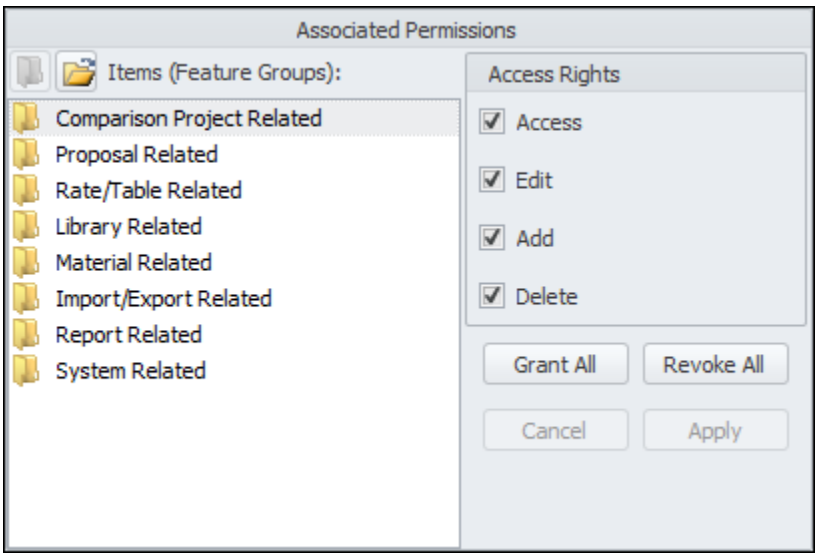
Proposal Access

This column regulates the proposals the user will be able to see in his list of proposals. There are two options to choose from:

- Full - This option allows the user to see all proposals in his list of proposals.
- Limited - This option limits the user to see in his list of proposals just the proposals he creates or is granted the opportunity to see in the list by someone else.

Associated Permissions

This grid is where you grant the Access Rights the role will have. It is subdivided into two groups: Items (Feature Groups) and Access Rights.



Items (Feature Groups)

This box displays eight folders containing different ProPricer features or options. Each folder contains individual elements. Double-click a folder to see its contents. The folders include:

- Comparison Project Related
- Proposal Related
- Rate/Table Related
- Library Related
- Material Related
- Import/Export Related
- Report Related
- System Related

Access Rights

The user Access Rights consist of *Access*, *Edit*, *Add*, *Delete*, and *Print*. Some elements will not have all these rights available. You can grant rights to all the items in a folder, or open the folder and grant them individually. If you want to grant specific rights on an item-by-item basis, you need to select the **Access** checkbox first to enable the checkboxes of the subsequent rights.

The elements within the Rate/Table Related Options and Report Related Options also include a (New) option. The rights you assign to the (New) items, will become the default Access Rights for all new tables and/or reports.

Grant All

Click this button to grant all the Access Rights for the folder or element. All the checkboxes will be selected.

Revoke All

Click this button to revoke all the Access Rights for the folder or element. All the checkboxes will be cleared.

Cancel

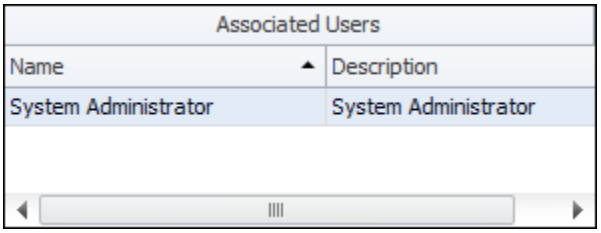
Ignores any changes you have made.

Apply

Saves the changes you have made.

Associated Users

This grid shows all the users that have been assigned the role selected above. It is for information only.



Assign a Role to a User

Roles determine the level of participation a user will have in the system. Once you create the role and assign the appropriate Access Rights, you can then assign the role to a user.

1. On the **Setup** ribbon, in the **Security** group, click **User Information**.
2. Do one of the following:
   - In the **Users** grid, under the **Role** column, select the role you want to assign to the user.
   - Right-click the user, point to **Assign Role** in the shortcut menu, and then click the role you want.
3. Press **Ctrl**+**S** or move to another row to save your work.

Copy a Role

1. On the **Setup** ribbon, in the **Security** group, click **Role Information**.
2. Right-click the role you want copy, and then click **Copy** on the shortcut menu.
3. Enter a name for the new role.
4. Click **OK**.

Notes:

- *Role names are unique and cannot be duplicated*.
- *The Associated Permissions assigned to the role you selected to copy will also be assigned to the new role*.

Create a Role

Roles determine the level of participation a user will have in the system. Once you create the role and assign the appropriate Access Rights, you can then assign the role to a user.

1. Click the **Setup** ribbon, and then click **Role Information** in the **Security** group.
2. In the **Roles** grid, type a name for the role, and enter a description.
3. In the **Associated Permissions** section:
    3.1. Select the entire folder and click **Grant All** to select the checkboxes of all the elements within the folder.
    3.2. Open the folders and grant the access rights to the individual elements within the folder. You must select the **Access** checkbox to enable the subsequent checkboxes.
4. Click **Apply**.

Delete a Role

1. Click the **Setup** ribbon, and then click **Role Information** in the **Security** group.
2. Right-click the role you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

Grant/Revoke

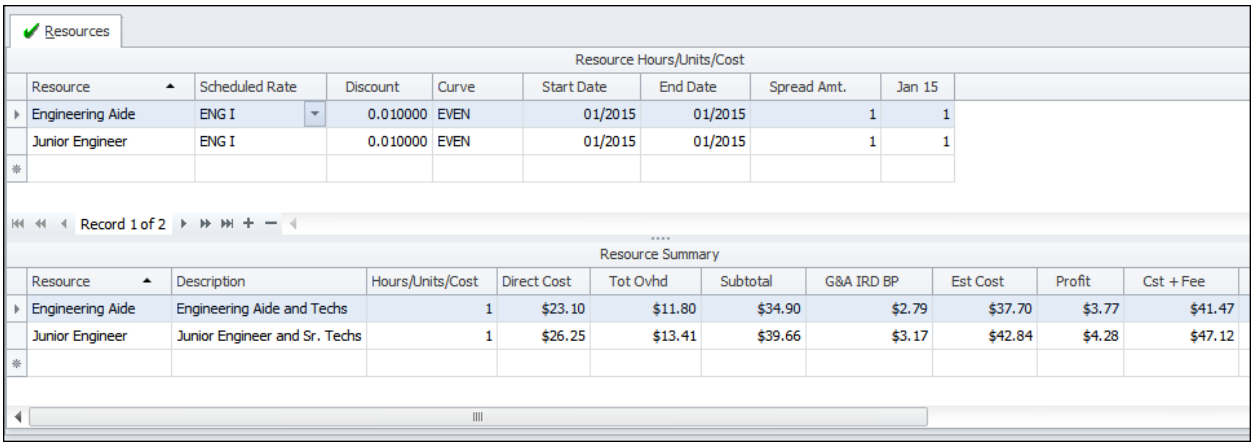
Access Rights are granted to the individual roles that are then assigned to the users.

1. Click the **Setup** ribbon, and then click **Role Information** in the **Security** group.
2. In the **Roles** grid, select the role for which you want to grant/revoke Access Rights.
3. In the **Associated Permissions** section:
    3.1. Select the entire folder and click **Grant All**/**Revoke All** to select/clear all the checkboxes of the elements within the folder.
    3.2. Open the folders and grant/revoke the Access Rights to the individual elements within the folder. You must select the **Access** checkbox to enable the subsequent checkboxes.
4. Click **Apply**.

Scheduled Rates

Scheduled rates represent those that are published in a schedule for goods and services, such as the General Service Administration (GSA) pricing schedule. These rates fully account for indirect costs. Scheduled Rate Tables allow you to enter the rate from the schedule, associate that rate with your resources, and then compare your labor rates to those published in the schedule to determine the profitability of using different resources. For example:

The published scheduled rate for Engineer I is $72.55 per hour. Your company has two employees that can cover the position: Engineering Aide and Junior Engineer. The direct cost for one hour for Junior Engineer is $26.25 and $23.10 for Engineering Aide. The following screenshot shows that Junior Engineer will generate a higher profit.



You cannot use a Scheduled Rate Table in place of a Direct Rate Table. The program requires a Direct Rate Table and its associated Indirect Rate Table to calculate the total cost of the proposal. Scheduled rates are only used to calculate the profit generated from different resources that can be used to fulfill a task.

You can only use scheduled rates if the Fee Base of your proposal is *Sell* and your Algorithm supports them.

You can set a Scheduled Rate Table as the current Scheduled Rate Table, which will make it the default table for every new proposal you create. It will automatically be

entered on the **Pricing** page in the **Proposal** folder of **Proposal Properties**. The name of the current Scheduled Rate Table appears in bold letters in the **Scheduled Rates** folder and the icon will have a star.

Associate a Scheduled Rate with a Resource

Once you create a Scheduled Rate Table and assign it to the proposal, you can associate a scheduled rate with a resource to compare your labor rates to those published in the schedule.

1. In the **Tasks** grid, click the task.
2. Click the **Resources** tab.
3. In the **Resource Input** grid, enter the scheduled rate in the **Scheduled Rate** column of the resource.
4. Press **Ctrl**+**S** or move to another row to save your work.

Set the Scheduled Rates Decimal Display

The **Scheduled Rates Decimal Display** field allows you to determine the number of places after the decimal point that will be shown for scheduled rates in Scheduled Rate Tables and on reports.

1. Click the **Setup** ribbon, and then **System Options** in the **Preferences** group.
2. Click the **General** page.
3. In the **Scheduled Rates Decimal Display** field, enter a number between 2 and 6.
4. Click **OK**.

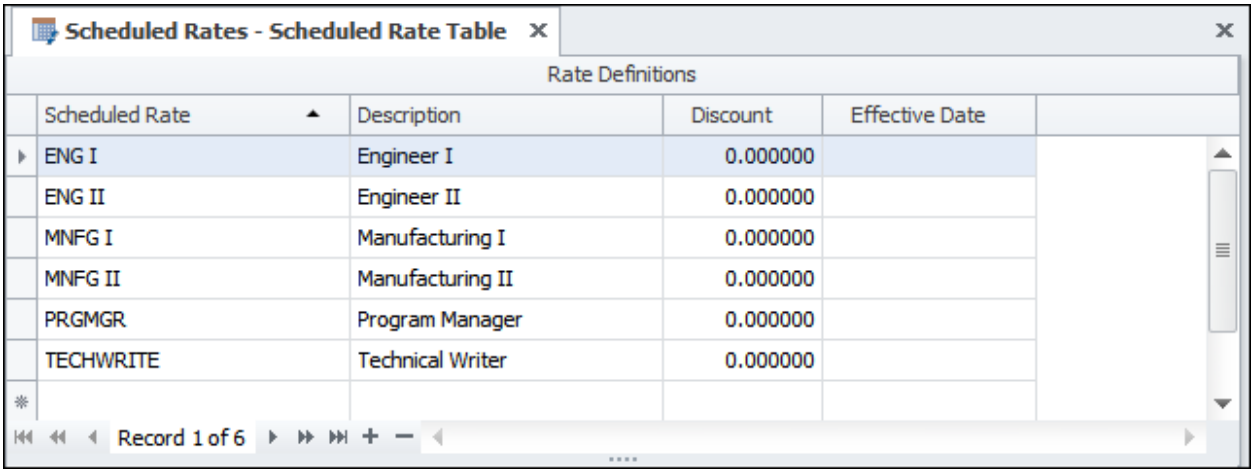
Scheduled Rate Tables

Scheduled Rate Tables are divided into three grids: Rate Definitions, Escalation Sets, and Rates.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Rate Definitions

This grid shows all the scheduled rates in the table. It is also where you add new scheduled rates and remove unnecessary ones.



Scheduled Rate

Enter a name for the scheduled rate.

Description

Type a description for the scheduled rate.

Discount

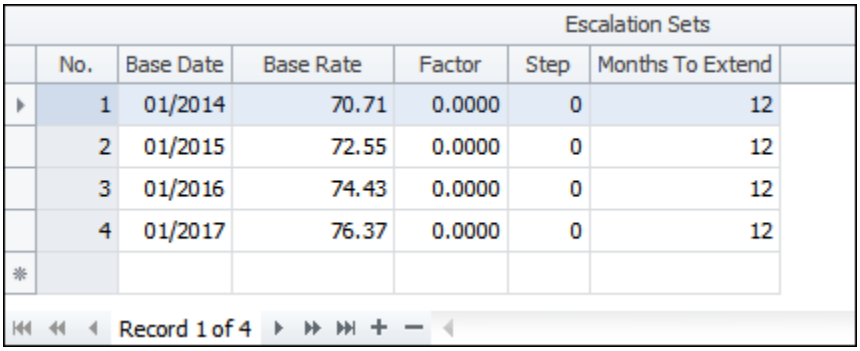
Enter a discount for the scheduled rate. The value must be a number between 0 and 1, inclusive.

Effective Date

Enter the date the rate will take effect. This is for information only.

Escalation Sets

In this grid, you define one or more escalation sets for the scheduled rates in the table.



Escalation Sets

	No.	Base Date	Base Rate	Factor	Step	Months To Extend
▸	1	01/2014	70.71	0.0000	0	12
	2	01/2015	72.55	0.0000	0	12
	3	01/2016	74.43	0.0000	0	12
	4	01/2017	76.37	0.0000	0	12
*						

Record 1 of 4

No.

The cells of this column cannot be edited. ProPricer assigns numbers to the escalation sets, based on their start dates. The set with the earliest date receives number 1.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the rate for the first month.

Factor

Enter the factor that will be applied to the base rate to escalate it. For example, express 1% as 0.01.

Step

Enter the number of months the base rate will remain constant before the factor is applied.

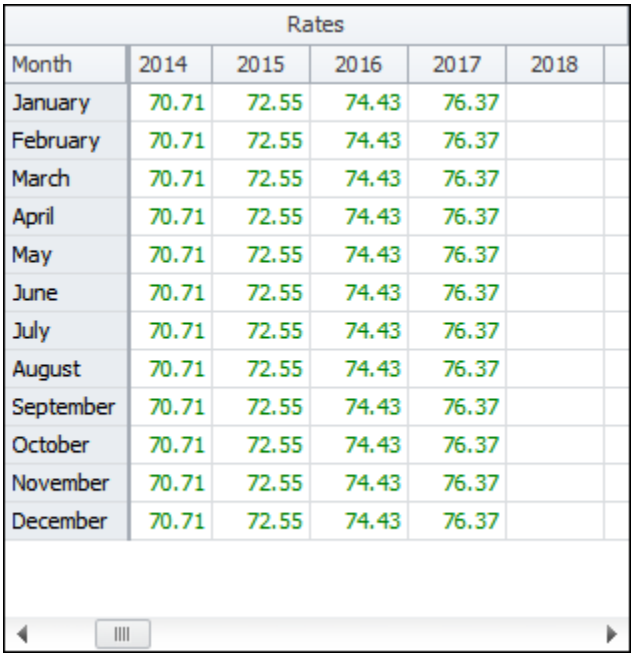
Months to Extend

Enter the number of months that the escalation set should last.

Rates

This grid shows rates by month and year for the scheduled rate selected in the **Rate Definitions** grid above. The value in every cell is the amount of money chargeable for using the resource. The grid shows all years in the system period. However, you only need to enter rates for the years you require.

You can use an escalation set to enter rates or enter them manually. If you enter rates manually and then create an escalation set, ProPricer will delete the rates entered manually and then enter the new calculated rates in the cells. Likewise, if you use an escalation set to enter rates, you can still enter rates manually if needed. The screen shot shows the rates calculated from the escalation set (green) and rates entered manually (black). The **Rates** grid shows only the rates defined with escalation sets or entered manually. Default rate values are not shown.



Rates

Month	2014	2015	2016	2017	2018
January	70.71	72.55	74.43	76.37	
February	70.71	72.55	74.43	76.37	
March	70.71	72.55	74.43	76.37	
April	70.71	72.55	74.43	76.37	
May	70.71	72.55	74.43	76.37	
June	70.71	72.55	74.43	76.37	
July	70.71	72.55	74.43	76.37	
August	70.71	72.55	74.43	76.37	
September	70.71	72.55	74.43	76.37	
October	70.71	72.55	74.43	76.37	
November	70.71	72.55	74.43	76.37	
December	70.71	72.55	74.43	76.37	

ProPricer shows scheduled rates with two, three, four, five, or six digits after the decimal point, depending on the value entered on the **General** page in the **System** folder of **System Options**. If you enter rates with more digits after the decimal point, ProPricer will round the rate to the value entered when you leave the cell. When you click the rate again, you will see the complete rate entered.

Assign a Scheduled Rate Table to a Proposal

If you want to assign scheduled rates to the resources in your proposal, you need to associate a Scheduled Rate Table with your proposal.

1. Do one of the following:
   - In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties**.
   - Select the appropriate proposal. On the **Proposal** ribbon, in the **Proposal** group, click **Properties**.
2. In the **Proposal** folder, click the **Pricing** page.
3. In the **Scheduled Rate Table** field, enter the name of the appropriate table.
4. Click **OK**.

Copy a Scheduled Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Scheduled Rates** folder.
    - Double-click the **Scheduled Rates** folder to open the list of Scheduled Rate Tables.
3. Right-click the Scheduled Rate Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.

Copy a Scheduled Rate within a Table

Once you have defined the rates for a scheduled rate in a Scheduled Rate Table, you can copy the rates into another scheduled rate in the table.

1. Right-click the scheduled rate you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the scheduled rate to which you want to copy the rates.
3. Click **OK**.

ProPricer will check to see if rates have been entered for the target scheduled rate, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Create a Scheduled Rate Table

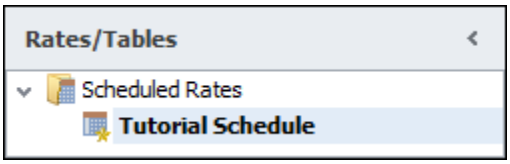
If you want to calculate the profit from a contract based on scheduled resource rates, you need to create a Scheduled Rate Table and assign it to the proposal.

1. Do one of the following:
    - In the Main Menu, click **New Scheduled Rate Table**.
    - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Scheduled Rates** folder, then click **New Scheduled Rate Table**.
2. Enter a name and description for the new table.
3. Click **OK**. The Scheduled Rate Table will open in the Workspace.

Current Scheduled Rate Table

Setting a Scheduled Rate Table as the current one indicates which table has the rates your company wants to use. It will be the default table for every new proposal you create and will automatically be entered on the **Pricing** page in the **Proposal** folder of **Proposal Properties**.

The name of the current table will appear in bold letters in the **Scheduled Rates** folder in the Navigation Pane, and the icon will have a star. The table list has a **Current** checkbox as well.



You can open the table by clicking **Scheduled Rates** in the **Current Tables** group on the **Rates** ribbon. Or you can double-click the table in the Navigation Pane.

You can run the Audit Report to determine if your proposal is using the current Scheduled Rate Table.

Notes:

- *There can only be one current Scheduled Rate Table at a time. You can set another Scheduled Rate Table as the new current table whenever necessary.*
- *You can switch the current Scheduled Rate Table assigned to the proposal at any time.*
- *If there is no table set as the current one, the **Scheduled Rate Table** field on the **Pricing** page in the **Proposal** folder of **Proposal Properties** will be blank when you create a new proposal.*
- *None of the exports distinguish if the Schedule Rate Table is set as current.*

- *The Archive/Restore processes do not distinguish if the Scheduled Rate Table is set as current.*
- *Proposals that were locked with the current table are not affected by changes to the current table.*
- *You need the Associated Permission to be able to set a Scheduled Rate Table as the current one.*

Define a Scheduled Rate

1. Click the **Rates/Tables** button and expand the **Scheduled Rates** folder. Double-click the appropriate Scheduled Rate Table.
2. Enter a name and description for the new rate.
3. *(Optional)* Enter a value in the **Discount** column.
4. Define an escalation set for the rate, or enter the rates in the **Rates** grid.
5. Press **Ctrl**+**S** or move to another row to save your work.

Delete a Scheduled Rate from a Table

You can remove any scheduled rate you no longer need from a Scheduled Rate Table.

1. Click the **Rates/Tables** button and expand the **Scheduled Rates** folder. Double-click the appropriate Scheduled Rate Table.
2. Right-click the rate you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

*Note: You can only delete scheduled rates that are not used anywhere in the system. If the rate is used, ProPricer will display the **Item Usage Info** box instead.*

Delete a Scheduled Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Scheduled Rates** folder.
    - Double-click the **Scheduled Rates** folder to open the list of Scheduled Rate Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete a Scheduled Rate Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Scheduled Rate Table Properties

The **Scheduled Rate Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

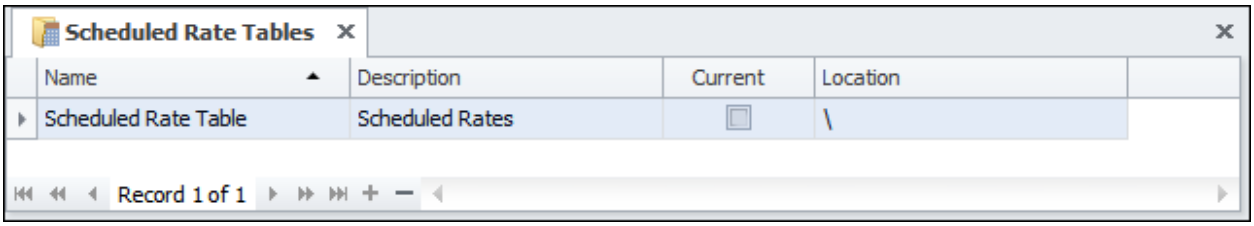
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Scheduled Rate Tables List

The Scheduled Rate Tables List shows all the Scheduled Rate Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Current

The checkbox indicates if a Scheduled Rate Table has been set as current. This table is the default table for every new proposal you create and will be automatically entered on the **Pricing** page in the **Proposal** folder of **Proposal Properties**.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Scheduled Rates** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Set a Scheduled Rate Table as Current

Setting a Scheduled Rate Table as current makes it the default Scheduled Rate Table for every new proposal you create. ProPricer will automatically assign it in the Pricing page of the Proposal Properties.

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand the **Scheduled Rates** folder.

2. Right-click the appropriate table, and then click **Current**. In the **Scheduled Rates** folder, the name of the current Scheduled Rate Table will appear in bold letters and its icon will have a star.

Selections

The **Edit List** dialog box is where you choose the elements to include in or exclude from a selection. If the condition of a selection criterion is set to *Is any of*, then the specified elements are included. If it is set to *Is none of*, then the elements are excluded.

While creating or editing a selection, open this dialog box from the **Selection Criteria** grid by clicking in the **Value** column.

Available Elements

Shows the items from the category entered in the **Field Name** column.

Selected Elements

Shows the items you have selected to include in or exclude from the selection. Use the buttons to select the item or items.

Move an element to **Selected Elements**

Move all elements to **Selected Elements**

Move an element to **Available Elements**

Move all elements to **Available Elements**

Note: You can double-click an element to move it from one area to the other.

OK

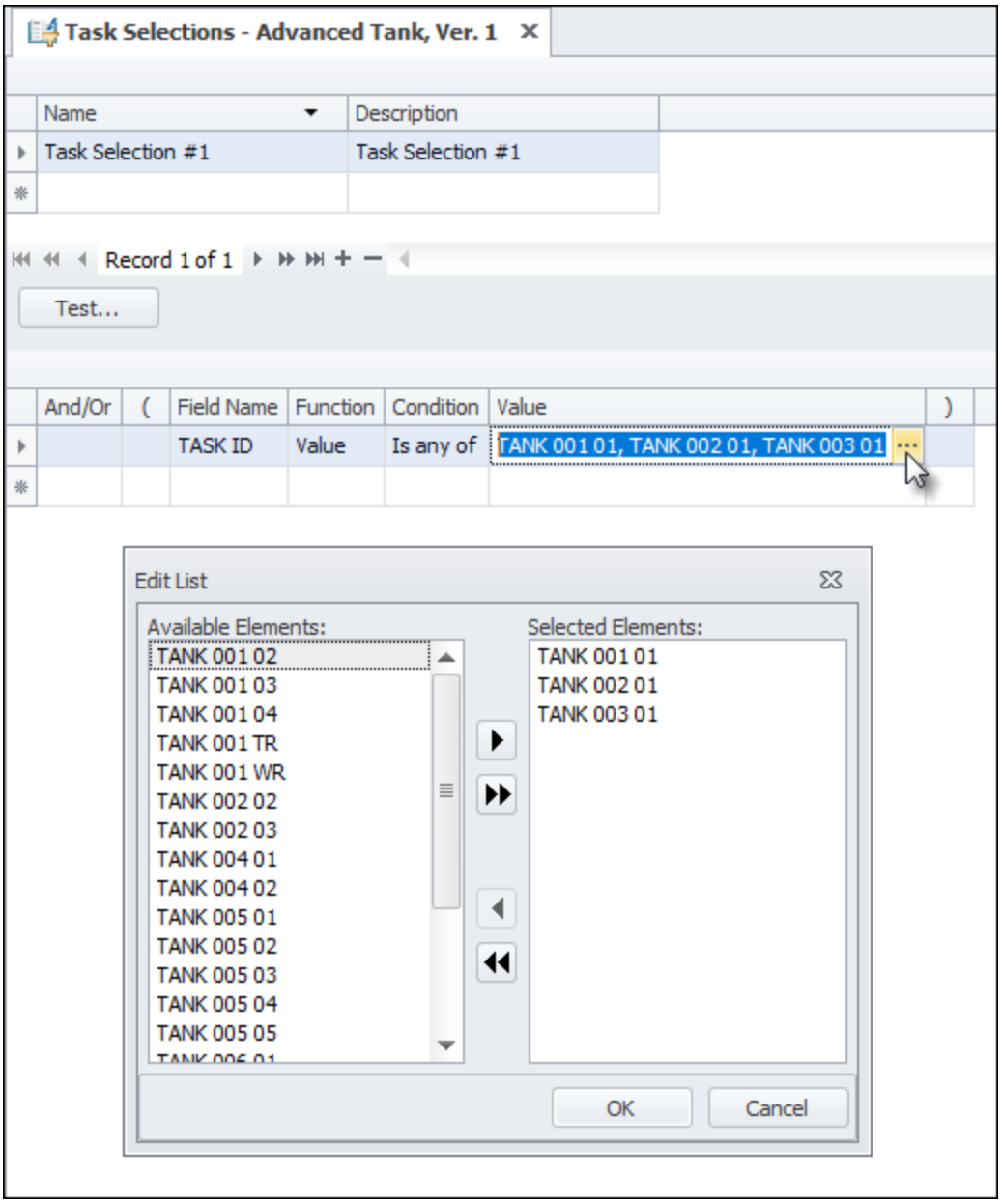
Applies the changes you made and closes the dialog box.

Cancel

Closes the dialog box without making any changes.

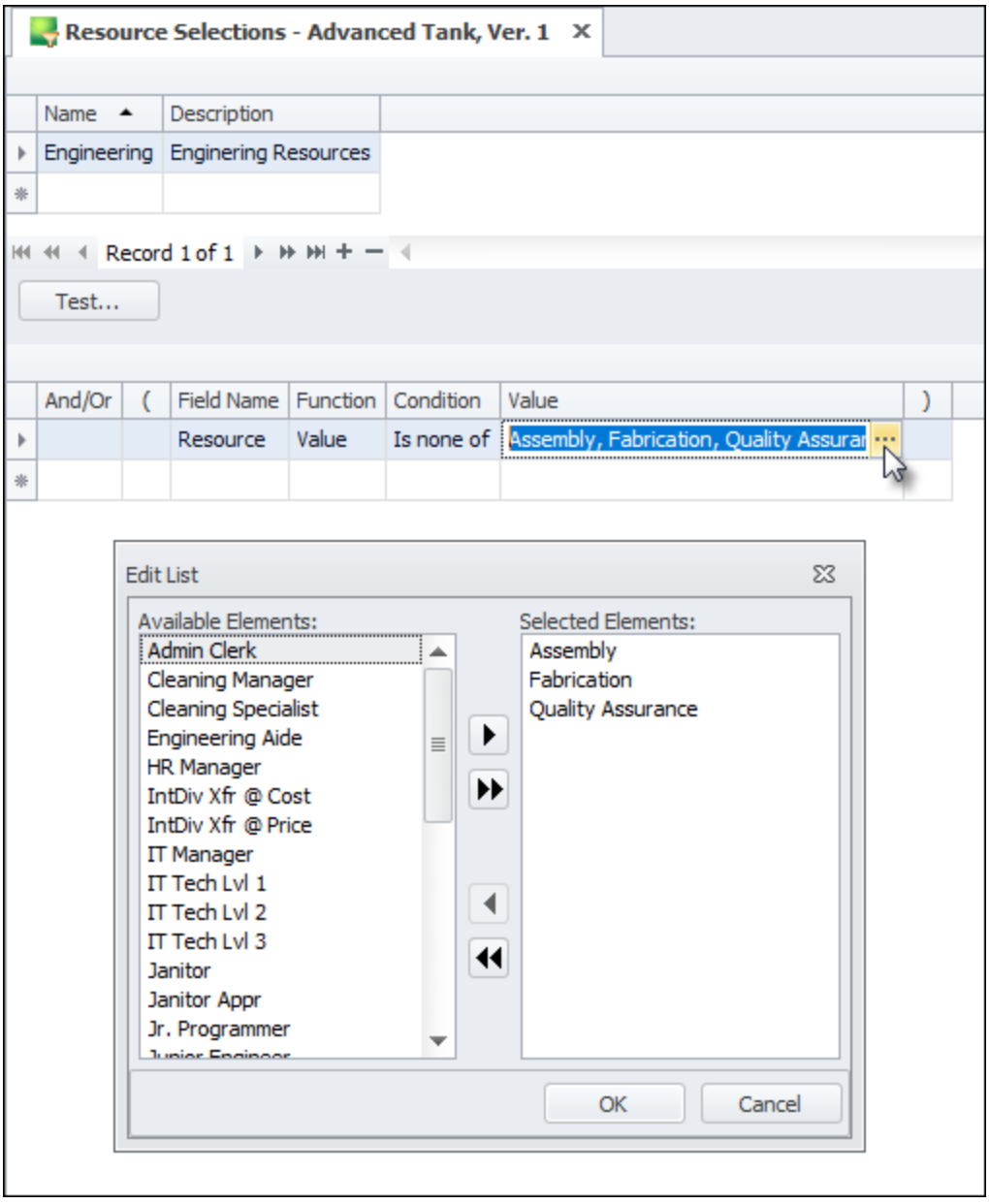
Example: Including Selected Elements with the *Is any of* Condition

The *Is any of* condition allows you to pick multiple values to include in a selection criterion. Here is an example of a task selection that will look for any of the tasks selected in the **Edit List** dialog box:



Example: Excluding Selected Elements with the *Is none of* Condition

The *Is none of* condition allows you to pick multiple values to exclude from a selection criterion. Here is an example of a resource selection that will not look for any of the resources selected in the **Edit List** dialog box:

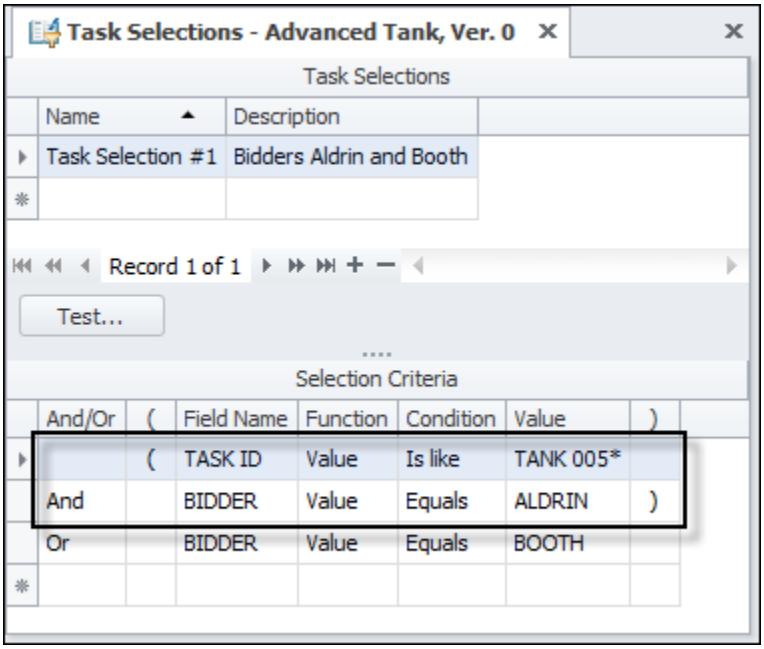


When you create a selection, such as a task or resource selection, placing parentheses around a set of criteria creates a logic group. The placement of parentheses affects the results of the selection.

This topic presents two examples of the same task selection. They show what happens when the logic group in the selection changes.

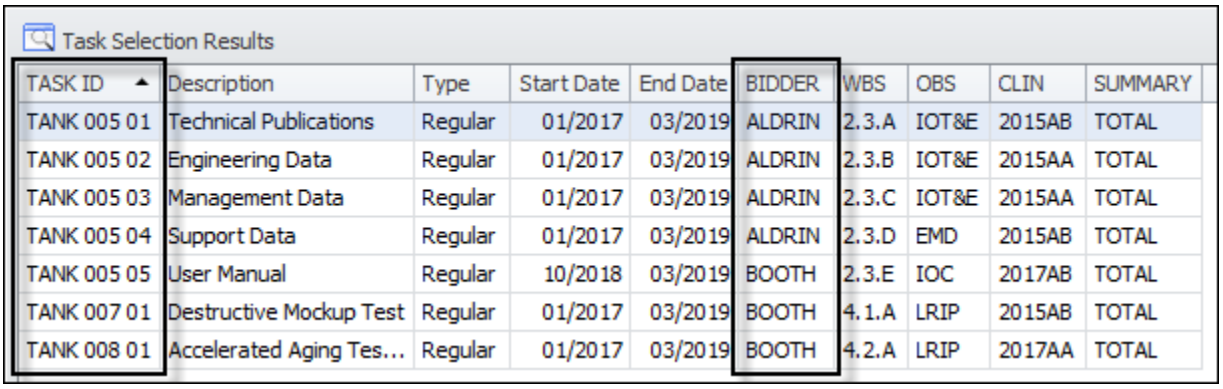
Example 1

Parentheses are placed around the first and second selection criteria to create a logic group:



- The logic group is *(TASK ID Is like TANK 005* And BIDDER Equals ALDRIN)*, and the criterion that follows it is *BIDDER Equals BOOTH*.
- The logic group and the subsequent criterion are combined with the conjunction *Or*.

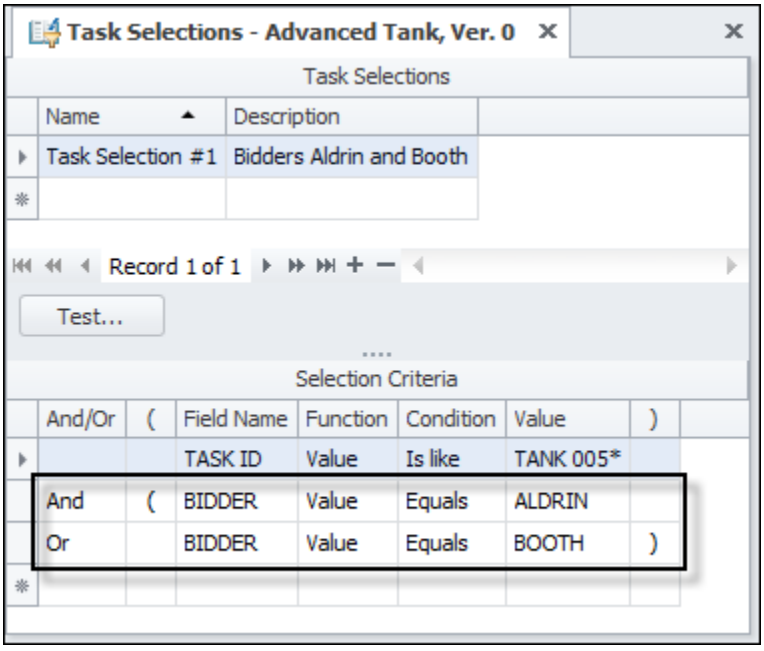
With the criteria set up like this, the task selection will find all the tasks starting with *TANK 005* that Alyson Aldrin bid. It will also find all the tasks that David Booth bid, regardless of the name of the task. These are the results:


Task Selection Results

TASK ID	Description	Type	Start Date	End Date	BIDDER	WBS	OBS	CLIN	SUMMARY
TANK 005 01	Technical Publications	Regular	01/2017	03/2019	ALDRIN	2.3.A	IOT&E	2015AB	TOTAL
TANK 005 02	Engineering Data	Regular	01/2017	03/2019	ALDRIN	2.3.B	IOT&E	2015AA	TOTAL
TANK 005 03	Management Data	Regular	01/2017	03/2019	ALDRIN	2.3.C	IOT&E	2015AA	TOTAL
TANK 005 04	Support Data	Regular	01/2017	03/2019	ALDRIN	2.3.D	EMD	2015AB	TOTAL
TANK 005 05	User Manual	Regular	10/2018	03/2019	BOOTH	2.3.E	IOC	2017AB	TOTAL
TANK 007 01	Destructive Mockup Test	Regular	01/2017	03/2019	BOOTH	4.1.A	LRIP	2015AB	TOTAL
TANK 008 01	Accelerated Aging Tes...	Regular	01/2017	03/2019	BOOTH	4.2.A	LRIP	2017AA	TOTAL

Example 2

Here, the parentheses are placed around a different set of criteria:


Task Selections - Advanced Tank, Ver. 0

Task Selections

Name	Description
Task Selection #1	Bidders Aldrin and Booth

Record 1 of 1

Test...

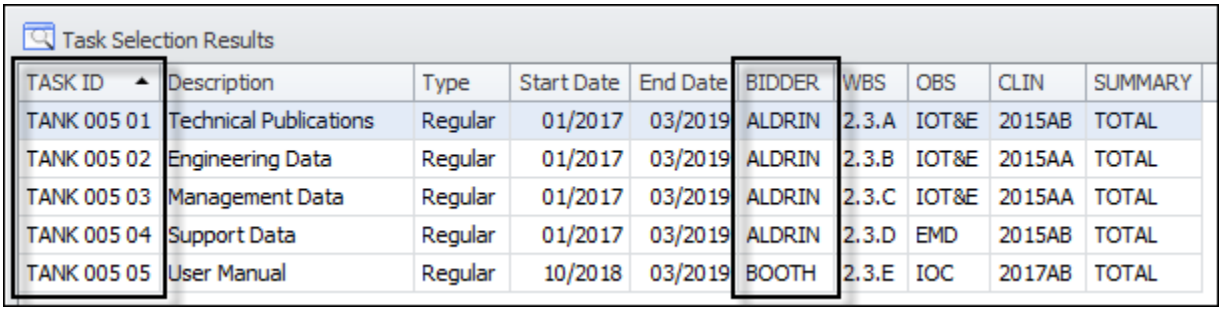
Selection Criteria

And/Or	(	Field Name	Function	Condition	Value	)
		TASK ID	Value	Is like	TANK 005*	
And	(	BIDDER	Value	Equals	ALDRIN	
Or		BIDDER	Value	Equals	BOOTH	)

- Now the logic group is *(BIDDER Equals ALDRIN Or BIDDER equals BOOTH)*, and the criterion that precedes it is *TASK ID Is like TANK 005**.

- The logic group and the preceding criterion are combined with the conjunction *And*.

This means the task selection will find all the tasks starting with *TANK 005* that were bid by Alyson Aldrin or David Booth. Notice that the selection results no longer include *TANK 007 01* and *TANK 008 01* that were bid by David Booth:



Task Selection Results

TASK ID	Description	Type	Start Date	End Date	BIDDER	WBS	OBS	CLIN	SUMMARY
TANK 005 01	Technical Publications	Regular	01/2017	03/2019	ALDRIN	2.3.A	IOT&E	2015AB	TOTAL
TANK 005 02	Engineering Data	Regular	01/2017	03/2019	ALDRIN	2.3.B	IOT&E	2015AA	TOTAL
TANK 005 03	Management Data	Regular	01/2017	03/2019	ALDRIN	2.3.C	IOT&E	2015AA	TOTAL
TANK 005 04	Support Data	Regular	01/2017	03/2019	ALDRIN	2.3.D	EMD	2015AB	TOTAL
TANK 005 05	User Manual	Regular	10/2018	03/2019	BOOTH	2.3.E	IOC	2017AB	TOTAL

Material Selections

A material selection is a group of parts and/or assemblies that meet specific criteria. Once you create a material selection, ProPricer will search through the parts and assemblies, and then group the materials that meet the criteria. They are particularly useful when running what-if scenarios and reports. If you run a what-if based on a material selection, only the parts/assemblies contained in the selection will be changed. Likewise, if you run a report based on a material selection, only the parts/assemblies contained in the selection will be reported.

The criteria you specify for a material selection can be something as simple as *Type equals Part*, or involve logic groups if you need something more complex. A material selection can be based on the Material ID, Material Description, Product, Type, Assembly/Part, Part Description, Base Unit Cost, Unit Cost, Resource, Make/Buy, Cost Source, Vendor, Rule ID, and any material field and resource field. The field name you select determines the elements you will be able to choose from. For example, if you select *Type*, the list will show *Part* and *Assembly*. The conditions you can choose from include: *Equals*, *Is greater than*, *Contains*, *Is like*, and *Is any of*, to name a few.

Create a Material Selection

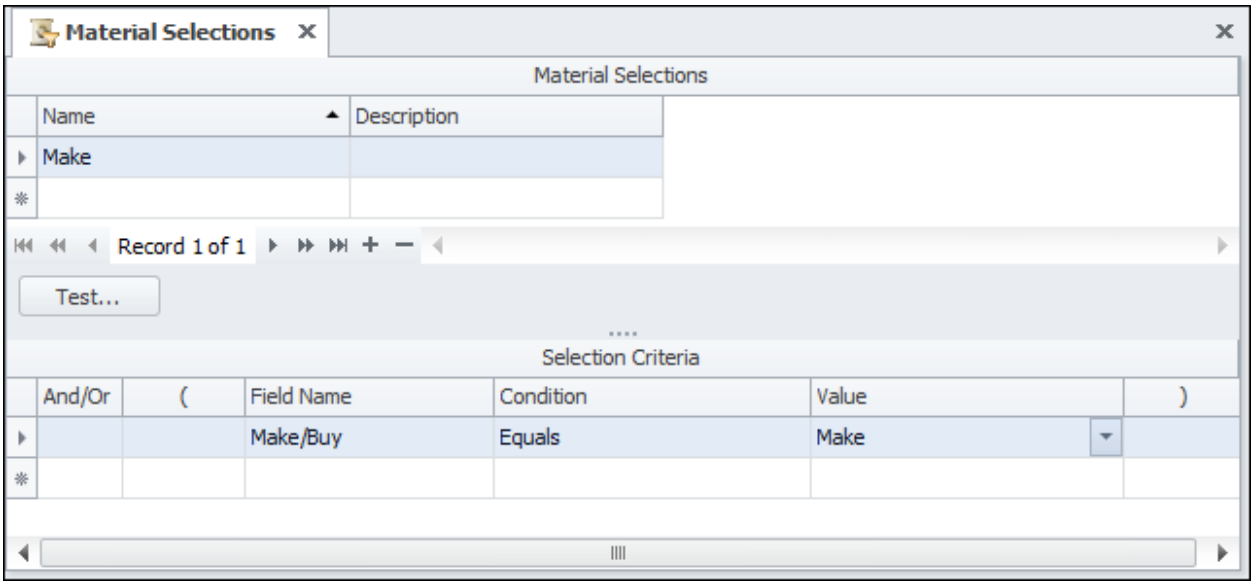
1. In the Navigation Pane, click the **Material** button, and then double-click **Material Selections**.
2. Go to the last row in the **Material Selections** grid, or click the plus sign in the navigation tools.
3. Enter a name and description for the material selection.
4. Go to the **Selection Criteria** grid.
5. Define the selection criteria for the query. Your query can be simple or complex, as well as use wildcards. Complex queries involve logic groups.
6. Press **Ctrl+S** or move to another row to save your work.
7. Click **Test** to view the results.
8. Modify the criteria.

Note: See the Material Selections Maintenance help topic to learn more about the columns in each grid.

Material Selections Maintenance

You can use material selections to limit reports and What-Ifs to specific parts or assemblies.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Material Selections

This grid shows any material selections created. Each row in the grid represents a separate selection. The **Test** button works with the material selection highlighted in the grid.

Name

Enter a name for the material selection

Description

Enter a short description of the material selection.

Test

Click this button to see the **Material Selection Results** dialog box, which lists the parts/assemblies that met the criteria of the query. The **Test** button becomes available after you save the selection query.

Selection Criteria

Here you define and organize the attributes of the parts and assemblies you want to include in the selection query. You can create simple queries, such as Unit Cost greater than 50 USD, or complex queries that involve logic groups.

And/Or

Enter *And* or *Or*, to combine criteria. *And* means that a material should meet all the criteria specified to be included in the selection. *Or* means that a material should meet one of the specified criteria to be included in the selection. Do not use *And* or *Or* in the first line of the query.

(left parenthesis

Enter a left (opening) parenthesis if you want to create a complex query using logic groups. The logic group can include one criterion or combined criteria. A left parenthesis should always be followed by a right parenthesis. The right parenthesis does not necessarily have to be on the same line.

Field Name

Enter a category to use for the selection criteria. The available field names are: *Product*, *Type*, *Assembly/Part*, *Description*, *(Base) Unit Cost*, *Resource*, *Make/Buy*, *Cost Source*, *Vendor ID*, and any resource or material fields (if any).

Function

When you enter the field name, the function becomes *Value* by default. You can then specify which field value to use in the criterion.

If the field name is related to a date/time and can serve as a point of reference, these additional functions may become available: *Days Since*, *Months Since*, *Years Since*, and *Year*. You can then set the corresponding amount of days/months/years, or the corresponding year, as the value.

Condition

Enter the type of condition/comparison you want to apply to the field name and value. The conditions include standard mathematical comparisons: *Equals*, *Does not equal*, *Is greater than*, *Is greater than or equal to*, *Is less than*, and *Is less than or equal to*. They also include *Contains*, *Is like*, *Is any of*, and *Is none of*.

Contains

This option allows you to enter the character string that must occur anywhere in the data string. Use *Contains* to find a string of contiguous characters (such as *ENG*) anywhere within the field.

For example, "Assembly/Part Contains Xray" would find the part called *Xray Film* since *Xray* is contained in the value.

Is Like

This option allows you to use wildcards (* or ?). Use *Is like* to find non-contiguous characters (for example, *E*NG*).

Is any of

This option allows you to select multiple values for the category entered in the **Field Name** column, thus eliminating the need to enter a separate record for each value.

Is none of

This option allows you to exclude from the selection the values listed in the **Value** column.

Value

Enter a value (for example, *ENG*, *Make*, *Part*) or select it from the drop-down list.

If you chose the *Is any of* or *Is none of* condition, clicking the lookup button will open the Edit List dialog box, which allows you to select the items you want to include or exclude from the list of criterion values.

) right parenthesis

Enter a right parenthesis, if applicable. The right (closing) parenthesis must be preceded by a left (opening) parenthesis.

Proposal Selections

A proposal selection is a group of proposals that meet specific criteria. The selection criteria can be based on various properties, such as the proposal name, version, manager, business unit, etc. The field name you select determines the values you can choose from. For example, if you select *Proposal Name*, the list of values will be the names of all the proposals in your database.

For each selection criterion, you must specify a condition, such as *Equals* or *Is like*. A criterion can be as simple as *Status Equals Submitted*, but if you need something more complex, you can also use logic groups.

Proposal selections are only used in the Proposal Log Report. Without a proposal selection, the report includes data for all proposals in your system.

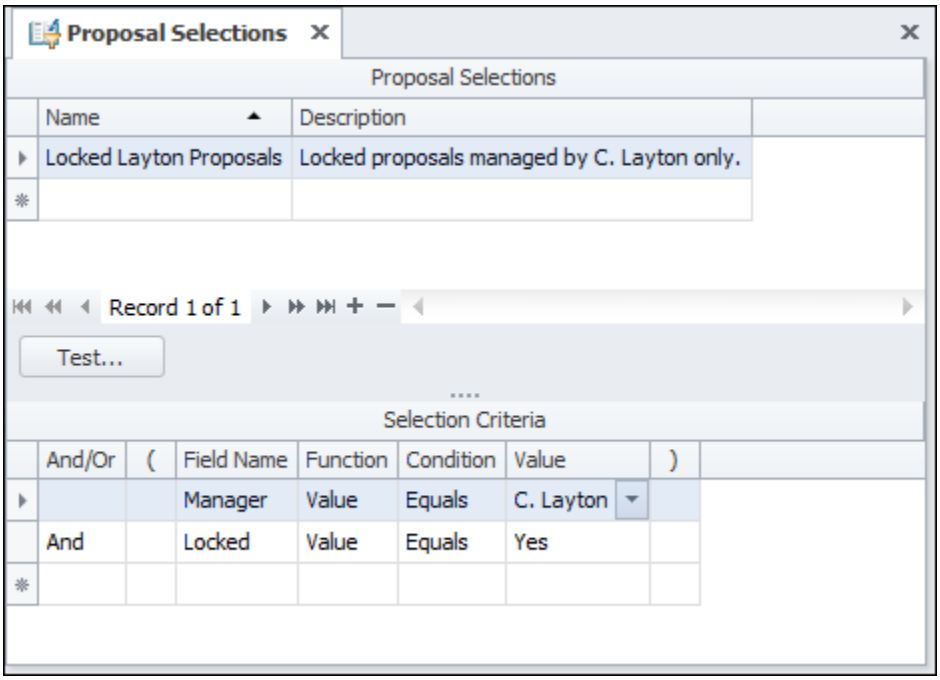
Create a Proposal Selection

1. On the **Proposal** ribbon, in the **Selections** group, click **Proposal Selection**.
2. In the **Proposal Selections** grid, enter the **Name** and **Description** of the selection.
3. In the **Selection Criteria** grid, enter the first criterion. The **Field Name**, **Function**, **Condition**, and **Value** are required. If your selection will have multiple criteria, you can enter opening and closing parentheses to create a complex query that uses logic groups.
4. Press **Ctrl**+**S** or move to another row to save your work.
5. If you enter more criteria in other rows, you must choose how to combine them with the **And/Or** column.
6. Click **Test** to see which proposals meet the selection criteria.

Note: See the Proposal Selections Maintenance help topic to learn more about the columns in each grid.

Proposal Selections Maintenance

You can use proposal selections in the Proposal Log Report to limit the printed information to specific proposals.



Proposal Selections

This grid shows all proposal selections created. Each row in the grid represents a separate selection. The **Test** button works with the selection highlighted in the grid.

Name

Enter a name for the proposal selection.

Description

Enter a short description of the proposal selection.

Test

Click this button to see the **Proposal Selection Result** dialog box, which lists the proposals that met the criteria of the query. The **Test** button becomes available after you save the selection.

Selection Criteria

Here you define the attributes of the proposals you want to include in the selection query. You can create simple queries, such as *Status Equals Submitted*, or complex queries that involve logic groups. The criteria include:

And/Or

Enter *And* or *Or*, to combine criteria. *And* means that a proposal should meet all the criteria specified to be included in the selection. *Or* means that a proposal should meet one of the specified criteria to be included in the selection. This column is disabled for the first line of the query.

(left parenthesis

Enter a left (opening) parenthesis if you want to create a complex query using logic groups. The logic group can include one criterion or combined criteria. A left parenthesis should always be followed by a right parenthesis. The right parenthesis does not necessarily have to be on the same line.

Field Name

Enter a category to use for the selection criterion. The available field names are the properties and details of proposals.

Function

When you enter the field name, the function becomes *Value* by default. You can then specify which field value to use in the criterion. For example, if you enter *Status* in the **Field Name** column, then *Value* appears in the **Function** column, and you would enter *Canceled*, *In Progress*, *Loss*, etc. in the **Value** column.

For most fields, *Value* is the only function available. If the field name is related to a date/time and can serve as a point of reference, these additional functions may become available: *Days Since*, *Months Since*, *Years Since*, and *Year*. You can then set the corresponding amount of days/months/years, or the corresponding year, as the value. For example, if you enter *Days Since* in the **Function** column, you would enter the number of days in the **Value** column.

Condition

Enter the type of condition/comparison you want to apply to the field name and value. They include standard mathematical comparisons: *Equals*, *Does not equal*, *Is greater than*, *Is greater than or equal to*, *Is less than*, and *Is less than or equal to*. They also include *Contains*, *Is like*, *Is any of*, and *Is none of*.

Contains

This option allows you to find a string of contiguous characters anywhere within the field.

For example, *Proposal Name Contains Advanced* would find proposals such as *Advanced Tank* and *Advanced Tank Materials*, because *Advanced* is in both names. It would not find one named *Adv Tank*.

Is Like

This option allows you to use wildcards (* or ?) to find a string of non-contiguous characters.

For example, *Proposal Name Contains A* Tank* would find proposals such as *Advanced Tank*, *Advanced Tank Materials*, and *Adv Tank*. All proposal names start with an *A* followed by any sequence of characters, and all names end with *Tank*.

Is any of

This option allows you to select multiple values for the category entered in the **Field Name** column, thus eliminating the need to enter a separate record for each value.

Is none of

This option allows you to exclude from the selection the values listed in the **Value** column.

Value

Enter a value or select it from the drop-down list.

If you chose the *Is any of* or *Is none of* condition, clicking the lookup button will open the Edit List dialog box, which allows you to select the items you want to include or exclude from the list of criterion values.

) right parenthesis

Enter a right parenthesis, if applicable. The right (closing) parenthesis must be preceded by a left (opening) parenthesis.

Resource Selections

A resource selection is a group of resources that meet specific criteria. Once you create a resource selection, ProPricer will search through the resources and group the ones that meet the criteria. They are particularly useful when running what-if scenarios and reports. If you run a what-if based on a resource selection, only the resources contained in the selection will be changed. Likewise, if you run a report based on a resource selection, only the resources contained in the selection will be reported.

The criteria you specify for a resource selection can be as simple as *Resource Type Equals Travel*. If you need something more complex, you can use logic groups in the criteria.

A resource selection can be based on the Accounting Calendar, Activity ID (if enabled), Indirect Pool, CER, Class, Currency (if enabled), Curve, Description, End Date, Formula ID, Material ID, Rate Band, Resource, Resource Set, Scheduled Rate (if used), Scheduled Rate Discount, Source Type, Spread Method, Start Date, Trip ID, Type, and any resource field created for the proposal. The field name you select determines the values you can choose from. For example, if you select *Resource*, the list of values will be the names of all the resources in the Direct Rate Table assigned to the proposal. The conditions you can choose from include: *Equals*, *Is greater than*, *Contains*, *Is like*, and *Is any of*, to name a few.

Resource selections are proposal specific. You must prepare separate selections for every proposal.

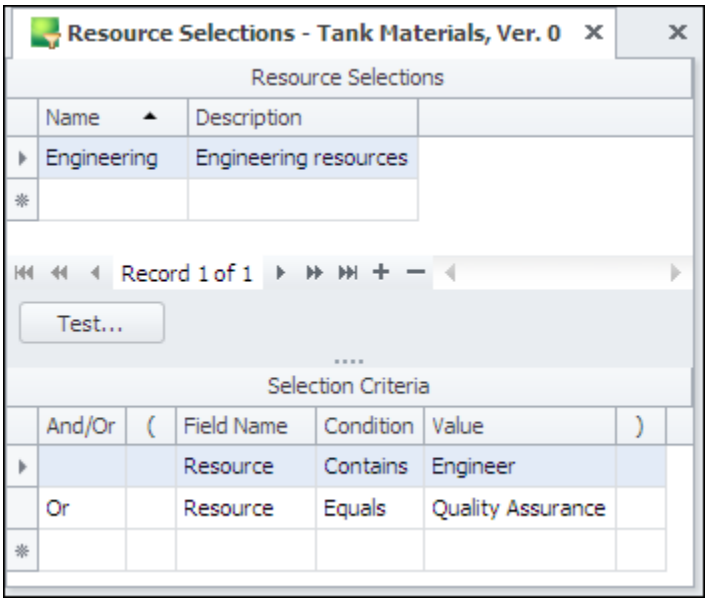
Create a Resource Selection

1. In the Navigation Pane, select a proposal.
2. On the **Proposal** ribbon, in the **Selections** group, click **Resource Selection**.
3. In the **Resource Selections** grid, enter the **Name** and **Description** of the selection.
4. In the **Selection Criteria** grid, enter the first criterion. The **Field Name**, **Function**, **Condition**, and **Value** are required. If your selection will have multiple criteria, you can enter opening and closing parentheses to create a complex query that uses logic groups
5. Press **Ctrl**+**S** or move to another row to save your work.
6. If you enter more criteria in other rows, you must choose how to combine them with the **And/Or** column.
7. Click **Test** to see which resources meet the selection criteria.

Note: See the Resource Selections Maintenance help topic to learn more about the columns in each grid.

Resource Selections Maintenance

You can use resource selections to limit reports and what-ifs to specific resources.



Resource Selections

This grid shows all resource selections created. Each row in the grid represents a separate selection. The **Test** button works with the resource selection highlighted in the grid.

Name

Enter a name for the resource selection.

Description

Enter a short description of the resource selection.

Test

Click this button to see the **Resource Selection Result** dialog box, which lists the resources that met the criteria. The **Test** button becomes available after you save the selection.

Selection Criteria

Here you define and organize the attributes of the resources you want to include in the selection. You can create simple queries, such as *Type Equals Labor*, or complex queries that involve logic groups.

And/Or

Enter *And* or *Or*, to combine criteria. *And* means that a resource should meet all the criteria to be included in the selection. *Or* means that a resource should meet one of the criteria to be included in the selection. This column is disabled for the first line of the query.

(left parenthesis

Enter a left (opening) parenthesis if you want to create a complex query using logic groups. The logic group can include one criterion or combined criteria. A left parenthesis should always be followed by a right parenthesis. The right parenthesis can be on the same line as the left parenthesis, or it can be on a different line.

Field Name

Enter a category for the selection criteria. The available field names are: *Accounting Calendar*, *Activity ID* (if enabled), *Allocation Name*, *Indirect Pool*, *CER*, *Class*, *Currency* (if enabled), *Curve*, *Description*, *End Date*, *Formula ID*, *Material ID*, *Rate Band*, *Resource*, *Resource Set*, *Scheduled Rate* (if used), *Scheduled Rate Discount*, *Source Type*, *Spread Method*, *Start Date*, *Type*, *Trip ID*, *Type*, and any resource field created for the proposal.

Function

When you enter the field name, the function becomes *Value* by default. You can then specify which field value to use in the criterion.

If the field name is related to a date/time and can serve as a point of reference, these additional functions may become available: *Days Since*, *Months Since*,

Years Since, and *Year*. You can then set the corresponding amount of days/months/years, or the corresponding year, as the value.

Condition

Enter the type of condition/comparison you want to apply to the field name and value. The conditions include standard mathematical comparisons: *Equals*, *Does not equal*, *Is greater than*, *Is greater than or equal to*, *Is less than*, and *Is less than or equal to*. They also include *Contains*, *Is like*, *Is any of*, and *Is none of*.

Contains

This option allows you to enter the character string that must occur anywhere in the data string. Use *Contains* to find a string of contiguous characters (like *ENG*) anywhere within the field.

For example, *Resource Contains ENG* will find resources such as *ENG*, *Engineer*, *Engr*, etc.

Is like

This option allows you to use wildcards (* or ?). Use *Is like* to find non-contiguous characters (for example, *E*NG*).

Is any of

This option allows you to select multiple values for the category entered in the **Field Name** column, thus eliminating the need to enter a separate record for each value.

Is none of

This option allows you to exclude from the selection the values listed in the **Value** column.

Value

Enter a value (for example, *1/1/02*, *ENG*, or *?001.**) or select it from the drop-down list.

If you chose the *Is any of* or *Is none of* condition, clicking the lookup button will open the Edit List dialog box, which allows you to select the items you want to include or exclude from the list of criterion values.

) right parenthesis

Enter a right parenthesis, if applicable. The right (closing) parenthesis must be preceded by a left (opening) parenthesis.

Task Selections

A task selection is a group of tasks that meet specific criteria. Once you create a task selection, ProPricer will search through the tasks in a proposal and group the ones that meet the criteria. They are particularly useful when running what-if scenarios and reports. If you run a what-if based on a task selection, only the tasks contained in the selection will be changed. Likewise, if you run a report based on a task selection, only the tasks contained in the selection will be reported.

The criteria you specify for a task selection can be as simple as *Start Date Equals 1/1/09*. If you need something more complex, you can use logic groups in the criteria.

A task selection can be based on the Indirect Pool, Description, End Date, Quantity, Start Date, Task ID, and any summary field created for the proposal. The field name you select determines the values you can choose from. For example, if you select *Task ID*, the list of values will be the names of all the tasks in the proposal. The conditions you can choose from include: *Equals*, *Is greater than*, *Contains*, *Is like*, *Is any of*, to name a few.

Task selections are proposal-specific. You must prepare separate selections for every proposal.

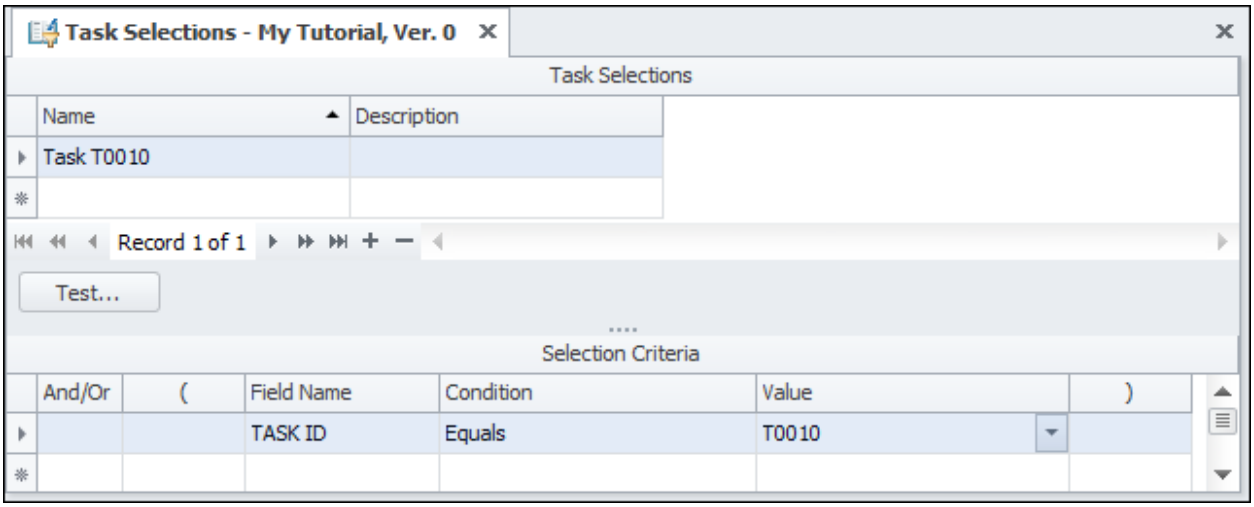
Create a Task Selection

1. In the Navigation Pane, select a proposal.
2. On the **Proposal** ribbon, in the **Selections** group, click **Task Selection**.
3. In the **Task Selections** grid, enter the **Name** and **Description** of the selection.
4. In the **Selection Criteria** grid, enter the first criterion. The **Field Name**, **Function**, **Condition**, and **Value** are required. If your selection will have multiple criteria, you can enter opening and closing parentheses to create a complex query that uses logic groups
5. Press **Ctrl**+**S** or move to another row to save your work.
6. If you enter more criteria in other rows, you must choose how to combine them with the **And/Or** column.
7. Click **Test** to see which tasks meet the selection criteria.

Note: See the Task Selections Maintenance help topic to learn more about the columns in each grid.

Task Selections Maintenance

You can use task selections to limit reports and What-Ifs to specific tasks.



Task Selections

This grid shows all task selections created. Each row in the grid represents a separate selection. The **Test** button works with the task selection highlighted in the grid.

Name

Enter a name for the task selection.

Description

Enter a short description of the task selection.

Test

Click this button to see the **Task Selection Result** dialog box, which lists the tasks that met the criteria. The **Test** button becomes available after you save the selection.

Selection Criteria

Here you define the attributes of the tasks you want to include in the selection. You can create simple queries, such as *Start Date Equals 1/1/11*, or complex queries that involve logic groups.

And/Or

Enter *And* or *Or*, to combine criteria. *And* means that a task should meet all the criteria specified to be included in the selection. *Or* means that a task should meet one of the specified criteria to be included in the selection. This column is disabled for the first line of the query.

(left parenthesis

Enter a left (opening) parenthesis if you want to create a complex query using logic groups. The logic group can include one criterion or combined criteria. A left parenthesis should always be followed by a right parenthesis. The right parenthesis can be on the same line as the left parenthesis, or it can be on a different line.

Field Name

Enter a category to use for the selection criteria. The available field names are: *Task ID*, *Description*, *Indirect Pool*, *Start Date*, *End Date*, *Quantity*, and all summary fields created for the proposal.

Function

When you enter the field name, the function becomes *Value* by default. You can then specify which field value to use in the criterion.

If the field name is related to a date/time and can serve as a point of reference, these additional functions may become available: *Days Since*, *Months Since*, *Years Since*, and *Year*. You can then set the corresponding amount of days/months/years, or the corresponding year, as the value.

Condition

Enter the type of condition/comparison you want to apply to the field name and value. The conditions include standard mathematical comparisons: *Equals*, *Does not equal*, *Is greater than*, *Is greater than or equal to*, *Is less than*, and *Is less than or equal to*. They also include *Contains*, *Is like*, *Is any of*, and *Is none of*.

Contains

This option allows you to enter the character string that must occur anywhere in the data string. Use *Contains* to find a string of contiguous characters (like *ENG*) anywhere within the field.

For example, "TASK ID Contains 001" will find the task *Task0011*.

Is Like

This option allows you to use wildcards (* or ?). Use *Is like* to find non-contiguous characters (for example, *E*NG*).

Is any of

This option allows you to select multiple values for the category entered in the **Field Name** column, thus eliminating the need to enter a separate record for each value.

Is none of

This option allows you to exclude from the selection the values listed in the **Value** column.

Value

Enter a value (for example, *1/1/02*, *ENG*, or *?001.**) or select it from the drop-down list.

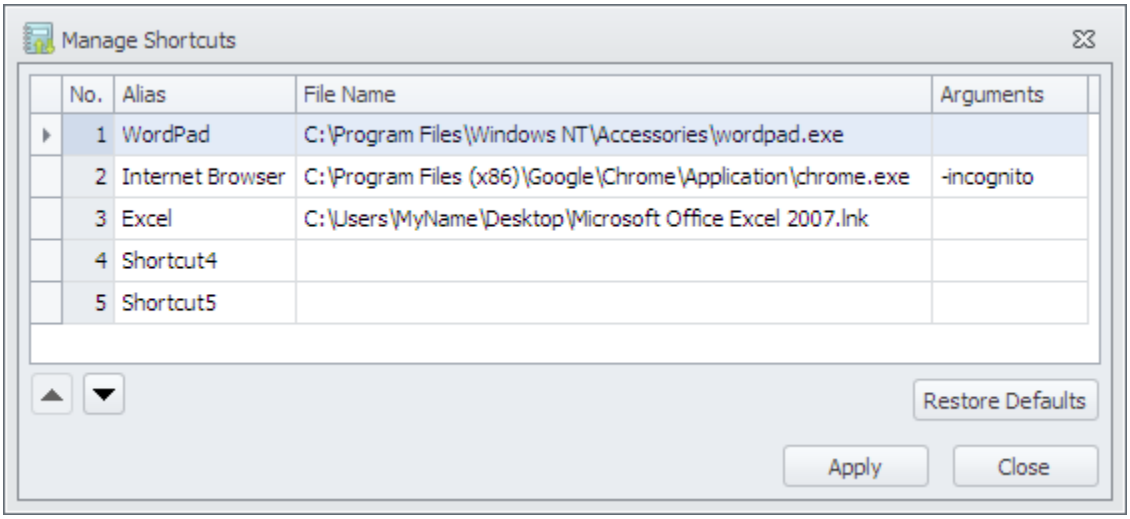
If you chose the *Is any of* or *Is none of* condition, clicking the lookup button will open the Edit List dialog box, which allows you to select the items you want to include or exclude from the list of criterion values.

) right parenthesis

Enter a right parenthesis, if applicable. The right (closing) parenthesis must be preceded by a left (opening) parenthesis.

Shortcuts
Manage Shortcuts Dialog Box

The **Manage Shortcuts** dialog box contains settings for establishing and customizing your program shortcuts.



No.

This column displays the order of the shortcuts. The values cannot be edited, but you can rearrange the order with the up and down arrows below the grid.

Alias

Enter the name that will appear on the ribbon below the shortcut.

File Name

Enter the location of the file that you normally use to start the program. Typically, this is an executable file (with a file name extension of *.exe*), or a Windows shortcut file (with a file name extension of *.lnk*) on your desktop that is linked to the executable file. You can click to browse your computer for the file.

Note: You must enter the full path to the file's location.

Arguments

Enter a command line argument for the executable file. These arguments change how the program operates when you start it from ProPricer.

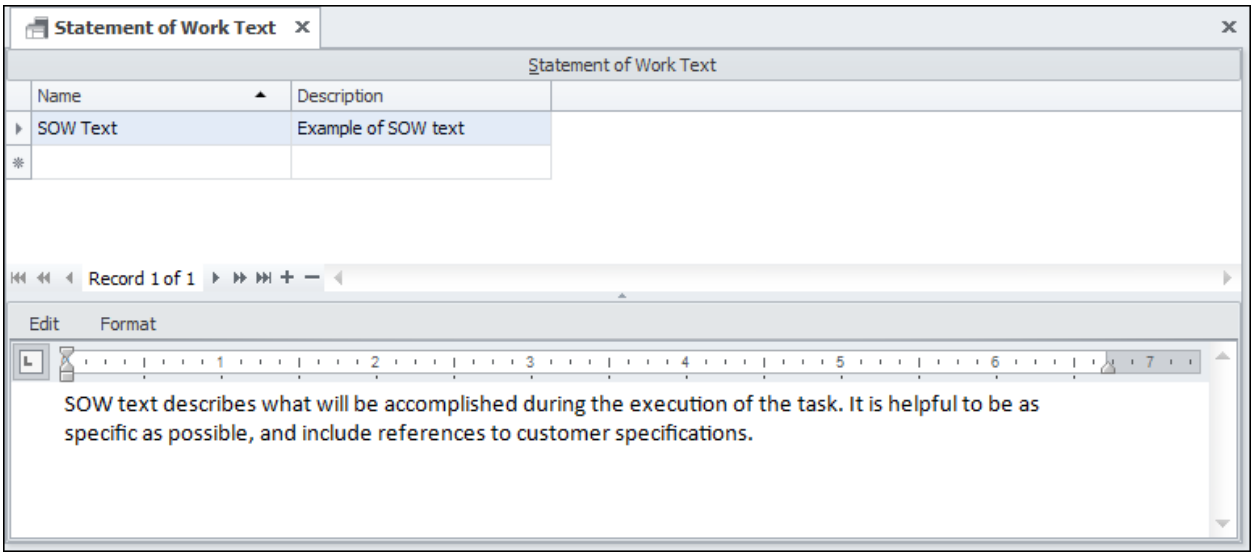
Notes:

- *Every argument must begin with a hyphen (-). Two hyphens (--) are also acceptable.*
- *You do not need to enclose an argument in quotation marks (" ").*
- *If you do not know the command line arguments that a program accepts, refer to the program's documentation.*

SOW Text Library

In this library you enter statement of work text that you can later add to your tasks.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Name

Enter a name for the entry.

Description

Enter a description of the entry.

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Create SOW or BOE Text Library Entries

You can create SOW or BOE Text Library entries that you can then add to tasks on the **SOW/BOE** tabs.

1. In the Navigation Pane, click the **Libraries** button, and then double-click **BOE Text** or **SOW Text**.
2. Enter a unique name for the text entry in the **Name** column.
3. Enter a short description for the text entry in the **Description** column.
4. Enter the text in the Text Area.
5. Press **Ctrl**+**S** or move to another row to save your work.

Spread Curves

Spread curves tell ProPricer how to divide the hours/units/cost spread for a resource within a task. They define the proportional distribution of the hours/units/cost over twelve periods. Each curve is subdivided into 12 periods, with each period receiving a specific weight that shows what part of the total amount will be spread in that period.

The curves are stored in the Spread Curve Library. There are two types: *System* and *User*. ProPricer has 20 predefined System curves that represent the most commonly used distribution patterns. System curves cannot be modified or deleted. User curves are those you define in the library.

You can set a spread curve in the Properties of a proposal or proposal template.

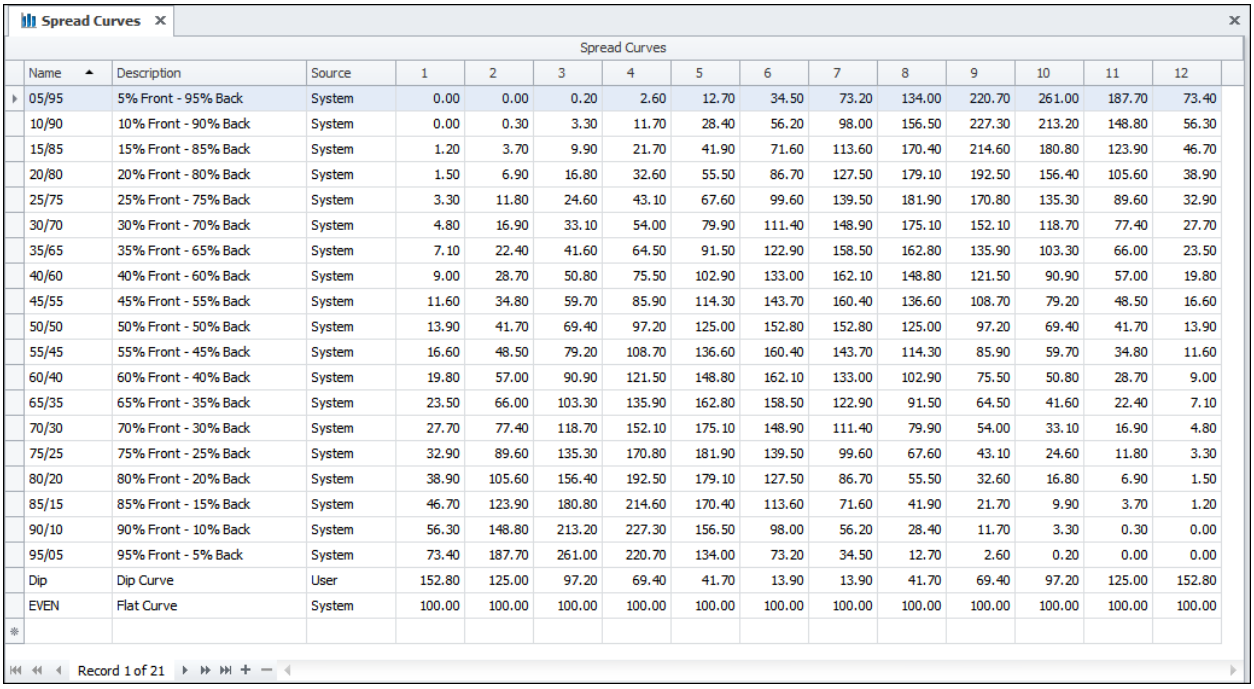
Spread Curve Library

The Spread Curve Library is where the predefined system curves are stored, as well as where you create new ones. It is divided into two sections: Spread Curves and Graph.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Spread Curves

This grid shows all the distribution curves in the system. It is where you create, copy, rename, and delete user-defined curves. System curves cannot be modified or deleted.



Name	Description	Source	1	2	3	4	5	6	7	8	9	10	11	12
05/95	5% Front - 95% Back	System	0.00	0.00	0.20	2.60	12.70	34.50	73.20	134.00	220.70	261.00	187.70	73.40
10/90	10% Front - 90% Back	System	0.00	0.30	3.30	11.70	28.40	56.20	98.00	156.50	227.30	213.20	148.80	56.30
15/85	15% Front - 85% Back	System	1.20	3.70	9.90	21.70	41.90	71.60	113.60	170.40	214.60	180.80	123.90	46.70
20/80	20% Front - 80% Back	System	1.50	6.90	16.80	32.60	55.50	86.70	127.50	179.10	192.50	156.40	105.60	38.90
25/75	25% Front - 75% Back	System	3.30	11.80	24.60	43.10	67.60	99.60	139.50	181.90	170.80	135.30	89.60	32.90
30/70	30% Front - 70% Back	System	4.80	16.90	33.10	54.00	79.90	111.40	148.90	175.10	152.10	118.70	77.40	27.70
35/65	35% Front - 65% Back	System	7.10	22.40	41.60	64.50	91.50	122.90	158.50	162.80	135.90	103.30	66.00	23.50
40/60	40% Front - 60% Back	System	9.00	28.70	50.80	75.50	102.90	133.00	162.10	148.80	121.50	90.90	57.00	19.80
45/55	45% Front - 55% Back	System	11.60	34.80	59.70	85.90	114.30	143.70	160.40	136.60	108.70	79.20	48.50	16.60
50/50	50% Front - 50% Back	System	13.90	41.70	69.40	97.20	125.00	152.80	152.80	125.00	97.20	69.40	41.70	13.90
55/45	55% Front - 45% Back	System	16.60	48.50	79.20	108.70	136.60	160.40	143.70	114.30	85.90	59.70	34.80	11.60
60/40	60% Front - 40% Back	System	19.80	57.00	90.90	121.50	148.80	162.10	133.00	102.90	75.50	50.80	28.70	9.00
65/35	65% Front - 35% Back	System	23.50	66.00	103.30	135.90	162.80	158.50	122.90	91.50	64.50	41.60	22.40	7.10
70/30	70% Front - 30% Back	System	27.70	77.40	118.70	152.10	175.10	148.90	111.40	79.90	54.00	33.10	16.90	4.80
75/25	75% Front - 25% Back	System	32.90	89.60	135.30	170.80	181.90	139.50	99.60	67.60	43.10	24.60	11.80	3.30
80/20	80% Front - 20% Back	System	38.90	105.60	156.40	192.50	179.10	127.50	86.70	55.50	32.60	16.80	6.90	1.50
85/15	85% Front - 15% Back	System	46.70	123.90	180.80	214.60	170.40	113.60	71.60	41.90	21.70	9.90	3.70	1.20
90/10	90% Front - 10% Back	System	56.30	148.80	213.20	227.30	156.50	98.00	56.20	28.40	11.70	3.30	0.30	0.00
95/05	95% Front - 5% Back	System	73.40	187.70	261.00	220.70	134.00	73.20	34.50	12.70	2.60	0.20	0.00	0.00
Dip	Dip Curve	User	152.80	125.00	97.20	69.40	41.70	13.90	13.90	41.70	69.40	97.20	125.00	152.80
EVEN	Flat Curve	System	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00

Name

Enter a name for the user curve.

Note: We recommend you do not use the letters D, E, L, nor the numbers 1 through 9. This is because these letters/numbers were reserved for spread codes during importing in previous versions of ProPricer: D (discrete values), L (Load), E (Even), 1 (10/90), 2 (20/80)0, 3 (30/70), 4 (40/60), 5 (50/50), 6 (60/40), 7 (70/30), 8 (80/20), 9 (90/10).

Description

Enter a description for the curve.

Source

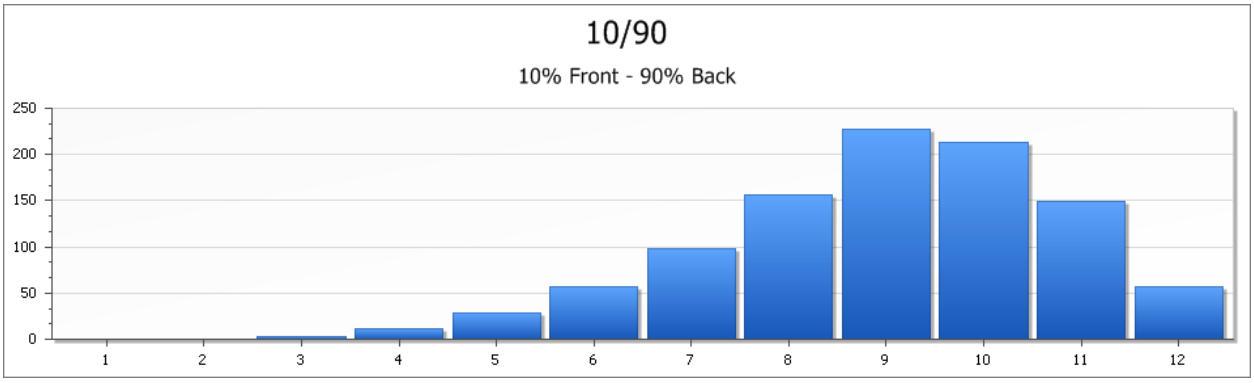
This column indicates if the curve is a system curve or a user-defined curve. It cannot be edited.

Periods

Each curve is divided into 12 periods that appear in the grid as columns labeled 1 through 12. The numbers you enter in the columns represent the relative weights of the periods, which define what part of the hours/units/cost will be spread for that particular period. For example, a period with weight 3 would have double the amount of hours/units/cost as a period with weight 1.5, but half that of a period with weight 6.

Graph

This section shows a graphical representation of the curve selected above.



Copy a Spread Curve

1. Click the **Libraries** button, and then double-click **Spread Curves**.
2. Right-click the curve you want to copy, and then click **Copy** on the shortcut menu.
3. Enter a name for the new curve, and then click **OK**.

Create a Spread Curve

1. Click the **Libraries** button and then double-click **Spread Curves**.
2. Enter a name for the curve in the **Name** column.
3. Enter a short description for the curve in the **Description** column.
4. Enter weight values in the cells labeled 1 through 12. You cannot enter negative values. As you enter the values, ProPricer will create a graphical representation of the data below.
5. Press **Ctrl**+**S** or move to another row to save your work.

Delete a Spread Curve

1. Click the **Libraries** button and then double-click **Spread Curves**.
2. Right-click the curve you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

Notes:

- *You cannot delete or edit system curves.*
- *You can only delete curves that are not used anywhere in the system. If the curve is used, ProPricer will display the **Item Usage Info** box instead.*

Summary Fields

Summary fields serve organizational and reporting purposes. For example, you could use summary fields to specify the people responsible for the tasks, identify the departments in which the tasks will be performed, rate the overall importance of the tasks for the proposal, etc. You can then use these summary fields to group tasks and run reports based on the values entered in the fields.

ProPricer includes the following built-in summary fields:

- TASK ID - the name of the task.
- Bidder - the name of the person who estimates and offers the price.
- WBS - the code that identifies the location of the specific task in the entire proposal effort.
- OBS - the code that identifies the organization that is responsible for the task.
- CLIN - a number that defines the task's position in the contract.
- Summary - summary code for the nature of the task.

With a Title Table, you can organize and supply the selectable values in summary fields, define hierarchical relationships among the values, and run reports based on the relationships in the table. Alternatively, you can set up a hierarchy in a value list by designating a parent values.

The values in the summary fields can help summarize tasks on reports. Reporting proposal data by one summary field or another shows different aspects of the proposal. Additionally, ProPricer allows you to roll up data on reports and apply character masks. These two features can be applied to the summary field values, providing you with numerous ways of showing proposal costs.

To simplify the task data entry process, you can map summary fields and values in the Proposal Properties. Once mapped, ProPricer will automatically filter the list of available values in a summary field, based on the user's entry in the previous summary field.

Change the Sort Order of Summary Fields

You can change the sort order of summary fields for reporting proposal data.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, open the **Summary Fields** subfolder, and then click the **General** page.
3. In the **Sort Order** field of the appropriate summary field, select the new sort order.
4. Click **OK**.

Create a Summary Field

You can have up to 100 summary fields in a proposal or proposal template.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, open the **Summary Fields** subfolder, and then click the **General** page.
3. Enter a name for the summary field.
4. Select a data type.
5. If the data type is *Text*, you can enter a Title Table name, and choose whether to validate the entries in the summary fields with those entered in the Title Table.
    - After a text summary field has been created and used in a proposal, you can convert its text entries into a value list. Just change the field's data type from *Text* to *List*.
6. If the data type is *List*, click the **Value List** button to type the entries you want to appear in the drop-down list.
7. Define the length.
8. Select the sort order.
9. *(Optional)* Assign a Title Table to the summary field, and then select whether or not you want ProPricer to validate the entries based on the Title Table elements.
10. Select whether or not the summary field must contain data.
11. Click **OK**.

Delete a Summary Field

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, open the **Summary Fields** subfolder, and then click the **General** page.
3. Right-click the summary field you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when prompted.

Notes:

- *You can only delete summary fields that are not used anywhere in the system.*
- *When you delete a summary field, all task entries in the field are deleted as well.*
- *You can change the Field Label if you want to rename an existing summary field.*
- *If you need to reorder the existing summary fields, you have to delete them first and then re-enter them.*

Map Summary Fields and Values

Mapping summary fields and their values provides greater control over the task input process. Your mapping tells ProPricer how to filter successive summary field values after a user enters a certain value in a base summary field. This helps prevent the user from entering incorrect values since ProPricer already filtered out the irrelevant ones.

Not all summary fields will be eligible for mapping. To enable a summary field for mapping, define it to meet either of the following specifications:

- **Data Type** is set to *List*, and the **Value List** contains values.
- **Data Type** is set to *Text*, a Title Table containing elements is assigned, and **Validate** is selected.

The summary field mapping setup in the Proposal Properties is a two-part procedure. You start by mapping the fields, and then you can map the values of those correlated fields.

Map Summary Fields

1. In **Proposal Properties**, go to **Proposal** > **Summary Fields** > **Mapping**.
2. In the **Summary Field Mapping** section of the **Mapping** page, all fields that can be mapped will initially appear as base summary fields. Drop one of these fields over another to map it to that field. The mapped field will be a child of its base field.
3. Repeat step 2 as needed. You can drag and drop to any field in the mapping structure, including child fields that are already mapped to other fields.
4. To undo a mapping, drop the child summary field over **(Root)**. The field will move to the top level of the mapping structure and become a base field again.

Map Summary Field Values

1. In the **Summary Field Value Mapping** section of the **Mapping** page, expand a base summary field that has at least one other field mapped to it (that is, a base summary field with a child summary field).
2. Select the values that users will be able to enter in the base summary field during task input.
3. Expand one of the base summary field values you just selected. The child fields mapped to the base will be listed, along with their values.
4. For each child field, select the values that will be available to users after they enter the base summary field value selected in step 3.
5. Repeat all steps as needed for any other parent field that has fields mapped to it.
6. Click **OK** or **Apply**.

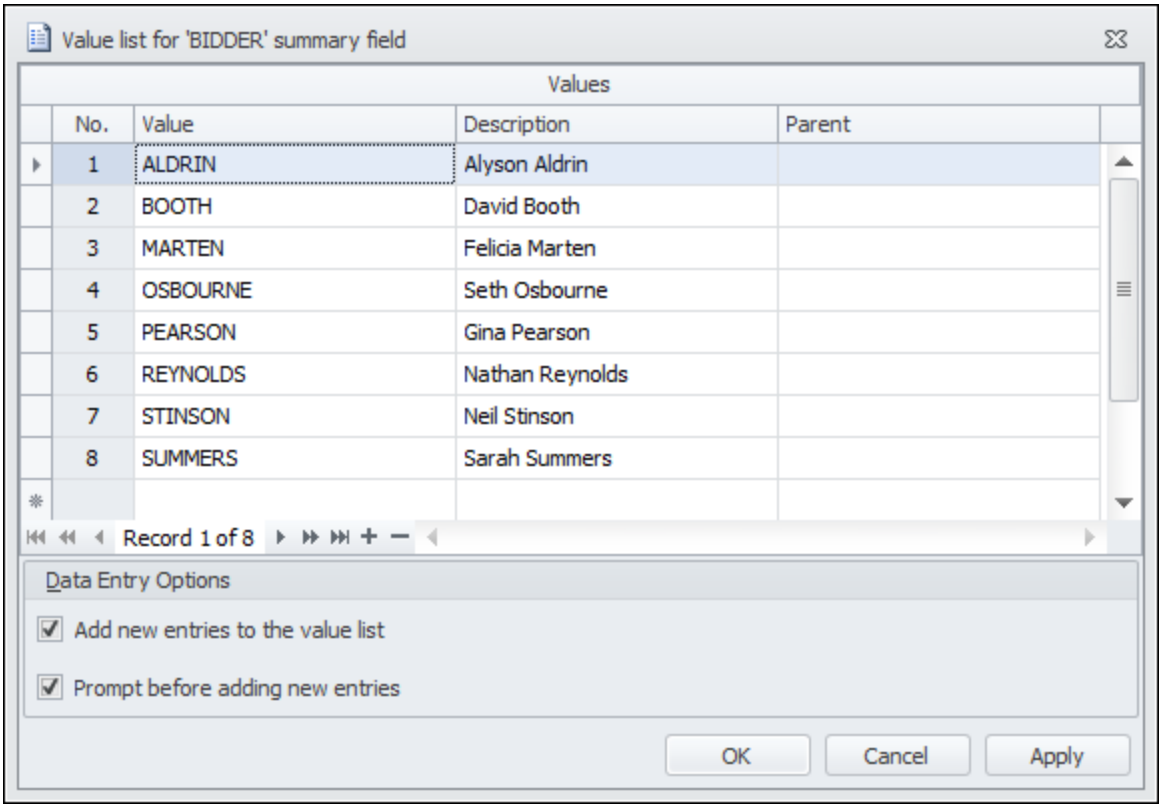
Set Summary Field Values

Entering values for list-type summary field predefines the list of entries a summary field will accept.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, open the **Summary Fields** subfolder, then click the **General** page.
3. Either select or create a summary field with data type *List*, then click the **Value List** button.
4. In the **Value** column, type the value or values that will be available for the summary field.
5. *(Optional)* Type a description.
6. *(Optional)* In the **Parent** column, set up a hierarchy in the value list.
    - One of the values should have no parent. This makes it the topmost value in the hierarchy.
    - A hierarchical summary field value list is used to roll up data in some reports.
    - Leave the entire **Parent** column blank if the value list does not need to be hierarchical.
7. Under **Data Entry Options**, select the options you want to use for new entries.
8. Click **OK**.

Summary Field Values Dialog Box

The **Values** dialog box is where you predefine the list of the entries a summary field will accept. The values you enter here are what will appear in the drop-down list of the summary field. The dialog box also has an option that will allow you to add new values to the list during data entry.



No.

Shows the order of the values. Cannot be edited.

Value

Type the entry you want to appear in the drop-down list of the summary field.

Description

Enter a description for the summary field value. You can enter up to 255 characters.

Parent

If you want values to be hierarchical, select a parent value for a child value. Like the parent-child relationships provided by a Title Table, this hierarchy allows you to roll up the summary field's data in some reports. To fully roll up, the list should contain one topmost value (with no parent) that is only used as a parent of second-level values.

Data Entry Options

Add new entries to the value list

Select this checkbox if you want to be able to add new entries to the list during data entry.

Prompt before adding new entries

Select this checkbox if you want ProPricer to prompt you every time a new entry is detected in a summary field during data entry.

OK

Saves the changes and closes the dialog box.

Cancel

Closes the dialog box without saving the changes.

Apply

Saves the changes without closing the dialog box.

Sort Order

Sort order is an important aspect of summary fields. It defines how the elements will be arranged in tasks or on reports, how they will be rolled up, and how a mask will be applied. There are two sort order types:

- Alphabetic - the entries are treated as strings of characters. Words are sorted based on the order of the letters. The numbers 1, 2, 10, 20, 100, 200 sorted alphabetically would result in 1, 10, 100, 2, 20, 200.
- Numeric - the entries are treated as segmented strings that are sorted based on their value. Each string consists of one or more parts separated by a period. The segments provide roll-up and mask steps. When a summary field's sort order is numeric, ProPricer expects all entries to have the format "*value.value.value*." If an entry is not in this format, you will not be able to report data or sort tasks based on the respective summary field.

The way tasks are arranged in reports or the **Tasks** grid differs for numeric and alphabetic fields. Suppose you have three tasks with entries **1.1.1**, **1.12.1**, and **1.2.1** in the WBS field. If the field is alphabetic, ProPricer will order the tasks in the following manner:

1.1.1

1.12.1

1.2.1

If the field is numeric, the order of the tasks will be:

1.1.1

1.2.1

1.12.1

The sort order of a field influences the way roll-up is performed and masks are applied. With a numeric field, if the step is one and no Title Table is used, ProPricer rolls up the

WBS entries **1.1** and **1.222** to **1** on the Annual Cost Breakdown report, for instance. Applying a mask of two to the entry **AB.BC.CD** produces **AB.BC** on the report.

With an alphabetic field, if the step is one and no Title Table is used, the same WBS entries of **1.1** and **1.222** roll up in the following manner:

1

1.

1.1

1.2

1.22

1.222

The application of a mask of two to the entry **AB.BC.CD** produces **AB** on the report.

System Options

System Options regulate the system itself. It is where you define the default currency, decimal displays, base year, etc. The options include:

- Calendar
- Currency
- General
- Material
- Security
- Travel
- System Logs

The following buttons are common to all pages:

OK

Saves the changes and closes the dialog box.

Cancel

Closes the dialog box without saving the changes.

Apply

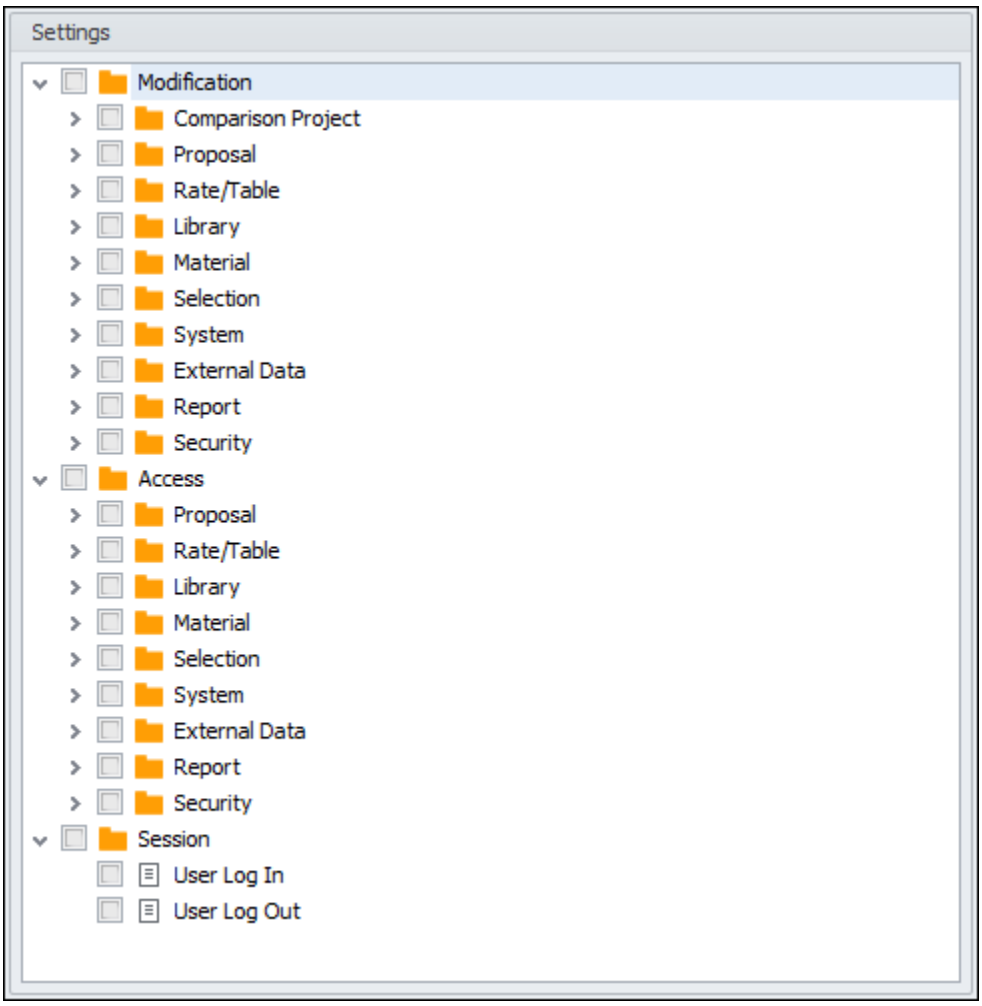
Saves the changes without closing the dialog box.

System Logs Page

This page is for enabling the Audit Log and Change Log, and configuring the events they will record. There are three categories of events organized in folders: Modification, Access, and Session.

Initially, the logs are disabled because no events are selected. If you select any event and save your changes to these settings, the Audit Log will be enabled. The Change Log, however, is only enabled when modification events are selected.

Tracking numerous events in the Audit Log might cause ProPricer to perform slowly due to extensive communication between the client and server. It is recommended that you keep the log's events to a minimum and only select things that you must monitor regularly.



Modification

Track the changes being made to your global and proposal data. These are the modification events in the Change Log. If you select anything in the **Modification** folder, you will enable the Change Log and the Audit Log.

Access

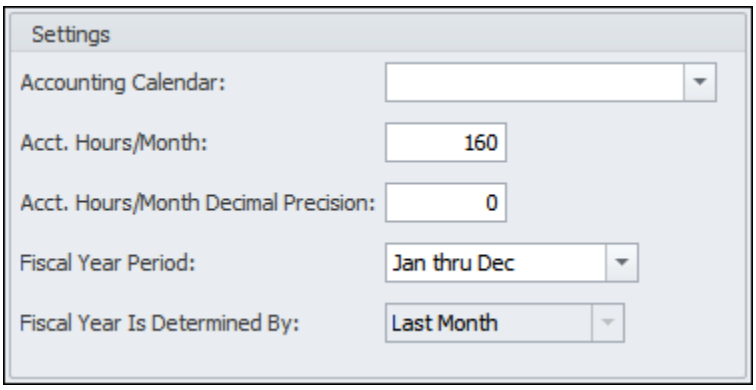
Track the data that is accessed and viewed in ProPricer. For example, selecting **Access** > **Rate/Table** > **Direct Rate Table** will record each time a user opens the properties of a Direct Rate Table.

Session

Track the login and logout activity in your ProPricer system. Login activity includes successful and failed attempts to log into your ProPricer system.

Calendar Page

On this page, you set the accounting calendar and fiscal year defaults that will be used in every new proposal you create. This information will appear on the **Calendar** page in the **Proposal** folder of the **Proposal Properties**.



Accounting Calendar

Set the default accounting calendar. This calendar appears in the **Accounting Calendar** field on the **Calendar** page in the **Proposal** folder of the **Proposal Properties** in every new proposal you create.

Accounting Hours/Month

Enter the default number of accounting hours per month. This value represents the number of hours that will be worked per month if you do not set an accounting calendar. This value will be entered in the **Default Accounting Hours/Month** field on the **Calendar** page in the **Proposal** folder of the **Proposal Properties** in every new proposal you create.

Accounting Hours/Month Decimal Precision

Enter the number you want ProPricer to use to round the accounting hours in calendars and on reports. You can enter a number between 0 and 6. The default is *0*. See Decimal Display versus Decimal Precision.

Fiscal Year Period

Set the default fiscal year period. This period will be selected in the **Fiscal Year Period** field on the **Calendar** page in the **Proposal** folder of the **Proposal Properties** in every new proposal you create.

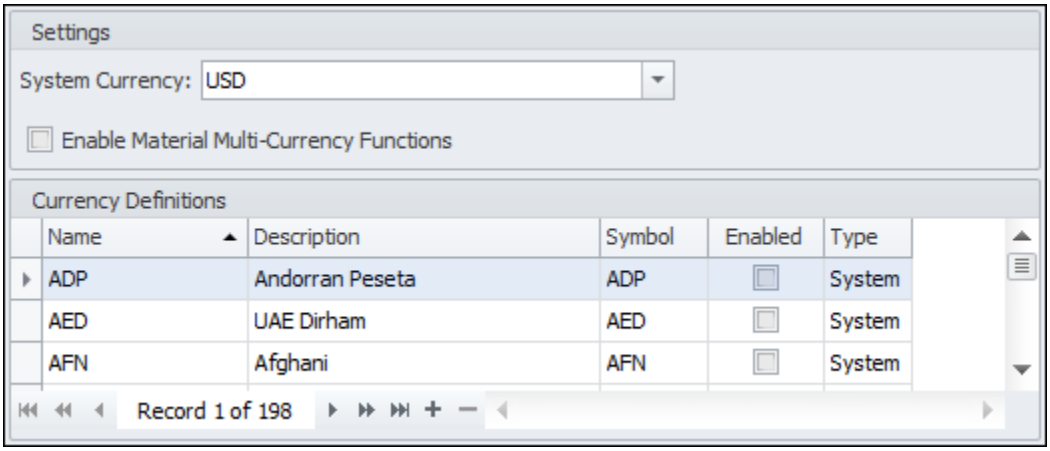
Fiscal Year Is Determined By

If you changed the fiscal year period above to something other than *January thru December*, select how you want to number the fiscal years on your reports. This option will be selected in the **Fiscal Year Is Determined By** field on the **Calendar** page in the **Proposal** folder of the **Proposal Properties** in every new proposal you create. There are two options:

- The fiscal year is based on the calendar year in which the fiscal year begins. For example, a fiscal year beginning October 1, 2009 and ending September 30, 2010 is fiscal year 2009.
- The fiscal year is based on the calendar year in which the fiscal year ends. In this case, a fiscal year beginning October 1, 2009 and ending September 30, 2010 is fiscal year 2010.

Currency Page

On this page, you set the default currency for the system, create user-defined currencies, enable multicurrency functions for material costs, as well as enable the other currencies you need to use in your proposals. The default currency will automatically be entered in the **Currency** field on the **Currency** page in the **Proposal** folder of **Proposal Properties** for every new proposal you create. The page is divided into two sections: **Settings** and **Currency Definitions**.



Settings

System Currency

Select the currency you want to use as the default currency.

Enable Material Multi-Currency Functions

Select this checkbox to be able to enter different currencies for your parts and assemblies. ProPricer will calculate the costs in the proposal currency.

Currency Definitions

This section lists the currencies available. You cannot delete a currency, but you can modify their Description and Symbol if necessary. You can also create custom currencies.

Name

The ISO 4217 unique, three-letter alphabetic currency code. For information only.

Description

Descriptive name of the currency (for example, US Dollar, Deutsche Mark, Euro, etc.).

Symbol

The currency symbol that identifies the currency of a particular country.

Enabled

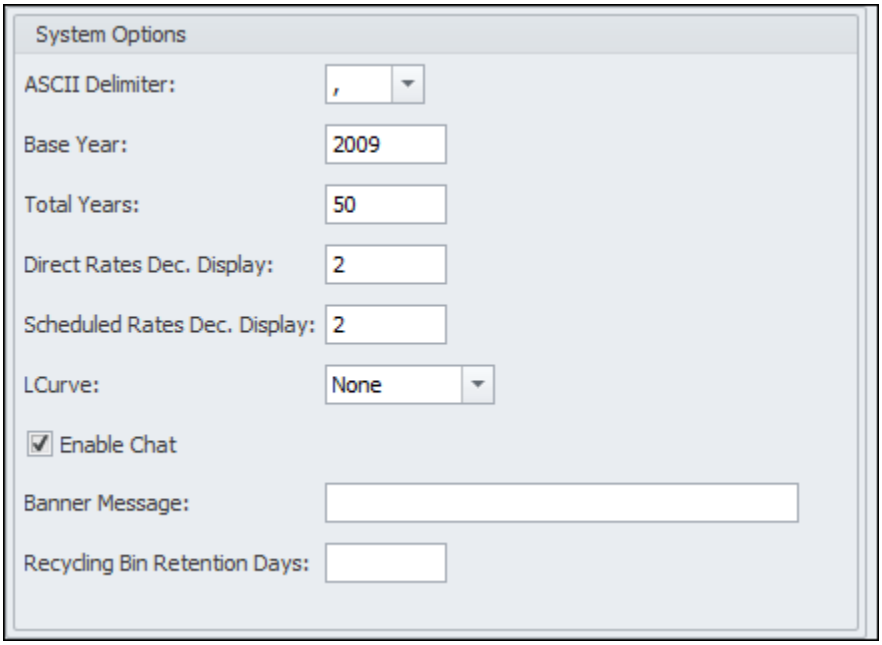
Select the checkbox of the currency you want to be able to use in a proposal.

Type

This column indicates if the currency is a system currency or user-defined currency.

General Page

On this page, you set general system-related options.



System Options

ASCII Delimiter

Enter the delimiter you want to set as the default. This delimiter will separate the fields in the files created when you export ASCII data.

Base Year

Enter the base year for the system. This year defines the start year for the entire system. You will not be able to enter a date prior to this one for any rate table, proposal, task, etc.

Total Years

Enter the total number of years the system needs to cover. This number defines the out-year limit of the system. You will not be able to enter a date later than this one for any rate table, proposal, task, etc.

Direct Rates Decimal Display

Enter the number of places after the decimal point you want ProPricer to show for the direct rates in a Direct Rate Table and on the Direct Rate Report. ProPricer will round the number if necessary, but this is strictly for viewing purposes. When you click a rate in the Direct Rate Table, you will see all the values entered after the decimal point for the rate. The default number is 2, but you can change it to a number between 2 and 6. See Decimal Display versus Decimal Precision.

Scheduled Rates Decimal Display

Enter the number of places after the decimal point you want ProPricer to show for the scheduled rates in a Scheduled Rate Table and on the Scheduled Rate Report. ProPricer will round the number if necessary, but this is strictly for viewing purposes. When you click a rate in the Scheduled Rate Table, you will see all the values entered after the decimal point for the rate. The default number is 2, but you can change it to a number between 2 and 6. See Decimal Display versus Decimal Precision.

LCurve

Enter the learning curve type you want to set as the default. This curve type will appear in the **LCurve** fields of your proposals and libraries. If you select **None**, then you will need to choose a curve type each time you apply a learning a curve to associated costs or resource sets.

Enable Chat

Select this checkbox to send and receive messages to and from other users in ProPricer. When this feature is enabled, you can access it on the Miscellaneous ribbon.

Banner Message

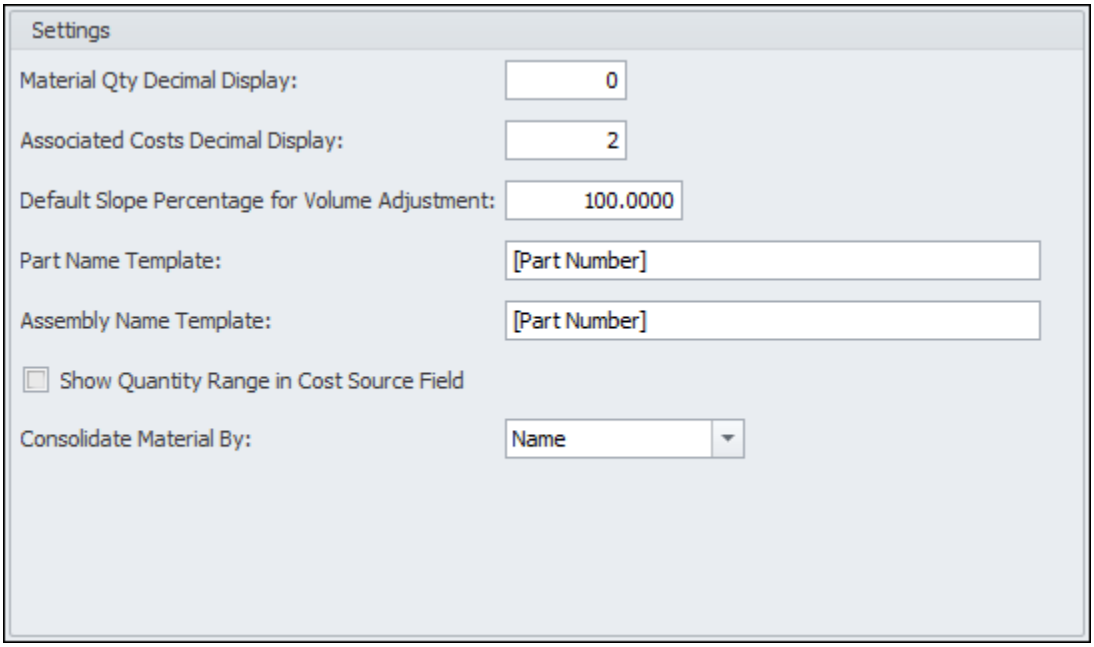
Type a message here to have it appear at the top of the ProPricer user interface. All connected users in your organization will see this message on their screen.

Recycling Bin Retention Days

Enter the number of days to retain deleted items in the Recycling Bin. When a deleted item reaches the retention limit, ProPricer automatically deletes it from the Recycling Bin.

Material Page

The options you set on this page are for the material library data and the unit cost consolidation process that are available in all proposals.



Settings

Material Quantity Decimal Display

Enter the number of places after the decimal point you want to show in the **Quantity** column in the material libraries, on the **Material** tab of Task View, the **Material Input** grid of Material View, and on the material reports. The default number is 0, but you can change it to a number between 0 and 6. The value entered also applies to the quantity range. See Decimal Display versus Decimal Precision.

Associated Costs Decimal Display

Enter the number of places after the decimal point you want to show for the associated costs in the material libraries, the **Associated Costs** grid of the **Material** tab of Task View and Material View, and on the material reports.

The default number is 2, but you can enter a number between 0 and 6. See Decimal Display versus Decimal Precision.

Default Slope Percentage for Volume Adjustment

Enter the percentage that will be used by default when Volume Adjustment is run in proposals. If the default percentage is not applicable in some situations, you can enter any percentage in the Volume Adjustment dialog box.

Show Quantity Range in Cost Source Field

Select this checkbox to display the quantity range used in the unit cost consolidation process. If selected, the quantity range will appear after the revision number in the **Cost Source** column on the **Material** tab of Task View, the **Material Input** grid of Material View, and in the **PriceBOM.log** file once the materials have been consolidated. This information will also appear in the Bill of Materials and Material Ad Hoc Reports. The checkbox is clear by default.

Part Name Template and Assembly Name Template

These settings determine how materials are named and uniquely identified in the Parts Library and Assemblies Library.

Enter the variable *[Part Number]* to automatically create names instead of typing them manually. The libraries' **Name** column will populate with the **Part Number** column value.

If you created material fields for parts and assemblies, you can use them in the template along with the *[Part Number]* variable. The material field name must also be in brackets. For example, a material field named *Example Field* would be entered as *[Example Field]*. Using material field variables with the *[Part Number]* variable allows you to have multiple material items with the same part number.

You can also include other text, such as additional words, numbers, punctuation, etc., in the template along with the variables.

Consolidate Material By

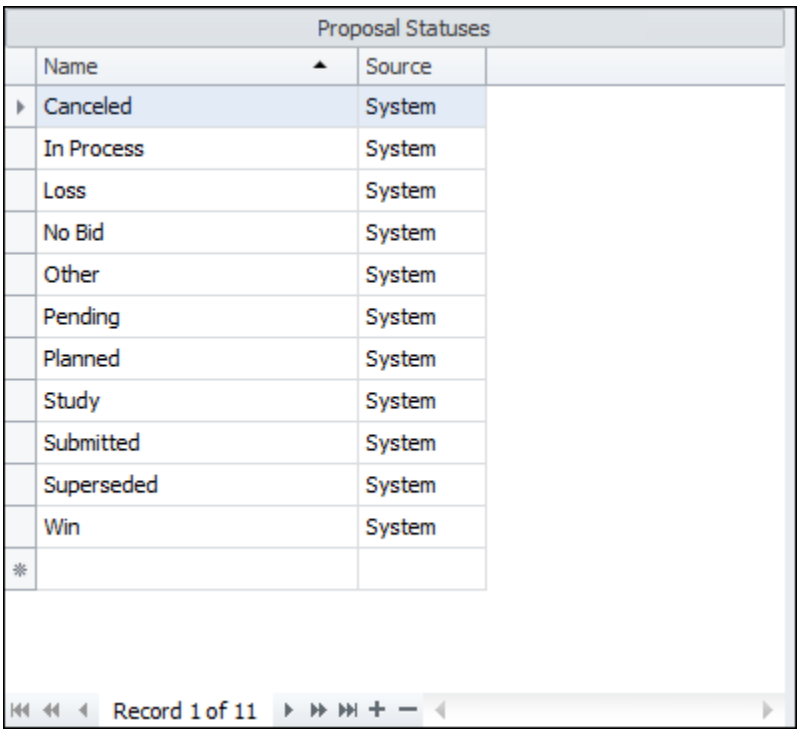
This setting determines how materials are uniquely identified during the cost consolidation process. If you consolidate by name, then every material is unique because each one has a different name. If you consolidate by part number, then every material with the same number is considered a single, unique item.

Consolidating by part number is useful and recommended when your **Part Name Template** or **Assembly Name Template** setting includes the *[Part Number]* variable and material field variables. In this case, the template allows you to enter the same part number for multiple items in your material libraries.

If this system-level setting is not appropriate for a specific proposal, you can select a different option for it when you set up the consolidation process.

Proposal Statuses

This page is for creating custom status options that are applicable to any proposal. After you create a new status, it immediately appears as an option in the **Status** setting on the General page of Proposal Properties.



Name

This column shows the name of each system-defined and user-defined proposal status in ProPricer. You can enter a name to create a new proposal status, and you can edit and delete user-defined statuses. System-defined statuses are read-only and cannot be deleted.

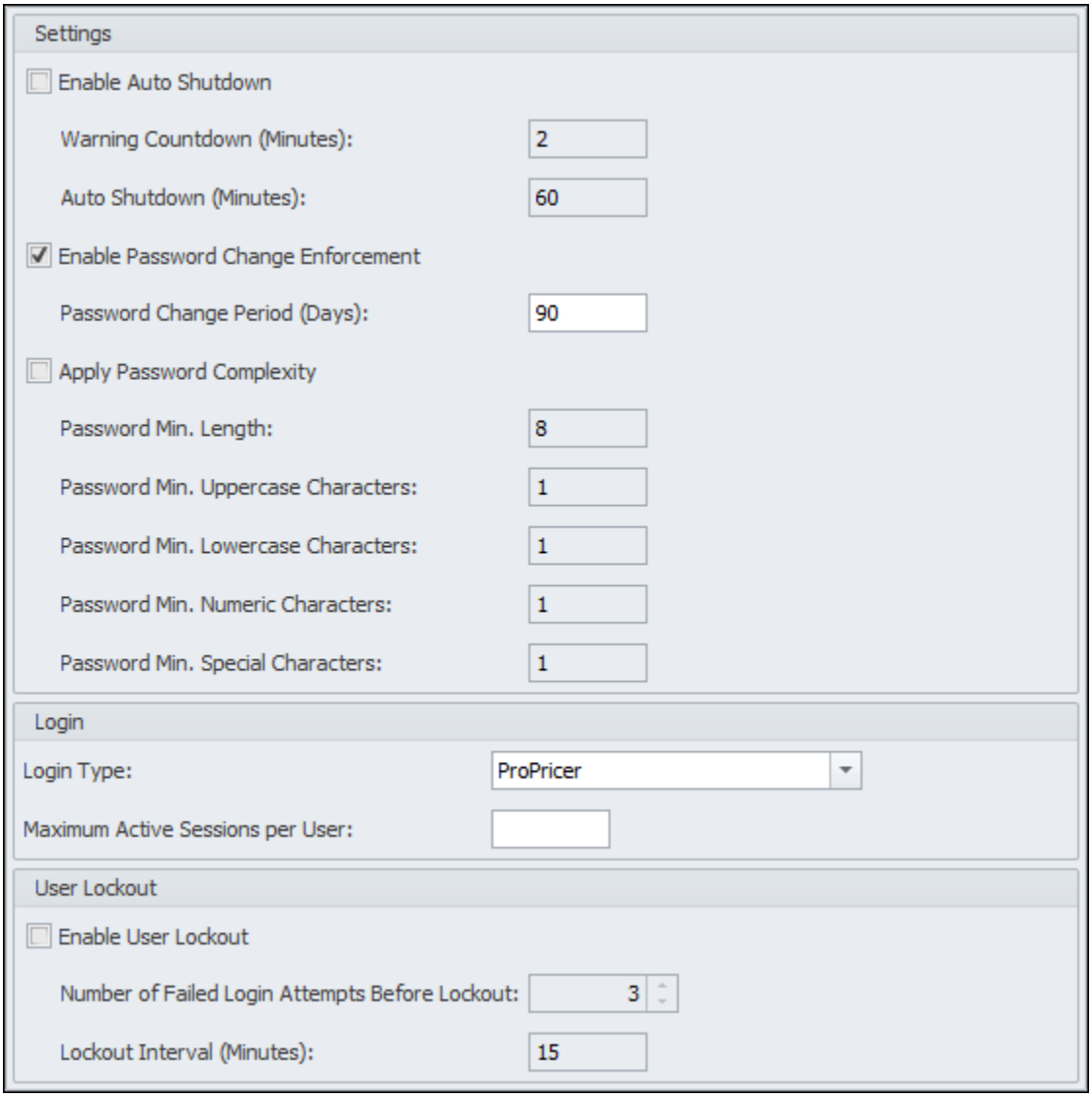
Source

The source of a proposal status indicates how it was created.

- **User**: A user created the status.
- **System**: The status is built into the ProPricer system.

Security Page

This page is for setting system-level security options for logging in and out of ProPricer.



Settings

Enable Auto Shutdown

Select this checkbox to automatically close ProPricer after a specified duration of inactivity.

Warning Countdown (Minutes)

Enter when you want a warning message to appear before Auto Shutdown occurs.

Auto Shutdown (Minutes)

Enter when you want Auto Shutdown to occur.

Enable Password Change Enforcement

Select this checkbox to periodically prompt users to change their passwords before logging in to ProPricer.

Enabling password change enforcement also requires new users with the ProPricer login type to update their temporary password after logging in for the first time.

Password Change Period (Days)

Enter the number of days that passwords remain active before expiring.

Apply Password Complexity

Select this checkbox to ensure all newly created passwords meet specific security criteria.

Password Min. Length

Enter the minimum amount of characters that a password must contain.

Password Min. Uppercase Characters

Enter the minimum amount of uppercase letters that a password must contain.

Password Min. Lowercase Characters

Enter the minimum amount of lowercase letters that a password must contain.

Password Min. Numeric Characters

Enter the minimum amount of numbers that a password must contain.

Password Min. Special Characters

Enter the minimum amount of special characters (@, #, %, etc.) that a password must contain.

Login

Login Type

Select the default login type that appears in User Login Information.

ProPricer

The user logs in with their ProPricer login name and password. When **Enable User Lockout** is selected, it only applies to this login type.

Windows (Integrated)

The user logs in automatically when they open ProPricer.

Windows (Interactive)

The user logs in with their Windows username and password.

Azure AD

The user logs in with Azure Active Directory (AD) credentials and is verified by Azure AD Multi-Factor Authentication.

CAC

The user logs in with their PIN for their Common Access Card (CAC) issued by the Department of Defense. ProPricer validates the digital certificate stored on the CAC to authenticate the user without requiring a username and password.

Choose

The user chooses how to log in.

Maximum Active Sessions per User

This setting prevents users from running too many concurrent ProPricer sessions. You can enter the maximum number of sessions to set the limit.

User Lockout

Enable User Lockout

Select this checkbox to temporarily lock a user account after someone unsuccessfully attempts to log in too often.

Number of Failed Login Attempts Before Lockout

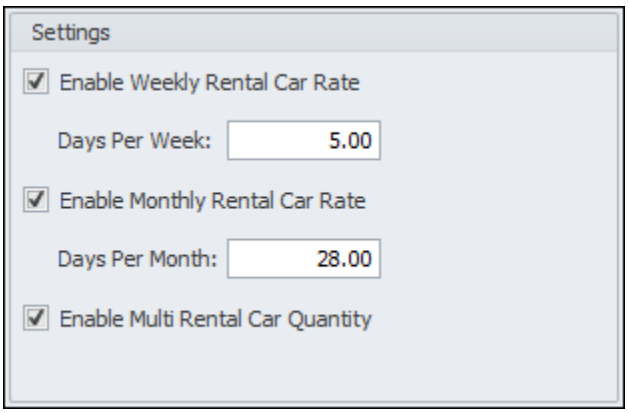
Enter the maximum number of times someone can unsuccessfully attempt to log in to an account. After the last failed attempt, the account is temporarily locked.

Lockout Interval (Minutes)

Enter the span of time for user lockouts. If someone reaches the limit of failed login attempts within this interval, a lockout occurs and the account stays locked for the remainder of time.

Travel Page

On this page, you set travel options that will be the default settings for every new Travel Rate Table you create. To change these settings for a specific table, go to the Travel Rate Table properties.



Enable Weekly Rental Car Rate

If selected, Daily Rate and Weekly Rate columns will appear in the Rental Car section of Travel Rate Tables.

Days Per Week

Enter a number (5, 6, or 7) that represents the length of the rental car week in days. If you enter 5, for example, ProPricer will use the weekly rate in trips that last for six or more days.

Enable Monthly Rental Car Rate

If selected, Daily Rate and Monthly Rate columns will appear in the Rental Car section of Travel Rate Tables.

Days Per Month

Enter a number (28, 29, 30, or 31) that represents the length of the rental car month in days. If you enter 30, for example, ProPricer will use the monthly rate in trips that last for 31 or more days.

Enable Multi Rental Car Quantity

This option becomes available when weekly or monthly rental car rates are enabled. If it is selected in a Travel Rate Table's properties, proposals that use the table will have Daily Quantity, Weekly Quantity, and/or Monthly Quantity columns in the Rental Car section of the Travel input tab and Travel View.

T&M Rates

A contract could require that you show the other party the complete price of an hour or unit of a resource, but you might not need to disclose the indirect costs. T&M rates allow you to extend the rate of a resource so that it incorporates the indirect rates without showing the indirect elements.

Since you use a Direct Rate Table, Composite Rate Table, or another T&M Rate Table to create a T&M Rate Table, T&M rates are essentially direct rates. This means you can assign a T&M Rate Table to a proposal in lieu of a Direct Rate Table. If you use a T&M Rate Table instead of a Direct Rate Table, your reports will only print the build-up of the T&M rates of the resources.

ProPricer will use the value entered in the **Profit/Fee** column in the T&M Rate Table to calculate the rates of the resources. If the column is blank, it will use the profit/fee factor entered for the indirect pool in the base Indirect Rate Table. There are two things to keep in mind:

- The value you enter in the **Labor Profit/Fee Factor** field of the **T&M Rate Table Properties** dialog box will be the default value for the labor resources only. It does not affect non-labor resources. You can override the value. An overridden factor will be displayed in black.
- The value entered in the **Global Profit/Fee Factor** field on the **Pricing** page of **Proposal Properties** does not affect the factors entered in a T&M Rate Table.

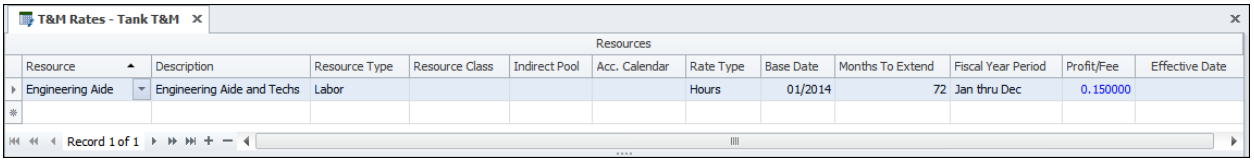
T&M Rate Tables

This is where you enter time and material rate data. The table is divided into two grids: Resources and Rates.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resources

Here you add the resources to the table.



Resource

Enter the name of the resource for which you want to define a T&M rate. You can only add resources from the Base Rate Table.

Description

ProPricer extracts the description from the Resource Library and displays it here.

Resource Type

This column displays the resource type entered for the resource in the Resource Library.

Resource Class

(Optional) Enter a resource class for the resource.

Indirect Pool

(Optional) Enter the indirect pool you want to use to price the indirect costs for the resource.

Accounting Calendar

This column displays the accounting calendar (if any) associated with the resource in the Resource Library.

Rate Type

Select how you want to measure the resource input. There are three options available:

- Hours - the resource input is measured in hours or equivalent heads (typically for labor resources).
- Units - the resource input is measured in units (typically for non-labor resources).
- Cost - the units of the resource and the direct cost of the resource have the same numeric expression, that is, the resource input represents cost values (typically for non-labor resources).

Currency

This column appears only if the **Multi-Currency** option has been selected for the Base Rate Table entered on the **T&M Rate Table Properties** dialog box. It is for information only and shows the currency entered for the rate in the Base Rate Table.

Base Date

Enter a beginning month for the T&M rate.

Months To Extend

Enter the number of months to extend the T&M rate.

Note: The period defined by the base date and the number of months to extend should fall within the period covered by the rates for the selected resource in the Base Rate Table.

Fiscal Year Period

Enter the Fiscal Year Period.

Profit/Fee

Here you specify a resource-level profit/fee factor to be used when calculating the T&M rates. The factor entered here will apply only to this resource and will not affect the calculation of the T&M rates of the other resources in the table. When you enter a default Labor profit/fee factor in the **T&M Rate Table Properties** dialog box, ProPricer automatically fills the **Profit/Fee** cells of the labor resources with the specified value. You can enter overriding factors for both labor and non-labor resources. The overriding values are displayed in black. If the **Profit/Fee** cell of a resource is empty, the profit/fee factor entered for the resource's indirect pool in the Base Rate Table will be used.

*Note: To enter or change the profit/fee of several resources at the same time, select the resources, right-click and then click **Adjust Profit/Fee** on the shortcut menu. Enter the value, and then click **Process**. ProPricer will change the profit/fee of the resources selected and recalculate the new T&M rates.*

Effective Date

Enter the date the rate will take effect. This is for information only.

Rates

This grid is for information only. It shows the T&M rates calculated using the data in the **Resources** grid. The timescale is determined by the table properties.

Rates							
Month	2014	2015	2016	2017	2018	2019	20
January	25.30	26.57	27.89	29.29	31.05	32.91	
February	25.30	26.57	27.89	29.29	31.05	32.91	
March	25.30	26.57	27.89	29.29	31.05	32.91	
April	25.30	26.57	27.89	29.29	31.05	32.91	
May	25.30	26.57	27.89	29.29	31.05	32.91	
June	25.30	26.57	27.89	29.29	31.05	32.91	
July	25.30	26.57	27.89	29.29	31.05	32.91	
August	25.30	26.57	27.89	29.29	31.05	32.91	

Assign a T&M Rate Table to a Proposal

All proposals require a rate table that will provide the resources for the tasks and, in turn, the rates of the resources.

1. In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties** in the shortcut menu.
2. In the **Proposal** folder, click the **Pricing** page.
3. In the **Direct Rate Table** field, enter the name of the T&M Rate Table you want to use.
4. Click **OK**.

Note: If you are replacing the rate table that is already assigned to a proposal, the new table must contain all the resources used in the proposal.

Copy a T&M Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **T&M Rates** folder.
    - Double-click the **T&M Rates** folder to open the list of T&M Rate Tables.
3. Right-click the T&M Rate Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Copy a T&M Rate within a Table

1. Right-click the resource whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the resource to which you want to copy the rates.
3. Click **OK**.

ProPricer will check to see if rates have been entered for the target resource, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Create a T&M Rate Table

1. Do one of the following:
   - In the Main Menu, click **New T&M Rate Table**.
   - In the Navigation Pane, click the **Rates/Tables** button, right-click the **T&M Rates** folder, then click **New T&M Rate Table**.
2. Enter a name and description for the new table.
3. Select a timescale for the rates in the table. The rates can be annual, quarterly, monthly, or daily.
4. Select a Base Rate Table. ProPricer needs the rates from this table to calculate the rates of the resources in the T&M Rate Table.
5. *(Optiona*l) Enter a profit/fee factor.
6. Click **OK**. The T&M Rate Table will open in the Workspace.

Define a T&M Rate

1. Click the **Rates/Tables** button and expand the **T&M Rates** folder. Double-click the appropriate table.
2. Enter a resource in the **Resource** column.
3. *(Optional)* Specify a resource class.
4. *(Optional)* Specify an indirect pool.
5. Define a period for the rate.
6. Specify a fiscal year period.
7. *(Optional)* Enter the profit/fee factor you want to apply.
8. Press **Ctrl**+**S** or move to another row to save your work.

Delete a T&M Rate from a Table

1. In the Navigation Pane, click the **Rates/Tables** button, expand the **T&M Rates** folder, and then double-click the appropriate table.

2. Right-click the resource whose rates you want to delete, and then click **Delete** on the shortcut menu.

3. Confirm the deletion when asked.

*Note: You can only delete resources that are not used anywhere in the system. If the resources is used, ProPricer will display the **Item Usage Info** box instead.*

Delete a T&M Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **T&M Rates** folder.
    - Double-click the **T&M Rates** folder to open the list of T&M Rate Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete a T&M Rate Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

T&M Rate Table Properties

The **T&M Rate Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Timescale

Select a timescale for the rates in the table. The available options are Annual, Quarterly, Monthly, and Daily.

Base Rate Table

Select the rate table that will serve as the base for the T&M Rate Table.

Labor Profit/Fee Factor

In this field you can specify a default profit/fee factor that will be applied to the rates of the labor resources in the T&M Rate Table. ProPricer will automatically enter this value in the **Profit/Fee** cells of all labor resources in the table.

Multi-Currency

This column indicates if Multi-Currency functions have been enabled for the Base Rate Table entered above. You cannot select or clear this checkbox. If it is selected, a **Currency** column will appear in the T&M Rate Table that will show the currency entered for the resource.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

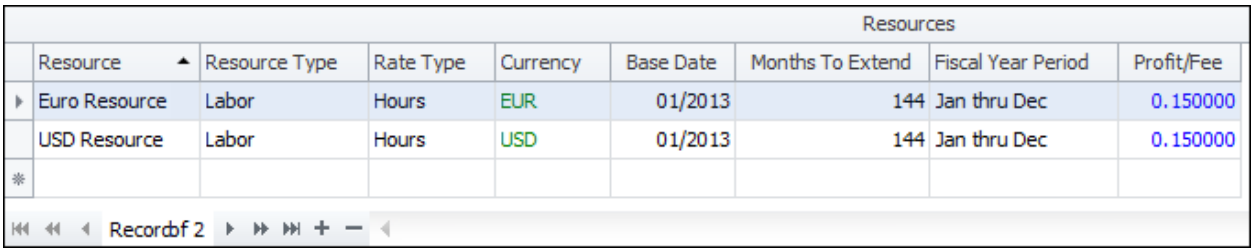
Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

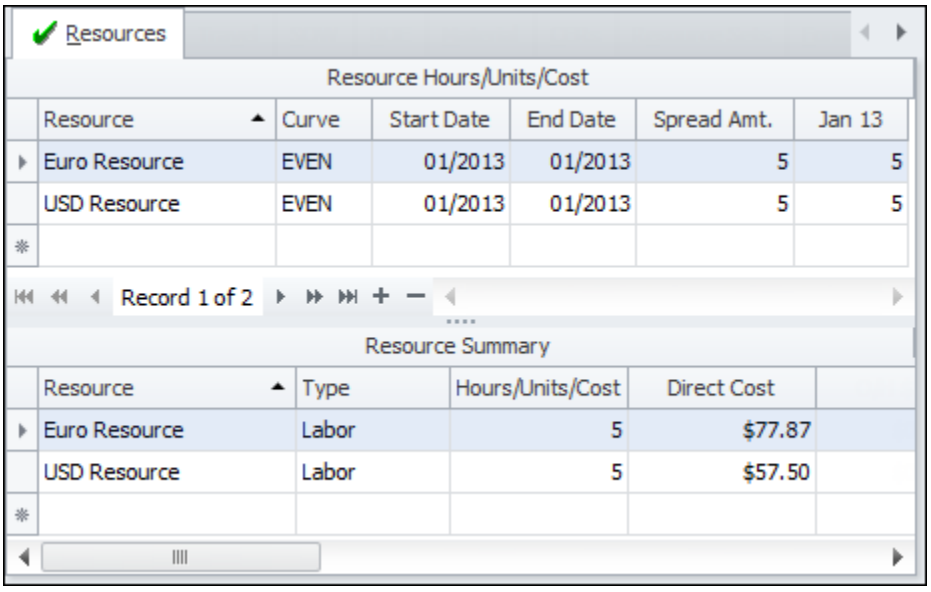
T&M Rate Tables and Multi-Currency

If the **Multi-Currency** checkbox is selected for the Base Rate Table assigned to the T&M Rate Table, a currency column will appear that will show the currency entered for the rate in the Base Rate Table.

Our system and proposal currency are USD. We added two resources to the T&M Rate Table: USD Resource and Euro Resource. The rate for January 2013 is 11.50 for both resources.

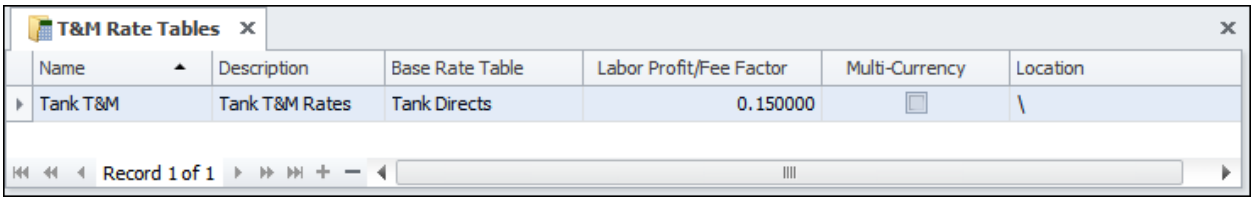


We added both resources to a task and spread 5 hours for them. The **Resources** tab shows $57.50 US dollars for the USD Resource and $77.87 US dollars for the Euro Resource. ProPricer used the rate from the Exchange Rate Table to convert the Euros to US dollars (the proposal currency).



T&M Rate Tables List

The T&M Rate Tables List shows all the T&M Rate Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Timescale

This column shows the measurement of time for rates in the table.

Base Rate Table

This column shows the name of the rate table that provides the resources and rates for the T&M Rate Table.

Labor Profit/Fee Factor

This column shows the profit/fee factor that will be applied to the rates of the labor resources in the T&M Rate Table.

Multi-Currency

This column indicates if Multi-Currency functions have been enabled for the Base Rate Table.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **T&M Rates** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Task Rights

Task Rights determine if a user can view, add, edit, or delete the tasks in a proposal. The initial rights are inherited from the role assigned to the user (**Proposal Input** page in the **Proposal Related** folder of **Role Information**), which you can then change at the proposal level or at the task level. Changes made on the **Task Rights** page in the **Proposal** folder of **Proposal Properties** affect all the tasks in the proposal. Changes made at the task level are specific to that task.

The **Enable Task Security** checkbox must be selected on the **Task Rights** page in the **Proposal** folder of **Proposal Properties** if you want any changes you make to the Task Rights of a user at the proposal and/or task level to take effect.

In addition to task input, the Task Rights granted to a user affect reporting, What-Ifs, the update proposal process, etc.

In the following example, we revoked the right of a user to view task T0010 in My Tutorial, Ver. 0. It does not appear in Task Input.

Tasks

TASK ID	Description	Start Date	End Date	BIDDER	WBS	OBS	CLIN	SUMMARY
T0011	Program Office Support	01/2012	12/2015	Jones	1.1.2	PMO	0001AB	Total
T0020	Design System	01/2012	06/2012	Smith	1.2.1	ENG	0002AA	Total
T0021	Build Prototype	01/2012	12/2012	Taylor	1.3.1	MFG	0002AB	Total
T0022	Test System	01/2013	03/2013	Nixon	1.2.2	ENG	0002AA	Total
T0023	Enhance System	04/2013	09/2013	Jones	1.2.3	ENG	0003AA	Total
T0024	Final Test	10/2013	12/2013	Taylor	1.2.4	ENG	0003AB	Total
T0040	Production	01/2014	12/2015	Taylor	1.3.2	MFG	0003AA	Total
T0041	Quality Control	01/2014	12/2015	Taylor	1.2.5	ENG	0003AA	Total
T0042	Tooling & Rework	01/2015	12/2015	Smith	1.3.3	MFG	0004AA	Total
T0050	Materials	01/2012	12/2015	Taylor	1.4.2	MAT	0004AA	Total
T0051	Shipping & Receiving	01/2012	12/2015	Taylor	1.4.3	MAT	0004AB	Total
T0060	Deliverables	06/2013	12/2015	Taylor	1.5.1	MAT	0005AA	Total

Record 1 of 12

Nor does it appear in the Annual Cost Summary Report.

Proposal: My Tutorial, Ver. 0
RFQ Ref.: DCAA-000-000
Proposal Manager: Joe Shurance
Rate Tables: Tank Directs | Tank Indirects

Executive Business Services, Inc.
Annual Cost Summary Report

Proposal Number: B&P-000
Date: 11/17/2014
Time: 10:55:16 AM
Page: 1

Direct Cost - Standard

Period of Performance: 01/2012 - 12/2015
Fiscal Year: (Jan through Dec)

TASK ID	2012	2013	2014	2015	Total
T0011	102,948	104,602	107,509	110,018	425,077
T0020	25,616				25,616
T0021	272,583				272,583
T0022		19,646			19,646
T0023		3,196			3,196
T0024		18,222			18,222
T0040			44,686	36,281	80,967
T0041			76,954	81,409	158,363
T0042				161,435	161,435
T0050	230,120	264,935	52,965	1,980	550,000
T0051	6,321	7,483	1,583	39	15,427
T0060				33,601	33,601
TOTALS	637,588	418,084	283,697	424,763	1,764,132

Enable Task Security

Task Security refers to the actions a user can perform on the tasks in a proposal. They include View, Edit, Add and Delete. You can modify the Task Rights of every user that has been granted the right to view the proposal. Once the modifications are complete, you must enable Task Security for the changes to take effect.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Task Rights** page.
3. Select the **Enable Task Security** checkbox.
4. Click **OK**.

Grant/Revoke Task Rights at the Proposal Level

1. Right-click the proposal, and then click **Properties** on the shortcut menu.
2. Click the **Task Rights** page in the **Proposal** folder.
3. Select or clear the checkboxes of the right you want to grant/revoke for each user.
4. Click **OK**.

Notes:

- *You can only grant rights that were revoked here. You cannot grant rights that are not inherent to the role assigned to the user to begin with.*
- *All the checkboxes in the Rights section are selected by default the first time you access the page. However, if the corresponding checkbox is not selected in the Effective Rights section, the right will not be granted. The checkbox must be selected in both sections.*
- *The **Enable Task Security** checkbox must be selected on the **Task Rights** page in the **Proposal** folder of **Proposal Properties** in order for the changes to take effect.*

Grant/Revoke Task Rights at the Task Level

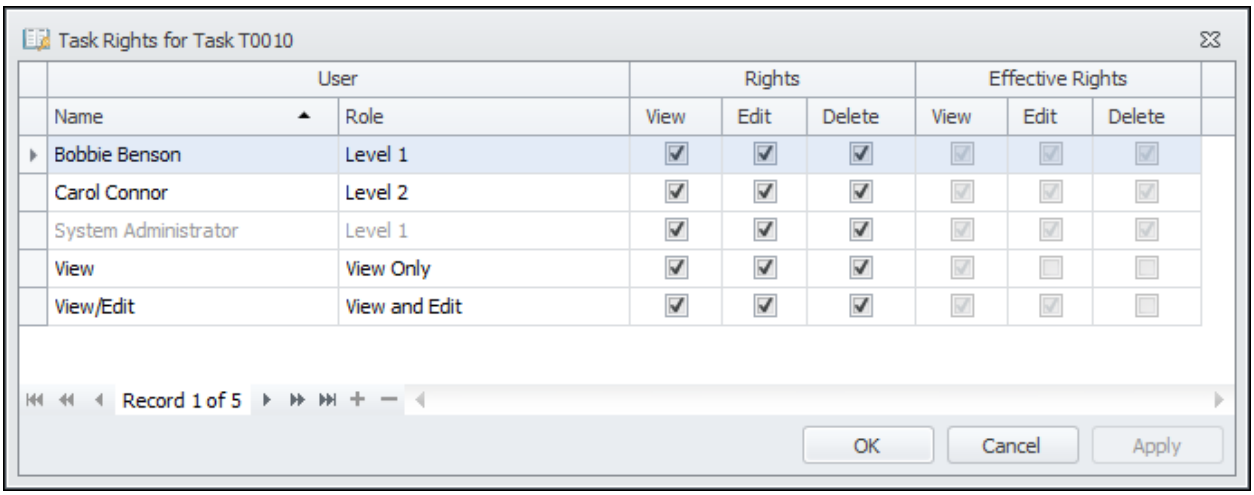
1. Right-click the task, and then click **Task Rights** on the shortcut menu.
2. Select or clear the checkboxes of the right you want to grant/revoke for each user.
3. Click **OK**.

Notes:

- *You can only grant rights that were revoked here. You cannot grant rights that were revoked on the **Task Rights** in the **Proposal** folder of **Proposal Properties** or that are not inherent to the role assigned to the user to begin with.*
- *All the checkboxes in the Rights section are selected by default the first time you open the dialog box. However, if the corresponding checkbox is not selected in the Effective Rights section, the right will not be granted. The checkbox must be selected in both sections.*

Task-Level Task Rights

Here you specify if a user can view, edit, or delete a specific task in the current proposal. For example, you can allow a user to edit a task, but not delete it. The dialog box page is divided into three sections: User, Rights, and Effective Rights.



User

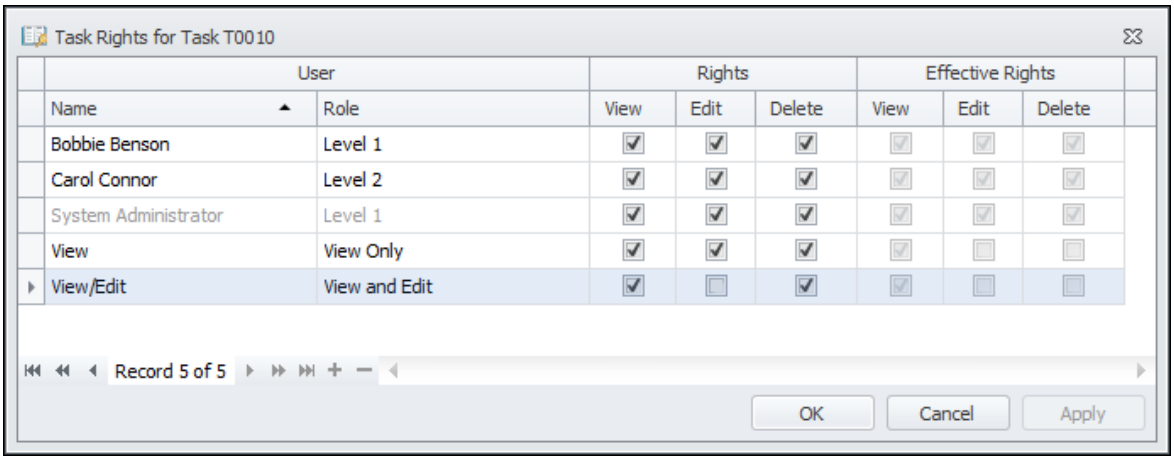
The user section shows a list of the people who have been granted View Rights to the proposal and the role assigned to them. This is for information only and cannot be edited.

Rights

The Rights section is where you limit the user's rights granted by the role. The section consists of View, Edit, Add, and Delete checkboxes that are all selected by default. The Effective Rights section in the screenshot above shows the rights inherited from the roles (we did not select/clear any of the checkboxes in the Rights section). The *View Only* role assigned to user *View* does not allow him to edit, add, or delete tasks. Even though the Edit, Add, and Delete checkboxes are selected in the Rights section, View will only be able to see the tasks. You can only revoke a right that has been granted by the role.

Effective Rights

The Effective Rights section shows the View, Edit, Add, and Delete rights for the task. It is a combination of the rights inherited from the role, the **Task Rights** page in the **Proposal** folder of **Proposal Properties** and changes in the Rights section made here. It is read only and cannot be edited. In the following example, we cleared the Edit checkbox in the Rights section for user *View/Edit*. The Effective Rights section only shows the View checkbox selected, indicating that View/Edit will only be able to see the task.



OK

Saves the changes and closes the dialog box.

Cancel

Closes the dialog box without saving the changes.

Apply

Saves the changes without closing the dialog box.

Tasks

Add a Copy of a Resource

1. Open a proposal in Task View or Resource View.
2. In the **Resource Input** grid, right-click a resource, and then click **Add Copy**.
3. Do one of the following since duplicate resources cannot be assigned to a task:
    - Change the new resource.
    - In any resource field, change the value for the new resource.
4. Press **Ctrl**+**S** or move to another row to save your work.

Add a Copy of a Resource Set

1. Open a proposal in Task View.
2. In the **Resource Set Input** grid, right-click a resource set, and then click **Add Copy**.
3. Enter a new **Resource Set ID** since resource sets cannot be assigned with duplicate IDs.
4. Press **Ctrl**+**S** or move to another row to save your work.

Add a Copy of a Task

1. Open a proposal in Task View.
2. In the **Tasks** grid, right-click a task, and then click **Add Copy**.
3. Change the new task's name.
4. Press **Ctrl**+**S** or move to another row to save your work.

Add a Copy of a Trip

1. Open a proposal in Task View or Travel View.
2. In the **Travel Info** grid, right-click a trip, and then click **Add Copy**.
3. Enter a new **Trip ID** since trips cannot be assigned with duplicate IDs.
4. Press **Ctrl**+**S** or move to another row to save your work.

Assign a CER to a Task

1. In the **Tasks** grid, select the task to which you want to assign a CER.
2. Click the **CERs** tab.
3. In the **CER ID** column, enter a name for the CER to give it a unique identity in the task.
4. In the **CER** column, select a CER from the proposal's CER Table.
5. Press **Ctrl**+**S** or move to another row to save your work. The base and derivative resources defined for the CER will be added to the respective grid, and the input values of the derivative resources will be distributed.

Assign a Resource Set to a Task

1. In the **Tasks** grid, select the task to which you want to assign a resource set.
2. Click the **Resource Sets** tab.
3. In the **Resource Set ID** column, enter a name for the resource set to give it a unique identity in the task.
4. In the **Resource Set** column, select a set from the proposal's Resource Set Table.
5. *(Optional)* In the **Acct Calendar** column, select a calendar for each resource.
    - An accounting calendar can be assigned to a resource at the task level in this column. A calendar can also be assigned to a resource at the global level in the Resource Library and in a Direct Rate Table.
    - If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.
6. Enter a curve and spread amount, or enter discrete values, for the resource set.
7. *(Optional)* Change the resource set elements as needed.

Note: ProPricer distributes the hours/units/cost of the element resources based on the factors specified in the proposal's Resource Set Table.

Assign a Resource to a Task

Assign a Resource in Task View

1. In the **Tasks** grid, click the task, and then click the **Resources** tab.
2. Add a resource to the task.
3. *(Optional)* Assign an indirect pool to the resource.
4. *(Optional)* Assign a rate band to the resource if you have assigned a Rate Band Table to the Direct Rate Table.
5. *(Optional)* Assign a scheduled rate to the resource if you have assigned a Scheduled Rate Table to the proposal.
6. Distribute the appropriate number of resource hours/units/cost.
7. Press **Ctrl**+**S** or move to another row to save your work.

Assign a Resource in Resource View

You can also add resources to tasks while in Resource View.

1. On the **Proposal** ribbon, in the **Proposal** group, click the down arrow under **Task View**, and then click **Resource View**.
2. When you start to enter the resource, the **Select Task** dialog box will open. Click the task to which you want to add the resource, and then click **OK**.
3. *(Optional)* Assign an indirect pool to the resource.
4. *(Optional)* Assign a rate band to the resource if you have assigned a Rate Band Table to the Direct Rate Table.

5. *(Optional)* Assign a scheduled rate to the resource if you have assigned a Scheduled Rate Table to the proposal.

6. Distribute the appropriate number of resource hours/units/cost.

7. Press **Ctrl**+**S** or move to another row to save your work.

Assign a Trip to a Task

Use Task View or Travel View to enter trip information in tasks.

Note: To switch proposal views, go the Proposal ribbon.

Assign a Trip to a Task in Task View

1. Open your proposal in Task View.
2. In the **Tasks** grid, select a task, and then click the **Travel** tab.
3. In the **Travel Information** grid, enter a trip ID and description.
4. Select a destination.
5. Enter the number of people traveling and the number of days that the trip will last.
6. In the **Trip Distribution** grid, enter the spread parameters for the trip.
7. Press **Ctrl**+**S** or move to another row to save your work.

Assign a Trip to a Task in Travel View

1. Open your proposal in Travel View.
2. In the **Trip Distribution** grid, start entering a trip ID. The **Select Task** dialog box will open.
3. In the **Select Task** dialog box, choose the task that the trip will be assigned to.
4. Finish entering the trip ID, and enter a description.
5. Select a destination.

6. Enter the number of people traveling and the number of days that the trip will last.

7. In the **Trip Distribution** grid, enter the spread parameters for the trip.

8. Press **Ctrl**+**S** or move to another row to save your work.

Assign Material to a Task

You can assign parts and assemblies to tasks on the Material tab of Task View. You can also use Material View to assign parts and assemblies to tasks. To select a view for your proposal, go to the **Proposal** ribbon.

Due to the two-way functionality of material assignments, any part/assembly you assign to a task on the Material tab will appear in Material View, and vice versa.

Assign Materials to Tasks on the Material Tab

1. In the **Tasks** grid, select the task, and then click the **Material** tab.
2. In the **Material Input** grid, go to the **Material ID** column and enter an ID.
3. Do one of the following:
   - In the **Source Material** column, select a part or assembly from your material libraries.
   - In the **Source Library** column, select **(None)** to create a proposal-specific part or assembly. Then in the **Part Number** and **Assembly/Part** columns, enter a number and name.
4. In the **Resource** column, select a resource for the part or assembly.
5. In the **Material Distribution** grid, enter the spread information for the material. You can enter spread parameters or discrete values in the months.
6. Press **Ctrl+S** or move to another row to save your work.

Assign Materials to Tasks in Material View

1. At the top of Material View, click the **Miscellaneous** tab.

2. In the **Material Input** grid, go to the **Material ID** column and enter an ID.
3. Do one of the following:
    - In the **Source Material** column, select a part or assembly from your material libraries.
    - In the **Source Library** column, select **(None)** to create a proposal-specific part or assembly. Then in the **Part Number** and **Assembly/Part** columns, enter a number and name.
4. In the **Resource** column, select a resource for the part or assembly.
5. In the **Task** column, enter the name of the task.
6. In the **Material Distribution** grid, enter the spread information for the material. You can enter spread parameters or discrete values in the months.
7. Press **Ctrl**+**S** or move to another row to save your work.

Delivery/Ship Quantity Input Mode

ProPricer offers you two ways of entering Delivery/Ship Quantity data in the Material tab and in Material View:

- Direct - the **Delivery/Ship Qty** column can be edited. The value that you enter here is used to calculate the Total Manufacturing Start Quantity. The **Material Distribution** grid will show the distribution of the Total Manufacturing Start Quantity. If you enter discrete values in the months, the sum of the values must equal the Total Mfg Start Quantity.
- Distributed - the **Delivery/Ship Qty** column cannot be edited. It is calculated based on the values entered in the **Material Distribution** grid, either discretely or with spread parameters.

Change the Delivery/Ship Qty Input Mode

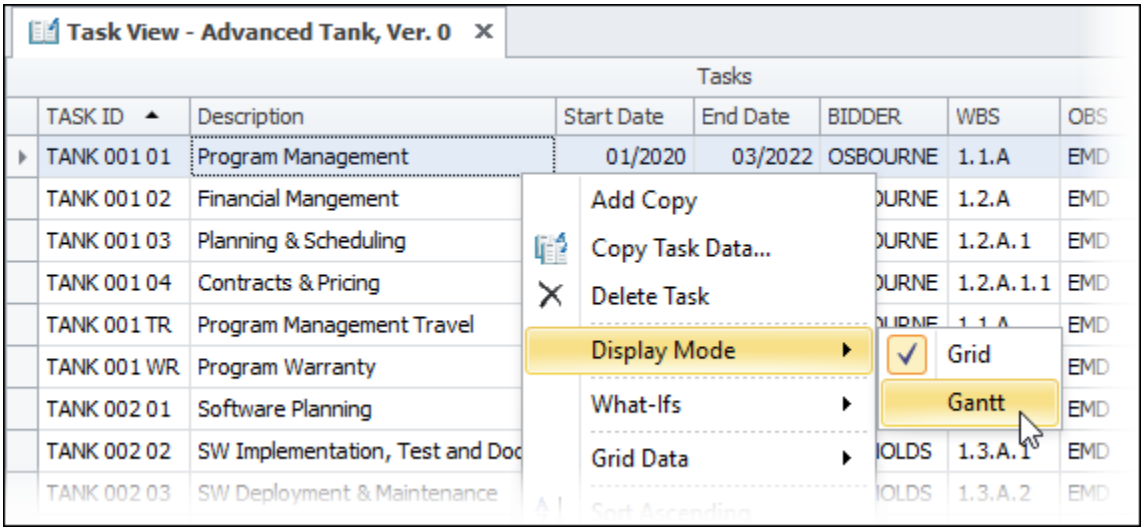
In a proposal (in Material View or the Material tab of Task View), go to the top of the **Material Input** or **Material Distribution** grid, and then click the **Distributed** button.

Alternatively, right-click anywhere in either grid, go to **View** > **Delivery/Ship Qty Input Mode**, and then select a mode.

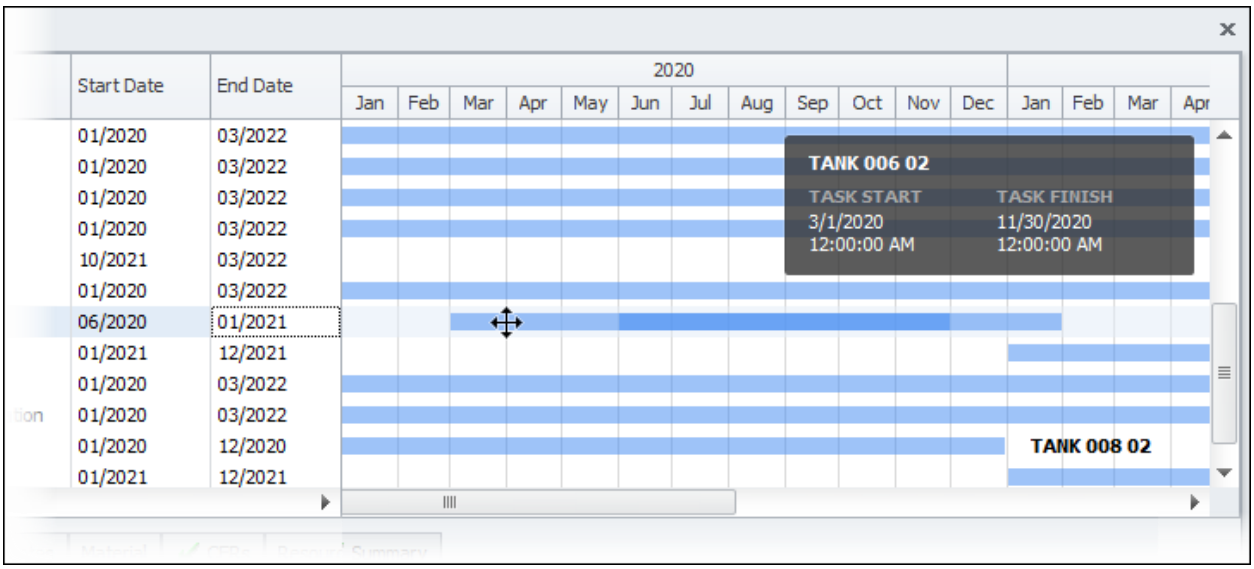
Change the Display Mode of Tasks

With a proposal open in Task View, you have two ways to display tasks. The default display mode is Grid, and the other mode is Gantt. Grid mode is for organizing and editing all the task information in rows and columns. Gantt mode has a bar chart for visualizing and changing the duration of tasks.

To switch how tasks appear, right-click the **Tasks** grid, go to **View** > **Display Mode**, and then select **Grid** or **Gantt**. Alternatively, press **Ctrl**+**D** on your keyboard.



In Gantt mode, you can move a task's dates forward or backward by dragging the bar and moving it within the period of performance.


Start Date
End Date
2020
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Jan
Feb
Mar
Apr
01/2020 03/2022
01/2020 03/2022
01/2020 03/2022
01/2020 03/2022
10/2021 03/2022
01/2020 03/2022
06/2020 01/2021
01/2021 12/2021
01/2020 03/2022
01/2020 03/2022
01/2020 12/2020
01/2021 12/2021
TANK 006 02
TASK START
3/1/2020
12:00:00 AM
TASK FINISH
11/30/2020
12:00:00 AM
TANK 008 02

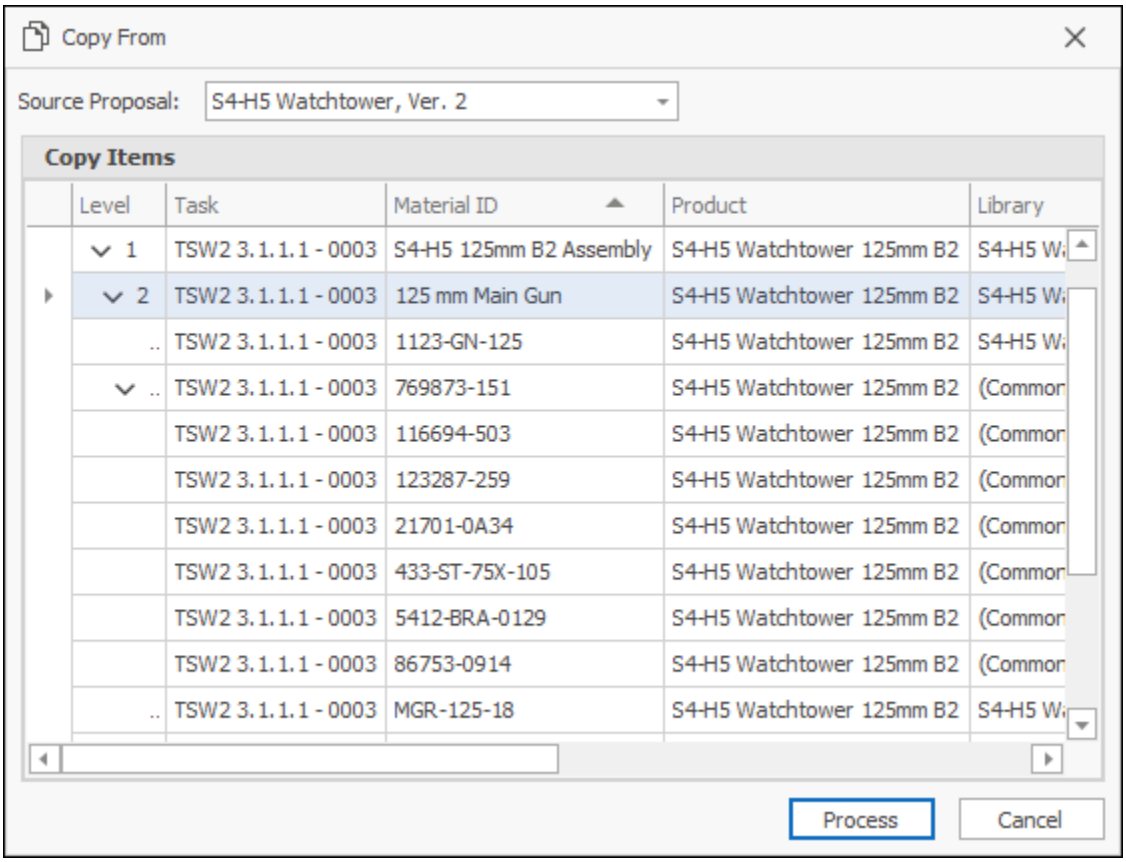
Copy Selected Data from a Task

Copy Selected Data from a Task

1. Go to the task that needs data.
2. Click an input tab for a type of data in the task, such as the Material tab, CERs tab, and Travel tab.
3. Right-click an empty row in the grid that needs new data, and then click **Add Copy From** on the shortcut menu.
4. In the **Source Proposal** field, select the proposal containing the data you want to copy.
5. In the **Copy Items** section, select the row of data to copy from the proposal. If the selected row is a parent in hierarchically structured data, such as a product assembly, all rows within it will also be copied.
6. Click **Process**.

Copy From Dialog Box

The **Copy From** dialog box appears when you go to a data input tab (such as the Material tab), right-click an input grid, and then select **Add Copy From**. After picking a proposal to copy from, you can select a row of data to copy.



Source Proposal

Select the proposal that you want to copy data from.

Copy Items

This area shows the rows of data you can copy from the source proposal. If the selected row is a parent in hierarchically structured data, such as a product assembly, all rows within it will also be copied.

Process

Click this button to start the copy process.

Cancel

Click this button to close the dialog box without copying data.

Copy Task Data to Another Task

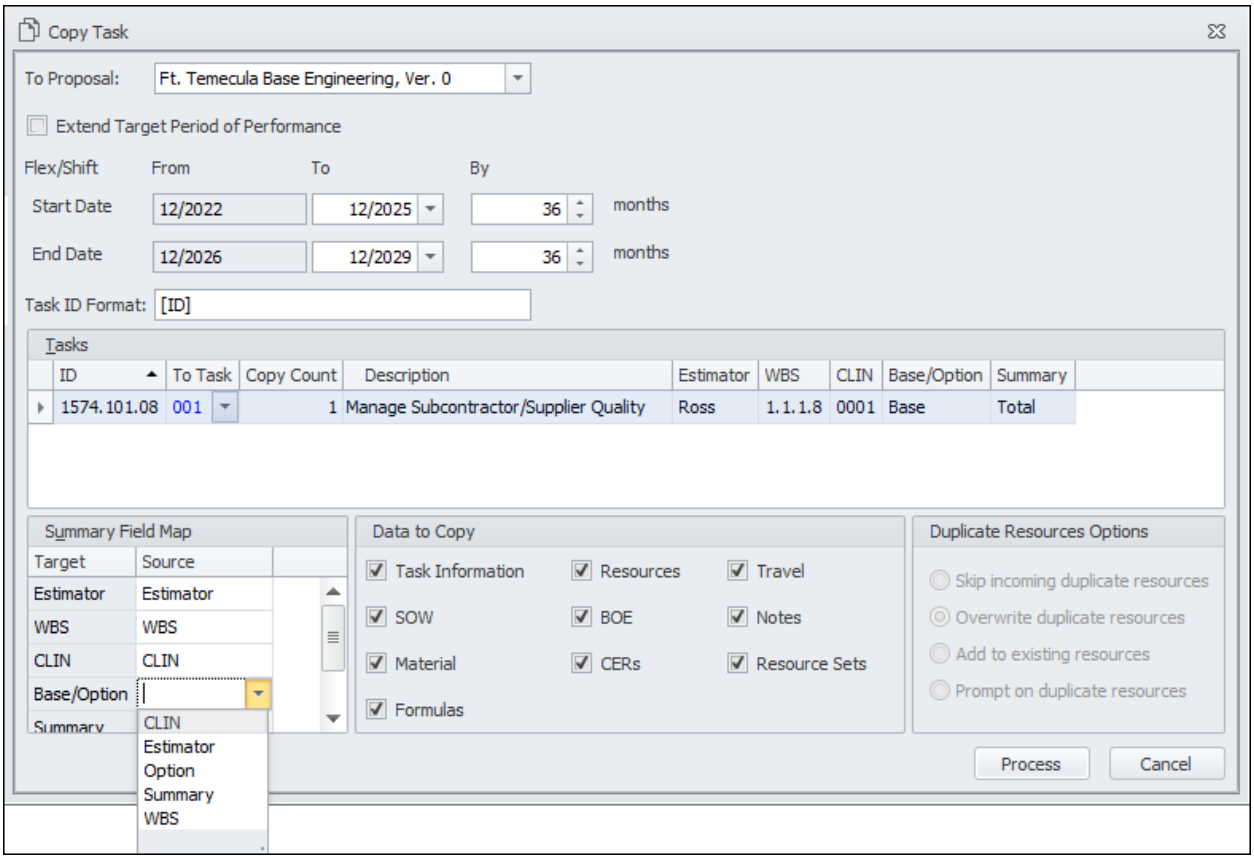
1. Right-click the task containing information you want to copy, and then click **Copy Task Data** on the shortcut menu. If you want to copy more than one task at once, hold the **Shift** key to select adjacent tasks or the **Ctrl** key to select separate rows of tasks.
2. In **To Proposal**, select the proposal that the data will be copied to.
3. *(Optional)* Select **Extend Target Period of Performance** to adjust the target proposal's period of performance when copied tasks are not within that time frame.
4. *(Optional)* Enter **Flex/Shift** options to adjust period of performance start and end dates. This is the same as adjusting dates with the Flex/Shift what-if.
5. *(Optional)* In **Task ID Format**, enter a prefix and/or suffix for the copied task.
6. In **To Task**, enter the name of the task that will receive the data.
7. In **Copy Count**, enter the number of copies to create.
8. *(Optional)* Change the description of the task that will receive the data.
9. *(Optional)* Change the summary field entries of the task that will receive the data.
10. Under **Summary Field Map**, select the source summary field that will be copied to the indicated target summary field. This is especially useful when you need to copy the source's data to a field with a different name.
11. Select the checkboxes of the data you want to copy.
12. Click **Process**.

*Note: You can use the **Task Information** checkbox to create tasks or overwrite the information in existing ones. For example:*

- *If you select the checkbox and enter a new Task ID in **To Task**, you will create a new task with the same information. The input data (resources, travel, material, etc.) selected will also be copied to the new task*.
- *If you select the checkbox and enter the name of an existing task in **To Task**, you will overwrite the task data of the existing task, in addition to the input data selected*.
- *If the checkbox is clear, you must enter an existing task in **To Task**. In this instance the task data will remain the same. All you will overwrite is the input data*.

Copy Task Dialog Box

The **Copy Task** dialog box appears when you right-click a task or selection of tasks, and then select **Copy Task Data**. It lets you choose what data to copy into the target tasks and proposal.



To Proposal

Enter the name and version of the proposal that you want to copy the task to.

Extend Target Period of Performance

Select this checkbox to adjust the target proposal's period of performance when copied tasks are not within that time frame.

Flex/Shift

These settings let you use the Flex/Shift what-if to quickly adjust period of performance dates during the copy process. You can enter new dates, or you can adjust by a specific number of months.

Task ID Format

Enter a prefix and/or suffix up to ten characters long you want the copied task or tasks to begin/end with. You can also insert a summary field variable by right-clicking the field, pointing to **Insert Variable**, and then selecting the summary field you want.

Tasks

This section contains the following elements:

TASK ID

This field shows the name of the task you are going to copy.

To Task

Enter the name of the target task. This can be a new task or an existing task. If you select to copy data into an existing task, the data from the source task will overwrite the data in the target task.

Copy Count

Enter the number of task copies to create.

Description

This field shows the description of the task you selected to copy. You can leave the existing description or enter a new one.

Summary Fields

These fields show the summary field entries of the task you selected to copy. You can leave the existing entries or enter new ones.

Summary Field Map

The target summary fields listed are in the proposal you are copying to. The source summary fields, which may have different names, are the ones you can

copy data from. Select a source summary field to map it to a target and copy it there.

Data to Copy

Select the checkboxes of the items you want to copy. All the checkboxes are selected by default. The checkboxes include:

Task Information

Select this checkbox to copy the information from the **Tasks** grid, including the Description, Type, Start Date, End Date, Indirect Pool, Quantity, Profit/Fee, and the summary elements.

Resources

Select this checkbox to copy the resources assigned to the task.

Activities

Select this checkbox to copy the Activities added to the task.

Travel

Select this checkbox to copy the trips assigned to the task.

SOW

Select this checkbox to copy the SOW text entered for the task. Please note that if you are copying to an existing task, the text from the source task will replace the text in the target task. Text cannot be merged or appended.

BOE

Select this checkbox to copy the BOE text entered for the task. Please note that if you are copying to an existing task, the text from the source task will replace the text in the target task. Text cannot be merged or appended.

Notes

Select this checkbox to copy the Notes text entered for the task. Please note that if you are copying to an existing task, the text from the source task will replace the text in the target task. Text cannot be merged or appended.

Material

Select this checkbox to copy the material assigned to the task.

CERs

Select this checkbox to copy the CERs assigned to the task.

Resource Sets

Select this checkbox to copy the resource sets assigned to the task.

Formulas

Select this checkbox to copy the formulas added to the task.

Duplicate Resource Options

Skip incoming duplicate resources

The incoming duplicate resources are not copied into the task.

Overwrite duplicate resources

ProPricer replaces the target data with the incoming data. This is a record-by-record procedure in which duplicate records are overwritten when encountered.

Add to existing resources

ProPricer adds the value of the incoming record to the value of the target record.

Prompt on duplicate resources

ProPricer will inform you of each duplicate resource and ask how you want to handle it. It will display the values of the duplicate records so you can compare them and then select one of four options:

Skip

Leaves the existing resource and does not import the new one.

Overwrite

Replaces the existing resource with the imported resource.

Add To

Adds the values of the incoming resource to the values of the existing resource.

Cancel

Quits the current import session without making any changes.

Process

Click this button to start the copy process.

Cancel

Click this button to close the dialog box without copying.

Create a Task

Once you have created the proposal and entered the properties, you can begin to add tasks to the proposal that will describe the individual work efforts.

Create a Task in Task View

1. Open the proposal in Task View.
2. In the **Tasks** grid, go to a blank row.
3. Enter a name and description for the task. If tasks are AutoNumbered, then ProPricer creates task IDs for you.
4. Define the period of the task by modifying the start and end dates.
5. Enter any additional data in the relevant columns.
6. Press **Ctrl**+**S** or move to another row to save your work.
7. Repeat steps 3 through 7 to create more tasks, or begin adding resources to the new task.

Create a Task in Resource View

1. Open the proposal in Resource View.
2. In the **Resource Input** grid, go to a blank row.
3. In the **Resource** column, select a resource that you want to assign to a task.
4. In the **Select Task** dialog box, choose **Create a new task**.
5. Enter a name and description for the task. If tasks are AutoNumbered, then ProPricer creates task IDs for you.

6. Define the period of the task by modifying the start and end dates.
7. Enter any additional data in the relevant columns.
8. Click **OK**.

Delete a Task

1. In the **Tasks** grid, right-click the task you want to delete, and then click **Delete Task** on the shortcut menu.

2. Confirm the deletion when asked.

Set a Default Resource

You can set the direct resource in the last row of the **Resources** tab as the default resource. This means that the next resource you assign to the task will have the same resource field values, indirect pool, rate band, scheduled rate, and hours/units/cost distribution.

1. On the **Resources** tab, right-click anywhere in the row of the resource.
2. From the shortcut menu, select **Use Last Resource As Default**. A check mark appears before the command indicating that the option is selected.

Note: Resource actuals are copied to the new resource, but are not marked as actuals.

Spread Hours/Units/Cost

There are two ways to spread hours/units/cost for the resources in your proposal. You can use a curve and enter a spread amount, or you can manually enter the values in each month, quarter, or year. If you manually enter values, the Curve, Spread Method, Start/End Date, and Spread Amount columns will be blank.

If you use a curve, you can see how the hours/units/cost will be distributed before saving the resource to the task. After you enter the curve and spread amount, but before moving to another row (this will save the change), right-click and then select **Apply Spread** on the shortcut menu. ProPricer will spread the hours/units/cost. If you are satisfied with the results, you can save your changes. If not, you can select a new spread curve and click **Apply Spread** again.

If you manually entered hours/units/cost, just enter the new value in the appropriate month, quarter, or year. If you used a curve and spread amount, you can enter a new spread amount or tell ProPricer to add/subtract a specific amount of hours/units/cost from the existing value.

- To indicate that you want to add hours/units/cost to the existing value, select the value in the **Spread Amount** column and then type a + (plus sign) and the amount you want to add. For example, to add 100 hours, type +100.
- To indicate that you want to subtract hours/units/cost from the existing value, select the value in the **Spread Amount** column and then type + - (plus and minus signs) before the amount. For example, to subtract 100 hours, type + - 100.

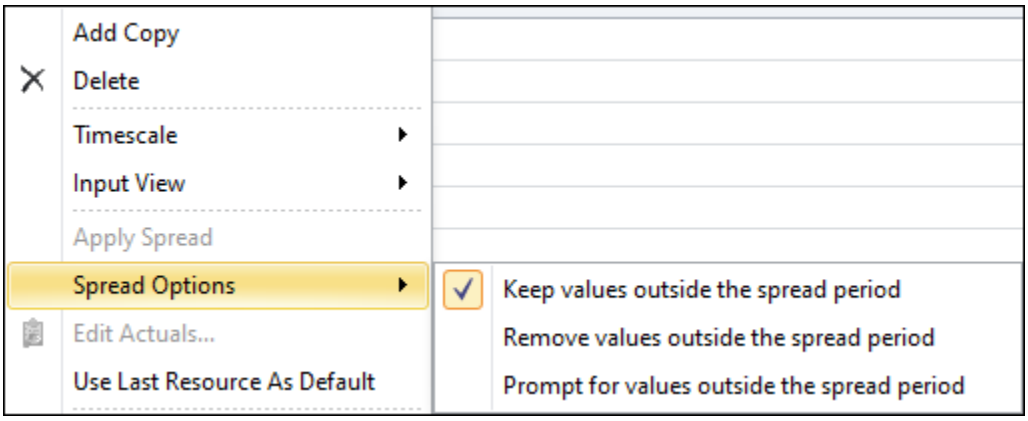
You can also edit the values individually by entering a new value or using the plus and plus/minus signs described above. If you change a value, the spread information will be cleared. This is because the new distribution of the hours/units/cost does not result from a single spread pattern.

You can change the spread curve if you want to distribute the hours/units/cost differently and the new values will overwrite the existing ones. You can also change the

start/end dates. The new values will overwrite the existing ones in the new period. Any values that fall outside the new period can be kept or removed, depending on the spread option selected.

Spread Options

The spread options appear on the shortcut menu when you right-click anywhere in the row. They control what happens when a spread period is shortened after estimates have been distributed.



Keep values outside the spread period

The values outside the spread period are added to the spread amount, and ProPricer clears all the spread parameters.

Remove values outside the spread period

The values outside the spread period are deleted, so the spread amount and all other spread parameters stay the same. This is the default option.

Prompt for values outside the spread period

ProPricer will ask you to keep or remove the values that fall outside the spread period.

Example

We spread 100 hours using the curve 10/90 for the period of 01/2013 to 05/2013.

Resource Hours/Units/Cost

Curve	Start Date	End Date	Spread Amt.	Jan 13	Feb 13	Mar 13	Apr 13	May 13
10/90	01/2013	05/2013	100	0	4	18	50	28

Now we will change the end date and keep the values outside the spread period.

Resource Hours/Units/Cost

Curve	Start Date	End Date	Spread Amt.	Jan 13	Feb 13	Mar 13	Apr 13	May 13
(None)			0	2	33	65	50	28

The total number of hours is now 178. January has been assigned 2 hours, and the hours for February and March were overwritten with the new values. The hours for April and May did not change because we elected to keep the values outside the new spread period. Notice that the spread information is cleared because the new distribution of the resource hours does not result from a single spread pattern.

If we had elected to remove the hours outside the spread period, the 100 hours would be redistributed between January and March, and there would be no hours entered for April and May. In this instance, the spread information was not cleared.

Resource Hours/Units/Cost

Curve	Start Date	End Date	Spread Amt.	Jan 13	Feb 13	Mar 13	Apr 13	May 13
10/90	01/2013	03/2013	100	2	33	65	0	0

Timescale

In Task View, Resource View, and Activity View, you can switch from the proposal's default timescale and enter hours/units/cost (H/U/C) amounts in months, quarters,

years, or phases. You can also enter summary-level estimates instead of timephased estimates. The new amounts that you enter will be proportionally redistributed in the spread period, down to the monthly level. If a resource's initial spread amount is zero, then an even distribution will be applied.

There are different ways to switch the timescale in the **Resource Input** grid. You can:

- Click the timescale name at the top of the grid, then select an option.
- Right-click anywhere in the grid, go to **View** > **Timescale**, and then select an option.
- Press **Ctrl**+**T** to select the next option.
- Press **Ctrl**+**Shift**+**T** to select the previous option.
- Press **Alt**+**T** to open the **Timescale** menu, and then select an option.

Note: You can also switch the timescale while using Summary View. However, all data is read-only in that proposal view.

Input View

In Task View, Resource View, and Activity View, if the rate type of the resources assigned to your tasks is *Hours*, you can view their input data as hours or equivalent heads.

There are different ways to switch the input view in the **Resource Input** grid or **Resource Summary** grid. You can:

- Click the input view name at the top of the grid, and then select an option.
- Right-click anywhere in the grid, go to **View** > **Input View**, and then select an option.
- Press **Ctrl**+**D** to select the next option.
- Press **Ctrl**+**Shift**+**D** to select the previous option.

- Press **Alt+D** to open the **Input View** menu, and then select an option.

*Note: The **Hours/Units/Cost** and **Actual Hours/Units/Cost** options show different information when an hours/units/cost modifier is set up in your proposal. **Hours/Units/Cost** shows what is entered, and **Actual Hours/Units/Cost** shows the calculated amounts after ProPricer applies the modifier.*

Note: You can set the Default Input View on the Proposal Input page of the Proposal Properties.

Spread Methods

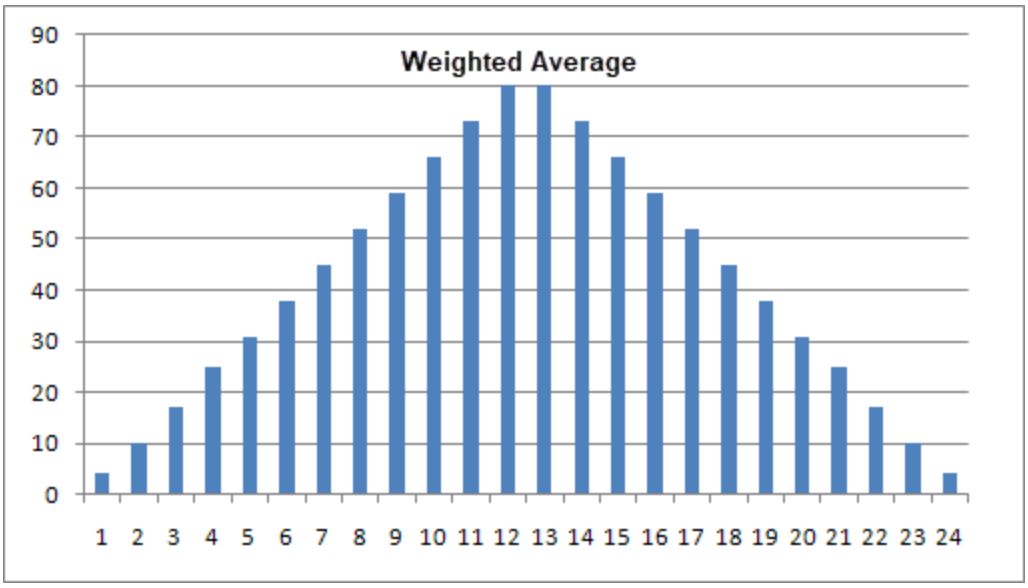
If you use a spread curve to distribute hours/units/cost, you can specify a spread method. The spread method defines how the curve will be applied over the spread period. There are three spread methods available:

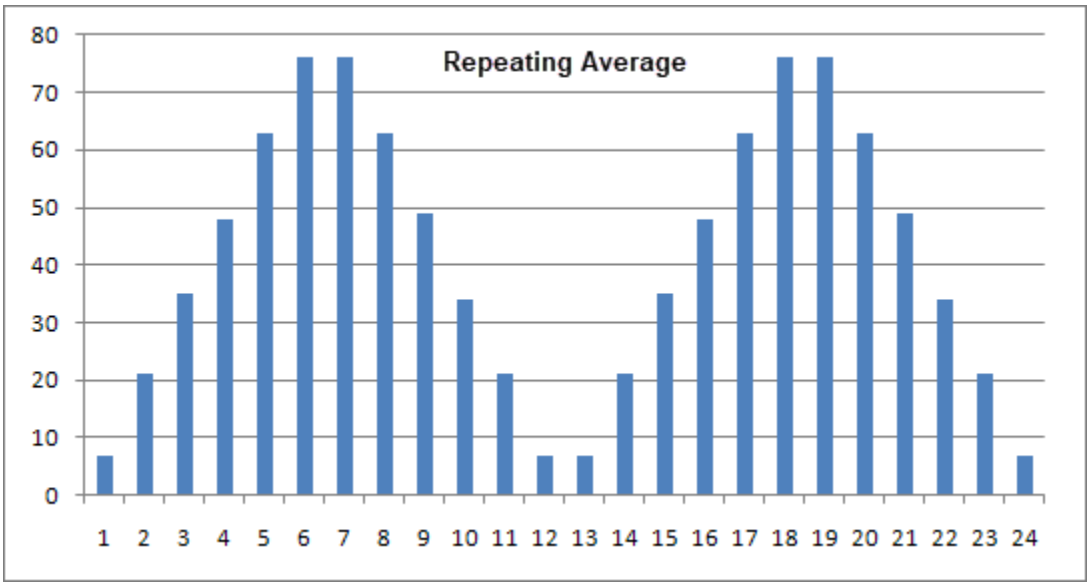
- **Weighted Average** - this method averages the curve over the duration of the task, based on the monthly weights of the curve.
- **Repeating Average** - this method repeats the curve every 12 months.
- **Loading Curve** - this method loads monthly hours/units/cost, based on the curve's monthly values.

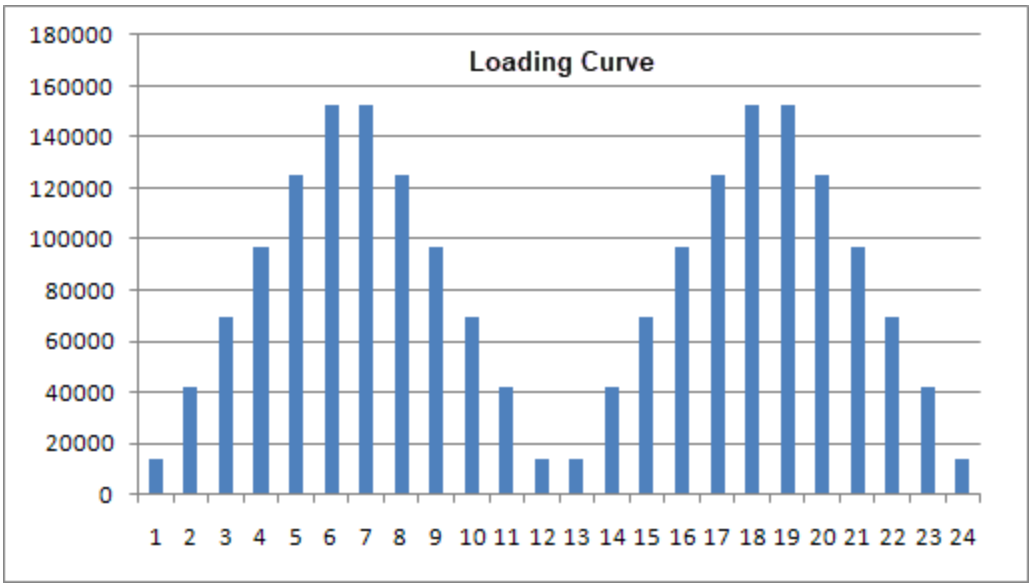
We used the three different spread methods with the 50/50 curve to distribute 1,000 hours from January 2009 to December 2010. The following is the number of hours spread for each month and method.

	Weighted Average	Repeating Average	Loading Curve
Jan 09	4	7	13900
Feb 09	10	21	41700
Mar 09	17	35	69400
Apr 09	25	48	97200
May 09	31	63	125000
Jun 09	38	76	152800
Jul 09	45	76	152800
Aug 09	52	63	125000
Sep 09	59	49	97200
Oct 09	66	34	69400
Nov 09	73	21	41700
Dec 09	80	7	13900
Jan 10	80	7	13900
Feb 10	73	21	41700
Mar 10	66	35	69400
Apr 10	59	48	97200
May 10	52	63	125000
Jun 10	45	76	152800
Jul 10	38	76	152800
Aug 10	31	63	125000
Sep 10	25	49	97200
Oct 10	17	34	69400
Nov 10	10	21	41700
Dec 10	4	7	13900

Graphical representation of this data looks like this:


Weighted Average
90
80
70
60
50
40
30
20
10
0
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24


Repeating Average
80
70
60
50
40
30
20
10
0
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24


Loading Curve
180000
160000
140000
120000
100000
80000
60000
40000
20000
0
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24

Spread Parameters

There are five Spread Parameters that appear as separate columns on the Resources tab, Travel tab, Material tab, Groups tab, and Summary tab:

- **Curve** - specifies the spread curve that distributes the estimated hours/units/cost.
- **Spread Method** - specifies how the data is to be spread, based on the curve selected.
- **Spread Amount** - the amount of hours/units/cost that needs to be spread.
- **Start Date** - the beginning of the spread period.
- **End Date** - the end of the spread period.

By default, the start and end dates coincide with the start and end dates of the task.

Curve and Spread Amount are primary parameters. Spread Method, Start Date, and End Date are secondary parameters. You must enter a curve and spread amount in order to have ProPricer spread hours/units/cost. Spread Method, Start Date, and End Date have default values, but you can change them if needed.

You can hide any or all the secondary parameters. If you hide either of the primary parameters, all the spread parameters will be hidden.

Task Text

Add Text from the SOW or BOE Text Library to a Task

1. Select the task in the **Tasks** grid.
2. Click the **SOW** or **BOE** tab.
3. Select the text entry from the **SOW Text** or **BOE Text** lookup.
4. Press **Ctrl**+**S** or move to another row to save your work.

Attach a File to a Text Tab

1. Open a proposal in Task View, and then select a task.
2. Click the **SOW**, **BOE**, or **Notes** tab.
3. In the text editor, do one of the following:
   - Drag a file from your computer and drop it in the designated area.
   - Click **Edit** > **Attach File**, select the file, and then click **Open**.
4. Save the task.

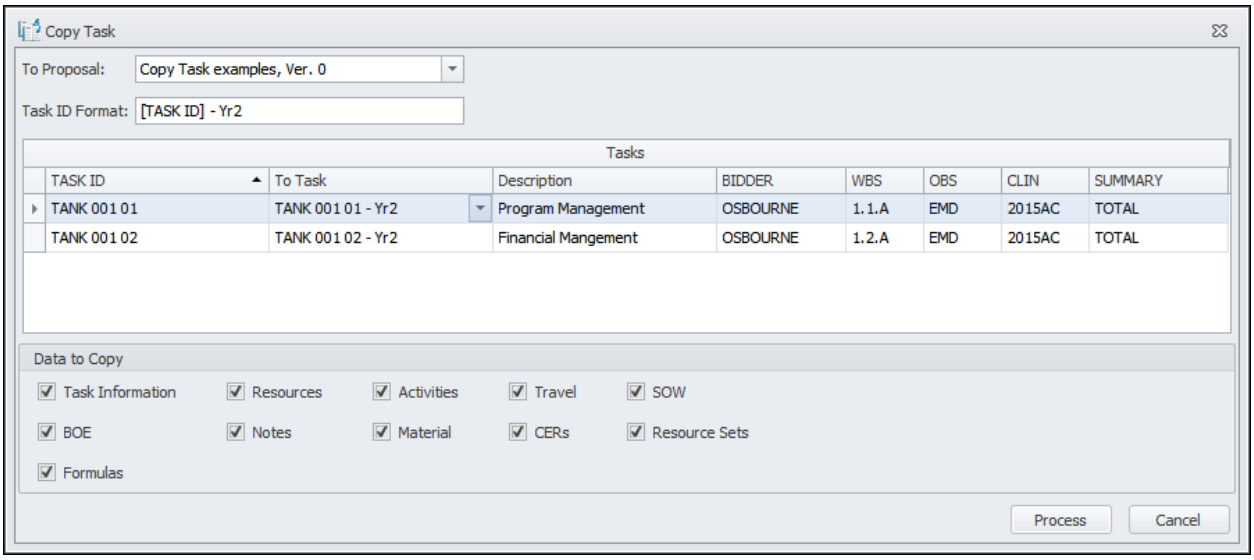
Copy Task Notes

You can use the Copy Task Data function to create new tasks or overwrite data in existing tasks within the same proposal to a different one. The following examples provide detailed information about how this function works.

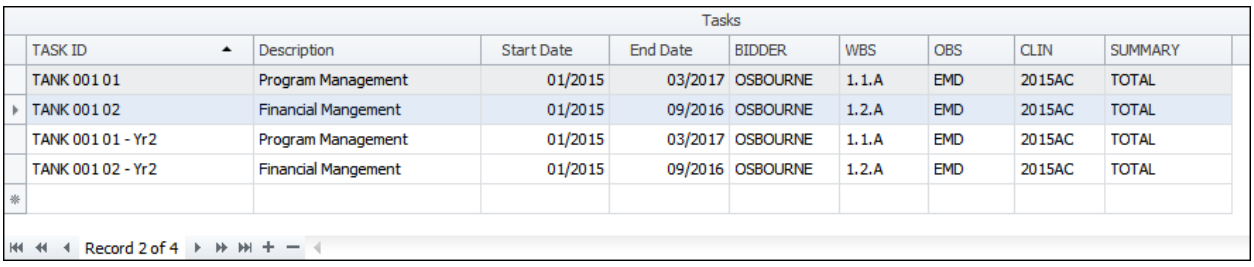
Task ID Format

You can use this field to enter a prefix/suffix to the names of the target tasks, or completely change their names. All the target task names will have the text you enter here.

We added - *Yr2* after [TASK ID].



The names of the tasks that were created show - *Yr2*.



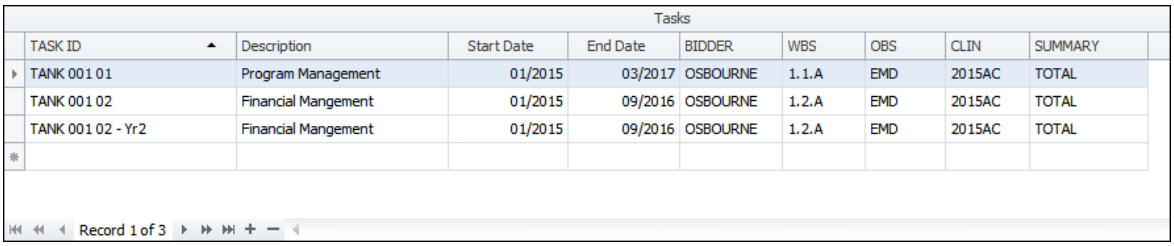
Task Information Checkbox

Task information refers to the fields in the **Tasks** grid: Description, Type, Start Date, End Date, Indirect Pool, Quantity, Profit/Fee, and the summary field entries. The results you obtain depend on whether the checkbox is selected or not.

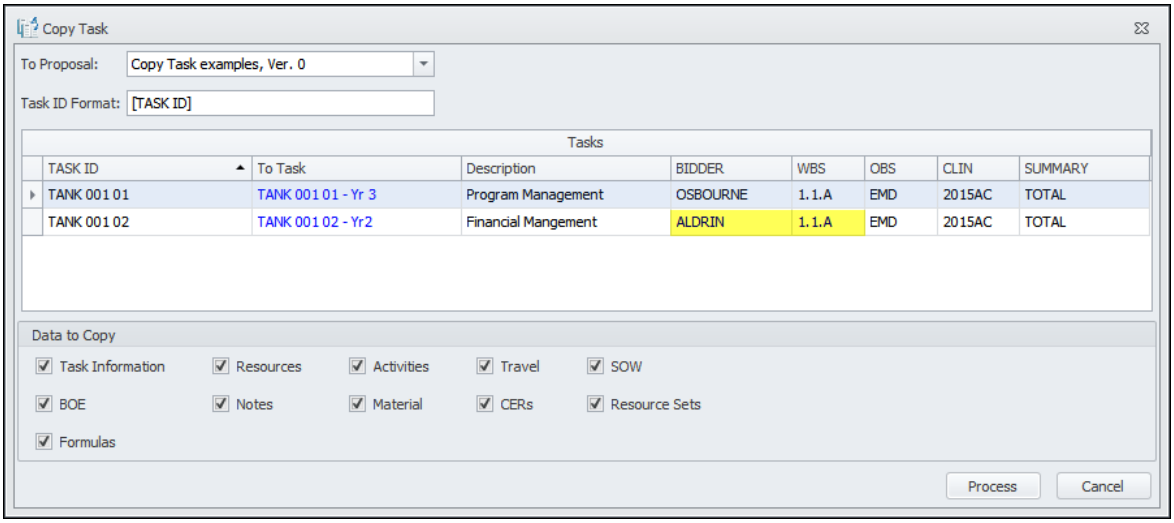
Selected

- Copying to a new task - The task information will be copied to the target task, as well as any input data (resources, travel, material, etc.) selected.
- Copying to an existing task - The task information of the source task will overwrite the task information of the target task, including any input data (resources, travel, material, etc.) selected.

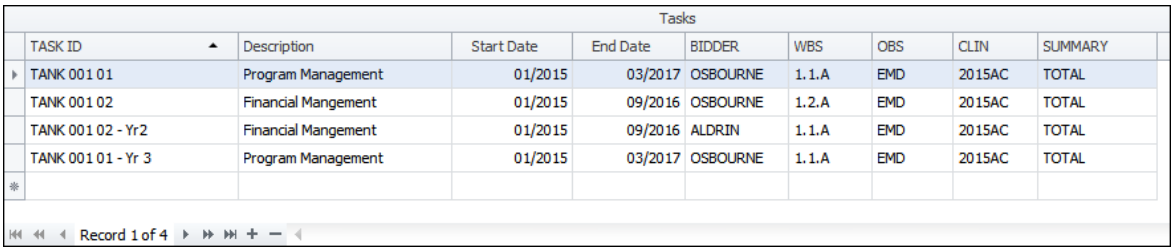
These are our existing tasks.



We will create a new task based on TANK 001 01 and overwrite the existing task with changes to task Tank 001 02.



We were prompted to overwrite the TANK 001 02 - Yr 2, which we accepted. The **Tasks** grid shows the new task TANK 001 01 - Yr 3, and task TANK 001 02 - Yr 2 shows Aldrin as the Bidder and 1.1.A for the WBS entry.



Note: We were able to change the summary field values of Bidder and WBS because we copied the task to the same proposal. You cannot change summary field values if you copy tasks to a different proposal.

Not Selected

- Copying to a new task - Cannot be done. The **Task Information** checkbox must be selected.
- Copying to an existing task - Only the information corresponding to the checkboxes selected in **Data to Copy** will be copied to the target task.

Notes:

- *If the source task and the target task use the same resources, the distribution of the source resources will replace the distribution of the target resources*.
- *Any new resources from the source task will be copied to the target task*.
- *Any resources in the target task that do not exist in the source task will remain the same*.
- *If you changed the structure of a CER, assembly, or travel expense in the target task and the source task uses the same CER, assembly, or trip, your changes will be lost. This is because ProPricer uses just the name to check for duplicates, not the structure or travel expense*.
  - *Any SOW or BOE text or attachment on the target task will be overwritten by that from the source task*.
  - *The months from the source task that have distribution data must fall within the period of the target task*.

Task	Months with Distribution Data						Can be Copied to
Task 1			Jan	Feb	Mar		Task 4 only
Task 2				Feb	Mar	Apr	None of the other tasks
Task 3				Feb	Mar		All the other tasks
Task 4	Nov	Dec	Jan	Feb	Mar		None of the other tasks

Copying to Another Proposal

- The Direct Rate Tables of both proposals must be compatible (the resources of the source proposal must be included in the Direct Rate Table of the target proposal.

- If copying travel data and the trip from the source task exists in the Travel Rate Table assigned to the source proposal, the target proposal must have a compatible Travel Rate Table assigned to it. Task-specific trips will be copied whether or not there is a Travel Rate Table assigned to the target proposal.
- If copying resources with indirect cost actuals, the Algorithms of both proposals must be compatible.
- Both proposals must have the same summary fields.
- Both proposals must have the same resource fields.
- Both proposals must use the same currency.
- The start/end dates of the source task must fall within the time frame of the target proposal.
- If copying material data, both proposals must have the same fiscal year start month.
- If copying resources with scheduled rates, the Scheduled Rate Tables of both proposals must be compatible.
- If copying resources with rate bands, the Rate Band Tables of both proposals must be compatible.
- Activities must be enabled for the target proposal if you want to copy Activities from the source proposal.
- If copying resources that have indirect cost actuals, the Algorithms of both proposals must be compatible.

Delete an Attachment from a Text Tab

1. Select the appropriate task.
2. Click the **SOW**, **BOE**, or **Notes** tab.
3. Right-click the file you want to delete, and then click **Remove** on the shortcut menu. To delete all attachments at once: Right-click any attachment and then click **Remove All** on the shortcut menu.
4. Save the task.

ProPricer will remove the attachment from the proposal's database. It will not delete the original file from your computer.

View or Edit an Attachment on a Text Tab

1. Select the appropriate task.
2. Click the **SOW**, **BOE**, or **Notes** tab.
3. Right-click the attachment, and then click **Open** on the shortcut menu. The file will open in the program with which it was created. ProPricer becomes unavailable for viewing or editing while the attachment is open.
4. Make the necessary changes to the file and save it.
5. Close both the file and the program to enable ProPricer again.
6. Save the task.

Notes:

- *You can also open an attachment by selecting it and pressing Enter, or by double-clicking it.*
- *You cannot open a file that is not associated with a program on your computer. Check the help of your operating system to learn how to associate files with programs.*

Three-Point Estimating

Three-Point Estimating allows you to view Best Case, Most Likely, and Worst Case scenarios for the resources in your proposal. The resource data you enter in a task is reflected in the Most Likely scenario (or point). The estimates in the Best Case and Worst Case scenarios are automatically calculated by applying user-defined factors to the Most Likely hours/units/cost.

Note: The factors for calculating the Best Case and Worst Case estimates are initially set at the proposal level in the Proposal Properties. However, the factors can be overridden at the task level, if needed.

Using the estimates from the three points, expected values are generated for each resource. An expected value is a weighted average that accounts for the best and worst possible outcomes. It is calculated as:

[*Best Case* + (4 * *Most Likely*) + *Worst Case*] / 6 = *Expected Value*

In **Proposal Properties**, the **Three-Point Estimating** folder contains two pages: **General** and **Rates**. On the **General** page, you can enable Three-Point Estimating in your proposal. On the **Rates** page, you can choose the Direct Rate Table and Indirect Rate Table that will be used to calculate Best Case and Worst Case estimates.

After enabling Three-Point Estimating in **Proposal Properties**, the **Three-Point Estimating** tab appears in Task View. You can also switch to Three-Point Estimating View on the ribbon to see estimates and expected values for all resources in your proposal.

Enable the Three-Point Estimating Tab

The **Three-Point Estimating** tab allows you to view the Best Case, Most Likely, and Worst Case estimates for the resources assigned to a task. It also shows the expected values calculated with the three-point estimates.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, open the **Three-Point Estimating** subfolder, then click the **General** page.
3. Select the **Enable Three-Point Estimating** checkbox.
4. Enter a factor value in the **Best Case Default** field.
5. Enter a factor value in the **Worst Case Default** field.
6. *(Optional)* In the **Factor Definitions** section, create Best Case and Worst Case factors for specific resources, classes, or types of resources. You can also limit the factors to certain tasks with a task selection. The **Task Selection** column is hidden by default.
7. Click **OK**.

Title Tables

Title Tables allow you to define hierarchical relationships among the entries in a summary field (such as Bidder, CLIN, OBS, WBS). You can then report proposal data, based on the hierarchy defined in the table.

Title Tables provide:

- Parent-child levels with roll-up capabilities that may or may not be logical (for example, when 1.2.1. rolls up to ABC).
- Validation of the summary field entries during task input.
- Reusable summary field entries. You can use the same Title Table with different proposals.
- Descriptions of summary field elements on reports.

You can create empty Title Tables and build them manually, or you can build Title Tables with summary field data that already exists in a proposal.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

This is a sample Title Table we created for the *WBS* summary field.

Title Table - Tank WBS

Element	Description	Parent
0	Total Program	
1	System Summary	0
1.1	Management	1
1.1.A	Project Management	1.1
1.2	Finance	1
1.2.A	Financial Management	1.2
1.2.A.1	Financial Planning	1.2.A
1.2.A.1.1	Pricing	1.2.A.1
1.3	Software Design	1
1.3.A	Code Development	1.3
1.3.A.1	Implementation and Deployment	1.3.A
1.4	Hardware Design	1
1.4.A	CAD-CAM	1.4
2	System Integration	0
2.1	Integ, Assy, Test & Checkout	2
2.1.A	Integration	2.1
2.1.A.1	Integration & Assy	2.1.A
2.1.A.1.1	Human Factors Engr	2.1.A.1
2.2	System Test	2
2.2.A	Tabletop Layout	2.2
2.3	Data	2
2.3.A	Technical Publications	2.3
2.3.B	Engineering Data	2.3
2.3.C	Management Data	2.3
2.3.D	Support Data	2.3
3	System Test & Eval	0
3.1	Operational Test	3
3.1.A	Mockup	3.1
4	Redesign Analysis	0
4.1	Performance Analysis	4
4.1.A	Test to failure	4.1
4.2	Reliability Analysis	4
4.2.A	Aging Test	4.2

Record 1 of 33

Assign a Title Table to a Proposal

Title Tables are assigned to proposals through the summary fields. When you assign a Title Table to a summary field, you can limit the entries of the summary fields to those specified in the Title Table.

1. In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties** in the shortcut menu.
2. In the **Proposal** folder, open the **Summary Fields** subfolder, and then click the **General** page.
3. In the **Title Table Name** column of the appropriate summary field, enter the Title Table to use.
4. Select the **Validate** checkbox if you want ProPricer to validate the entries in the summary fields based on the elements in the Title Table.
5. Click **OK**.

Build a Title Table from a Proposal

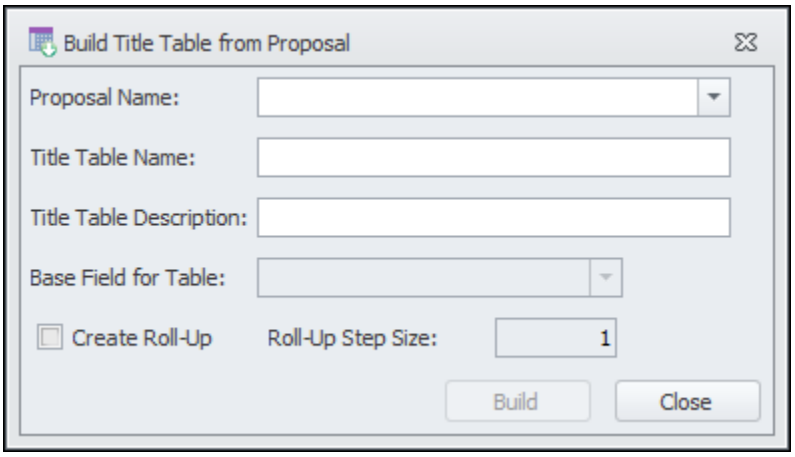
Instead of creating a Title Table from scratch, you can save time by building one from the summary field data entered in the tasks of a proposal.

1. On the **Proposal** ribbon, in the **Proposal** group, click **Title Table from Proposal**.
2. Select the proposal to build a Title Table for.
3. Enter a name and description for the new Title Table.
4. Select the summary field to provide the data for the table.
5. *(Optional)* Select to roll up the data in the table and type the step for the roll-up.
6. Click **Build**.
7. Click **Close** to exit the dialog box when you are finished.

Now you can attach the table to the summary fields of a proposal, draw entries for the summary fields from the Title Table elements, and use the Title Table hierarchy to report proposal data.

Build Title Table from Proposal Dialog Box

ProPricer allows you to build Title Tables based on the entries in the summary fields of an existing proposal.



Proposal Name

Enter the name of the proposal containing the data you want to place in a Title Table.

Title Table Name

Enter a name for the new table.

Title Table Description

Enter a description of the new table.

Base Field for Table

Select the summary field that will provide the data for the new Title Table. The available fields are defined in **Proposal Properties**. ProPricer will also use the Sort Order entered for the summary field. Once the new table is created, you can change it in the **Title Table Properties** dialog box.

Create Roll-Up

Select this checkbox to have ProPricer define the hierarchy of the table, based on the Roll-Up Step Size entered. In other words, ProPricer will automatically enter the Parent of the element.

Roll-Up Step Size

This field is available if the **Create Roll-Up** checkbox is selected. Enter a number the defines how the Elements of the table will be rolled up. For example:

- If you enter a value of 1, the roll-up will summarize every step starting with the lowest level.
- If you enter a value of 2, the roll-up will summarize every other step starting with the lowest level.

Note: The Roll-Up Step Size should not be greater than the field Length of the summary field.

Build

Click this button to build the new table.

Close

Click this button to close the **Build Title Table from Proposal** dialog box.

Copy a Title Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
   - Expand the **Title Tables** folder.
   - Double-click the **Title Tables** folder to open the list of Title Tables.
3. Right-click the Title Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: *If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.*

Create a Title Table

1. Do one of the following:
    - In the Main Menu, click **New Title Table**.
    - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Title Tables** folder, then click **New Title Table**.
2. Enter a name and description for the new table.
3. Select the Sort Order for the elements.
4. Click **OK**. The Title Table will open in the Workspace.

After you set up the elements, you can attach the Title Table to the summary fields of a proposal, draw entries for the summary fields from the Title Table elements, and use the Title Table hierarchy to report proposal data.

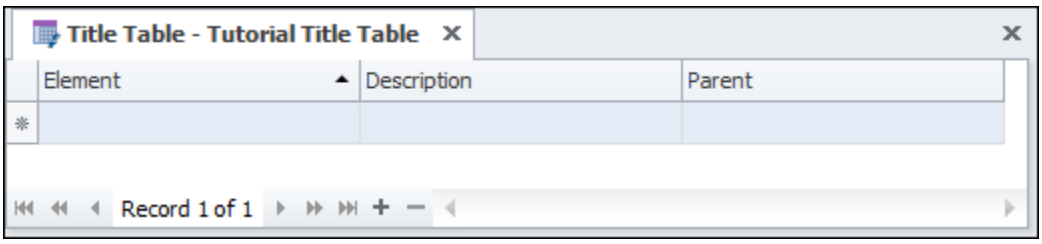
Delete a Title Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Title Tables** folder.
    - Double-click the **Title Tables** folder to open the list of Title Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete a Title Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Title Table Maintenance

The **Title Table** grid is where you add new elements and edit existing ones. These elements will serve as summary field values when the Title Table is assigned to a summary field in a proposal.



Element

Enter a name for the element. This will be one of the options you can choose from for the summary field in the **Tasks** grid.

Description

Enter a longer name or short description for the element.

Parent

Here is where you create the hierarchical structure of the Title Table. The table should contain one topmost element (with no parent) that is only used as a parent of second-level elements.

Title Table Properties

The **Title Table Properties** dialog box is where you define the table.

Name

Enter a name for the table.

Description

Enter a description for the table.

Sort Order

Select the Sort Order for the Title Table elements. You have two options to choose from.

Alphabetic

ProPricer will treat the entries as strings of characters.

Numeric

ProPricer will treat the entries as segmented strings having the "*value.value.value*" format.

The Sort Order you select here also defines how the Title Table elements will be sorted on reports.

OK

Saves the changes and closes the dialog box.

Cancel

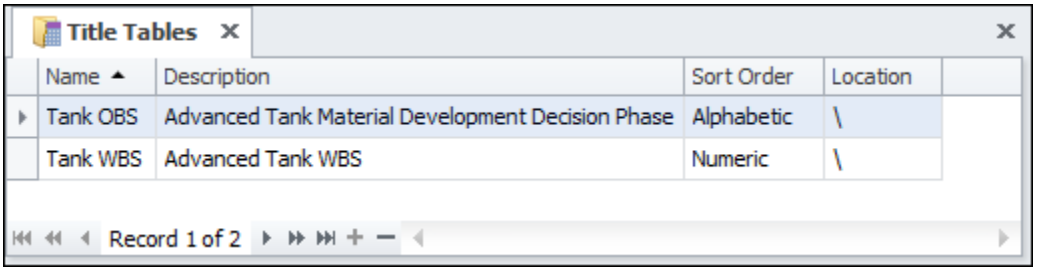
Ignores the changes and closes the dialog box.

Apply

Saves the changes without closing the dialog box.

Title Tables List

The Title Tables List shows all the Title Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Sort Order

This column shows how the entries will be sorted.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Title Tables** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Travel

Travel is an essential part of business. People might need to take a trip to visit a partner for negotiations, attend a conference, inspect a site, etc. All trips incur costs, and you can account for these expenses in a proposal.

The first step is to create the trip destination in the Travel Library, and then create a Travel Rate Table where you will enter the travel expense rates for the destination. If needed, you can create more travel expenses in the Travel Expense Library.

Define a Protected Travel Expense

If you override a travel rate in a trip, protect the rate to prevent it from being changed by the Update Travel process. You can also tell ProPricer to automatically protect travel rate overrides.

Note: Protected travel rate overrides can still be changed by importing travel data.

1. Select a task, and then click the **Travel** tab.
2. Right-click the travel expense rate you want to protect, and then select **Protected**. A padlock will appear next to the rate, and a check mark will appear before the **Protected** command on the shortcut menu.

Enable the Automatic Protection of Travel Expenses

You can automatically protect travel rate overrides in trips. Protected overrides are exempt from the Update Travel process, but they can still be changed by importing travel data.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Travel** page.
3. In the **Settings** group, select **AutoProtect Trip Edits**.
4. Click **OK**.

Per Diem Rate Factor for First/Last Day

Per diem is often reduced for the first and last days of trips. ProPricer allows you to enter a factor for the first and last days of a trip that it will use to calculate the per diem rates for those days. The examples below illustrate the reduction of per diem rates for the first and last days of a trip.

	Travel Info				Per Diem		
	Trip ID	Destination	People	Days	Qty	Rate	Cost
▸	Trip 1	SD/LA	2	3	6	$100.00	$600.00
*							

The default per diem factors for the first and the last days of Trip 1 are set to 1. The per diem rate for the trip is $100. The per diem cost of the trip is equal to the quantity times the rate: 6 x $100 = $600.

	Travel Info				Per Diem		
	Trip ID	Destination	People	Days	Qty	Rate	Cost
▸	Trip 1	SD/LA	2	3	6	$100.00	$550.00
*							

This example shows the per diem cost for the same trip after the First Day Per Diem Rate Factor was set to 0.75. The Last Day Per Diem Rate Factor was not changed. ProPricer makes the following calculations:

- The first day uses 0.75 of the per diem rate, so the rate for the first day is 0.75 x $100 = $75. For two people, the total is $150.
- The cost for the remaining days of the trip is the number of people on the trip, times the duration of the trip minus one, times the per diem rate: 2 x (3 - 1) x $100 = $400.
- The sum of both equals the final per diem cost $150 + $400 = $550.

	Travel Info				Per Diem		
	Trip ID	Destination	People	Days	Qty	Rate	Cost
▸	Trip 1	SD/LA	2	3	6	$100.00	$450.00
*							

This example shows the per diem cost for the same trip after the Last Day Per Diem Rate Factor was set to 0.5. The First Day Per Diem Rate Factor remained 0.75. ProPricer makes the following calculations:

- The first day uses 0.75 of the per diem rate, so the rate for the first day is 0.75 x $100 = $75. For two people, the total is $150.
- The cost for the second day of the trip is equal to the number of people on the trip, times the duration of the trip minus two, times the per diem rate: 2 x (3 - 2) x $100 = $200.
- The last day uses 0.5 of the per diem rate, so the rate for the last day of the trip is 0.5 x $100 = $50. For two people, the total is $100.
- The sum of all three equals the final per diem cost $150 + $200 + $100 = $450.

The per diem cost of a trip is calculated based on the per diem quantity. Per diem quantity is equal to the number of people times the number of days, but you can change this.

	Travel Info				Per Diem		
	Trip ID	Destination	People	Days	Qty	Rate	Cost
▸	Trip 1	SD/LA	2	3	4	$100.00	$250.00
*							

In this example, the per diem quantity of the trip was manually set to 4, because some or all the people left early. In this instance, only the money for the first and last day was spent. The per diem cost is equal to (0.75 x $100 + 0.5 x $100) x 2 = $250.

Per Diem Rate Factor for One-Day Trips

Per diem is often reduced for trips that last only one day. ProPricer allows you to enter a factor for one-day trips that it will use to calculate the per diem rates for that day.

The examples below illustrate the reduction of per diem rates for the one-day trips.

	Travel Info				Per Diem		
	Trip ID	Destination	People	Days	Qty	Rate	Cost
▸	Trip 1	SD/LA	2	1	2	$100.00	$200.00
	Trip 2	SD/LA	2	2	4	$100.00	$400.00
*							

The default per diem factor for one-day trips is 1. The per diem factors for the first and the last days of the trips are also 1. The per diem rate for Trip 1 and Trip 2 is $100. The per diem cost of the trips is equal to the quantity (the number of people taking the trip multiplied by the trip duration) times the rate: 2 x $100 = $200 for Trip 1 and 4 x $100 = $400 for Trip 2.

	Travel Info				Per Diem		
	Trip ID	Destination	People	Days	Qty	Rate	Cost
▸	Trip 1	SD/LA	2	1	2	$100.00	$100.00
	Trip 2	SD/LA	2	2	4	$100.00	$400.00
*							

This example shows the per diem costs for the same trips after the One Day Trip Per Diem Rate Factor was set to 0.5. Since this rate affects only one-day trips, the per diem cost for Trip 1 equals 2 x (0.5 x $100) = $100.

Set the First/Last Day Per Diem Rate Factor

The per diem expenses for the first and/or last day of a trip are often less than the expenses for the other days in the trip. ProPricer can represent this reduction by calculating the per diem rates for the first and last days as factors of the per diem rate for the trip.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, Click the **Travel** page.
3. In the **Per Diem Rate Factors** section, under **Multi Day Trip**, go to **First Day** and/or **Last Day**, then enter a number from 0 to 1.
4. Click **OK**.

Set the Miscellaneous Quantity Formula

The Miscellaneous Quantity Formula is what ProPricer uses to calculate the miscellaneous travel expenses.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Travel** page.
3. In the **Miscellaneous Quantity Formula** field, select a formula. The default value is *0*.
4. Click **OK**.

Set the Number of People per Car

The **People per Car** setting defines how many people can share a rental car.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Travel** page.
3. In the **People per Car** field, enter a number from 1 to 5.
4. Click **OK**.

Set the One-Day Trip Per Diem Rate Factor

The per diem expenses for one-day trips are often smaller than the expenses for longer trips. ProPricer can represent this reduction by calculating the per diem rate for a one-day trip as a factor of the per diem rate for the trip.

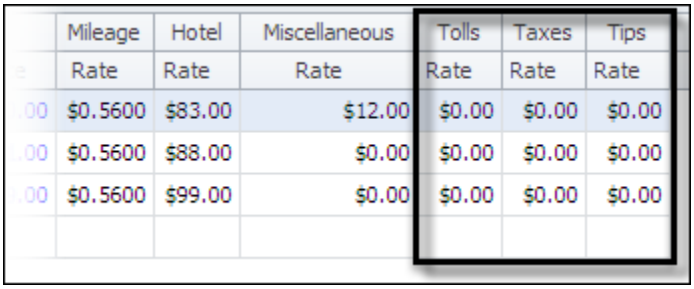
1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Proposal** folder, click the **Travel** page.
3. Under **Per Diem Rate Factors**, in the **One Day Trip** field, enter a number from 0 to 1.
4. Click **OK**.

Travel Expense Library

In the Travel Expense Library, you can create and define an unlimited number of travel expenses that appear as additional fields in all Travel Rate Tables and proposals.

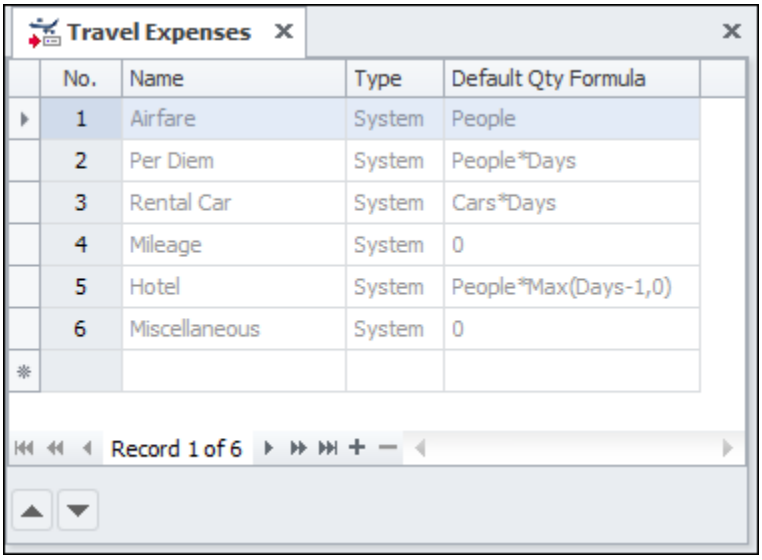
*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Here is an example of a Travel Rate Table with three user-defined travel expenses named *Tolls*, *Taxes*, and *Tips*:



	Mileage Rate	Hotel Rate	Miscellaneous Rate	Tolls Rate	Taxes Rate	Tips Rate
.00	$0.5600	$83.00	$12.00	$0.00	$0.00	$0.00
.00	$0.5600	$88.00	$0.00	$0.00	$0.00	$0.00
.00	$0.5600	$99.00	$0.00	$0.00	$0.00	$0.00

In the library, you can also view the six system-defined travel expenses. These expenses cannot be edited or deleted.



Travel Expenses

	No.	Name	Type	Default Qty Formula
▸	1	Airfare	System	People
	2	Per Diem	System	People*Days
	3	Rental Car	System	Cars*Days
	4	Mileage	System	0
	5	Hotel	System	People*Max(Days-1,0)
	6	Miscellaneous	System	0
*				

Record 1 of 6

No.

Displays the order in which the expenses will appear in Travel Rate Tables and proposals. Click the up and down arrows below the grid to rearrange the order of user-defined expenses. The order of system-defined expenses cannot be rearranged.

Name

Displays the name of each travel expense. Enter a name to create a travel expense.

Type

Indicates whether a travel expense is system-defined or user-defined. This column cannot be edited.

Default Qty Formula

Displays the formula that calculates the quantity of each travel expense. If you create an expense, you can specify its quantity formula. The default value is *0*, which means that the quantity will not be calculated by a formula. Instead, the quantity must be entered discretely in Travel Rate Tables and proposals. The other formula options are:

1

The quantity is equal to *1*.

Cars*Days

The quantity is equal to the number of rented vehicles multiplied by the trip duration. This formula is only applicable to the Rental Car expense.

Days

The quantity is equal to the trip duration.

Max(Days-2,0)

The quantity is equal to the trip duration, not including the first and last days. If the duration is one to two days, then the quantity will be *0*.

Min(Days,2)

The quantity is equal to the first and last days in the trip duration, so the quantity will not exceed *2*. If the duration is one day, then the quantity will be *1*.

People

The quantity is equal to the number of people taking the trip.

People*Max(Days-1,0)

The quantity is equal to the number of people taking the trip multiplied by a one-day reduction of the trip duration. If the duration is one day, then the quantity will be *0*.

People*Days

The quantity is equal to the number of people taking the trip multiplied by the trip duration.

People*Max(Days-2,0)

The quantity is equal to the number of people taking the trip multiplied by a two-day reduction of the trip duration. If the duration is one to two days, then the quantity will be *0*.

People*Min(Days,2)

The quantity is equal to the number of people taking the trip multiplied by the first and last days in the trip duration.

Create a Travel Expense

1. In the Navigation Pane, click the **Libraries** button, and then double-click **Travel Expenses** to open the Travel Expense Library.
2. In the **Name** column of the library, enter a name for the travel expense.
3. In the **Default Qty Formula** column, enter the formula that will calculate the quantity of the expense.
    - If you know that the expense quantity will be different (and will be entered discretely) for each Trip ID in a proposal task, leave the value as **0**.
4. Press **Ctrl**+**S** or move to another to save your work.

Delete a Travel Expense

1. In the Navigation Pane, click the **Libraries** button, and then double-click **Travel Expenses** to open the Travel Expense Library.

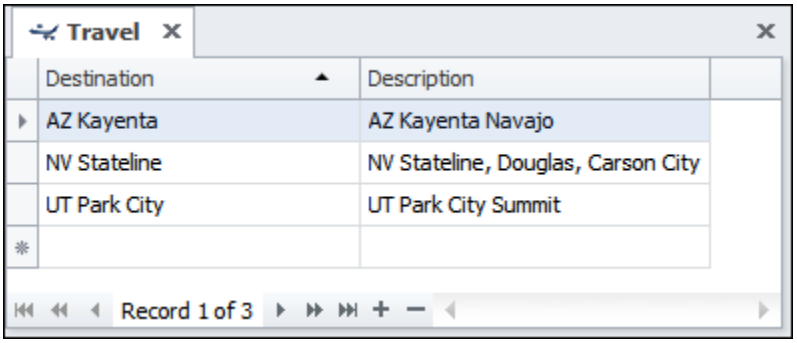
2. Right-click a user-defined travel expense, and then click **Delete**.

Note: System-defined travel expenses cannot be deleted.

Travel Library

The Travel Library is where you create the destinations you will assign to tasks as trips.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*



Destination

Enter a unique name for the destination.

Description

Enter a description for the destination. For example, you could enter a single city name (for example *Los Angeles*), or you could indicate a round trip by entering both the origin and destination cities (for example *San Diego - Los Angeles*).

Access Tags

Assign or remove access tags. If you assign a tag to an item, any user with the same tag can access it. To learn more, see Assign Access Tags to a User.

Copy a Travel Destination

1. Right-click the destination you want to copy, and then click **Copy** on the shortcut menu.
2. Enter a name for the new destination.
3. Click **OK**.

Create a Travel Destination

1. Click the **Libraries** button and double-click **Travel**.
2. Enter a name and description for the new destination.
3. Press **Ctrl**+**S** or move to another row to save your work.

Delete a Travel Destination from the Library

1. Click the **Libraries** button and double-click **Travel**.
2. Right-click the destination you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when prompted.

*Note: You can only delete destinations that are not used anywhere in the system. If the destination is used, ProPricer will display the **Item Usage Info** box instead.*

Travel Rates

Travel rates for travel expenses are used to calculate the cost of a trip. They are the Airfare, Per Diem, Rental Car, Mileage, Hotel, and Miscellaneous rates entered for a destination in a Travel Rate Table. They also include the rates for user-defined travel expenses created in the Travel Expense Library.

If people must travel to fulfill your contract, you will need to create a Travel Rate Table and assign it to the proposal.

You can set a Travel Rate Table as the current Travel Rate Table, which will make it the default table for every new proposal you create. It will automatically be entered on the Pricing page of Proposal Properties. The name of the current Travel Rate Table appears in bold letters in the **Travel Rates** folder, and the icon will have a star.

Travel Rate Tables

Travel Rate Tables are where you enter travel expense rates for the destinations created in the Travel Library.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

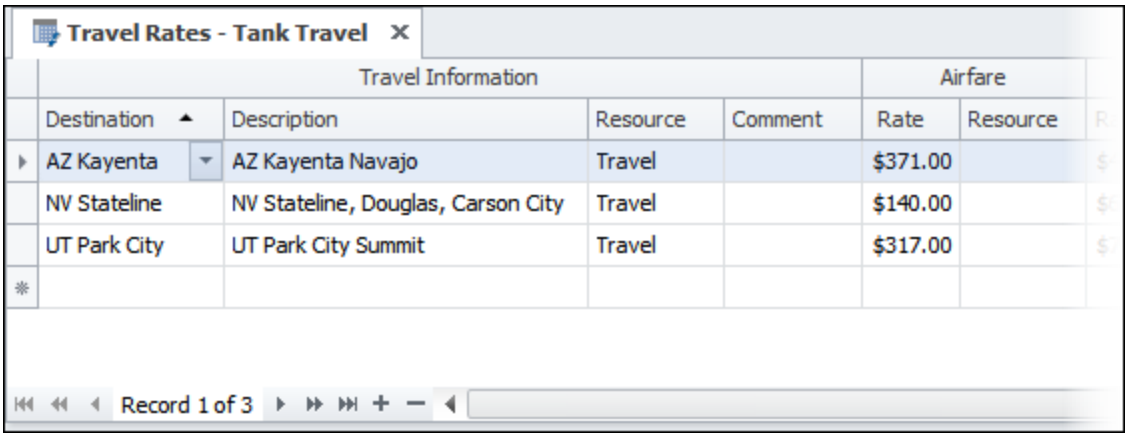
To timephase travel rates by month, quarter, or year, go to the Travel Rate Table Properties and select a timescale.

A table with no timescale has only one grid for entering a destination's travel expense rates. A timephased table, however, has two additional grids that allow you to escalate a travel expense rate over a range of months, quarters, or years.

Note: Proposals that use a timephased Travel Rate Table update automatically when changes are saved in the table. On the other hand, if a Travel Rate Table with no timescale is changed, then the Update Travel process is needed in each proposal that uses the table.

Travel Information and Expenses

Use this grid to associate travel expenses with a trip destination. In a timephased Travel Rate Table, each expense also appears as a separate tab below the grid.



Destination

Enter the name of the destination. If you enter a destination that does not exist in the Travel Library, follow the prompt to add it to the library without exiting the Travel Rate Table.

Description

This column shows the description of the destination entered in the Travel Library.

Resource

Enter the resource that will serve as the default resource of the destination. The rates of this resource will be applied to the travel expense unless a different resource is specified for an expense.

Currency

This column appears only if the **Multi-Currency** checkbox is selected in the Travel Rate Table Properties. It shows the system currency by default, but you can change it. The currency entered here is the default currency of the destination and will appear in the travel expenses (Airfare, Per Diem, Rental Car, Mileage, Hotel, Miscellaneous, and any other expenses created in the Travel Expense Library). You can change the currency of each expense. For example, Airfare rates might be in US dollars, while Hotel and Rental Car rates might be in Euros.

Resource Fields

These columns appear if there are resource fields defined in the Resource Field Library or on the Resource Fields page of Proposal Properties. Enter the resource field value you want to use. You can hide any resource field.

Comment

Enter any additional information regarding the destination. If you need more room, click the down arrow to open a text box.

Travel Expenses

Travel expenses are the individual cost components of a destination. They include Airfare, Per Diem, Rental Car, Mileage, Hotel, Miscellaneous, and any other expenses created in the Travel Expense Library.

In these columns, you enter the expense rate information. Each expense has a Rate column, a Resource column, and separate columns for resource fields. If you do not specify a resource for a travel expense, the destination's resource will be used by default.

When weekly and monthly rental car rates are enabled in the Travel Rate Table Properties, the Rental Car expense has Daily Rate, Weekly Rate, and Monthly Rate columns. The daily rate is the rate per day when the rental period is a week or shorter. The weekly rate is the rate per day when it surpasses a week, and the monthly rate is the rate per day when it surpasses a month. ProPricer chooses which rate to use, based on the number of days the car will be needed. To set the length of a rental car week or month, go to the Travel Rate Table Properties.

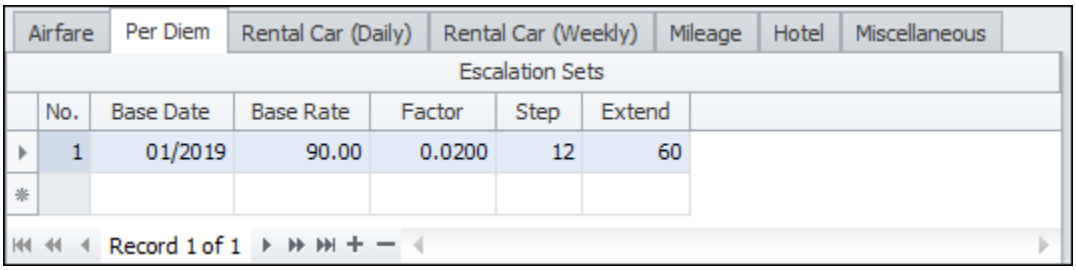
If a company offers discounted daily rates for renting a car longer than a week or month, you can account for that by entering the discounted daily rate in the Weekly Rate and Monthly Rate columns.

	Per Diem	Rental Car			Mileage	Hotel	Miscellaneous
	Rate	Daily Rate	Weekly Rate	Monthly Rate	Rate	Rate	Rate
00	$46.00	$115.00	$105.00	$100.00	$0.5600	$83.00	$12.00
00	$61.00	$97.00	$87.00	$82.00	$0.5600	$88.00	$0.00
00	$71.00	$91.00	$81.00	$76.00	$0.5600	$99.00	$0.00

If the **Multi-Currency** checkbox is selected in the Travel Rate Table Properties, a Currency column will appear for each expense. It shows the default currency of the destination, but you can change it for any expense.

Escalations Sets

Use escalation sets to regulate how a travel expense rate periodically increases. In a timephased Travel Rate Table, the expenses appear as separate tabs, and each tab contains this grid.



Airfare | Per Diem | Rental Car (Daily) | Rental Car (Weekly) | Mileage | Hotel | Miscellaneous

Escalation Sets

No.	Base Date	Base Rate	Factor	Step	Extend
1	01/2019	90.00	0.0200	12	60

Record 1 of 1

No.

The cells of this column cannot be edited. ProPricer assigns numbers to the escalation sets, based on their start dates. The set with the earliest date receives number 1.

Base Date

Enter when the escalation set begins.

Base Rate

Enter the rate for the first month, quarter, or year.

Factor

Enter the factor that will be applied to the rate to escalate it. For example, express 1% as 0.01.

Step

Enter the number of months, quarters, or years the base rate will remain constant before the factor is applied. For example, a step of 12 in a monthly table will cause the rate to escalate every twelve months.

Extend

Enter the number or months, quarters, or years the escalation set lasts.

Rates

The Rates grid shows a travel expense's rates by month, quarter, or year. In a timephased Travel Rate Table, the expenses appear as separate tabs, and each tab contains this grid.

You can use an escalation set to calculate rates, or you can enter rates manually. Calculated rates appear green, and manually entered rates appear black. If you enter rates and then create an escalation set that covers any of the same dates, ProPricer will change your rates. Likewise, after creating an escalation set, you can manually change any of the calculated rates.

Rates							
Month	2019	2020	2021	2022	2023	2024	2025
January	90.00	91.80	93.64	95.51	97.42		
February	90.00	91.80	93.64	95.51	97.42		
March	90.00	91.80	93.64	95.51	97.42		
April	90.00	91.80	93.64	95.51	97.42		
May	90.00	91.80	93.64	95.51	97.42		
June	90.00	91.80	93.64	95.51	97.42		
July	90.00	91.80	93.64	95.51	97.42		
August	90.00	91.80	93.64	95.51	97.42		
September	90.00	91.80	93.64	95.51	97.42		
October	90.00	91.80	93.64	95.51	97.42		
November	90.00	91.80	93.64	95.51	97.42		
December	90.00	91.80	93.64	95.51	97.42		

Assign a Travel Rate Table to a Proposal

You need to assign a Travel Rate Table to your proposal to be able to add trips to tasks.

1. In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties** in the shortcut menu.
2. In the **Proposal** folder, click the **Pricing** page.
3. In the **Travel Rate Table** field, enter the name of the Travel Rate Table to use.
4. Click **OK**.

Note: Proposals that use a timephased Travel Rate Table update automatically when changes are saved in the table. On the other hand, if a Travel Rate Table with no timescale is changed, then the Update Travel process is needed in each proposal that uses the table.

Copy a Travel Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Travel Rates** folder.
    - Double-click the **Travel Rates** folder to open the list of Travel Rate Tables.
3. Right-click the Travel Rate Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.

Copy the Rates of One Destination to Another within a Table

Once you have entered travel expense rates for a destination in a Travel Rate Table, you can copy them to another destination in the table or from the Travel Library.

1. Right-click the destination whose rates you want to copy, and then click **Copy** on the shortcut menu.
2. Enter the name of the destination to which you want to copy the rates.
3. Click **OK**.

ProPricer will check to see if rates have been entered for the target destination, and will:

- Copy them if there are none.
- Prompt you to replace the existing rates with the new ones.

Note: If the target destination does not exist in the Travel Library, ProPricer will offer you the option to add it to the library. Click ***Yes*** *when prompted to add it to the library. ProPricer will create the destination in the library and then copy the rates for it in the table. The description of the new destination will be the same as that of the source Destination.*

Create a Travel Rate Table

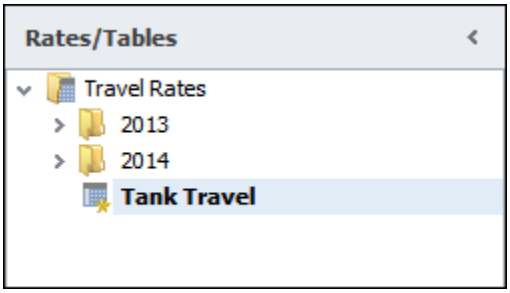
Travel Rate Tables are where you enter travel expense rates for destinations from the Travel Library.

1. Do one of the following:
    - In the Main Menu, click **New Travel Rate Table**.
    - In the Navigation Pane, click the **Rates/Tables** button, right-click the **Travel Rates** folder, then click **New Travel Rate Table**.
2. Set the Travel Rate Table properties.
3. Click **OK**. The Travel Rate Table will open in the Workspace.

Current Travel Rate Table

Setting a Travel Rate Table as the current one indicates which table has the rates your company wants to use. It will be the default table for every new proposal you create and will automatically be entered on the **Pricing** page in the **Proposal** folder of **Proposal Properties**.

The name of the current table will appear in bold letters in the **Travel Rates** folder in the Navigation Pane, and the icon will have a star. The table list has a **Current** checkbox as well.



You can open the table by clicking the Current Travel Rates icon on the **Rates** ribbon. Or you can double-click the table in the Navigation Pane.

You can run the Audit Report to determine if your proposal is using the current Travel Rate Table.

Notes:

- *There can only be one current Travel Rate Table at a time. You can set another Travel Rate Table as the new current table whenever necessary.*
- *You can switch the current Travel Rate Table assigned to the proposal at any time.*
- *If there is no table set as the current one, the **Travel Rate Table** field on the **Pricing** page in the **Proposal** folder of **Proposal Properties** will be blank when you create a new proposal.*

- *None of the exports distinguish if the Travel Rate Table is set as current.*
- *The Archive/Restore processes do not distinguish if the Travel Rate Table is set as current.*
- *Proposals that were locked with the current table are not affected by changes to the current table.*
- *You need the Associated Permission to be able to set a Travel Rate Table as the current one.*

Define Travel Expense Rates for a Destination

1. Click the **Rates/Tables** button, expand the **Travel Rates** folder, and then double-click a Travel Rate Table.
2. In the **Destination** column, enter the name of the destination.
3. Enter the default resource of the destination.
4. *(Optional)* Enter a currency if the **Multi-Currency** checkbox is selected in the table's properties.
5. *(Optional)* Enter a resource field value if any resource fields have been created.
6. Enter the rates for the travel expenses: **Airfare**, **Per Diem**, **Rental Car**, **Mileage**, **Hotel**, **Miscellaneous**, and any expenses created in the Travel Expense Library.
7. *(Optional)* Enter a resource for individual travel expenses.
8. *(Optional)* Enter a currency for individual travel expenses if the **Multi-Currency** checkbox is selected in the table's properties.
9. Press **Ctrl**+**S** or move to another row to save your work.

Delete a Destination from a Table

1. In the Navigation Pane, click the **Rates/Tables** button, expand the **Travel Rates** folder, and then double-click the appropriate Travel Rate Table.
2. Right-click the destination you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

*Note: You can only delete destinations that are not used anywhere in the system. If the destination is used, ProPricer will display the **Item Usage Info** box instead.*

Delete a Travel Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Travel Rates** folder.
    - Double-click the **Travel Rates** folder to open the list of Travel Rate Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete a Travel Rate Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Enable Weekly or Monthly Rental Car Rates

In ProPricer, *Weekly Rental Car Rate* refers to the daily rate per week when the rental period surpasses the days per week. A weekly rental rate would be entered if the rental company has special daily rates for extended vehicle usage. Similarly, *Monthly Rental Car Rate* means the daily rate per month when the rental period surpasses the days per month.

Daily and weekly rental car rates can be enabled at the system level and at the table level. If enabled at the system level, the **Enable Weekly Rental Car Rate** checkbox and **Enable Monthly Rental Car Rate** checkbox will automatically be selected in a table's properties when you create it.

Enable in All New Travel Rate Tables

1. On the **Setup** ribbon, click **System Options**.
2. Click the **Travel** page.
3. Select the **Enable Weekly Rental Car Rate** checkbox.
4. In the **Days Per Week** setting, enter the number of days in a rental week. Acceptable values are 5, 6, and 7.
5. Select the **Enable Monthly Rental Car Rate** checkbox.
6. In the **Days Per Month** setting, enter the number of days in a rental month. Acceptable values are 28, 29, 30, and 31.
7. Click **OK**.

Enable in a Single Travel Rate Table

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand the **Travel Rates** folder.
2. Right-click the appropriate Travel Rate Table, and then click **Properties** on the shortcut menu.
3. Select the **Enable Weekly Rental Car Rate** checkbox.
4. In the **Days Per Week** setting, enter the number of days in a rental week. Acceptable values are 5, 6, and 7.
5. Select the **Enable Monthly Rental Car Rate** checkbox.
6. In the **Days Per Month** setting, enter the number of days in a rental month. Acceptable values are 28, 29, 30, and 31.
7. Click **OK**.

Set a Travel Rate Table as Current

Setting a Travel Rate Table as current makes it the default Travel Rate Table for every new proposal you create. ProPricer will automatically assign it in the Pricing page of the Proposal Properties.

1. In the Navigation Pane, click the **Rates/Tables** button, and then expand or double-click the **Travel Rates** folder.

2. Right-click the appropriate Travel Rate Table, and then click **Current**. In the **Travel Rates** folder, the name of the current Travel Rate Table will appear in bold letters and its icon will have a star.

Travel Rate Table Properties

The **Travel Rate Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description of the table.

Timescale

Select no timescale for the table, or select an annual, quarterly, or monthly timescale. In a timephased table, you can escalate each travel expense rate by a specific factor over a certain number of years, quarters, or months.

After entering annual, quarterly, or monthly rates in a table, this option will be disabled.

Multi-Currency

Select this checkbox to enable multi-currency functions for the table. This allows you to enter different currencies for the travel expenses.

Enable Weekly Rental Car Rate

If selected, Daily Rate and Weekly Rate columns will appear in the Rental Car section of the table. Similarly, proposals that use the table will have Daily Rate and Weekly Rate columns in the Rental Car section of the Travel input tab and Travel View.

The daily rate is the regular rate charged once per day if the car is rented for less than a week. The weekly rate is the special rate charged once per day (not once per week) if the car is rented for more than a week. Depending on the length of the trip, ProPricer will use either the daily rate or the weekly rate.

Days Per Week

Enter a number (5, 6, or 7) that represents the length of the rental car week in days. If you enter 5, for example, ProPricer will use the weekly rate in trips that last for six or more days.

Enable Monthly Rental Car Rate

If selected, Daily Rate and Monthly Rate columns will appear in the Rental Car section of the table. Similarly, proposals that use the table will have Daily Rate and Monthly Rate columns in the Rental Car section of the Travel input tab and Travel View.

The daily rate is the regular rate charged once per day if the car is rented for less than a month. The monthly rate is the special rate charged once per day (not once per month) if the car is rented for more than a month. Depending on the length of the trip, ProPricer will use either the daily rate or the monthly rate.

Days Per Month

Enter a number (28, 29, 30, or 31) that represents the length of the rental car month in days. If you enter 30, for example, ProPricer will use the monthly rate in trips that last for 31 or more days.

Enable Multi Rental Car Quantity

This option becomes available when weekly or monthly rental car rates are enabled. If selected, proposals that use the Travel Rate Table will have Daily Quantity, Weekly Quantity, and/or Monthly Quantity columns in the Rental Car section of the Travel input tab and Travel View.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

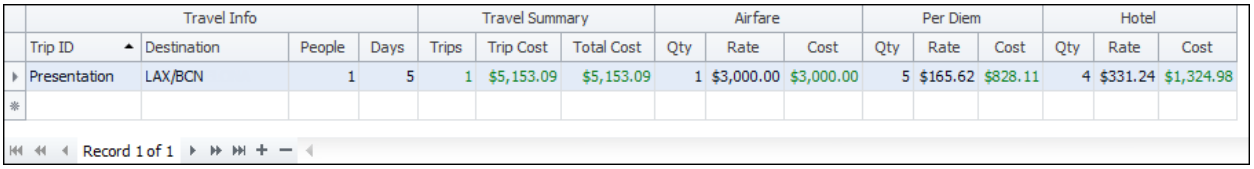
Travel Rate Tables and Multi-Currency

Enabling Multi-Currency functionality for a Travel Rate Table allows you to enter currencies that differ from the system currency for the destination and travel expenses: airfare, per diem, rental car, mileage, hotel and miscellaneous. In the examples that follow, we used a system currency of USD. We created a destination LAX/BCN and entered Euros for the Per Diem and Hotel travel expenses.

Travel Rates - MultiCurrency

Travel Information				Airfare		Per Diem		Hotel	
Destination	Description	Currency	Resource	Rate	Currency	Rate	Currency	Rate	Currency
LAX/BCN	Los Angeles - Barcelona	USD	TRAVEL	$3,000.00	USD	€100.00	EUR	€200.00	EUR

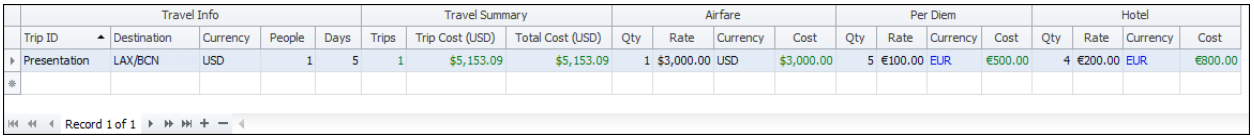
Before adding this destination to a task, we assigned an Exchange Rate Table to the proposal. In this example, the currency of the proposal is also USD. ProPricer will convert the rates and show them in the proposal currency.



Travel Info				Travel Summary			Airfare			Per Diem			Hotel		
Trip ID	Destination	People	Days	Trips	Trip Cost	Total Cost	Qty	Rate	Cost	Qty	Rate	Cost	Qty	Rate	Cost
Presentation	LAX/BCN	1	5	1	$5,153.09	$5,153.09	1	$3,000.00	$3,000.00	5	$165.62	$828.11	4	$331.24	$1,324.98

Record 1 of 1

If the **Multi-Currency** checkbox is selected for the proposal, the rates will appear in the currency entered in the table. ProPricer will convert the rates to calculate the Trip Cost, which appears in the proposal currency.



Travel Info					Travel Summary			Airfare				Per Diem				Hotel			
Trip ID	Destination	Currency	People	Days	Trips	Trip Cost (USD)	Total Cost (USD)	Qty	Rate	Currency	Cost	Qty	Rate	Currency	Cost	Qty	Rate	Currency	Cost
Presentation	LAX/BCN	USD	1	5	1	$5,153.09	$5,153.09	1	$3,000.00	USD	$3,000.00	5	€100.00	EUR	€500.00	4	€200.00	EUR	€800.00

Record 1 of 1

Enable Travel Multi-Currency Functions

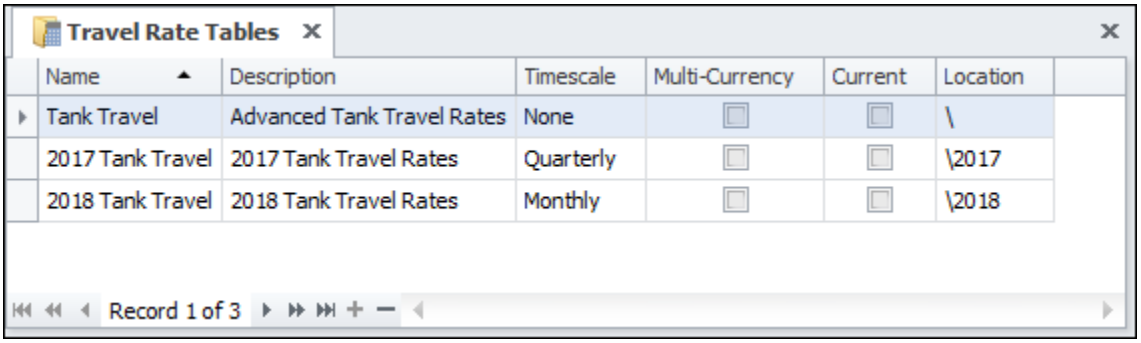
1. Click the **Rates/Tables** button. Expand the **Travel Rates** folder.
2. Right-click the appropriate Travel Rate Table, and then click **Properties** on the shortcut menu.

3. Select the **Multi-Currency** checkbox.

4. Click **OK**.

Travel Rate Tables List

The Travel Rate Tables List shows all the Travel Rate Tables that exist. It is also a convenient place to copy and delete tables.



Name

The name of the table.

Description

The description of the table.

Timescale

This column shows whether or not the table has timephased travel rates. A table can be annual, quarterly, or monthly, or it can have no timescale.

Multi-Currency

This column shows if Multi-Currency functions have been enabled for the table.

Current

This column shows if a Travel Rate Table has been set as current. The current table is the default for every new proposal you create, and it will be automatically entered on the Pricing page of the Proposal Properties.

Location

The folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root Travel Rates folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Weekly or Monthly Rental Car Rates and Number of People per Car

Weekly and monthly rental car rates are special rates when a car is rented for weeks or months at a time, respectively. The number of people per car defines the maximum number of people that can ride in a single rental car. The rates and number of people determine how the Rental Car travel expense is calculated for a trip.

The example in this topic uses regular daily rates and discounted weekly rates to demonstrate how ProPricer calculates the rental cost. Monthly rental car rates are not shown, but the same concept applies.

Example

The Travel tab contains six trips. Weekly rental car rates (that is, daily rates per week) have been enabled in the proposal's Travel Rate Table, with a threshold of five days in a week, and a limit of three people per car. In the Travel Rate Table, for destination *SD/LA*, **Daily Rate** is set to $70 and **Weekly Rate** is set to *$50*. The following screenshot shows the resulting data in the proposal's Travel tab:

	Travel Info				Rental Car		
	Trip ID	Destination	People	Days	Qty	Rate	Cost
▸	Trip 1	SD/LA	1	1	1	$70.00	$70.00
	Trip 2	SD/LA	1	5	5	$70.00	$350.00
	Trip 3	SD/LA	1	6	6	$50.00	$300.00
	Trip 4	SD/LA	3	1	1	$70.00	$70.00
	Trip 5	SD/LA	4	1	2	$70.00	$140.00
	Trip 6	SD/LA	7	7	21	$50.00	$1,050.00
*							

Record 1 of 6

- Trip 1 - One person rents one car for one day at the rate of $70 for a total of $70.

- Trip 2 - One person rents one car for five days at the rate of $70 for a total of $350. Since the number of days does not surpass the weekly rental car threshold of five days, the regular daily rental car rate of $70 applies.
- Trip 3 - One person rents one car for six days at the rate of $50 for a total of $300. Since the number of days does surpass the weekly rental car threshold, the weekly rental car rate of $50 applies.
- Trip 4 - Three people rent one car for one day at the rate of $70 for a total of $70. The number of the people taking the trip is within the limit, so ProPricer calculates the use of one car for the trip.
- Trip 5 - Four people rent two cars for one day at the rate of $70 for a total of $140. Two cars were used, because the limit does not allow for more than three people to ride in one car.
- Trip 6 - Seven people rent three cars for seven days at the rate of $50 for a total of $1,050. This trip shows the combined effect of the weekly rental car rate and the number of people per car. Since seven people are taking the trip, and the maximum number of people per single car is limited to three, ProPricer calculates that they must rent three cars. The trip lasts seven days, which exceeds the threshold of five days in a week, so ProPricer applies the weekly rental car rate of $50 per day.

Update Travel

If you change the rates in a Travel Rate Table, or if you set up travel rate overrides in a proposal, the changes will not be reflected in tasks until you perform an update. ProPricer will use the rates from the Travel Rate Overrides grid first, and then the rates from the proposal's Travel Rate Table.

When a Travel Rate Table has timephased rates, however, there is no need to perform an update. Instead, your proposal will update automatically after you save changes in the table.

Note: Protected travel rate overrides are exempt from the Update Travel process.

Update All Trips in the Proposal

1. In the Navigation Pane, select a proposal.
2. On the **Proposal** ribbon, click **Update Current Proposal**.
3. *(Optional)* Click **Copy** to create another version of the proposal before updating the trips.
4. Select **Update Travel**.
5. Click **Process**.

Update a Single Trip

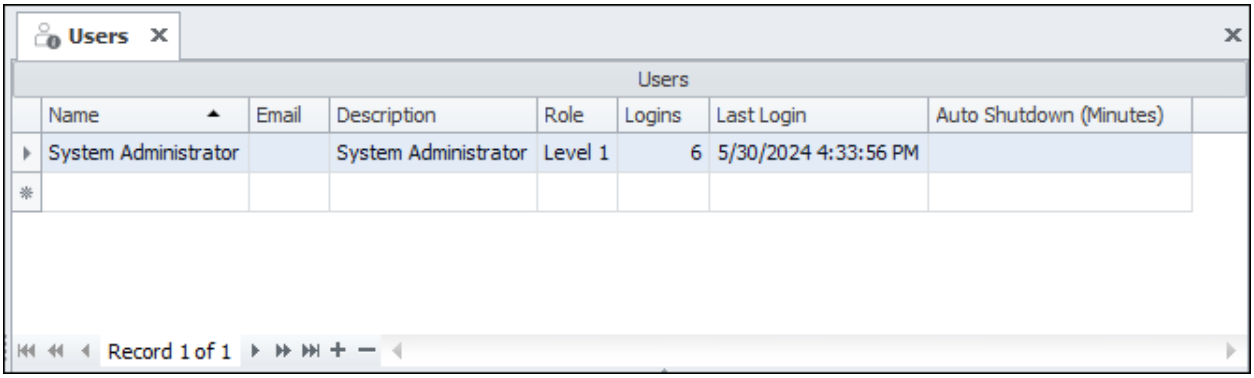
1. Select the task, and then click the **Travel** tab.
2. In the **Travel Info** grid, right-click a trip, and then click **Update Travel**.

User Information

User Information contains the Users grid and the User Logins grid.

Users

The Users grid is where you create and maintain users. After selecting a user here, you can view and edit their logins in the User Logins grid.



Name

Enter the user's name. Names are unique and cannot be duplicated.

Email

Enter the user’s email address.

Description

Enter additional information about the user (for example, the user's job title). This is for information only.

Role

Select the level of participation the user will have in the system. The role you select determines the user's associated permissions.

Logins

The number indicates how many times the user has logged in to ProPricer. This information cannot be edited.

Last Login

The date indicates the last time the user logged in to ProPricer. This information cannot be edited.

Auto Shutdown (Minutes)

Enter the length of time in minutes that the user can be inactive in ProPricer before the program closes automatically.

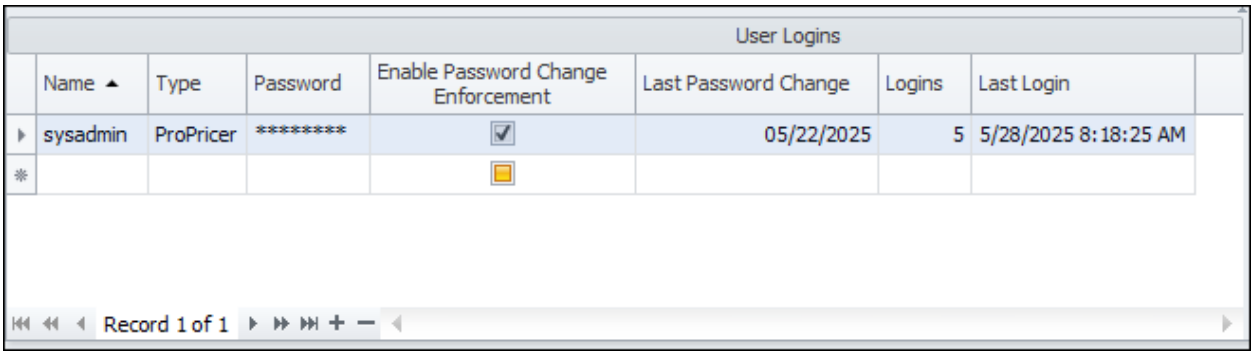
Allowed Access Tags

Select the access tags the user is allowed to have, or remove tags from the user. People with access tags can view or use items such as proposals, rate tables, resources, etc. that have the same tags. To learn more, see Assign Access Tags to an Item.

User Logins

The User Logins grid contains the same logins that are in User Login Information. You can set up and manage user logins the same way in both areas. A single user can have multiple logins, but at least one is required.

User logins control a person's ability to access the ProPricer application. They do not control any feature permissions.



Name

Enter the ID the user must provide to log in to ProPricer.

For the Windows login type, enter *domain_name\user_name*, or *computer_name\user_name* if there is no domain name.

For the CAC login type, enter the principal name from the certificate on the CAC, including *@mil*. For example, *1234123412341234@mil*.

Type

The user's login type. The default type is determined on the Security page of System Options.

Password

Enter a password for the user. For security purposes, it is displayed with asterisks. Passwords are case-sensitive and are only applicable to the ProPricer login type.

Enable Password Change Enforcement

Select this checkbox to periodically prompt users to change their passwords before logging in to ProPricer. Enabling password change enforcement also requires new users with the ProPricer login type to update their temporary password after logging in for the first time.

This column only appears when **Enable Password Change Enforcement** is selected at the system level on the Security page of System Options.

Last Password Change

The date of the user's most recent password change. It is for information only and cannot be edited. A blank field means that the user has never performed a password change.

This column only appears when **Enable Password Change Enforcement** is selected at the system level on the Security page of System Options.

Logins

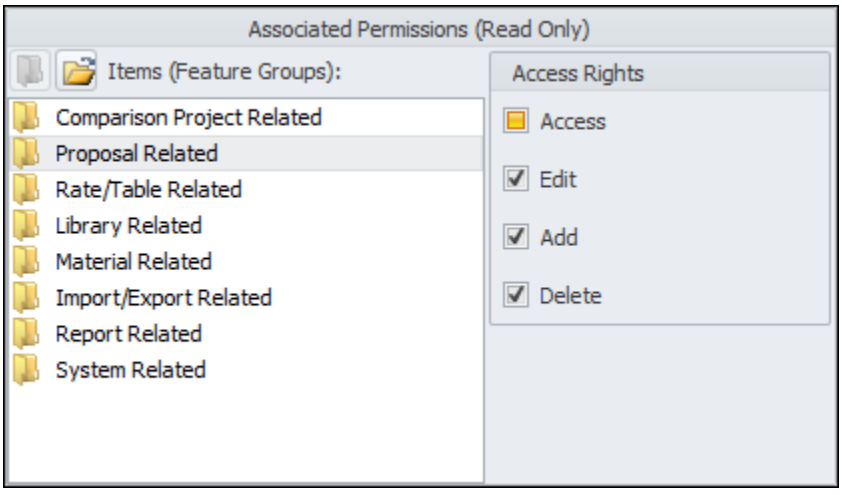
The number indicates how many times the user has logged in to ProPricer with a specific login. This information cannot be edited.

Last Login

The date indicates the last time the user logged in to ProPricer with a specific login. This information cannot be edited.

Associated Permissions

Here you can see the permissions granted to the user through the assigned role. This is for information only. Double-click a folder to see its contents and the Access Rights granted.



Auto Shutdown

Change the Auto Shutdown Time Limit of a User

The Auto Shutdown settings entered on the Security page of System Options are the default settings for every new user. You can also set a user-specific Auto Shutdown time limit in User Information.

1. On the **Setup** ribbon, in the **Security** group, click **User Information**.
2. In the **Auto Shutdown (Minutes)** column, enter the inactivity time limit for the selected user.
3. Press **Ctrl**+**S** or move to another row to save your changes.

Enable Auto Shutdown

Auto Shutdown logs a user out of ProPricer after a specified duration of inactivity. Prior to shutdown, a warning appears to alert the user of the approaching automatic logoff. Clicking **Cancel** on the warning resets the Auto Shutdown timer.

By default, Auto Shutdown is disabled. However, you can enable this feature and reconfigure its settings on the Security page of System Options.

1. On the **Setup** ribbon, in the **Preferences** group, click **System Options**.
2. On the **Security** page, select the **Enable Auto Shutdown** checkbox.
3. *(Optional)* In the **Warning Countdown (Minutes)** field, set the warning to appear at a specific time before shutdown. The number you enter must be greater than or equal to 1. The default number of minutes is 2.
4. *(Optional)* In the **Auto Shutdown (Minutes)** field, set the inactivity time limit that will trigger the shutdown. The number you enter must be greater than or equal to 1. The default number of minutes is 60.
5. Click **OK** to save your changes.

Copy a User

1. On the **Setup** ribbon, in the **Security** group, click **User Information**.
2. Right-click the user you want copy, and then click **Copy** on the shortcut menu.
3. Enter the word or words the user will enter in the **Login Name** field when he opens ProPricer.
4. Enter the user's name.
5. Click **OK**.

Notes:

- *Usernames are unique and cannot be duplicated*.
- *The role and its Associated Permissions assigned to the user you selected to copy will also be assigned to the new user*.
- *The Password is also copied*.

Create a User

1. On the **Setup** ribbon, in the **Security** group, click **User Information**.
2. In the **Users** grid, enter the user's real name and select their role.
3. In the **User Logins** grid, a single user can have multiple logins, but at least one is required.
    3.1. In the **Name** column, enter the case-sensitive ID the user must provide to log in to ProPricer. For the Windows login type, enter *domain_name**user_name*, or *computer_name**user_name* if there is no domain name.
    3.2. In the **Type** column, select the user's login type. The default type is determined on the Security page of System Options.
    3.3. In the **Password** column, enter a temporary password for the user. For security purposes, it is displayed with asterisks. Passwords are case-sensitive and are only applicable to the ProPricer login type. If password change enforcement is enabled on the Security page of System Options and applied to the user in the **Users** grid, the user must change the temporary password after logging in to ProPricer for the first time.
4. Press **Ctrl**+**S** or move to another row to save your work.

Delete a User

1. Click the **Setup** ribbon, and then click **User Information** in the **Security** group.
2. Right-click the user you want to delete, and then click **Delete** on the shortcut menu.
3. Confirm the deletion when asked.

Disable Password Change Enforcement for a User

When password change enforcement is enabled for all users on the Security page of System Options, you can disable it for individual users in User Information. An exempt user must still enter a password to log in to ProPricer, but that user will never be prompted for a mandatary password update.

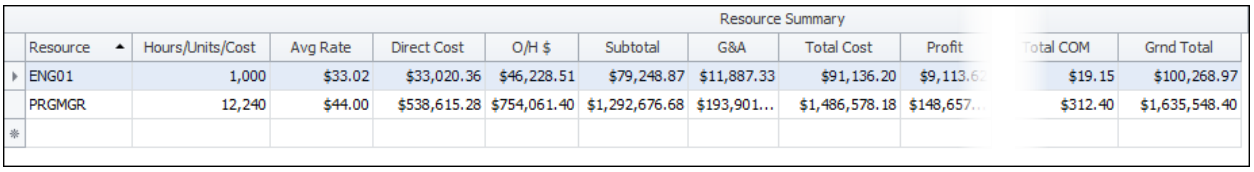
1. On the **Setup** ribbon, in the **Security** group, click **User Information**.
2. In the **Users** grid, clear the checkbox in the **Enable Password Change Enforcement** column for the exempt user.
3. Press **Ctrl**+**S** or move to another row to save your work.

Hide Cost Information from a User

You can revoke the right of any user to see cost information. This is especially useful if you have employees that should not see indirect costs or direct costs. Hiding cost information affects many areas in ProPricer, including the Resources tab, Summary tab, Resource View, Pivot Grid, Target Pricing what-if, Export Excel, Export Subcontractor, and reports. The most common scenarios are:

- Do not hide any cost information from a user.
- Hide the indirect costs from a user, but allow him to see direct costs.
- Hide both the direct and indirect costs from a user.

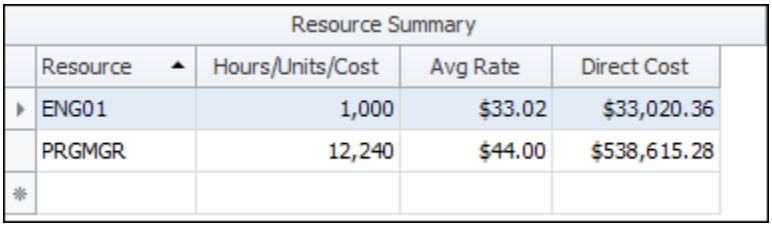
The following screenshots depict these three scenarios. The first one is of the **Resource Summary** grid for a user that has not been denied the right to see cost information.



Resource Summary

Resource	Hours/Units/Cost	Avg Rate	Direct Cost	O/H $	Subtotal	G&A	Total Cost	Profit	Total COM	Grnd Total
ENG01	1,000	$33.02	$33,020.36	$46,228.51	$79,248.87	$11,887.33	$91,136.20	$9,113.6	$19.15	$100,268.97
PRGMGR	12,240	$44.00	$538,615.28	$754,061.40	$1,292,676.68	$193,901...	$1,486,578.18	$148,657...	$312.40	$1,635,548.40

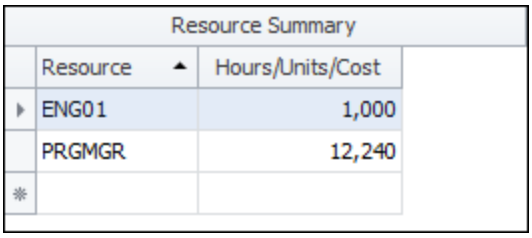
The next screenshot shows the same **Resource Summary** grid, but this time we revoked the right of the user to see the indirect costs. The only cost-related columns that appear after the **Hours/Units/Cost** column are *Average Rate* and *Direct Cost*.



Resource Summary

Resource	Hours/Units/Cost	Avg Rate	Direct Cost
ENG01	1,000	$33.02	$33,020.36
PRGMGR	12,240	$44.00	$538,615.28

The next screenshot shows the same **Resource Summary** grid, but this time we revoked the right of the user to see both direct and indirect costs.



Resource Summary

Resource	Hours/Units/Cost
ENG01	1,000
PRGMGR	12,240

Revoke the Right of a User to View Cost Information

1. Click the **Setup** ribbon, and then click **Role Information** in the **Security** group.
2. Select the appropriate role.
3. Open the **Proposal Related** folder.
4. Depending upon the cost information you want to hide, clear the **Access** checkbox for Show Indirect Costs or Show Direct Costs.
5. Click **Apply**.

Logins

Change the Login Type of a User

The login type selected on the Security page of System Options is the default type for every new user. You can also set a user-specific login type in User Login Information.

1. On the **Setup** ribbon, in the **Security** group, click **User Login Information**.
2. In the **Type** column, select a login type for the user.
3. Press **Ctrl**+**S** or move to another row to save your work.

Logging in to ProPricer

This topic describes the Login Types available on the Security page of System Options. These options regulate what the user sees and does at login. They include:

- **ProPricer** - This is used by organizations that do not want to integrate with the Windows security system. However, for organizations that do integrate with the Windows security system, this type can be used to create a backup account (such as a System user account for an IT Administrator). In the **Login** dialog box, users enter the Login Name and Password from User Login Information.
- **Windows (Integrated)** - This is used when users are already on a domain and are not required to log in to ProPricer. Users do not see the **Login** dialog box when they open ProPricer. Their Login Name must exist in User Login Information, and it must contain *domain_name**user_name*. If there is no domain name, it must contain *computer_name**user_name*.
- **Windows (Interactive)** - This is used when users are already on a domain and are required to log in to ProPricer. This type is required when users need to connect to a domain or environment that is different from the one they are currently logged in to (for example, logging in to a domain over a WAN or internet).
    - ProPricer attempts to log the users in automatically with Windows credentials. If the automatic login is successful, then the **Login** dialog box is not displayed. If the login is unsuccessful because the Windows user does not exist in ProPricer, then the **Login** dialog appears. The user must then enter their Windows username and password in the ProPricer Login Name and Password fields.
    - The Login Name can be either *domain_name**user_name*. If the user's computer is already logged in to the domain, there is no need to add the *domain_name*\. The user can just enter their Windows username and password. If the user is running ProPricer in a stand-alone environment and is logged in using their local account, there is no need to add the

computer_name\. The user can just enter their Windows username and password.

- **Azure AD** - This is used by organizations with an Azure Active Directory environment. It is a simple and secure login method that is based on the users' Azure AD credentials and Azure AD Multi-Factor Authentication.
- **CAC** - This is used by organizations that comply with federal security standards. Users who have been issued a Common Access Card (CAC) by the Department of Defense can access ProPricer with the PIN they set up for their CAC. ProPricer validates the digital certificate on a CAC to authenticate the user without requiring a username and password. The user's principal name from the certificate on the CAC must be set as their Login Name in User Login Information. The principal name must include @*mil*, like *1234123412341234@mil*.
- **Choose** - This is used by organizations with mixed accounts (such as a system administrator and a domain user). This option allows users to select how they will log in to ProPricer on the **Login** dialog box, which is always displayed. There will be a drop-down menu from which they can choose a login type. Depending on the user's selection, the dialog box will require some level of user input to complete the login process.
  - **ProPricer** - The user must enter valid ProPricer credentials.
  - **Windows (Integrated)** - The user's Windows credentials are automatically entered in the **Login Name** and **Password** fields, and neither field can be changed.
  - **Windows (Interactive)** - The user must enter valid Windows credentials.
  - **Azure AD** - The user's identity must be verified by Azure AD Multi-Factor Authentication.
  - **CAC** - The user enters the PIN for their CAC.

See the Login Information of a User

You can view logins in User Login Information or User Information.

On the **Setup** ribbon, in the **Security** group, do one of the following:

- Click **User Login Information**.
- Click **User Information**.

Set the Default Login Type

The login type you select in the System Options will be the default setting for every new user you create.

1. On the **Setup** ribbon, in the **Preferences** group, select **System Options**.
2. Select the **Security** page.
3. In **Login Type**, select a default login type.
    - **ProPricer**: The user logs in with their ProPricer login name and password.
    - **Windows (Integrated)**: The user logs in automatically when they open ProPricer.
    - **Windows (Interactive)**: The user logs in with their Windows username and password.
    - **Azure AD**: The user logs in with Azure Active Directory (AD) credentials and is verified by Azure AD Multi-Factor Authentication.
    - **CAC**: The user logs in with their PIN for their Common Access Card (CAC) issued by the Department of Defense. ProPricer validates the digital certificate stored on the CAC to authenticate the user without requiring a username and password.
    - **Choose**: The user chooses how to log in.
4. Click **OK**.

Passwords

Change ProPricer Login Password Dialog Box

If your login type is ProPricer, you can change your password by clicking **Change Password** on the Setup ribbon.

Login Name

This shows the name you used to log in to ProPricer.

Current Password

Enter your current password.

New Password

Enter the new password.

Confirm Password

Re-enter the new password.

Enable Password Change Enforcement

Password change enforcement requires all ProPricer users to update their login passwords on a regular basis. Additionally, new ProPricer users must update their passwords after logging in for the first time.

When this security feature is enabled, you can control the length of time that passwords remain active before users must change them.

By default, password change enforcement is disabled. However, you can enable enforcement and reconfigure its settings on the Security page of System Options. Once enabled at the system level, you can disable it for specific users in User Login Information or User Information.

1. On the **Setup** ribbon, in the **Preferences** group, click **System Options**.
2. On the **Security** page, select the **Enable Password Change Enforcement** checkbox.
3. *(Optional)* In the **Password Change Period (Days)** field, enter the number of days that the passwords will remain valid. The default entry is **90**.
4. Click **OK** to save your changes.

Enable Password Complexity

Password complexity determines the minimum requirements for all newly created passwords. Passwords with a high degree of complexity are generally more secure than passwords with little or no variation in length, character type, and capitalization.

By default, password complexity is disabled. However, you can enable password complexity and reconfigure its settings in on the Security page of System Options.

1. On the **Setup** ribbon, in the **Preferences** group, click **System Options**.
2. On the **Security** page, select the **Apply Password Complexity** checkbox.
3. *(Optional)* Enter new values for any of the minimum requirements.
4. Click **OK** to save your changes.

Set the Proposal Access of a User

Proposal Access determines whether a user will view a complete or limited list of proposals in the Navigation Pane. Users with Proposal Access Full can view all proposals. Users with Proposal Access Limited can only view the proposals he creates, as well as any proposal to which he has been granted view rights.

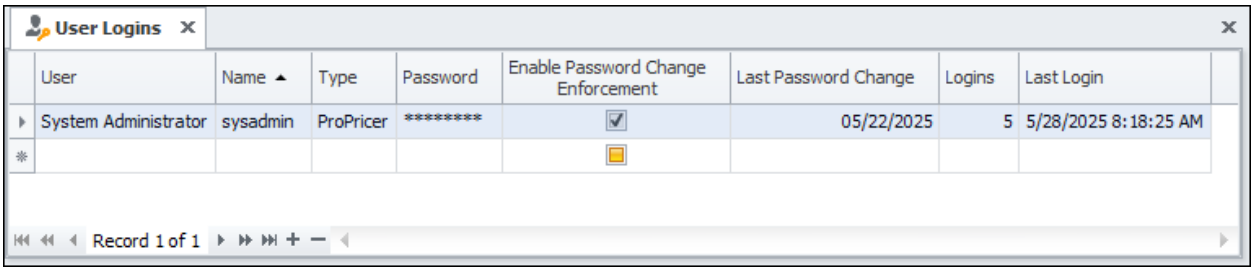
Proposal access, like all other Access Rights, is defined for a role. Once you have defined the proposal access for the role, you assign the role to a user.

1. On the **Setup** ribbon, in the **Security** group, click **Role Information**.
2. In the **Roles** grid, go to the **Proposal Access** column, and then select one of the following options for a role:
   - **Full**: Allows users to see the complete list of proposals.
   - **Limited**: Allows users to see only the proposals they create, or any proposal to which they have been granted view rights.
3. Press **Ctrl**+**S** or move to another row to save your work.
4. Return to the **Setup** ribbon and click **User Information**.
5. Assign the role to a user.

User Login Information

The User Logins grid contains the same logins that are in User Information. You can set up and manage user logins the same way in both areas. A single user can have multiple logins, but at least one is required.

User logins control a person's ability to access the ProPricer application. They do not control any feature permissions.



User

The user's name as it is entered in User Information. Select a user to enter login information.

Name

The user's login name. Enter the ID the user must provide to log in to ProPricer.

For the Windows login type, enter *domain_name\user_name*, or *computer_name\user_name* if there is no domain name.

For the CAC login type, enter the principal name from the certificate on the CAC, including @*mil*. For example, *1234123412341234@mil*.

Type

The user's login type. The default type is determined on the Security page of System Options.

Password

The user's password. For security purposes, it is displayed with asterisks. Passwords are case sensitive and are only applicable to the ProPricer login type.

Enable Password Change Enforcement

Select this checkbox to periodically prompt users to change their passwords before logging in to ProPricer. Enabling password change enforcement also requires new users with the ProPricer login type to update their temporary password after logging in for the first time.

This column only appears when **Enable Password Change Enforcement** is selected at the system level on the Security page of System Options.

Last Password Change

The date of the user's most recent password change. It is for information only and cannot be edited. A blank field means that the user has never performed a password change. The column only appears when **Enable Password Change Enforcement** is selected at the system level on the Security page of System Options.

Logins

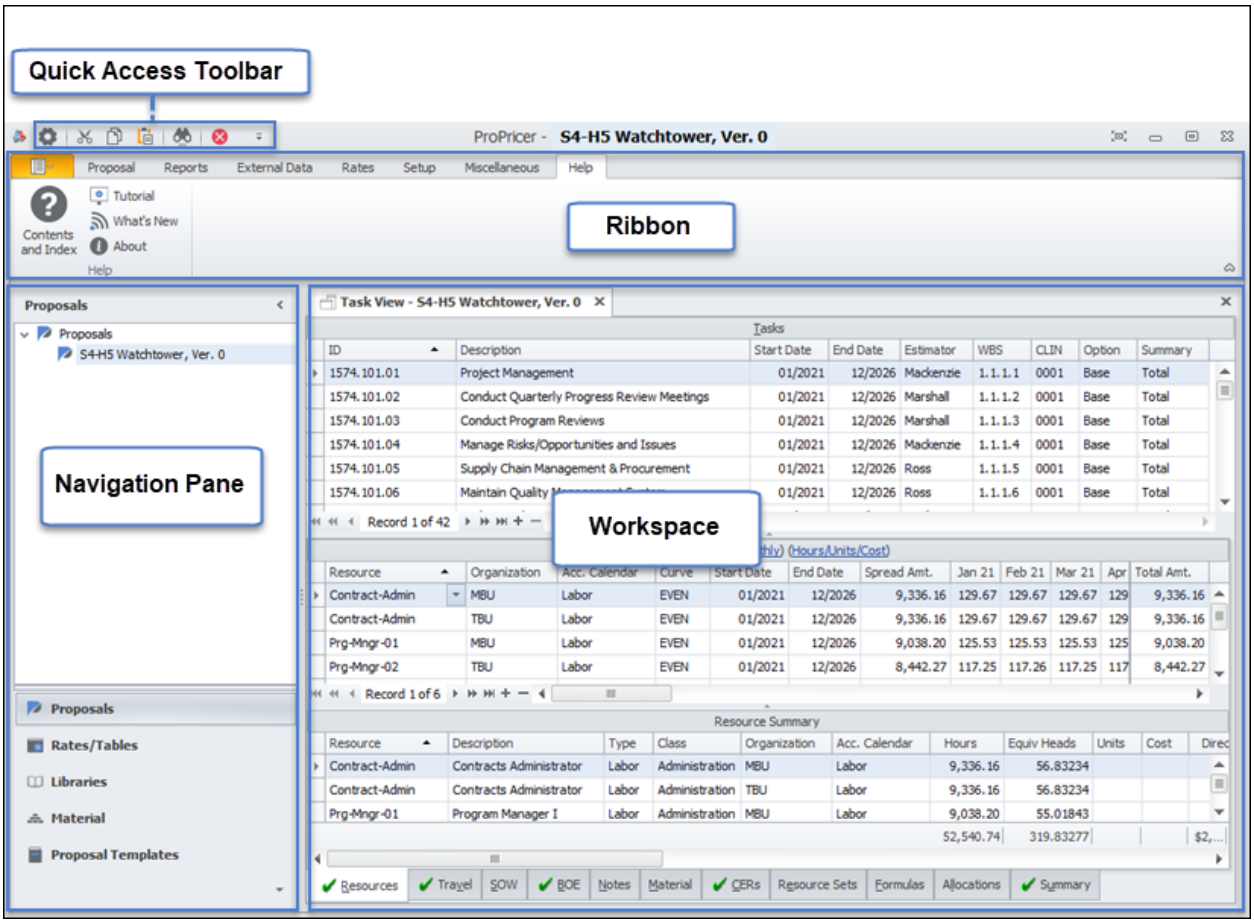
The number indicates how many times the user has logged in to ProPricer with a specific login. This information cannot be edited.

Last Login

The date indicates the last time the user logged in to ProPricer with a specific login. This information cannot be edited.

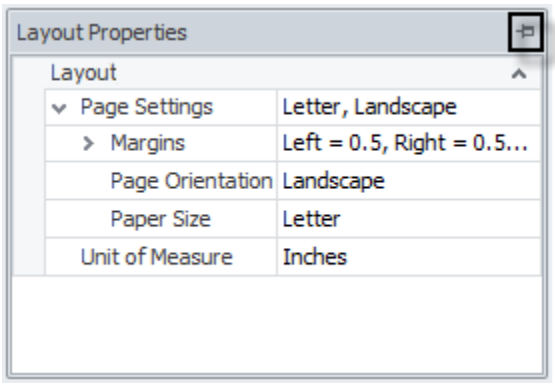
User Interface

The user interface consists of four major parts: Quick Access Toolbar, Ribbon, Navigation Pane, and Workspace.



AutoHide/Dock

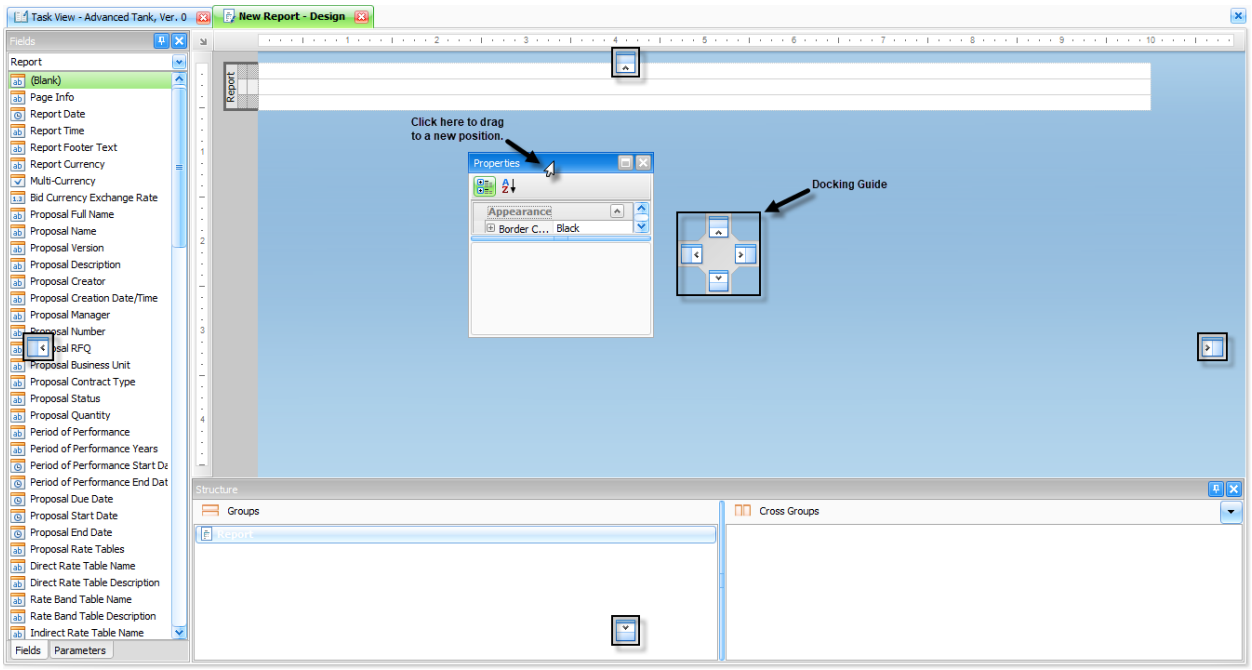
Some sections of ProPricer, such as report options, the Layout Properties and Field Properties of the Ad Hoc Layouts, and the Field List in the Pivot Grid have the AutoHide pin. This pin hides the section when you move the mouse to another area. The pin is located in the top-right corner. If the pin is in the horizontal position, AutoHide is enabled. If the pin is in the vertical position, the section will not hide when you move to another area. When AutoHide is not enabled, you can dock the section to the area of your choice.



This is the AutoHide pin. If the pin is in the horizontal position, Auto-Hide is enabled. The section will close when you move the cursor to another area.

Dock a Section

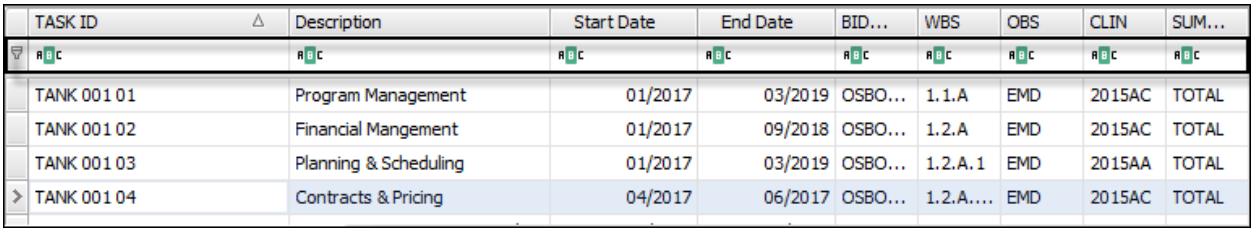
1. Click the AutoHide pin so that it is in the vertical position.
2. Click the name of the section and start to drag it. Docking guides will appear.
3. Drag the section to one of the docking guides.
4. Once it is in the desired position, you can click the AutoHide pin again to hide the section when you are not using it. Or you can leave it in the vertical position to have the section open and floating in the layout.


Task View - Advanced Tank, Ver. 0
New Report - Design
Fields
Report
(Blank)
Page Info
Report Date
Report Time
Report Footer Text
Report Currency
Multi-Currency
Bid Currency Exchange Rate
Proposal Full Name
Proposal Name
Proposal Version
Proposal Description
Proposal Creator
Proposal Creation Date/Time
Proposal Manager
Proposal Number
Proposal RFQ
Proposal Business Unit
Proposal Contract Type
Proposal Status
Proposal Quantity
Period of Performance
Period of Performance Years
Period of Performance Start Da
Period of Performance End Dat
Proposal Due Date
Proposal Start Date
Proposal End Date
Proposal Rate Tables
Direct Rate Table Name
Direct Rate Table Description
Rate Band Table Name
Rate Band Table Description
Indirect Rate Table Name
Fields
Parameters
Report
Click here to drag
to a new position.
Properties
Appearance
Border C...
Black
Docking Guide
Structure
Groups
Report
Cross Groups

Data Grids

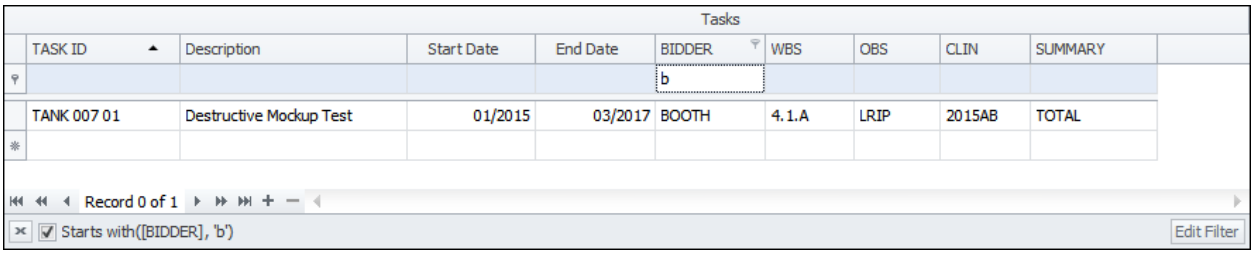
AutoFilter Row

Use the AutoFilter Row to search and organize grid data. The AutoFilter Row appears above the top row of the input grid.



TASK ID	Description	Start Date	End Date	BID...	WBS	OBS	CLIN	SUM...
TANK 001 01	Program Management	01/2017	03/2019	OSBO...	1.1.A	EMD	2015AC	TOTAL
TANK 001 02	Financial Mangement	01/2017	09/2018	OSBO...	1.2.A	EMD	2015AC	TOTAL
TANK 001 03	Planning & Scheduling	01/2017	03/2019	OSBO...	1.2.A.1	EMD	2015AA	TOTAL
TANK 001 04	Contracts & Pricing	04/2017	06/2017	OSBO...	1.2.A....	EMD	2015AC	TOTAL

Entering data in a column filters the records and then shows only those that match the criteria. For example, we typed *b* in the **Bidder** column. The **Tasks** grid only shows the tasks assigned to a bidder whose name begins with *b*.

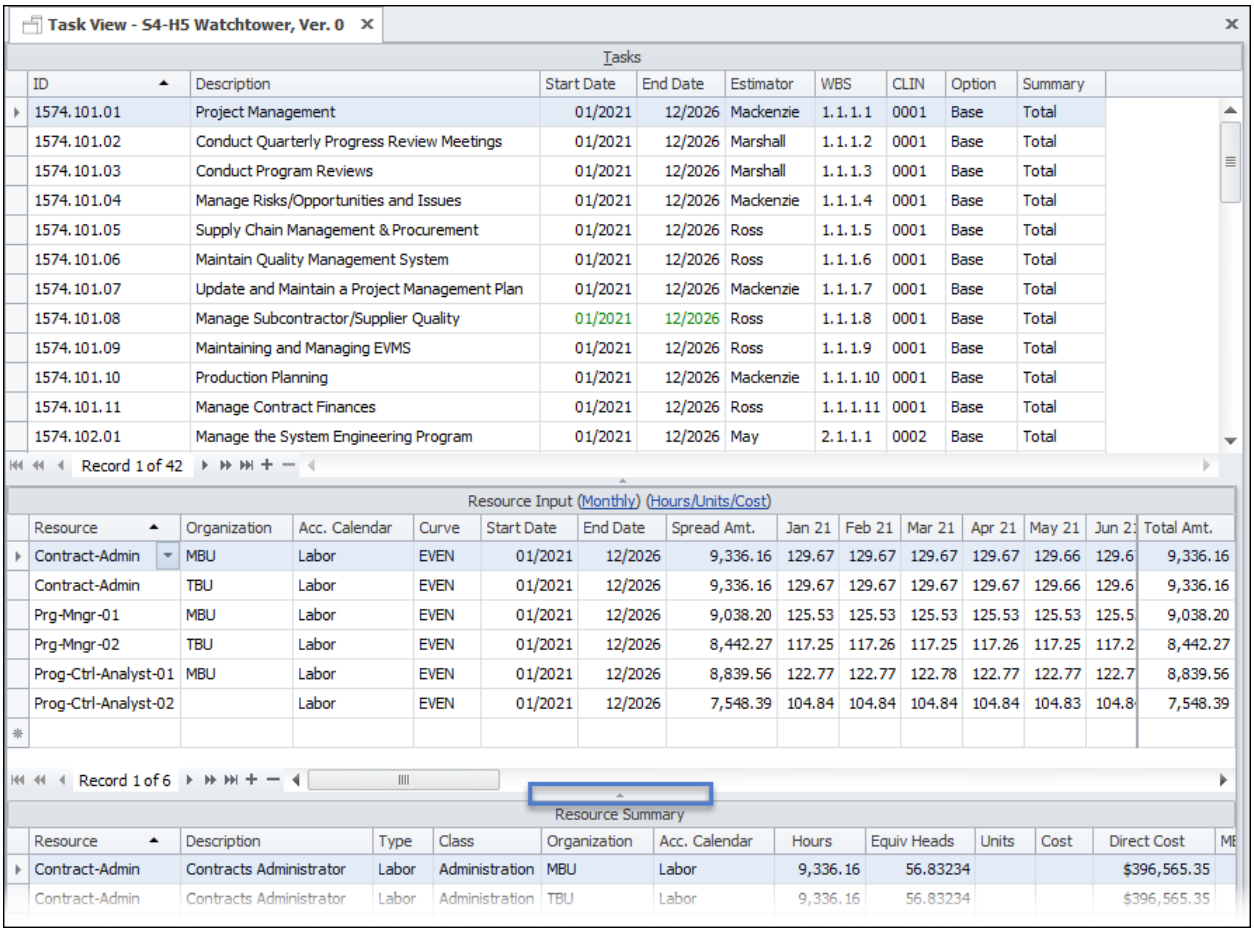


Show and Hide the AutoFilter Row

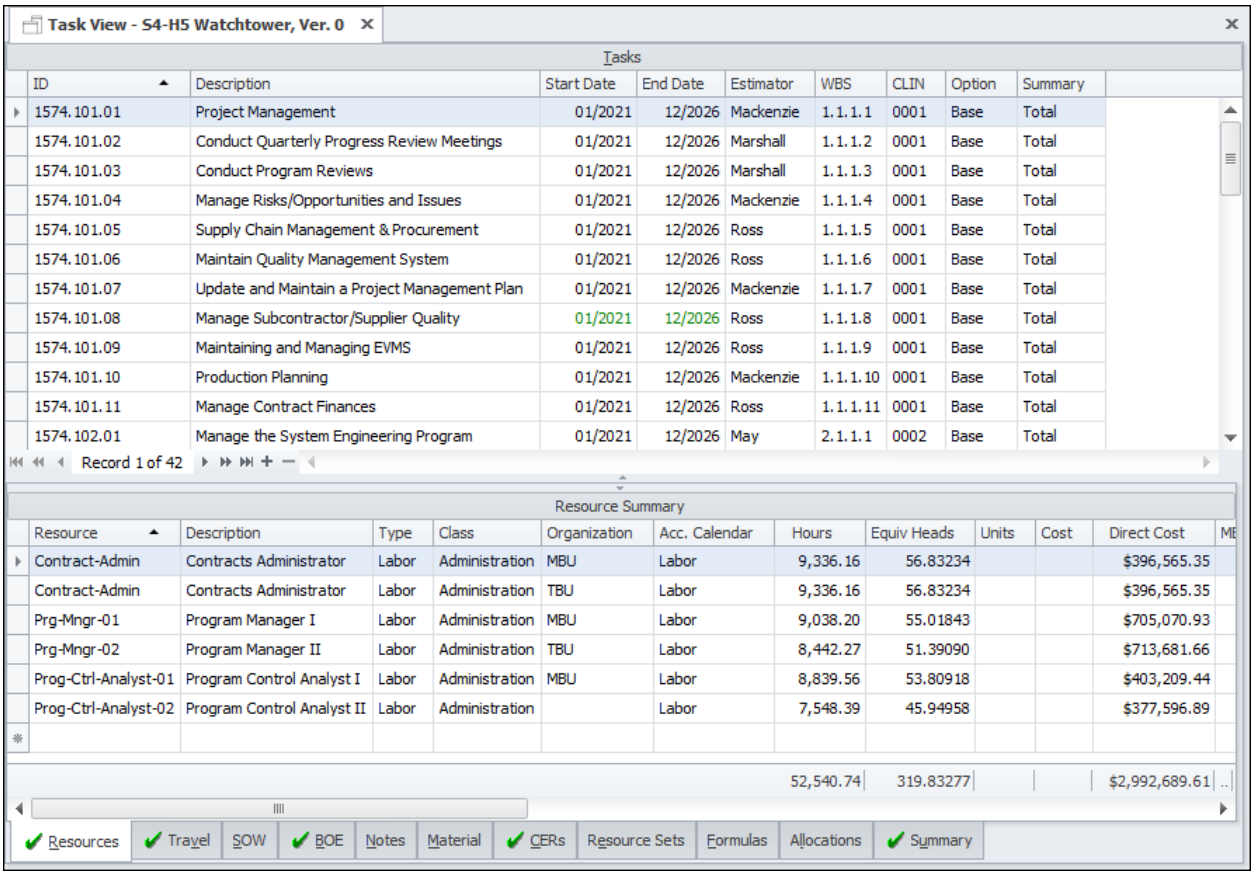
- Do one of the following:
  - Right-click a grid and select **View** > **Show AutoFilter Row**.
  - Press **Ctrl**+**Shift**+**F**.

Collapse or Expand Grids

Some areas of the user interface, such as Task View, are split into multiple grids or sections. To resize, collapse, or expand these sections, use the split bar between them.



In this example, collapsing the **Resource Input** grid yields a clearer view of the summarized resource information in tasks.


Task View - S4-H5 Watchtower, Ver. 0
Tasks
ID
Description
Start Date
End Date
Estimator
WBS
CLIN
Option
Summary
1574.101.01 Project Management 01/2021 12/2026 Mackenzie 1.1.1.1 0001 Base Total
1574.101.02 Conduct Quarterly Progress Review Meetings 01/2021 12/2026 Marshall 1.1.1.2 0001 Base Total
1574.101.03 Conduct Program Reviews 01/2021 12/2026 Marshall 1.1.1.3 0001 Base Total
1574.101.04 Manage Risks/Opportunities and Issues 01/2021 12/2026 Mackenzie 1.1.1.4 0001 Base Total
1574.101.05 Supply Chain Management & Procurement 01/2021 12/2026 Ross 1.1.1.5 0001 Base Total
1574.101.06 Maintain Quality Management System 01/2021 12/2026 Ross 1.1.1.6 0001 Base Total
1574.101.07 Update and Maintain a Project Management Plan 01/2021 12/2026 Mackenzie 1.1.1.7 0001 Base Total
1574.101.08 Manage Subcontractor/Supplier Quality 01/2021 12/2026 Ross 1.1.1.8 0001 Base Total
1574.101.09 Maintaining and Managing EVMS 01/2021 12/2026 Ross 1.1.1.9 0001 Base Total
1574.101.10 Production Planning 01/2021 12/2026 Mackenzie 1.1.1.10 0001 Base Total
1574.101.11 Manage Contract Finances 01/2021 12/2026 Ross 1.1.1.11 0001 Base Total
1574.102.01 Manage the System Engineering Program 01/2021 12/2026 May 2.1.1.1 0002 Base Total
Record 1 of 42
Resource Summary
Resource
Description
Type
Class
Organization
Acc. Calendar
Hours
Equiv Heads
Units
Cost
Direct Cost
Contract-Admin Contracts Administrator Labor Administration MBU Labor 9,336.16 56.83234 $396,565.35
Contract-Admin Contracts Administrator Labor Administration TBU Labor 9,336.16 56.83234 $396,565.35
Prg-Mngr-01 Program Manager I Labor Administration MBU Labor 9,038.20 55.01843 $705,070.93
Prg-Mngr-02 Program Manager II Labor Administration TBU Labor 8,442.27 51.39090 $713,681.66
Prog-Ctrl-Analyst-01 Program Control Analyst I Labor Administration MBU Labor 8,839.56 53.80918 $403,209.44
Prog-Ctrl-Analyst-02 Program Control Analyst II Labor Administration Labor 7,548.39 45.94958 $377,596.89
52,540.74 319.83277 $2,992,689.61
Resources
Travel
SOW
BOE
Notes
Material
CERs
Resource Sets
Formulas
Allocations
Summary

Copy or Paste Data in a Grid

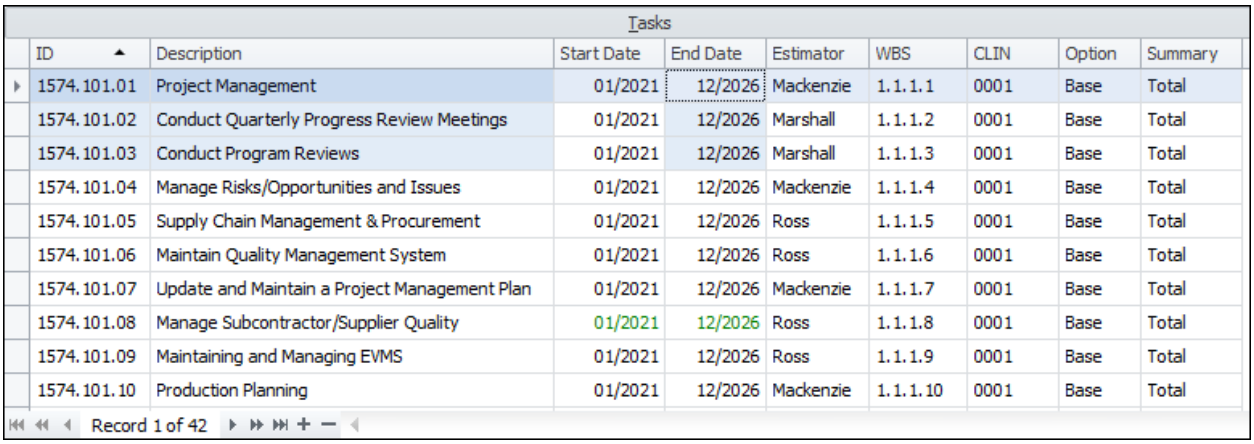
There are different ways to copy or paste ProPricer data. How you do it mainly depends on the Cell Selection Mode and Copy/Paste Headers options in a grid's right-click menu. The following examples show how to use these options for pasting copied data in ProPricer or another application.

Example: Cell Selection Mode

Before copying or pasting in a ProPricer grid, make sure you can select data exactly as needed by enabling or disabling Cell Selection Mode. To do so, right-click a grid and select **View** > **Cell Selection Mode**. Alternatively, press **Ctrl**+**M**.

When this option is enabled, you can select multiple cells by dragging your cursor over an area, and by holding **Shift** or **Ctrl** while clicking each cell.

In the following example, Cell Selection Mode is enabled, allowing the ID, description, and end date of the first three tasks to be selected. The selected cells can be copied by pressing **Ctrl**+**C**, or copied data can be pasted in the selected cells by pressing **Ctrl**+**V**.



Tasks

ID	Description	Start Date	End Date	Estimator	WBS	CLIN	Option	Summary
1574.101.01	Project Management	01/2021	12/2026	Mackenzie	1.1.1.1	0001	Base	Total
1574.101.02	Conduct Quarterly Progress Review Meetings	01/2021	12/2026	Marshall	1.1.1.2	0001	Base	Total
1574.101.03	Conduct Program Reviews	01/2021	12/2026	Marshall	1.1.1.3	0001	Base	Total
1574.101.04	Manage Risks/Opportunities and Issues	01/2021	12/2026	Mackenzie	1.1.1.4	0001	Base	Total
1574.101.05	Supply Chain Management & Procurement	01/2021	12/2026	Ross	1.1.1.5	0001	Base	Total
1574.101.06	Maintain Quality Management System	01/2021	12/2026	Ross	1.1.1.6	0001	Base	Total
1574.101.07	Update and Maintain a Project Management Plan	01/2021	12/2026	Mackenzie	1.1.1.7	0001	Base	Total
1574.101.08	Manage Subcontractor/Supplier Quality	01/2021	12/2026	Ross	1.1.1.8	0001	Base	Total
1574.101.09	Maintaining and Managing EVMS	01/2021	12/2026	Ross	1.1.1.9	0001	Base	Total
1574.101.10	Production Planning	01/2021	12/2026	Mackenzie	1.1.1.10	0001	Base	Total

Record 1 of 42

When Cell Selection Mode is disabled, entire rows are selected instead.

Tasks

ID	Description	Start Date	End Date	Estimator	WBS	CLIN	Option	Summary
1574.101.01	Project Management	01/2021	12/2026	Mackenzie	1.1.1.1	0001	Base	Total
1574.101.02	Conduct Quarterly Progress Review Meetings	01/2021	12/2026	Marshall	1.1.1.2	0001	Base	Total
1574.101.03	Conduct Program Reviews	01/2021	12/2026	Marshall	1.1.1.3	0001	Base	Total
1574.101.04	Manage Risks/Opportunities and Issues	01/2021	12/2026	Mackenzie	1.1.1.4	0001	Base	Total
1574.101.05	Supply Chain Management & Procurement	01/2021	12/2026	Ross	1.1.1.5	0001	Base	Total
1574.101.06	Maintain Quality Management System	01/2021	12/2026	Ross	1.1.1.6	0001	Base	Total
1574.101.07	Update and Maintain a Project Management Plan	01/2021	12/2026	Mackenzie	1.1.1.7	0001	Base	Total
1574.101.08	Manage Subcontractor/Supplier Quality	01/2021	12/2026	Ross	1.1.1.8	0001	Base	Total
1574.101.09	Maintaining and Managing EVMS	01/2021	12/2026	Ross	1.1.1.9	0001	Base	Total
1574.101.10	Production Planning	01/2021	12/2026	Mackenzie	1.1.1.10	0001	Base	Total

Record 3 of 42

Example: Copy/Paste Headers

As with Cell Selection Mode, you should enable or disable Copy/Paste Headers before copying or pasting in a ProPricer grid. To do so, right-click a grid and select **View** > **Copy/Paste Headers**.

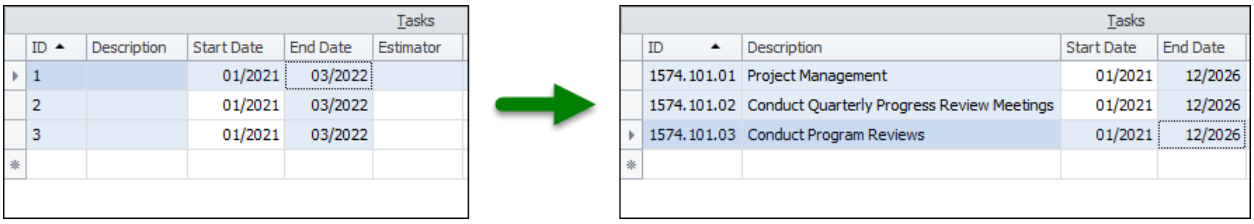
When this option is enabled, the column headers of any selected cells will be copied along with the cell data. This may be helpful when pasting ProPricer data in a spreadsheet or another application.

In the following example, the ID, Description, and End Date headers are copied and pasted automatically because Copy/Paste Headers is enabled.

	A	B	C	D
1	ID	Description	End Date	
2	1574.101.01	Project Management	Dec-26	
3	1574.101.02	Conduct Quarterly Progress Review Meetings	Dec-26	
4	1574.101.03	Conduct Program Reviews	Dec-26	
5				
6				

When Copy/Paste Headers is disabled, only the selected data is copied. If you are pasting in ProPricer, it is recommended that you disable this option to prevent column

names from being pasted unintentionally. The column headers already exist, so you should only be pasting data that belongs in those columns.



Tasks

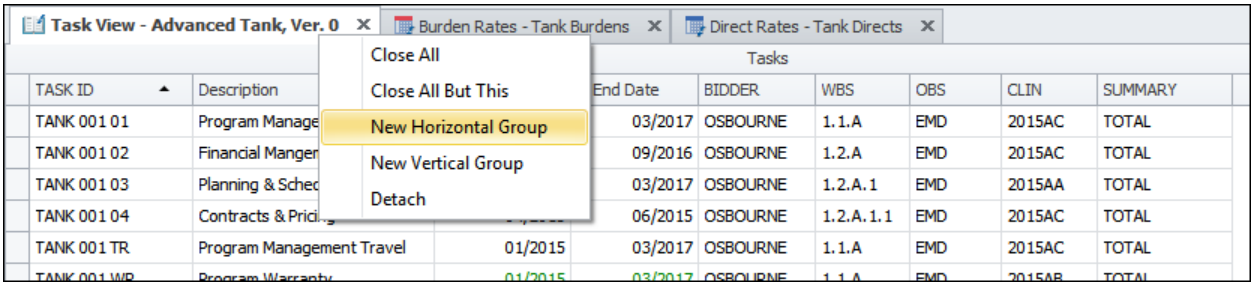
ID	Description	Start Date	End Date	Estimator
1		01/2021	03/2022	
2		01/2021	03/2022	
3		01/2021	03/2022	

Tasks

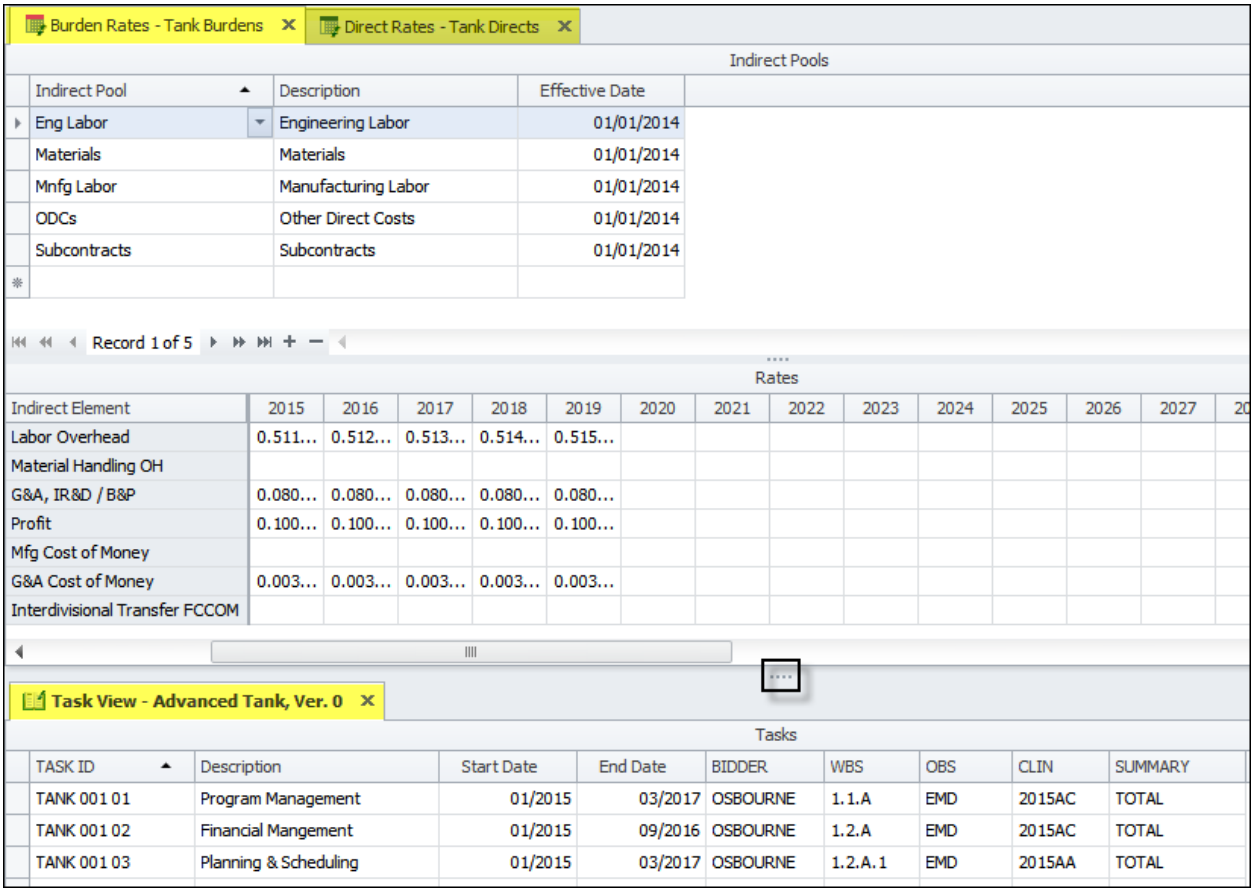
ID	Description	Start Date	End Date
1574.101.01	Project Management	01/2021	12/2026
1574.101.02	Conduct Quarterly Progress Review Meetings	01/2021	12/2026
1574.101.03	Conduct Program Reviews	01/2021	12/2026

Create a Horizontal Group in the Workspace

Creating a horizontal group in the Workspace allows you to open a grid below another. In contrast to a vertical group, this offers a wider view of the grids as a whole. To create a horizontal group, right-click the grid you want to place below the other and then click **New Horizontal Group** on the shortcut menu.

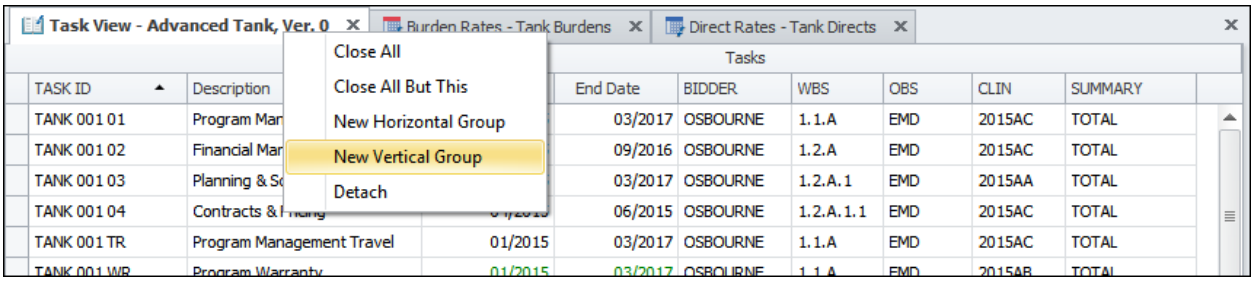


Your screen will look like this. You can move the horizontal split bar below the navigation tools to make a grid higher or shorter to suit your needs. To remove the horizontal split, drag the tab to the other side of the split bar.

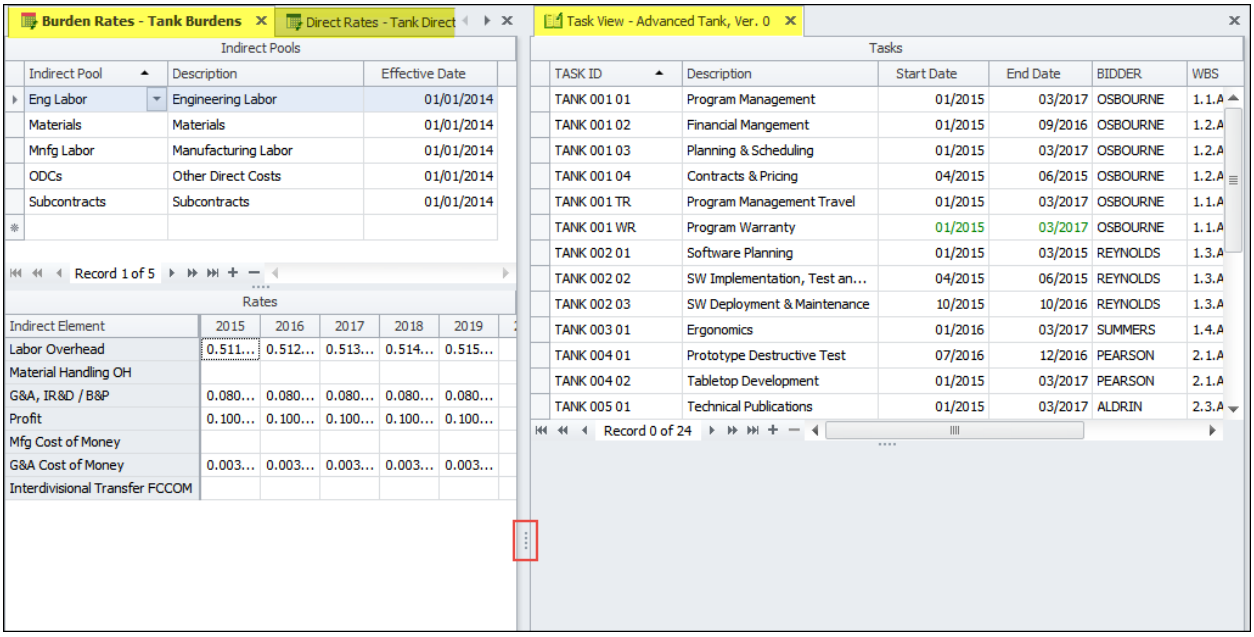

Burden Rates - Tank Burdens
Direct Rates - Tank Directs
Indirect Pools
Indirect Pool
Description
Effective Date
Eng Labor
Engineering Labor
01/01/2014
Materials
Materials
01/01/2014
Mnfg Labor
Manufacturing Labor
01/01/2014
ODCs
Other Direct Costs
01/01/2014
Subcontracts
Subcontracts
01/01/2014
Record 1 of 5
Rates
Indirect Element
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
2027
Labor Overhead
0.511...
0.512...
0.513...
0.514...
0.515...
Material Handling OH
G&A, IR&D / B&P
0.080...
0.080...
0.080...
0.080...
0.080...
Profit
0.100...
0.100...
0.100...
0.100...
0.100...
Mfg Cost of Money
G&A Cost of Money
0.003...
0.003...
0.003...
0.003...
0.003...
Interdivisional Transfer FCCOM
Task View - Advanced Tank, Ver. 0
Tasks
TASK ID
Description
Start Date
End Date
BIDDER
WBS
OBS
CLIN
SUMMARY
TANK 001 01
Program Management
01/2015
03/2017
OSBOURNE
1.1.A
EMD
2015AC
TOTAL
TANK 001 02
Financial Mangement
01/2015
09/2016
OSBOURNE
1.2.A
EMD
2015AC
TOTAL
TANK 001 03
Planning & Scheduling
01/2015
03/2017
OSBOURNE
1.2.A.1
EMD
2015AA
TOTAL

Create a Vertical Group in the Workspace

Creating a vertical group in the Workspace allows you have two grids open side-by-side. To create a vertical group, right-click the grid you want to place alongside the other and then click **New Vertical Group** on the shortcut menu.



Your screen will look like this. You can move the vertical split bar to make a grid wider or narrower to suit your needs. To remove the vertical split, drag the tab to the other side of the split bar.



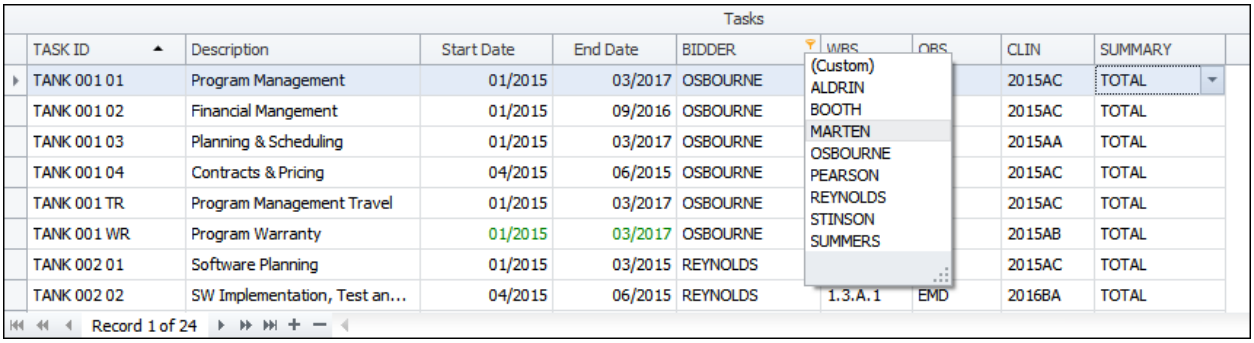
Filter Data in a Grid

Filtering allows you to narrow the list of items in a grid, based on a condition. When you apply a filter to the data in the grid, you only see the items that match the criteria specified.

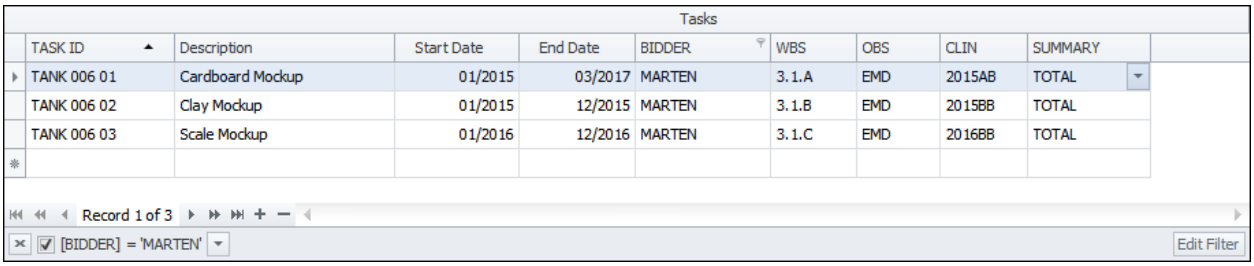
Instead of filtering, you can also search a column for text to narrow down the list of items displayed.

Example: Filter

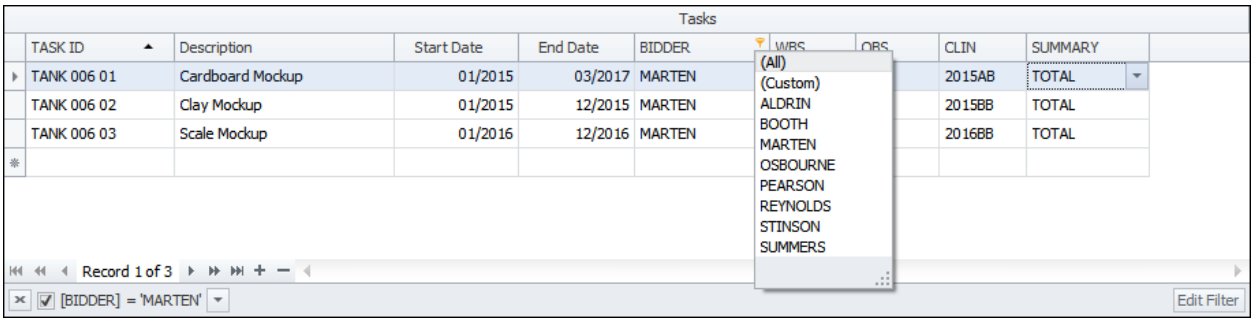
To view only the tasks that have been assigned to the bidder named Marten, we will click the filter icon on the **Bidder** field header and select **MARTEN**.



The grid now shows the bidder's tasks. Notice the area below the navigation tools.



In that area, clicking the **X** will permanently remove the filter and show all items in the grid again. Clearing the checkbox will temporarily remove the filter. You can also edit the filter and change how it is working.



Example: Search

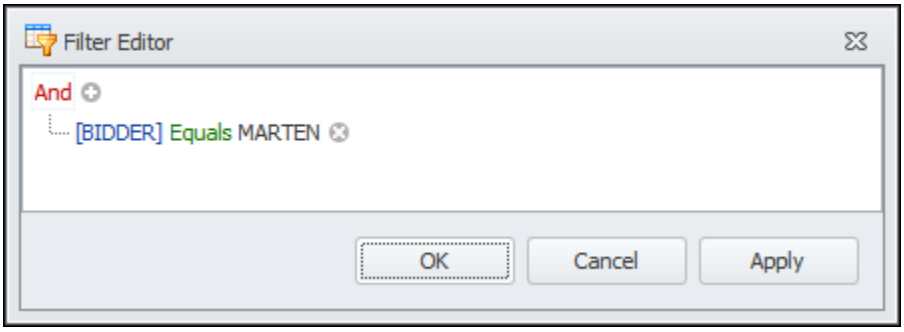
In this example, we only want to see management-related tasks. Switch from Filter to Search, then search the **Description** field for the word *Management*.

Now the grid only shows tasks that include the searched term in their description.

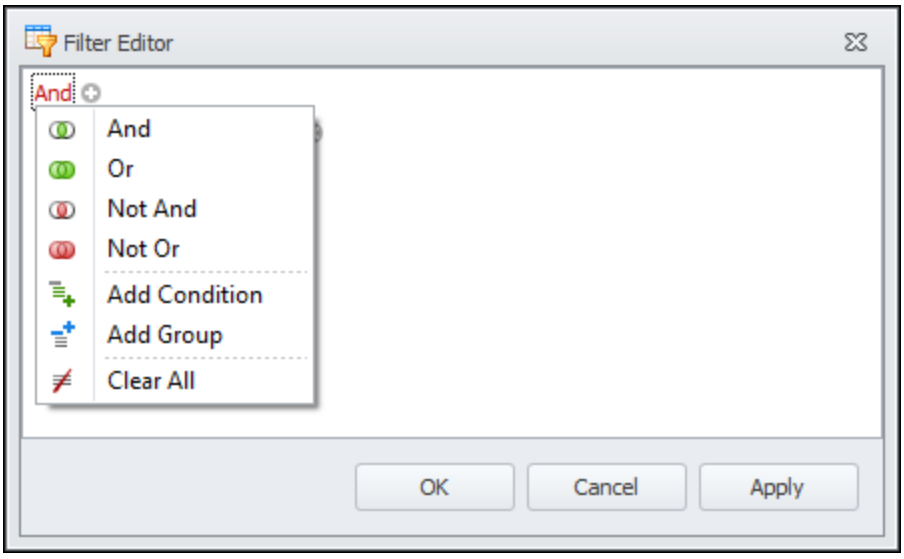
Filter Editor Dialog Box

When you filter data in a grid by clicking the **Filter** icon on a column header, the **Edit Filter** button appears below the grid. To open the Filter Editor, click the button.

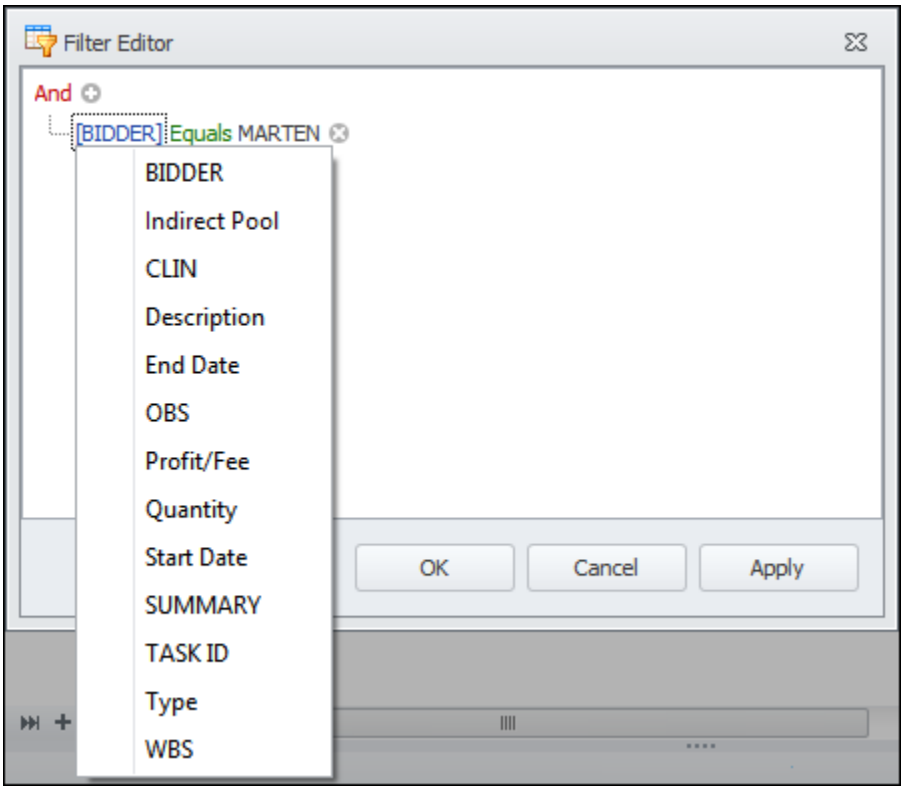
With the editor, you can change how your filter works. In this example, the filter is **[BIDDER] Equals MARTEN**.



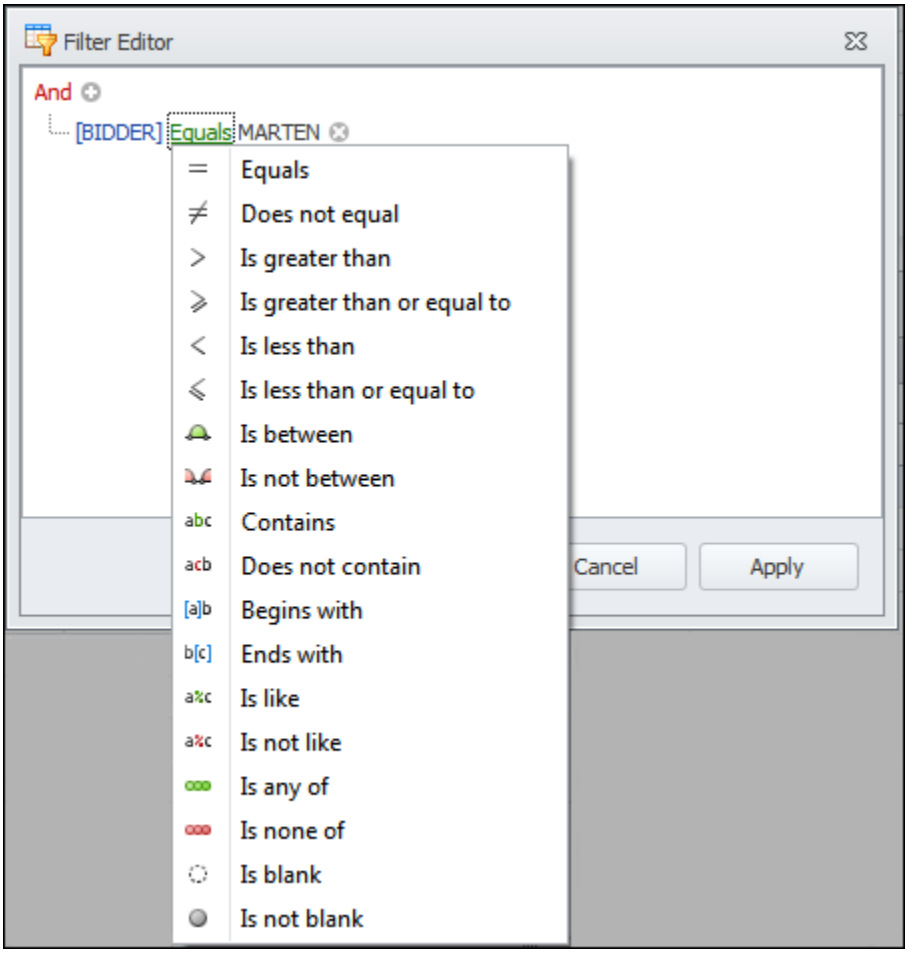
After clicking the operator **And**, the following options appear. These options allow you to add more conditions to the group, add another group of conditions, and clear all the filter information. If the group has more than one condition, you can also change the operator (**And**, **Or**, **Not And**, **Not Or**) that combines them.



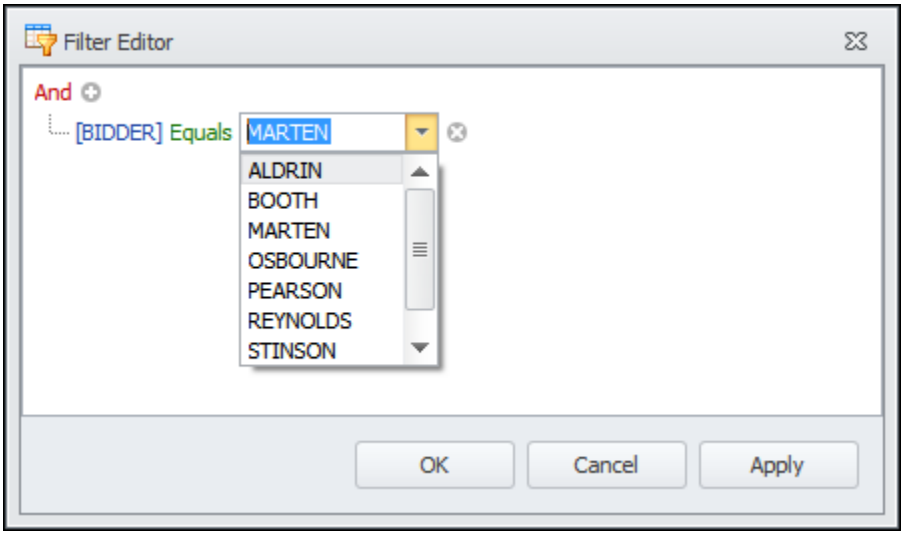
After clicking the field **[BIDDER]**, the following options appear. These options allow you to change the field (that is, the category of data).



After clicking the operator **Equals**, the following options appear. These options allow you to select a different comparison operator for the field and field value.



After clicking the field value **MARTEN**, a menu of available field values appears. The available values depend on the field selected. In this example, the field is **[BIDDER]**, so the available field values are the names of bidders.

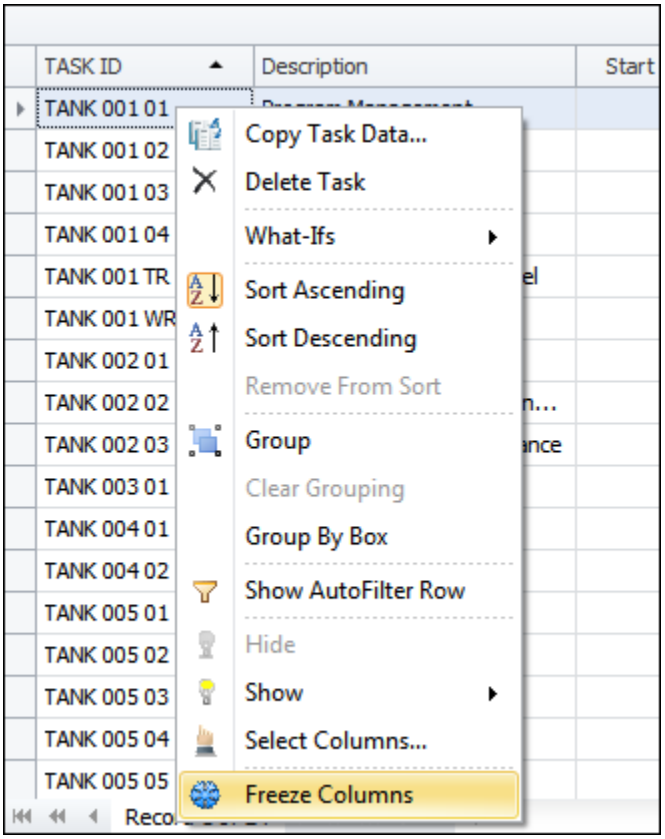


Freeze Columns

ProPricer allows you to freeze columns in a grid. The columns to the left of the frozen column will remain visible while you scroll through the remaining columns in the grid.

Freeze a Single Column

Right-click the column you want to freeze, and then click **Freeze** on the shortcut menu.



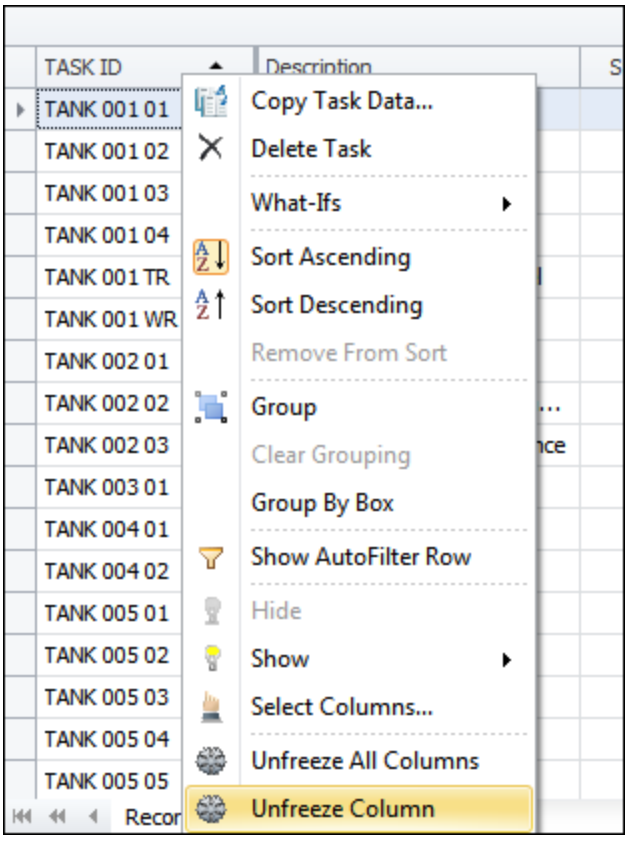
Note: You can increase the number of columns that remain visible by placing the cursor in a column to the right of the frozen one and repeat the process.

Unfreeze All Columns

Right-click any column to the left of the frozen one, and then click **Unfreeze All Columns** on the shortcut menu.

Unfreeze a Single Column

Right-click the column you want to unfreeze, and then click **Unfreeze Column** on the shortcut menu.



Note: When you unfreeze a column individually, ProPricer will place it immediately to the right of the frozen one, which may or may not be the original position of the column.

Group Data in a Grid

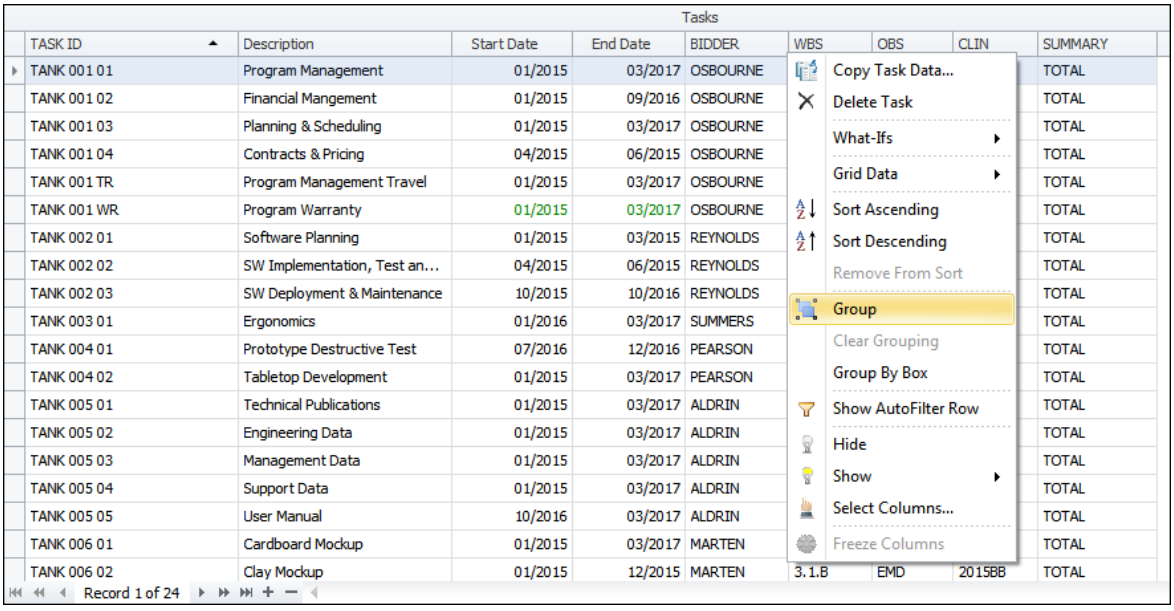
ProPricer allows you to group the data in a grid by one or more columns, which allows you to rearrange the data for easier viewing and evaluating. Grouping does not change the actual structure of your proposal, table, or library. It simply allows you to view the data in the grid in a manner that works best for you.

There are two ways to group your data: by using the column headers or by using the Group By Box. If you use the Group By Box option, a space will open above the grid that will show the hierarchy of the nested groups.

In the following examples, the tasks are grouped by Bidder and then WBS.

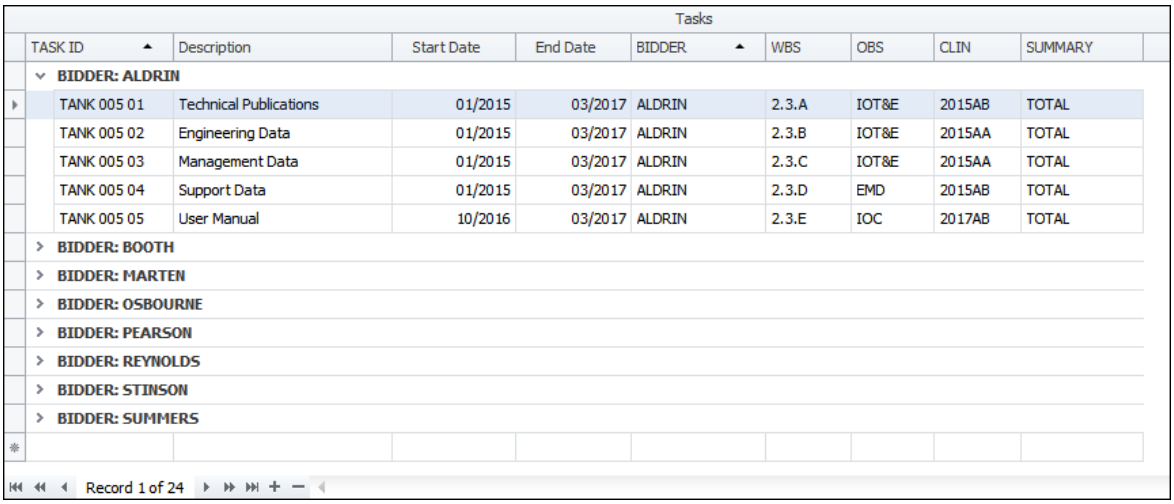
Group by a Single Column

1. Right-click the column by which you want to group the data, and then click **Group**.

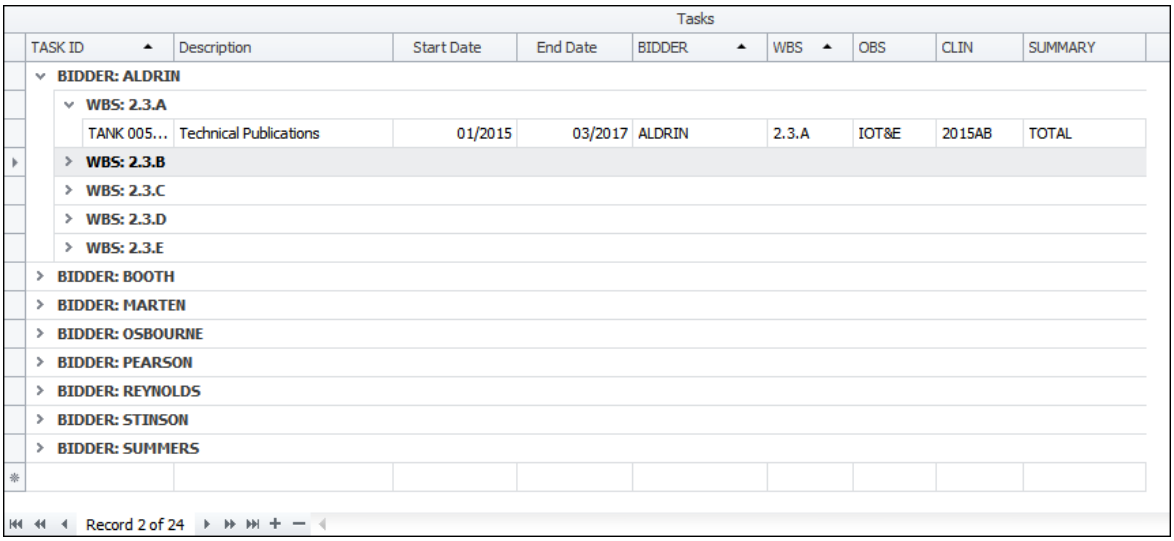


2. You will notice that the first column shows the element you chose followed by a colon. Click the plus sign to expand the group and see the subentries. If you want

to group the data further, right-click the column of the second element and click **Group**.



3. You can add another group if you want. Right-click the next column header, and then click **Group**.



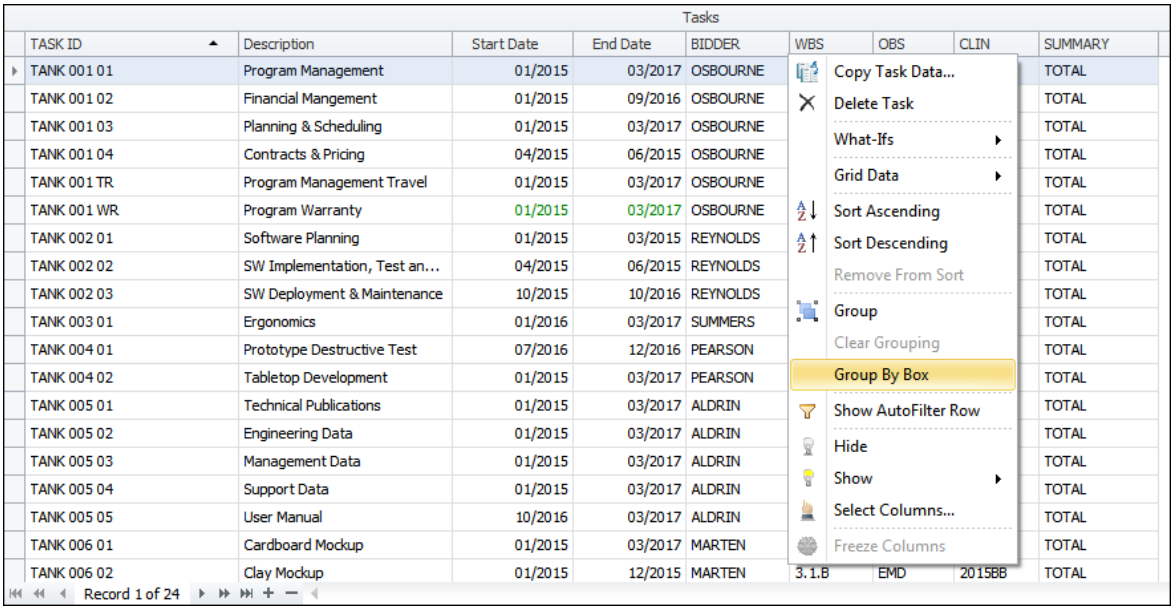
Remove the Grouping

Right-click anywhere in the grid, and then click **Clear Grouping**.

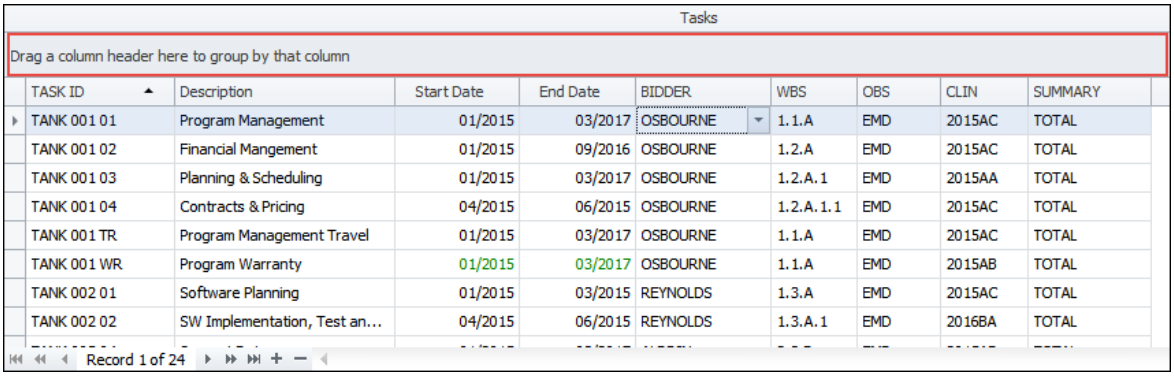
Group Using the Box

ProPricer also offers a **Group By Box** option. This option opens a space above the grid where you can drag and drop the columns you want to use to group the data. The **Group By Box** allows you to see the hierarchy of the nested groups and rearrange them to suit your needs.

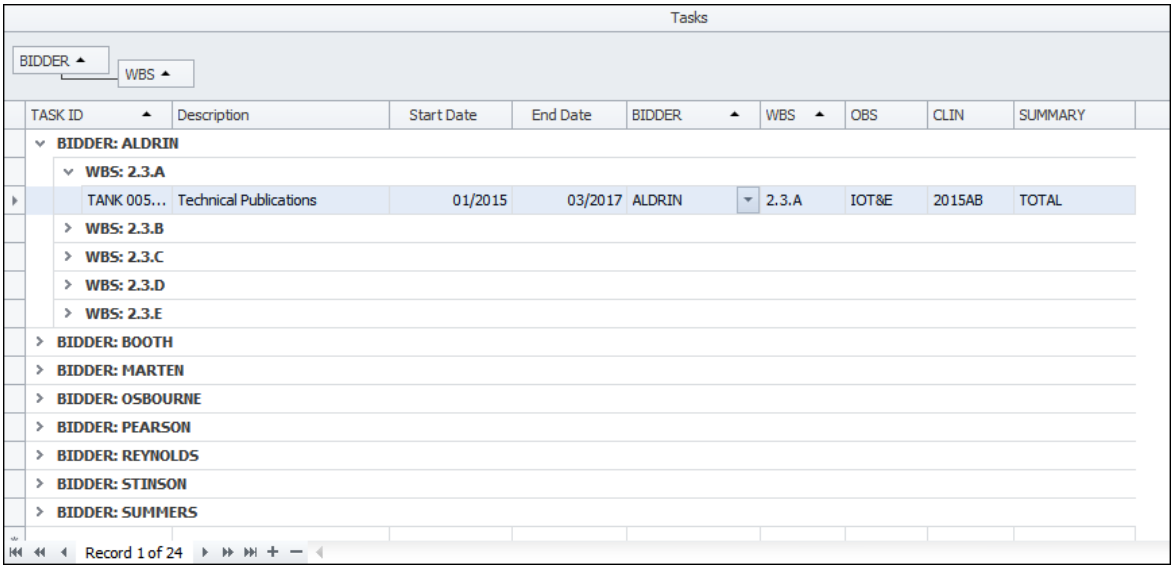
1. Right-click anywhere in the grid, and then click **Group By Box**.



Notice the space that opens above the grid.



2. Drag the column or columns by which you want to want to group the data.



Rearrange a Nested Group

Drag the group to the position desired.

Remove a Single Group from the Box

Drag the group from the box back to the grid. Alternatively, right-click the group, and then click **Ungroup**.

Remove the Entire Grouping from the Box

Right-click anywhere in the grid or box, and then click **Clear Grouping**. The grouping will be removed, but the box will remain open.

Close the Grouping Box

Right-click anywhere in the grid or box, and then select **View** > **Group By Box** to clear the check mark. The grouping will be removed, and the box will close.

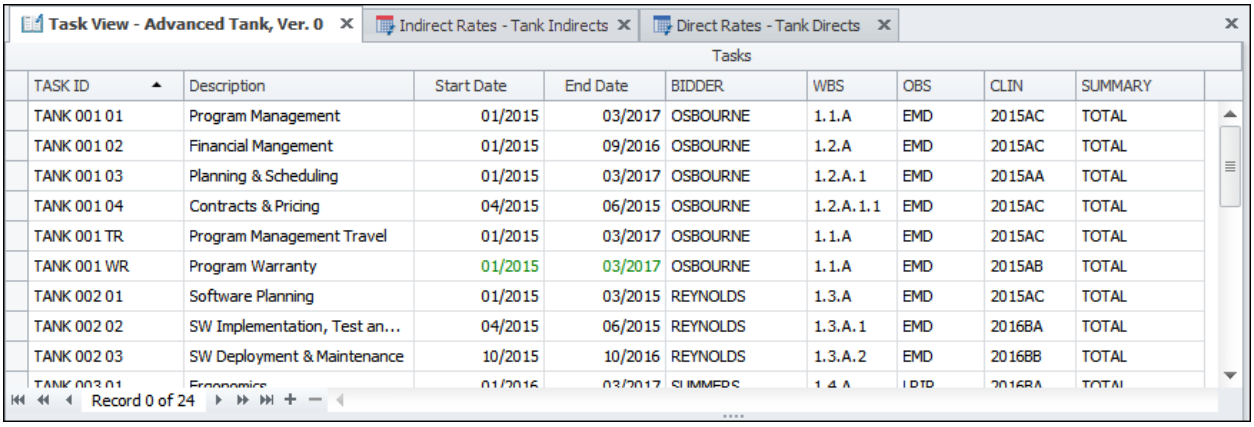
Move Columns

You can arrange the columns in a grid so that they appear in the order that best suits your needs.

- Click the heading of the column you want to move, and then drag it to the position you want.

Multiple Grids

ProPricer allows you to have one or more proposals, as well as one or more library or table maintenance grids open at the same time. The name of each grid you have open will appear in a separate tab along the top of the Workspace. Bold letters indicate the active tab.



You can also place the tabs you have open in horizontal or vertical groups, as well as drag a tab from one group to another.

Open a Single Grid

Double-click the name of the proposal, table, or library. Alternatively, right-click the item and click **Open**.

Open Another Grid in a New Tab

Double-click the name of the proposal, table, or library. Alternatively, right-click the item and click **Open in New Tab**.

Open a Grid in the Same Tab

Right-click the name of the proposal, table, or library and click **Open in Current Tab**.

Open Another Grid in a Detached Window

Right-click the name of the proposal, table, or library and click **Open in New Window**.

Detach a Grid that is Already Open

Right-click the tab of the grid you want to detach and click **Detach**.

Close a Single Tab

Click **X** on the tab you want to close.

Close All but the Current Tab

Right-click the tab you want to keep open and click **Close All But This**.

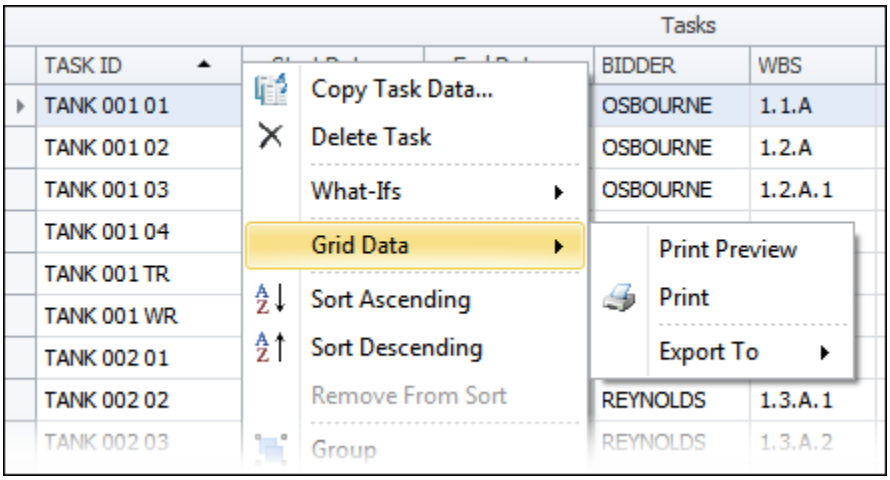
Close All Tabs

Right-click any tab and click **Close All**. Alternatively, click **X** next to the last tab on the right.

Print Data in a Grid

ProPricer gives you the ability to quickly print or export the data in any grid. You can also customize the design of your grid document and preview it before printing or exporting.

1. Right-click anywhere inside a grid.
2. Point to **Grid Data**.
3. Select **Print Preview**, **Print**, or **Export To**.
   - **Print Preview** - View and customize the grid document design. Design options are selected on the **Print Preview** ribbon.
   - **Print** - Open the printer settings dialog box, then print the grid document without any design customization.
   - **Export To** - Select a file format for the grid document, then save it to your computer.



Resize Columns

You can change the width of a column so that your Workspace shows as little or as much information as you need.

Manually Change the Width of a Column

1. Move your mouse to the edge of the column heading until the pointer changes to ↔.
2. Drag the edge of the column until it is the width you want.

Automatically Change the Width of a Column

Do one of the following:

- Move your mouse to the edge of the column heading until the pointer changes to ↔, and then double-click.
- Right-click any cell in the column, and then click **Best Fit** in the shortcut menu.

Automatically Change the Width of All Columns in a Grid

Right-click anywhere in the grid, and then click **Best Fit (all columns)** in the shortcut menu.

Show/Hide Columns

ProPricer allows you to hide columns in the various data input grids. It is an easy way to customize the grid to suit your needs. Some columns are shown by default, some are hidden by default, and others cannot be hidden. The more you use the program, the easier it will be for you to determine which columns you can hide and which ones you cannot.

To hide a column, drag the column off the grid. Or right-click the column, and then click **Hide** on the shortcut menu.

To hide multiple columns, right-click the grid, go to **View** > **Hide Columns**, and then click a column or group of columns. You can also click **(All)** to hide every column or an entire group of columns.

To show hidden columns, right-click the grid, go to **View** > **Show Columns**, and then click a column or group of columns. You can also click **(All)** to show every column or an entire group of columns.

Alternatively, right-click the grid, go to **View** > **Select Columns**, and then select what to hide/show.

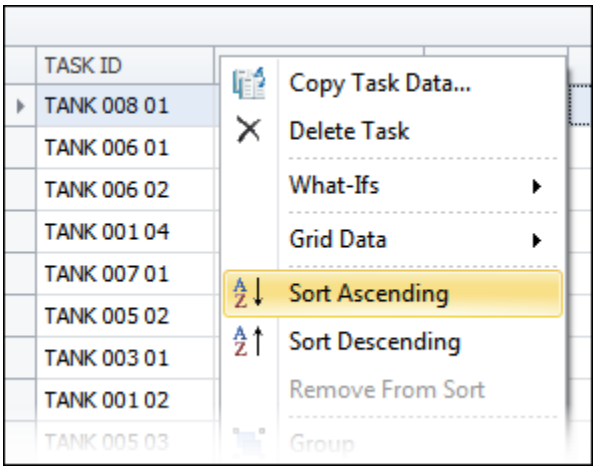
Sort Data in a Grid

Sorting is the order in which the items are arranged in a grid. You can sort by any column in either ascending or descending order. You can also do a multi-column sort by using the Shift key to create a unique list of entries.

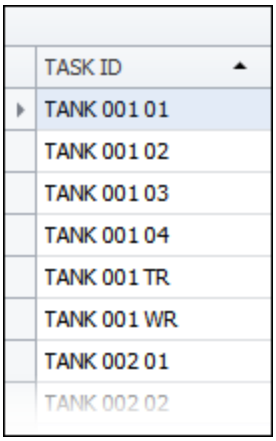
ProPricer sorts items by symbols, then numbers, and then letters. Numbers precede letters and symbols precede numbers.

Example

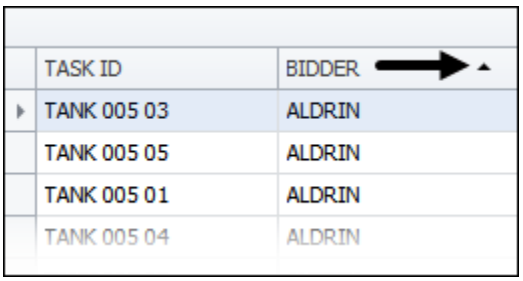
We want to sort the tasks in our proposal. Right-click the **Task ID** column, and then click **Sort Ascending** on the shortcut menu.



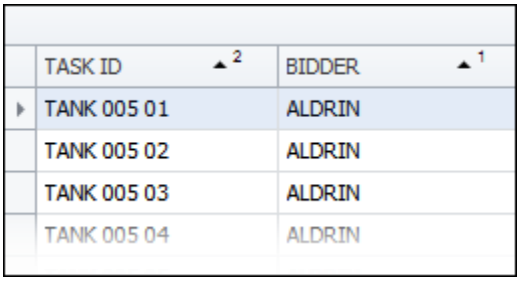
ProPricer will rearrange the tasks and place a small triangle in the column that indicates the sort order.



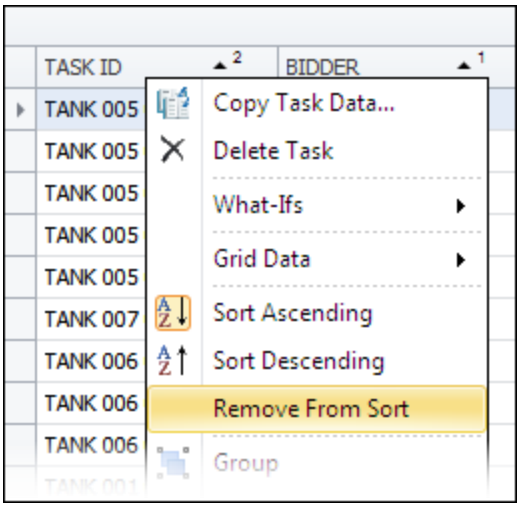
If you click a different column header, that column will become the sorting field. Clicking the same column header changes the sort order (from ascending to descending, or vice versa). If you click the **Bidder** column, the ascending triangle will appear there.



If you hold the **Shift** key and click the **Task ID** column, ProPricer will sort by **Bidder** first and then by **Task ID**. Small numbers will appear in the column header that indicate the first and subsequent sorts.



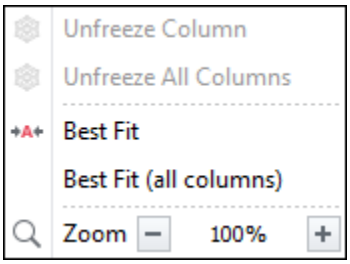
If you want to remove one of these columns from sort, right-click the column and then click **Remove From Sort** on the shortcut menu.


TASK ID
2
BIDDER
1
TANK 005
TANK 005
TANK 005
TANK 005
TANK 005
TANK 007
TANK 006
TANK 006
TANK 006
Copy Task Data...
Delete Task
What-Ifs
Grid Data
Sort Ascending
Sort Descending
Remove From Sort
Group

Zoom In or Out in a Grid

You can zoom in or zoom out in any grid to improve the readability of its data.

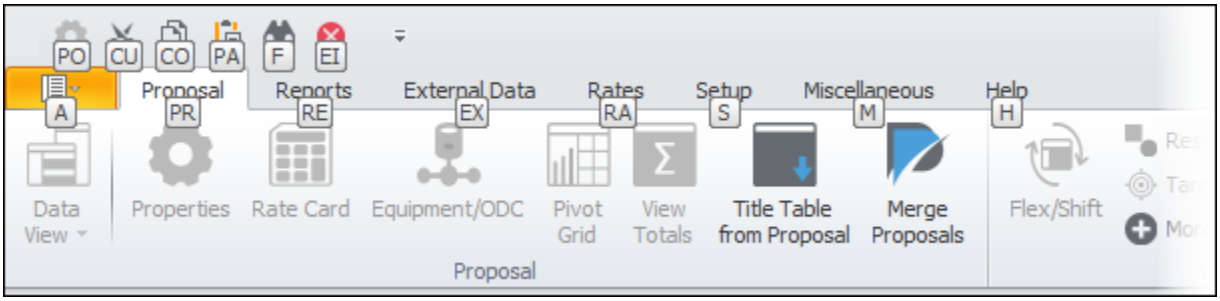
Right-click a grid and change the **Zoom** setting at the bottom of the menu.



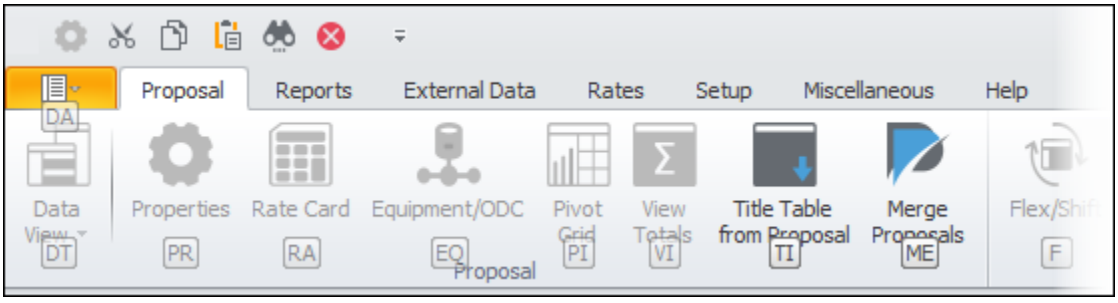
Alternatively, if your mouse has a scroll wheel, hover over a grid, hold **Ctrl** on your keyboard, and roll the wheel forward or backward.

Key Tips

Key Tips allow you to use access keys rather than a mouse for ribbon commands. Press and release the **Alt** key to display the Key Tips.



Type the letters for a specific ribbon to display the Key Tips for its buttons. After typing **PR** for the Proposal ribbon, the tips for its buttons appear. If we then type **ME**, the Merge Proposals dialog box will open.



Remember, you only ever see the Key Tip badges for the active ribbon. You have to move to another ribbon to see its Key Tips. If you end up with the Key Tips for the wrong buttons showing, just press **Esc** to see the tab Key Tips for the ribbons again. If a dialog box is open that uses the same letter in a shortcut as a Key Tip on the ribbon, the dialog box has precedence. The items in the Quick Access Toolbar also affect the Key Tips you will see. Once you start moving around the ribbon like this, the Key Tips disappear. Get them back by pressing **Alt** twice.

In addition to Key Tips, there's another way of using sequential keystrokes to move around the ribbon. First, you must press the **Alt** key, just like with Key Tips, to move the focus to the ribbon. Then you can move around by using the arrow keys.

- The **Left Arrow** and **Right Arrow** keys move you to the adjacent ribbons.
- The **Up Arrow** key moves the focus to the Quick Access Toolbar.
- The **Down Arrow** key moves you into the active ribbon, where you can move further using the other arrow keys.

Here's a brief list of other keystrokes you can use to move around:

- Press the **Tab** key to navigate a dialog box.
- Activate a command by pressing **Enter**.
- The **Spacebar** selects and clears checkboxes.
- **Shift**+**F10** opens the shortcut menu, which opens when you right-click an item.
- **Esc** closes an open dialog box or shortcut menu. If nothing is open, it takes the focus away from the ribbon and back to the main document.
- **Alt**+**F4** closes the active window.
- **F1** opens the Help window.

Keyboard Shortcuts

General

Shortcut	Action
F1	Display context-sensitive help information about the ProPricer feature you are currently using.
Alt	Display Key Tips on the ribbon.
F10	
Alt+Key Tip	Perform the action assigned to the Key Tip.
F10+Key Tip	
Alt+F4	Close ProPricer.
Esc	Close the active item.

Navigation Pane

Shortcut	Action
Shift+F10	Display the shortcut menu for the selected item.
Tab	Switch between the Navigation Pane and an open grid. ProPricer will move through all the cells in the grid before moving to the Navigation Pane.
Enter	Close the active item.
Alt+Enter	Open the **Properties** dialog box of table or the properties of a proposal.

Ctrl+Enter	Open the item in the current tab.
Ctrl+Double-click	
Shift+Enter	Open the item in a detached window.
Shift+Double-click	
Right Arrow	Expand a folder.
Plus Sign on numeric keypad	
Left Arrow	Collapse an expanded folder.
Minus Sign on numeric keypad	
Up Arrow	Move up in the Navigation Pane.
Down Arrow	Move down in the Navigation Pane.

Grids

Shortcut	Action
F6	Move from one grid to another.
F2	Select the current cell for editing.
F4	Open a lookup.
Alt+Down Arrow	
Shift+F4	Open the maintenance grids of Task/Resource/Material Selections, Resource Tables, and Ad Hoc Layouts.
F7	Type to search text in the current column.

Shift+F10	Display the shortcut menu for the selected item.
Esc	Undo unsaved changes. Pressing **Esc** once restores the previous data in the cell. Pressing **Esc** twice restores the data in the entire row.
Tab	Move to the next cell (to the right).
Enter	
Right Arrow	
Shift+Tab	Move to the previous cell (to the left).
Shift+Enter	
Left Arrow	
Ctrl+Enter	Move to the first column in a row.
Ctrl+M	Switch between two multi-selection modes for copying or pasting grid data. Alternatively, right-click the grid and select **View** > **Cell Selection Mode**. When Cell Selection Mode is enabled, you can select multiple cells instead of multiple rows, and then copy or paste data.
Ctrl+N	Open the **Select Columns** dialog box to choose which columns are shown in a grid.
Ctrl+S	Save.
Ctrl+Home	Move to the beginning (top-left cell).
Ctrl+End	Move to the end (bottom-right cell).
Ctrl+Shift+F	Show or hide the AutoFilter Row above the grid.

Ctrl+O	Open the **Report Options** panel when hidden.
Shift+O	Open hidden options.

Dialog Box

Shortcut	Action
Shift+F4	Open the maintenance grids of Task/Resource/Material Selections, Resource Tables, and Ad Hoc Layouts.
Tab	Move to the next option.
Shift+Tab	Move to the previous option.
Spacebar	Select or clear a checkbox.
Arrow Keys	Move to the next or previous option in a group.

Lookup Box

Shortcut	Action
Alt+Down Arrow	Open a lookup.
Esc	Close a lookup.

Drop-Down List

Shortcut	Action
F4	Open or close a drop-down list.
Alt+Down Arrow	
Esc	Close a drop-down list.

Up Arrow	Move upward in the list.
Down Arrow	Move downward in the list.

Text Box

Shortcut	Action
Home	Move the cursor to the beginning of the entry.
Shift+Home	Select the text between the cursor and the beginning of the entry.
End	Move the cursor to the end of the entry.
Shift+End	Select the text between the cursor and the end of the entry.
Left Arrow	Move the cursor to the left by one character.
Ctrl+Left Arrow	Move the cursor to the left by one word.
Shift+Left Arrow	Select the character to the left of the cursor.
Ctrl+Shift+Left Arrow	Select the word to the left of the cursor.
Right Arrow	Move the cursor to the right by one character.
Ctrl+Right Arrow	Move the cursor to the right by one word.
Shift+Right Arrow	Select the character to the right of the cursor.
Ctrl+Shift+Right Arrow	Select the word to the right of the cursor.

Edit Mode within a Cell

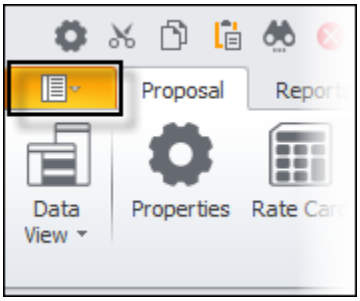
Shortcut	Action

Ctrl+C	Copy text.
Ctrl+V	Paste copied text.
Ctrl+X	Cut text.
Esc	Undo the unsaved changes in the cell.
Home	Move the cursor to the beginning of the entry.
Shift+Home	Select the text between the cursor and the beginning of the entry.
End	Move the cursor to the end of the entry.
Shift+End	Select the text between the cursor and the end of the entry.
Left Arrow	Move the cursor to the left by one character.
Ctrl+Left Arrow	Move the cursor to the left by one word.
Shift+Left Arrow	Select the character to the left of the cursor.
Ctrl+Shift+Left Arrow	Select the word to the left of the cursor.
Right Arrow	Move the cursor to the right by one character.
Ctrl+Right Arrow	Move the cursor to the right by one word.
Shift+Right Arrow	Select the character to the right of the cursor.
Ctrl+Shift+Right Arrow	Select the word to the right of the cursor.

Main Menu

The Main Menu is located at the top-left of your screen, next to the **Proposal** ribbon.

Open the Main Menu to create new items or exit ProPricer.



You can also use the Navigation Pane, instead of the Main Menu, to create new items.

Navigation Pane

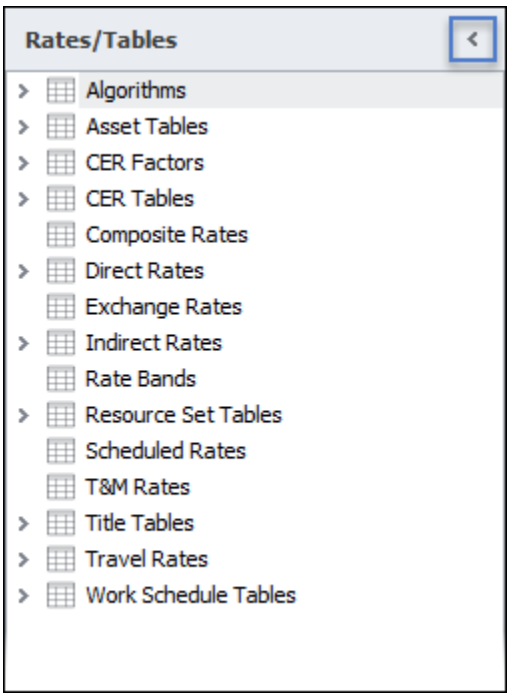
The Navigation Pane stores specific ProPricer data. It contains the following buttons:

- Comparison Projects/Proposals
- Rates/Tables
- Libraries
- Material
- Proposal Templates

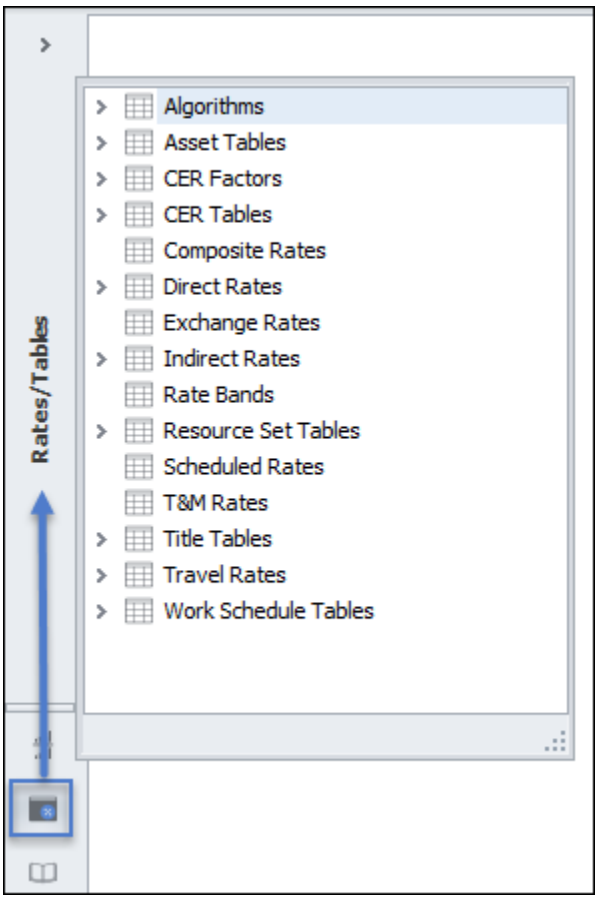
Folders in the Navigation Pane can contain subordinate items. Expand a folder to show the items in it.

Right-clicking an item in the Navigation Pane opens a shortcut where you can choose commands to work with the selected item. Some additional commands for proposals, templates, and tables allow you to create, copy, or delete items and folders, as well as view their properties. If you need to move an item to a different folder, there is a right-click command for that as well.

To provide more screen space for the maintenance and input grids, you can collapse the Navigation Pane by clicking the left arrow located at the top.

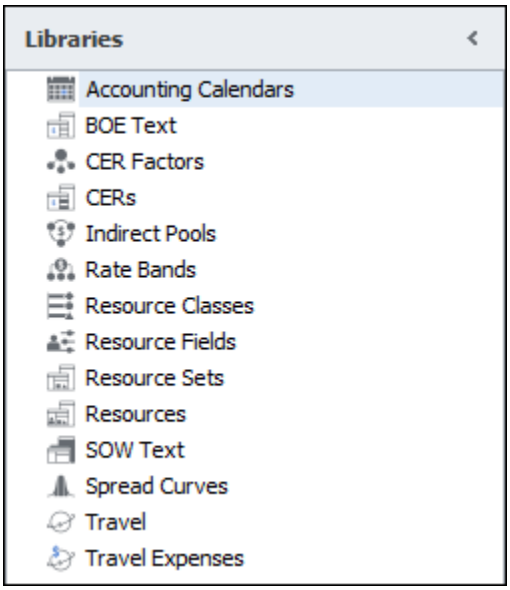


The name of the button will appear along the left side of the Navigation Pane. Click the name to see the contents.


Rates/Tables
Algorithms
Asset Tables
CER Factors
CER Tables
Composite Rates
Direct Rates
Exchange Rates
Indirect Rates
Rate Bands
Resource Set Tables
Scheduled Rates
T&M Rates
Title Tables
Travel Rates
Work Schedule Tables

Libraries Section

The **Libraries** section of the Navigation Pane provides access to the individual libraries that contain the global data you use in your proposals.



The individual libraries include:

- Accounting Calendars
- BOE Text
- CER Factors
- CERs
- Indirect Pools
- Rate Bands
- Resource Classes
- Resource Fields
- Resource Sets
- Resources
- SOW Text

- Spread Curves
- Travel
- Travel Expenses

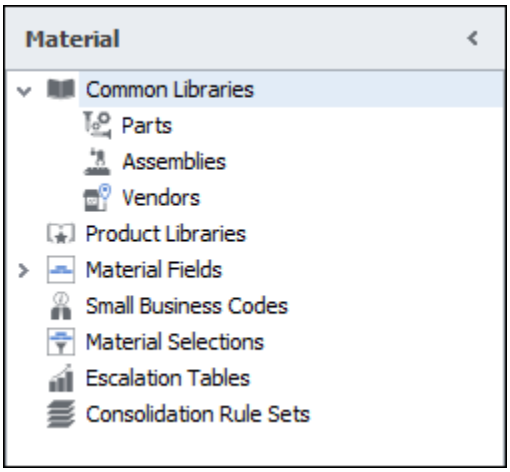
Double-click a library to open it. In most libraries, you can assign access tags to individual items.

In the Navigation Pane, use the incremental search function to find a specific item. Place the cursor anywhere in the section and start typing the name of the item you want to find. ProPricer will select the item that matches the text typed.

Note: Your ProPricer installation includes the ProPricer Import/Export Tool. It works with most types of data in your proposals, tables, and global libraries.

Material Section

The **Material** section of the Navigation Pane provides access to everything related to materials.



The items include:

- Common and Product Libraries
  - Parts Library
  - Assemblies Library
  - Vendor Library
- Material Fields
- Small Business Codes
- Material Selections
- Escalation Tables
- Consolidation Rule Sets

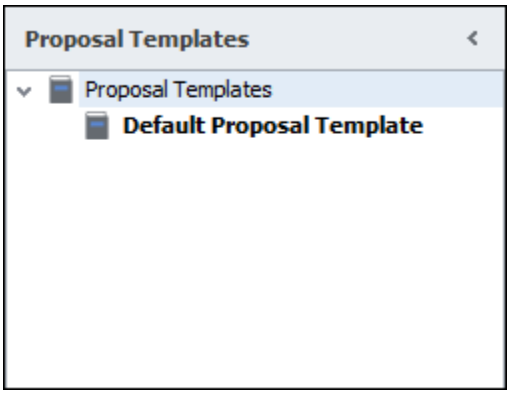
Right-click an item to perform different actions. If you right-click a product or an escalation table, you can assign access tags to it. You can also assign tags to individual items in the Parts Library, Assemblies Library, and Vendor Library.

In the Navigation Pane, use the incremental search function to find a specific item. Place the cursor anywhere in the section and start typing the name of the item you want to find. ProPricer will select the item that matches the text typed.

Note: Your ProPricer installation includes the ProPricer Import/Export Tool. It works with most types of data in your proposals, tables, and global libraries.

Proposal Templates Section

The **Proposal Templates** section of the Navigation Pane is for managing the proposal templates in your system. It has one default template that cannot be deleted. indicates an unlocked template, and indicates a locked one.



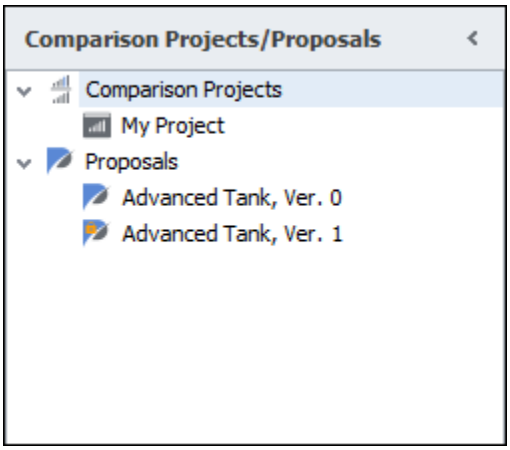
Double-click the **Proposal Templates** folder to open the Proposal Template List. Selecting a template and pressing **Alt+Enter** opens its properties.

Right-click a proposal template or folder to assign access tags and perform several other actions.

In the Navigation Pane, use the incremental search function to find a specific item. Place the cursor anywhere in the section and start typing the name of the item you want to find. ProPricer will select the item that matches the text typed.

Comparison Projects/Proposals Section

The **Comparison Projects/Proposals** section of the Navigation Pane provides access to your projects and proposals. indicates an unlocked proposal, and indicates a locked one.



Double-click the **Comparison Projects** or **Proposals** folder to open the respective list, which shows all the projects and proposals in your system. Double-click a project or proposal to open it. Selecting a proposal or project and pressing **Alt+Enter** opens its properties.

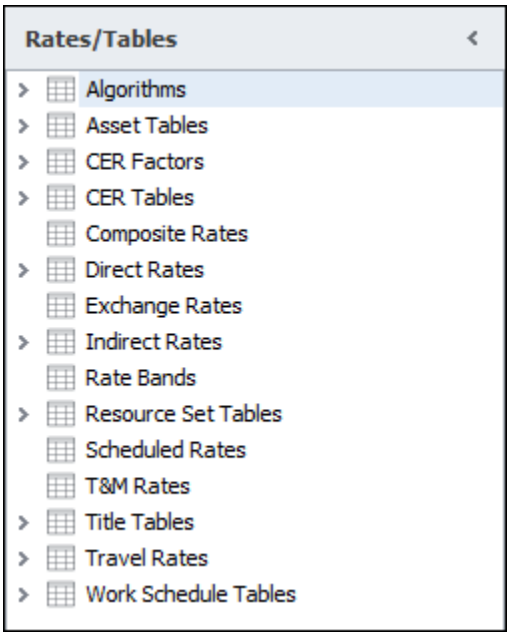
Right-click a proposal or folder to assign access tags and perform several other actions.

In the Navigation Pane, use the incremental search function to find a specific item. Place the cursor anywhere in the section and start typing the name of the item you want to find. ProPricer will select the item that matches the text typed.

Note: Your ProPricer installation includes the ProPricer Import/Export Tool. It works with most types of data in your proposals, tables, and global libraries.

Rates/Tables Section

The **Rates/Tables** section of the Navigation Pane provides access to the tables in ProPricer.



The tables include:

- Algorithms
- Asset Tables
- CER Factor Tables
- CER Tables
- Composite Rate Tables
- Direct Rate Tables
- Exchange Rate Tables
- Indirect Rate Tables
- Rate Band Tables
- Resource Set Tables

- Scheduled Rate Tables
- T&M Rate Tables
- Title Tables
- Travel Rate Tables
- Work Schedule Tables

Double-click a table's folder to view a list of all the tables in the folder. Double-click a table to open the maintenance grid.

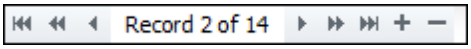
Right-click a table or folder to assign access tags and perform several other actions.

In the Navigation Pane, use the incremental search function to find a specific item. Place the cursor anywhere in the section and start typing the name of the item you want to find. ProPricer will select the item that matches the text typed.

Note: Your ProPricer installation includes the ProPricer Import/Export Tool. It works with most types of data in your proposals, tables, and global libraries.

Navigation Tools

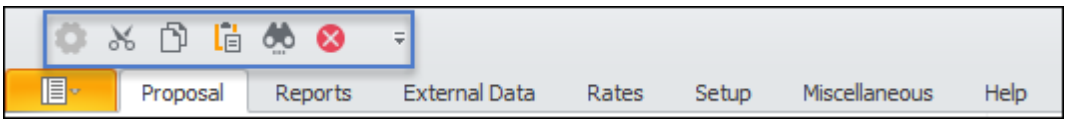
A set of buttons that allow you to quickly and easily locate an element in the table or grid, as well as add or delete items. The navigation tools and their functions include:



- goes to the first item
- goes to the previous block of items
- goes to the previous item
- Record 2 of 14 shows the current item
- goes to the next item
- goes to the next block of items
- goes to the last item
- click to enter a new item
- click to delete an item

Quick Access Toolbar

The Quick Access Toolbar is located above the tabs. This feature allows you to place the items you use most often in one, easy-to-access place. It contains six default icons: Properties, Cut, Copy, Paste, Find Material, and Exit. The Cut, Copy, and Paste icons cannot be removed.



Add an Item to the Quick Access Toolbar

1. Click the name of a ribbon. (In the following screenshot, we clicked the **Help** ribbon.)
2. Right-click an icon in a group (we selected the **Contents and Index** icon), and then click **Add to Quick Access Toolbar**.

Note: Adding a command to the Quick Access Toolbar does not remove it from its respective page on the ribbon.

Remove an Item from the Quick Access Toolbar

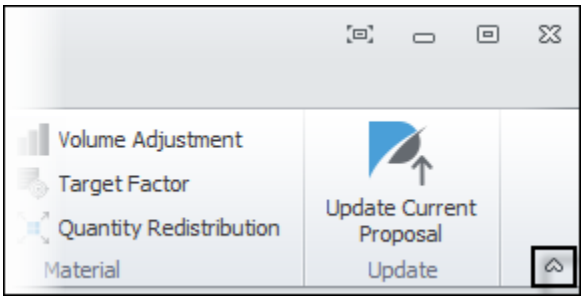
Right-click the icon you want to remove, and then click **Remove from Quick Access Toolbar** on the shortcut menu.

Ribbons

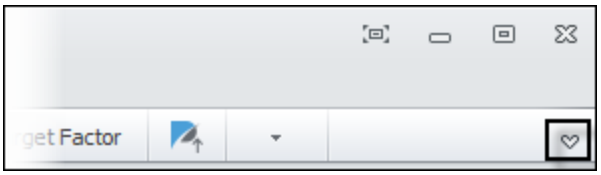
The following ribbons are available above your Workspace:

- Algorithm Edit
- Algorithm Test
- Batch Report Process
- Batch Report Setup
- External Data
- Help
- Miscellaneous
- Print Preview
- Proposal
- Rates
- Report Design
- Report Preview
- Reports
- Setup

To provide more screen space for the maintenance and input grids, you can collapse the ribbons by clicking the arrow located at the top right-hand corner.

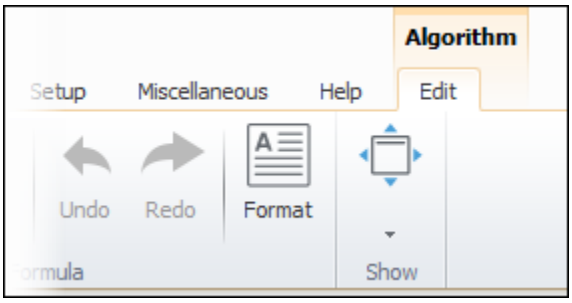


To expand the ribbons, click the arrow again.


get Factor

Algorithm Edit Ribbon

The **Algorithm Edit** ribbon appears after opening an Algorithm.



There are three groups of buttons: **Algorithm**, **Formula**, and **Show**.

Algorithm

Test

Test the Algorithm. The **Edit** ribbon will change to the **Test** ribbon.

Save

Save the Algorithm to a .ppax file. To use the Algorithm in proposals, you must publish it after saving.

Save As

Save the Algorithm to a .ppax file with a specific file name.

Publish

Add the Algorithm to your database.

Formula

Cut

Remove selected text. The button is disabled unless you are working in the Formula section of the Algorithm.

Copy

Make a duplicate record of selected text. The button is disabled unless you are working in the Formula section of the Algorithm.

Paste

Insert copied text. The button is disabled unless you are working in the Formula section of the Algorithm.

Undo

Repeal the most recent action performed. The button is disabled unless you are working in the Formula section of the Algorithm.

Redo

Perform the most recent action that was undone. The button is disabled unless you are working in the Formula section of the Algorithm.

Format

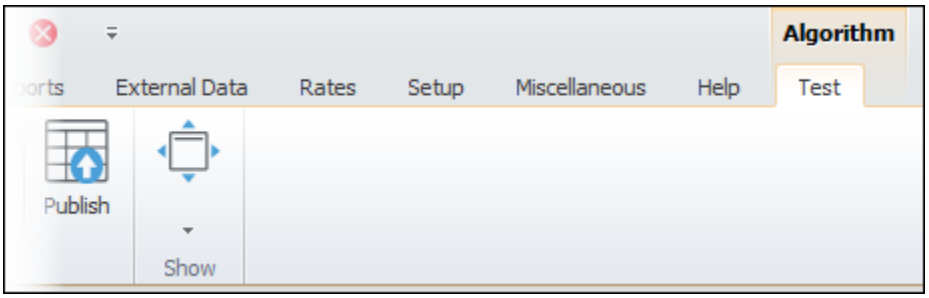
Correct any formatting errors, such as extra spaces, lines, indents, etc.

Show

The **Show** button displays the Elements, COM Definitions, Total Definitions, and Errors.

Algorithm Test Ribbon

After clicking the **Test** button on the **Algorithm Edit** ribbon, it becomes the **Algorithm Test** ribbon.



There are two groups of buttons on this ribbon: **Algorithm** and **Show**.

Algorithm

Edit

Open the maintenance grid. The **Test** ribbon will change to the **Edit** ribbon.

Save

Save the Algorithm to a file.

Save As

Click to save the Algorithm with a different name.

Publish

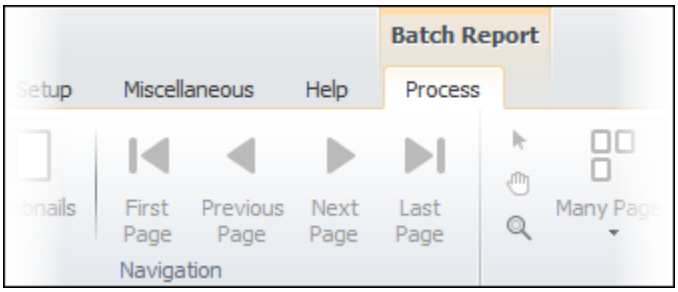
Click to incorporate the changes in the database.

Show

The **Show** button displays the Elements, COM Definitions, Total Definitions, and Errors.

Batch Report Process Ribbon

The **Batch Report Process** ribbon appears after running a batch report.



There are six groups of buttons on this ribbon: **Batch Report**, **Print**, **Navigation**, **Zoom**, **Page Background**, and **Export**.

Batch Report

Process

Click to open a submenu containing the **Process** and **Process All** options. Click **Process** in the submenu to run the member reports that have the **Print** checkbox selected.

Process All

Click **Process All** in the **Process** submenu to run all the member reports, regardless of the **Print** checkbox is selected or not.

Restore Defaults

Reset all Batch Options to the default settings.

Save As

Open the **Batch Report Properties** dialog box to save a new batch report in the Report List with a custom name, description, and category.

Edit

Return to the **Batch Report Setup** ribbon.

Print

Print

Open the **Print** dialog box.

Quick Print

Print the report without opening the **Print** dialog box.

Navigation

Find

Search for specific text in the report.

First Page

Go to the first page.

Previous Page

Go to the previous page.

Next Page

Go to the next page.

Last Page

Go to the last page.

Zoom

Mouse Pointer

Show the mouse pointer.

Hand Tool

Manually scroll through the report.

Magnifier

Click to activate. Click once on the report to make a single page completely visible. Click the report another time to zoom it to 100% of the normal size.

Many Pages

Select the number of pages you want to simultaneously view.

Zoom Out

See more of the page at a reduced size.

Zoom

Select the zoom level you want to use.

Zoom In

See a closer view of the page.

Page Background

Page Color

Add a background color to the report.

Watermark

Add a watermark to the report.

Export

Export To

Select how you want to export the report.

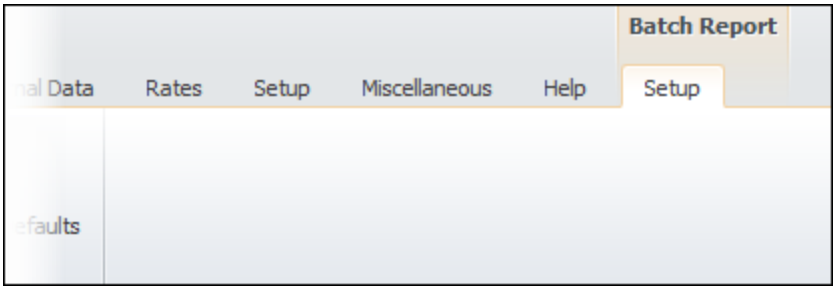
E-Mail As

Select how you want to email the report.

Batch Report Setup Ribbon

After clicking the **New Batch Report** button on the **Reports** ribbon, the **Batch Report Setup** ribbon appears.

It also appears after selecting an existing batch report in the Report List, and then clicking the **Edit** button on the **Reports** ribbon.



Save

Save the report.

Save As

Save the report with a different name.

Run

Open the report options.

Export

Export the report.

New

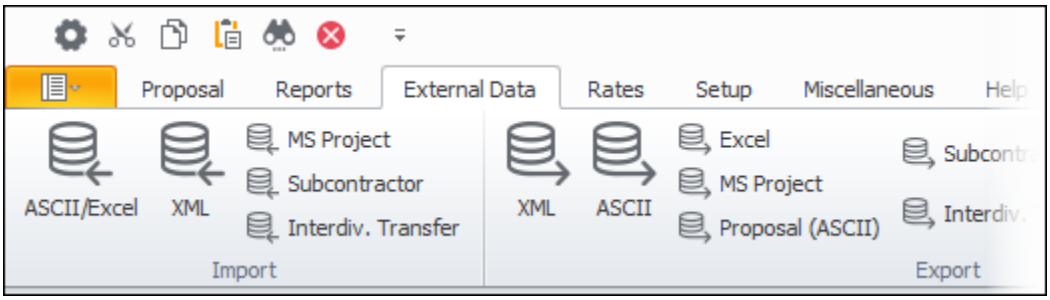
Create a new batch report.

Restore Defaults

Click to restore all the default settings.

External Data Ribbon

The **External Data** ribbon is for exporting data out of ProPricer and bringing data into ProPricer.



There are five groups of buttons: **Import**, **Export**, **Tools**, **Archive**, and **Restore**.

Import

- ASCII/Excel
- Interdiv. Transfer
- MS Project
- Open Plan
- Subcontractor
- XML

Export

- ASCII
- Excel
- Interdiv. Transfer
- MS Project

- Open Plan
- Prepare for Contractor
- Proposal (ASCII)
- Subcontractor
- XML

Tools

- ProPricer Import/Export

Archive

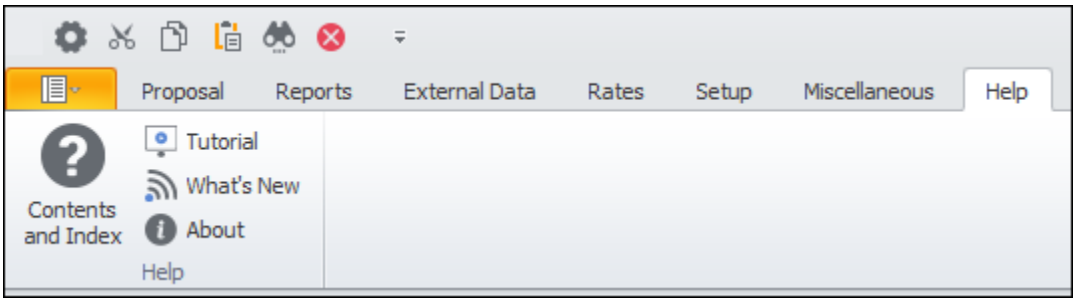
- Global
- Proposal

Restore

- Global
- Proposal

Help Ribbon

The **Help** ribbon contains assistance-related options, as well as information regarding the program and enhancements.



Contents and Index

View and search all Help topics.

Tutorial

Learn the basics of ProPricer.

What's New

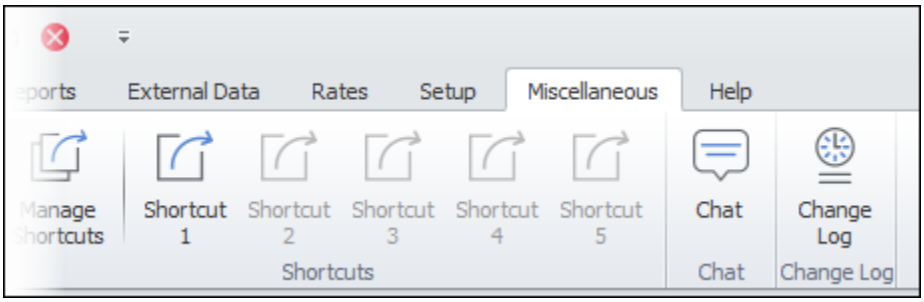
See the latest ProPricer features, updates, and upcoming features in the ProPricer Bulletin.

About

View general information about your ProPricer installation and your current session in the program.

Miscellaneous Ribbon

The **Miscellaneous** ribbon provides optional features that can enhance your ProPricer experience.



There are five groups of buttons: **Recycling**, **Auto-Archiving**, **Shortcuts**, **Chat**, and **Change Log**.

Recycling

The **Recycle Bin** button allows you to view, restore, save, and permanently remove items that were deleted in ProPricer.

Auto-Archiving

The **Auto-Archiving** group allows you to set up and review automatic proposal archiving jobs.

Archive Job Definitions

Define jobs with proposal selection criteria and data handling options.

Archive Job Logs

View a detailed record of each job that has been executed.

Shortcuts

The **Shortcuts** group allows you to start five other programs (also called applications) on your computer without exiting ProPricer.

Manage Shortcuts

Select, rearrange, and name your shortcuts.

Program Shortcuts

Run a program that is installed on your computer. The name that appears under each button is determined by the settings in **Manage Shortcuts**.

Chat

The **Chat** group allows you to communicate with other ProPricer users in your system. It also provides access to the Ask Dela feature.

Chat

Send messages to other users, and view messages you have received.

Ask Dela

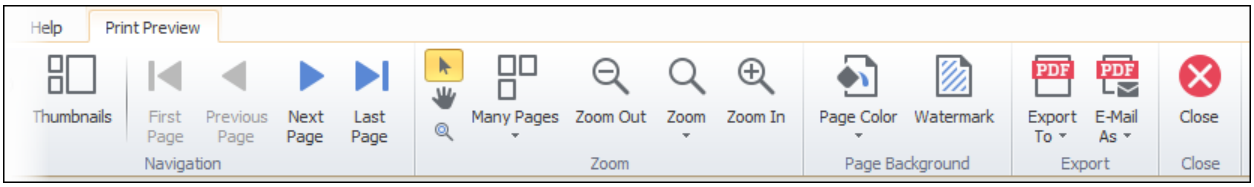
Send questions about the ProPricer application to the Ask Dela digital AI assistant. Responses from Ask Dela are immediate.

Change Log

The **Change Log** button allows you to see the events that have occurred in ProPricer at the system level.

Print Preview Ribbon

The **Print Preview** ribbon appears after right-clicking any grid and selecting **Grid Data > Print Preview**. To close the print preview of a grid document, click the red **Close** button on the right side of the ribbon, or click the **X** on the document tab.



There are six groups of buttons: **Print**, **Page Setup**, **Navigation**, **Zoom**, **Page Background**, **Export**, and **Close**.

Print

Print

Open the **Print** dialog box.

Quick Print

Print the grid document without opening the **Print** dialog box.

Options

Open the **Print Options** dialog box.

Page Setup

Header/Footer

Open the **Header/Footer** dialog box. You can add information such as page numbers here.

Scale

Stretch or shrink the grid document.

Margins

Change the margins of the grid document.

Orientation

Change the default orientation of the grid document.

Size

Select the size of the paper you want to use.

Navigation

Find

Search for specific text in the grid document.

Thumbnails

Show or hide the **Thumbnails** section. Use thumbnails to quickly navigate through the grid document.

First Page

Go to the first page.

Previous Page

Go to the previous page.

Next Page

Go to the next page.

Last Page

Go to the last page.

Zoom

Mouse Pointer

Show the mouse pointer.

Hand Tool

Manually scroll through the grid document.

Magnifier

Click to activate. Click once on the grid document to make a single page completely visible. Click the document another time to zoom it to 100% of the normal size.

Many Pages

Select the number of pages you want to simultaneously view.

Zoom Out

See more of the page at a reduced size.

Zoom

Select the zoom level you want to use.

Zoom In

See a closer view of the page.

Page Background

Page Color

Add a background color to the grid document.

Watermark

Add a watermark to the grid document.

Export

Export To

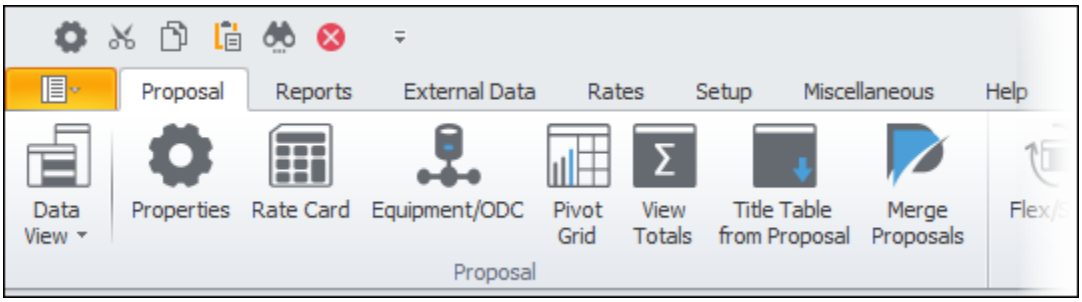
Select how you want to export the grid document.

E-Mail As

Select how you want to email the grid document.

Proposal Ribbon

The **Proposal** ribbon contains proposal management tools that allow you to perform pricing strategies, risk assessments, and set up key elements for cost reporting.



There are six groups of buttons: **Proposal** ,**What-Ifs**, **Selections**, **Overrides**, **Material**, **Update**.

*Note: Some of the features on the **Proposal** ribbon are also accessible from a right-click menu. For example, you can right-click a proposal in the Navigation Pane to select a proposal view or open its properties.*

Proposal

- Proposal Dashboard
- User Dashboard
- Data View
- Task View
- Resource View
- Activity View
- Travel View
- SOW View
- BOE View

- Material View
- CER View
- Resource Set View
- Formula View
- Allocation View
- Three-Point Estimating View
- Summary View
- Properties
- Rate Card
- Equipment/ODC
- Pivot Grid
- View Totals
- Title Table from Proposal
- Merge Proposals

What-Ifs

- Flex/Shift
- Resource Changes
- Target Pricing
- Resource Switching
- Field Editing (task)
- Field Editing (resource)
- Travel Switching
- Resource Distribution

- What-Ifs Log

Selections

- Proposal Selection
- Task Selection
- Resource Selection

Overrides

- CER Factor Overrides
- Direct Rate Overrides
- Exchange Rate Overrides
- Indirect Rate Overrides
- Rate Band Overrides
- Scheduled Rate Overrides
- Travel Rate Overrides

Material

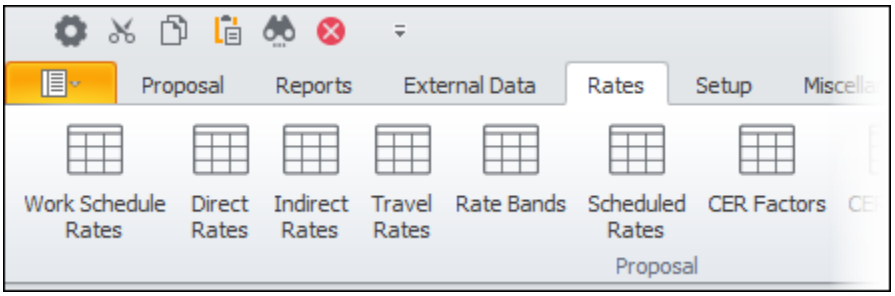
- Consolidate Material
- Field Editing (material)
- Volume Adjustment
- Quantity Redistribution

Update

- Update Current Proposal

Rates Ribbon

The **Rates** ribbon is for quickly viewing and working on the global rate tables used by your proposals.



There are three groups of buttons: **Proposal**, **Current Tables**, and **Adjustments**.

Proposal

When you click a button in the **Proposal** group, ProPricer opens the corresponding table assigned to the proposal selected in the Navigation Pane.

- Algorithm
- CER Factors
- CER Tables
- Direct Rates
- Exchange Rates
- Indirect Rates
- Rate Bands
- Resource Set Tables
- Scheduled Rates
- Travel Rates
- Work Schedule Rates

Current Tables

When you click a button in the **Current Tables** group, ProPricer opens the corresponding default table.

- Algorithms
- CER Factors
- Direct Rates
- Exchange Rates
- Scheduled Rates
- Travel Rates

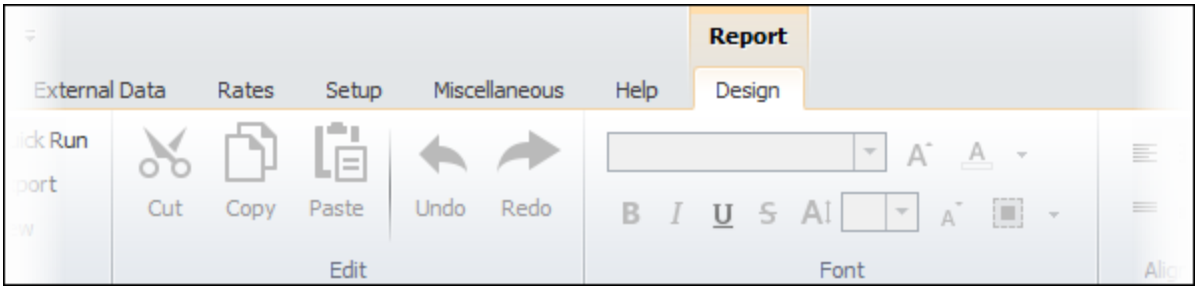
Adjustments

- Direct Rate Adjustments
- Indirect Rate Adjustments
- Rate Band Adjustments
- Rate Card Adjustments

Report Design Ribbon

After clicking the **New Report** button on the **Reports** ribbon, the **Report Design** ribbon appears.

It also appears after selecting an existing report in the Report List, and then clicking the **Edit** button on the **Reports** ribbon.



Report

- Save - Click to save the report.
- Save As - Click to save the report with a different name.
- Run - Click to run the report. This option includes selecting Report Options.
- Quick Run - Click to run the report with the default Report Options or the Report Options selected the last time you ran the report.
- Export - Click to export the report.
- New - Click to create a new report.

Edit

- Cut
- Copy
- Paste

- Undo
- Redo

Font

- The name of the font
- Increase font size
- Font color
- Bold
- Italic
- Underline
- Strikethrough
- Font size
- Decrease font size
- Background color

Alignment

- Align text left
- Align text center
- Align text right
- Align text top
- Align text middle
- Align text bottom

Border

- Border width
- Border color
- Border style
- Borders

Layout

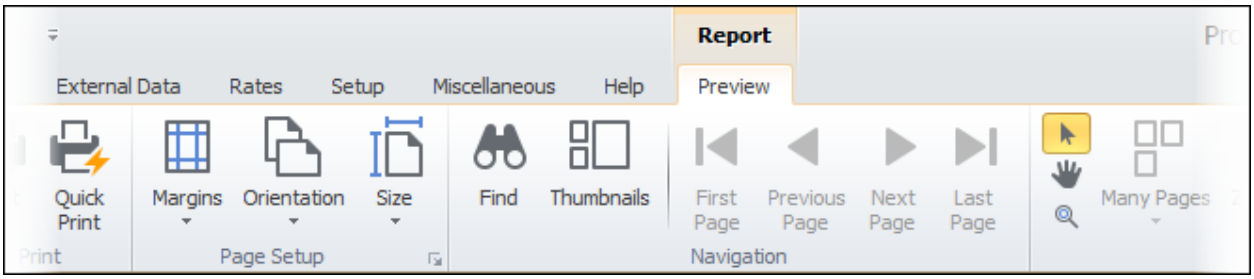
- Align fields left
- Align fields center
- Align fields right
- Align fields top
- Align fields middle
- Align fields bottom
- Same Width
- Same Height
- Same size
- Same format

Show

- The **Show** button displays the Fields, Parameters, Properties, Structure panes, and/or Rulers.

Report Preview Ribbon

The **Report Preview** ribbon appears after clicking the **Print to Screen** button when running a report. It contains options specific to the printed report.



There are seven groups of buttons: **Report**, **Print**, **Page Setup**, **Navigation**, **Zoom**, **Page Background**, and **Export**.

Report

Process

Run the report.

Save

Save the report.

Save As

Save the report after specifying a file name and/or location.

Edit

Edit the report.

Print

Print

Open the **Print** dialog box.

Quick Print

Print the report without opening the **Print** dialog box.

Page Setup

Margins

Change the margins of the report.

Orientation

Change the default orientation of the report.

Size

Select the size of the paper you want to use.

Navigation

Find

Search for specific text in the report.

Thumbnails

Show or hide the **Thumbnails** section. Use thumbnails to quickly navigate through the report.

First Page

Go to the first page.

Previous Page

Go to the previous page.

Next Page

Go to the next page.

Last Page

Go to the last page.

Zoom

Mouse Pointer

Show the mouse pointer.

Hand Tool

Manually scroll through the report.

Magnifier

Click to activate. Click once on the report to make a single page completely visible. Click the report another time to zoom it to 100% of the normal size.

Many Pages

Select the number of pages you want to simultaneously view.

Zoom Out

See more of the page at a reduced size.

Zoom

Select the zoom level you want to use.

Zoom In

See a closer view of the page.

Page Background

Page Color

Add a background color to the report.

Watermark

Add a watermark to the report.

Export

Export To

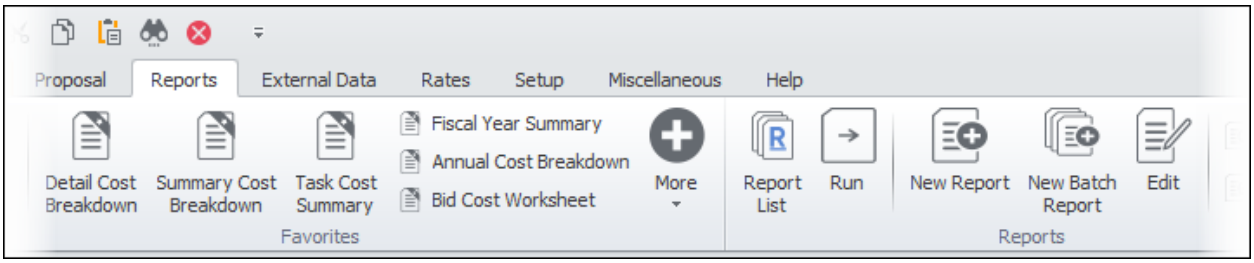
Select how you want to export the report.

E-Mail As

Select how you want to email the report.

Reports Ribbon

The Reports ribbon is for running, editing, and setting up built-in and custom reports.



There are three groups of buttons: **Favorites**, **Reports**, and **Tools**.

Favorites

- Manage Favorites - Select and sort your favorite reports.
- Favorite Report - Your first six favorite reports appear on the ribbon.
- More Favorites - Access a list of your nine remaining favorite reports.

Reports

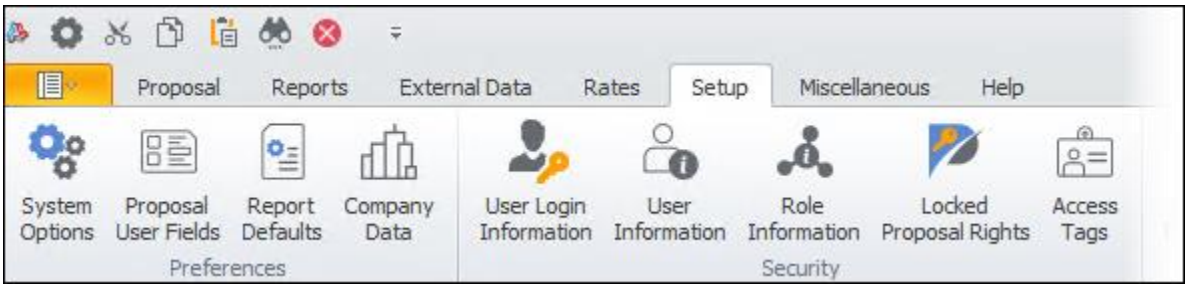
- Report List - Open the list of reports available.
- Run - Open the report options.
- New Report
- New Batch Report
- Edit
- Import
- Export

Tools

- Resource Tables
- Audit Report

Setup Ribbon

The **Setup** ribbon allows you to change system-level and user settings.



There are four groups of buttons: **Preferences**, **Security**, **User**, and **Skins**.

Preferences

- System Options
- Proposal User Fields
- Report Defaults
- Company Data
- Consolidation Rule Sets

Security

- User Login Information
- User Information
- Role Information
- Locked Proposal Rights
- Access Tags

User

- Change Password
- Dashboard
- Preferences

Skins

The **Skins** group lets you customize the look and feel of ProPricer. Click the Up or Down arrow until you find the skin you want, or click the drop-down button to see a larger example of the skin with its name. You can also select a different color palette for some skins.

Search

The Proposals, Rate/Tables, Libraries and Material sections in the Navigation Pane have an incremental search function that allows you to find a specific proposal, table, or library. Place the cursor anywhere in the section and start typing the name of the item you want to find. ProPricer will select the item that matches the text typed. If the item you are looking for is within a folder, the folder will expand automatically.

Set the System Period

ProPricer sets a system period of 30 years when you install it. However, you can change the Start Year of the system, and you can change the total number of years the system period should cover.

1. On the **Setup** ribbon, in the **Preferences group**, click **System Options**.
2. Click the **General** page.
3. In the **Base Year** field, type a new starting year for the period.
4. In the **Total Years** field, type the total number of years you want the system to cover.
5. Click **OK** to save the changes and close the dialog box, or **Apply** to save the changes, but leave the dialog box open.

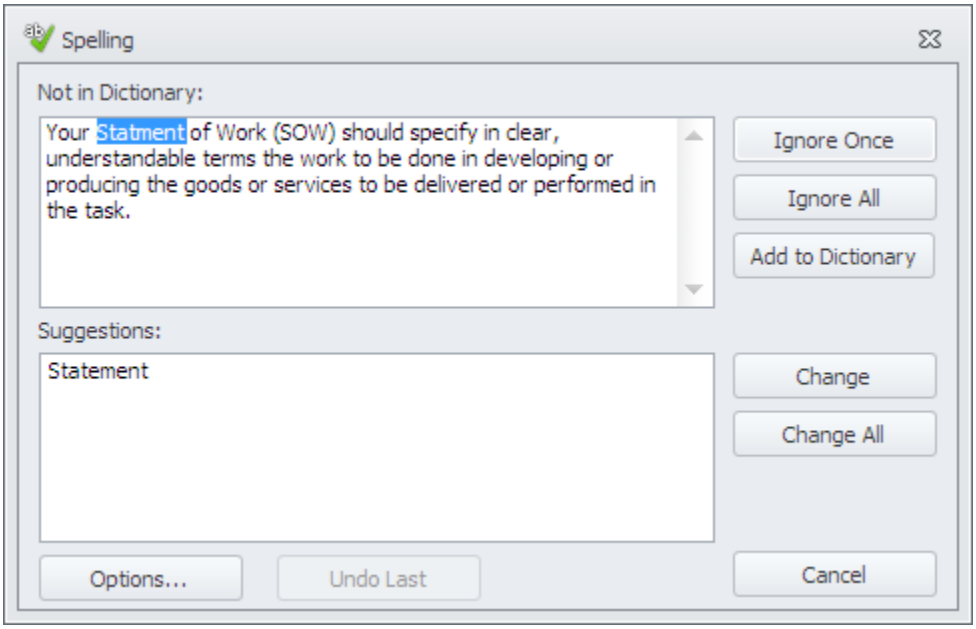
Skins

Skins allow you to change the appearance of ProPricer. There are several skins you can choose from to make working with our program more pleasant.

1. Click the **Setup** ribbon.
2. Do one of the following:
    - In the **Skins** group, click the Up/Down arrows until you find the skin you want.
    - Click the drop-down button to see a larger example of the skin with its name.
3. Select the skin you want.

Spelling Dialog Box

The **Spelling** dialog box appears when there are misspellings in the Text Area. It contains the following:



Not in Dictionary

This section highlights misspellings. Any word that is excluded from the system dictionary or custom dictionary is considered a misspelling.

Suggestions

This section provides a list of correctly spelled words that are similar to the highlighted text.

Ignore Once

Skip a single occurrence of the highlighted text. The spelling checker will continue to search the Text Area for every other instance of the misspelling, and you can decide to ignore or change each one.

Ignore All

Skip every occurrence of the highlighted text. The spelling checker will not search the Text Area for any other instance of the misspelling.

Add to Dictionary

Save the highlighted text as a correctly spelled word in the custom dictionary.

Change

Replace only the highlighted text with a selected word from the **Suggestions** section. You can also edit the text directly in the **Not in Dictionary** section, and then click **Change** to apply your correction.

Change All

Replace every occurrence of the highlighted text with a selected word from the **Suggestions** section. You can also edit the text directly in the **Not in Dictionary** section, and then click **Change All** to apply your correction.

Options

Open the **Spelling Options** dialog box.

Undo Last

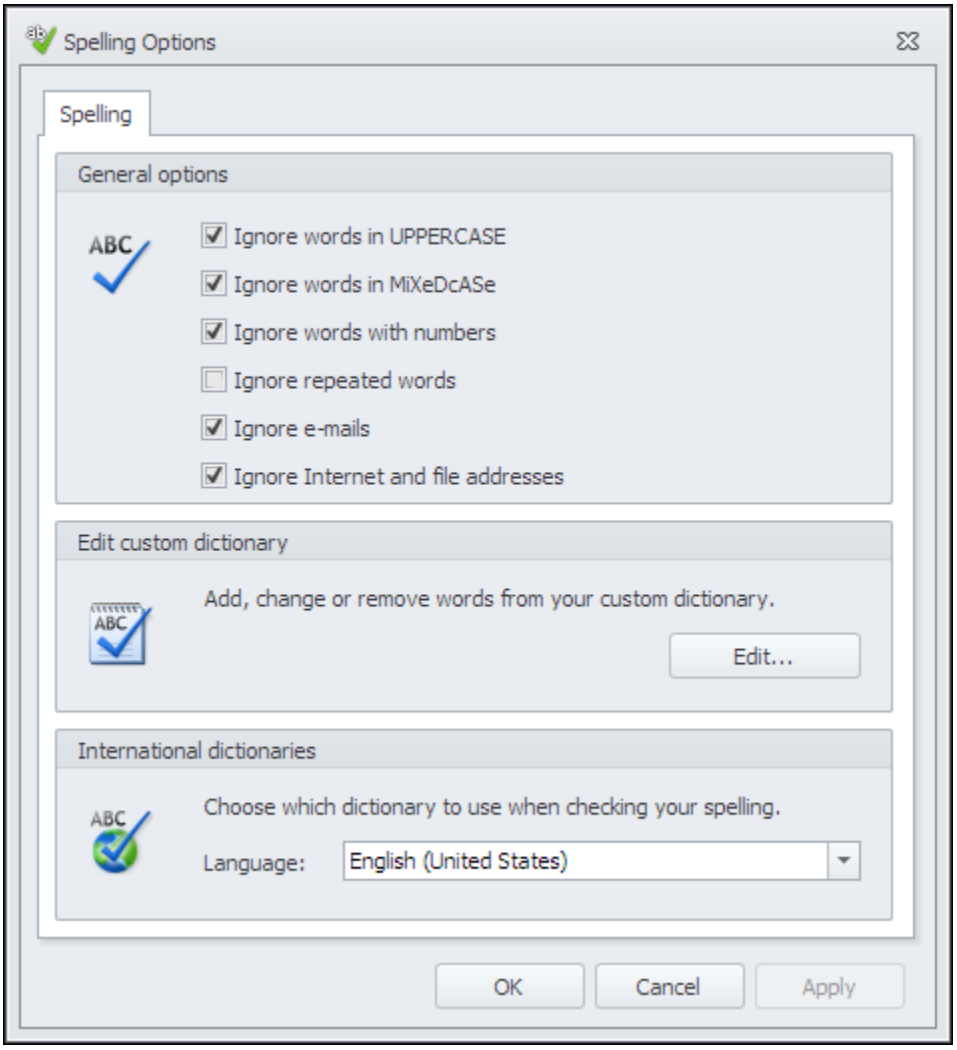
Discard your most recent change and replace it with the original highlighted text. This option is only available when another misspelling is found after you make a change.

Cancel/Close

Click **Cancel** to end the spelling check operation. If you change or ignore a misspelling, click **Close** to exit the dialog box.

Spelling Options Dialog Box

The **Spelling Options** dialog box contains the following:



General options

Select and clear the checkboxes to specify the types of text that the spelling checker evaluates for errors.

Edit custom dictionary

Click the **Edit** button to open your custom dictionary of saved words.

International dictionaries

Select your preferred language from the drop-down menu. This affects the evaluation of spelling variations such as *labor* and *labour*.

OK

Save your changes and close the dialog box.

Cancel

Discard your changes and close the dialog box.

Apply

Save your changes and keep the dialog box open.

A wildcard is a special character in a string of text that represents one or more other characters. In ProPricer, the asterisk *, question mark ?, and caret ^ are wildcards, and they have different functions.

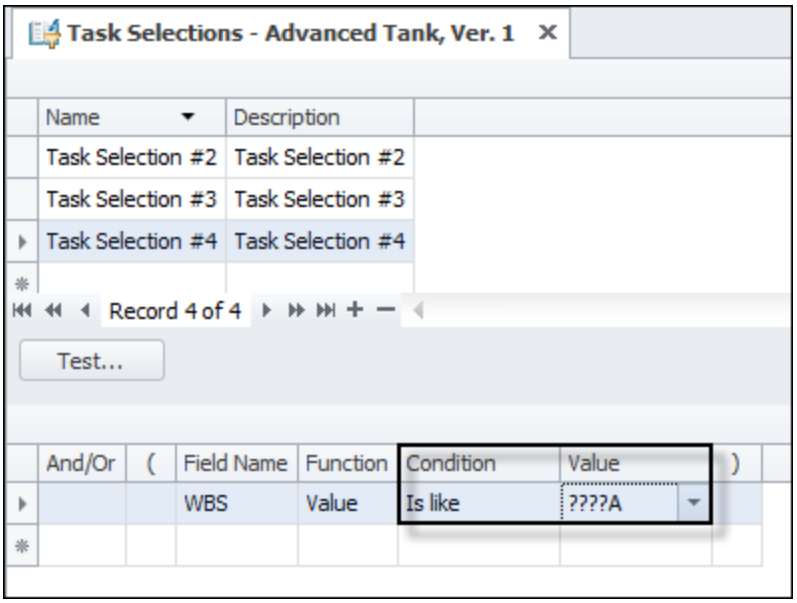
- An asterisk * represents continuous characters in a string.
- A question mark *?* represents a single character in a string.
- A caret ^ tells ProPricer to replace the characters that follow it.

Example: Wildcards in a Selection or Consolidation Rule

You can use wildcards in a selection criterion to look for similar values instead of exact values. To do so, the criterion's condition must be set to *Is like*. Wildcards work the same way for material fields in consolidation rule sets, but there is no need for a condition when you set up a rule.

If you were to enter *A** as a value, then that would include all values that start with the letter *A*, regardless of how long the value is. If you were to enter *????A* as the value, then that would include all values which are five characters long and end with the letter *A*.

For example, this task selection that is based on the *WBS* summary field uses the *Is like* condition:



The task selection will look for any task with a *WBS* summary field value that is like *????A*. When the selection is used in a report, such as Ad Hoc Cost Breakdown, the report only shows task information from specific parts of the WBS. Notice how all WBS values in the report have five characters (including periods) and end with an *A*:

Proposal: Advanced Tank, Ver. 1 | **Executive Business Services, Inc.** | **Proposal Number:** 2015 001

RFQ Ref.: AA-2015 | **Ad Hoc Cost Breakdown Report** | **Date:** 4/25/2019

Proposal Manager: C. Layton | **Time:** 2:41:34 PM

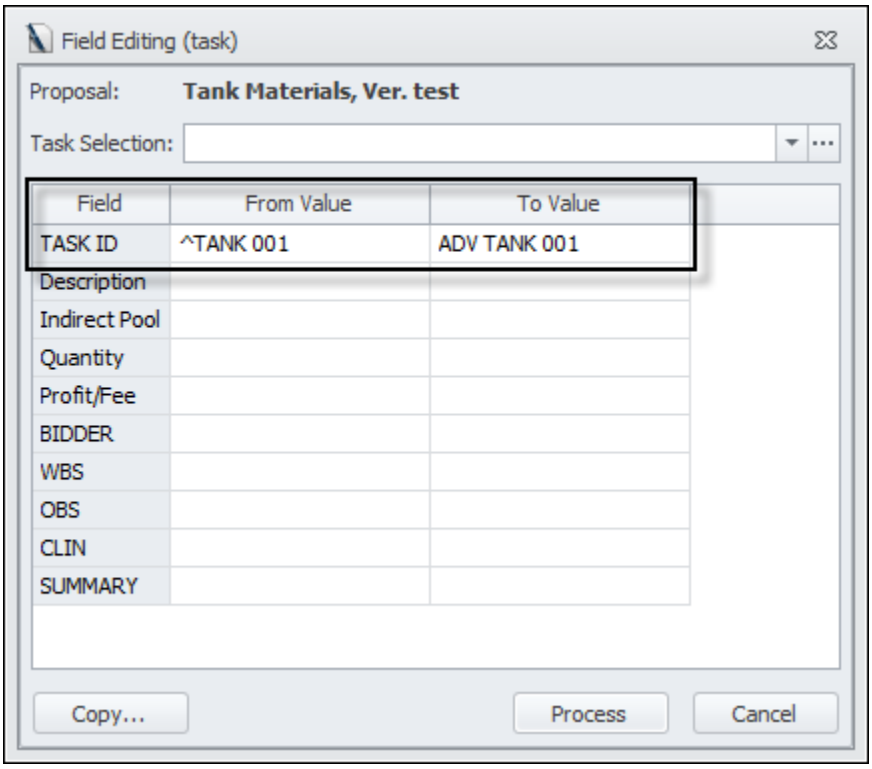
Rate Tables: Tank Directs | Tank Indirects | **Page:** 1

Task Selection: Task Selection #4 | **Full Disclosure** | **Period of Performance:** 01/2017 - 03/2019

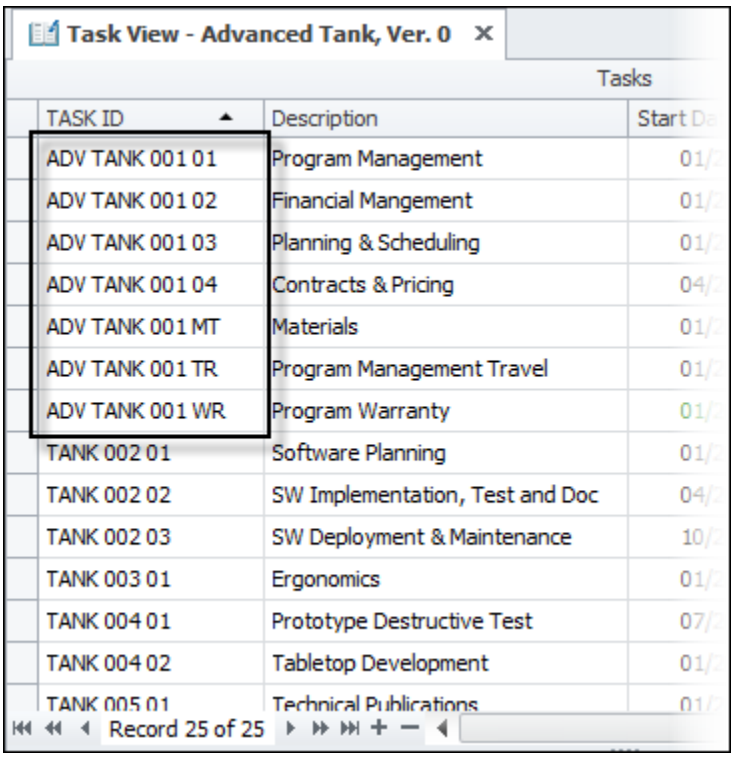
WBS	Description	Hours	Average Rate	Cost	Direct Cost
1.1.A	Project Management	64,000	31.73	2,115,990	2,115,990
1.2.A	Financial Management	25,200	29.68	778,057	778,057
1.3.A	Code Development	11,520	27.64	399,893	399,893
1.4.A	CAD-CAM	188,853	20.82	4,247,300	4,247,300
2.3.A	Technical Publications	90,000	22.88	2,159,512	2,159,512
3.1.A	Mockup	273,600	22.66	6,500,215	6,500,215
4.1.A	Test to failure	145,440	32.55	4,894,710	4,894,710
4.2.A	Aging Test	145,440	32.55	4,894,710	4,894,710
TOTALS		944,053		25,990,388	25,990,388
Profit				29,500	
IntDiv Xfr @ Price				265,000	
Total Cost + Fee				26,284,888	
Warranty				2,944,396	
Total Price				29,229,284	

Example: Wildcards in a What-If

In the Field Editing (task) and Field Editing (resource) What-Ifs, use the caret ^ wildcard to replace the text in a field.

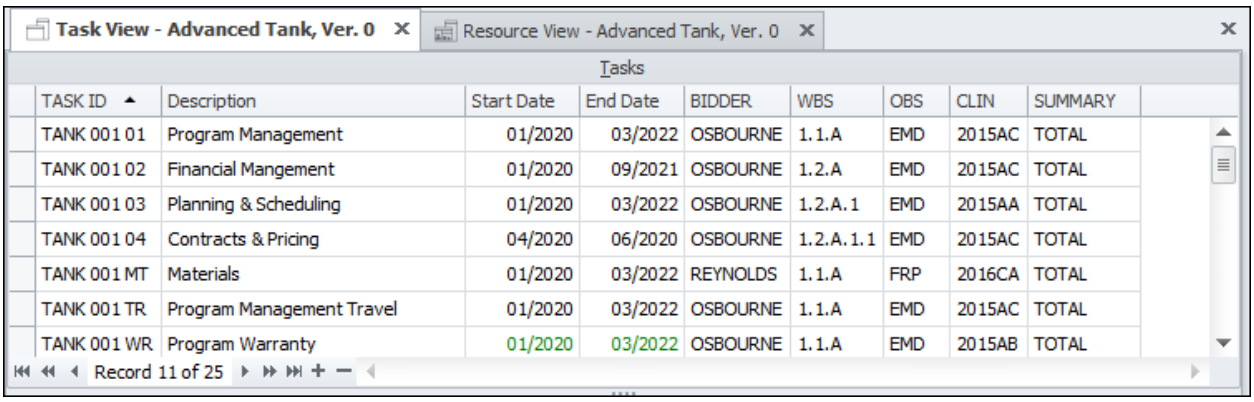


This is especially useful if you need to rename all tasks or a group of tasks at once.


Task View - Advanced Tank, Ver. 0
Tasks
TASK ID
Description
Start Da
ADV TANK 001 01
Program Management
01/
ADV TANK 001 02
Financial Mangement
01/
ADV TANK 001 03
Planning & Scheduling
01/
ADV TANK 001 04
Contracts & Pricing
04/
ADV TANK 001 MT
Materials
01/
ADV TANK 001 TR
Program Management Travel
01/
ADV TANK 001 WR
Program Warranty
01/
TANK 002 01
Software Planning
01/
TANK 002 02
SW Implementation, Test and Doc
04/
TANK 002 03
SW Deployment & Maintenance
10/
TANK 003 01
Ergonomics
01/
TANK 004 01
Prototype Destructive Test
07/
TANK 004 02
Tabletop Development
01/
TANK 005 01
Technical Publications
01/
Record 25 of 25

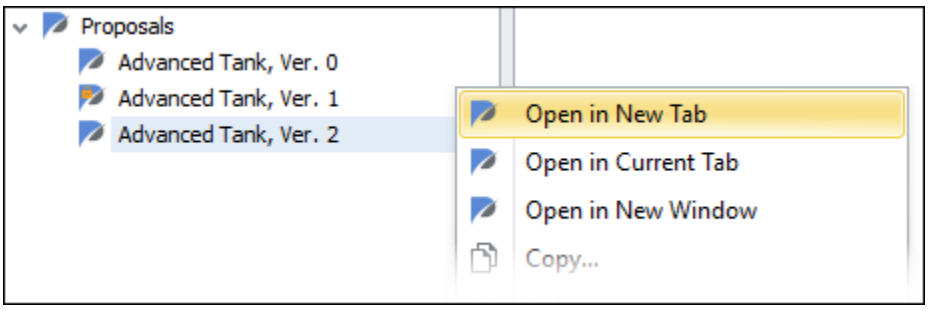
Workspace

The Workspace is the area to right of the Navigation Pane. It is where a proposal or maintenance grid of a table or library opens. When you open a proposal, for example, a tab will appear on the top of the Workspace. You can have various proposals or maintenance grids open at the same time. Bold letters indicate the active tab.



TASK ID	Description	Start Date	End Date	BIDDER	WBS	OBS	CLIN	SUMMARY
TANK 001 01	Program Management	01/2020	03/2022	OSBOURNE	1.1.A	EMD	2015AC	TOTAL
TANK 001 02	Financial Mangement	01/2020	09/2021	OSBOURNE	1.2.A	EMD	2015AC	TOTAL
TANK 001 03	Planning & Scheduling	01/2020	03/2022	OSBOURNE	1.2.A.1	EMD	2015AA	TOTAL
TANK 001 04	Contracts & Pricing	04/2020	06/2020	OSBOURNE	1.2.A.1.1	EMD	2015AC	TOTAL
TANK 001 MT	Materials	01/2020	03/2022	REYNOLDS	1.1.A	FRP	2016CA	TOTAL
TANK 001 TR	Program Management Travel	01/2020	03/2022	OSBOURNE	1.1.A	EMD	2015AC	TOTAL
TANK 001 WR	Program Warranty	01/2020	03/2022	OSBOURNE	1.1.A	EMD	2015AB	TOTAL

There are different ways you can open an item in the Workspace. Double-clicking the item will open it in a new tab. You can also right-click the item and select an option from the shortcut menu.

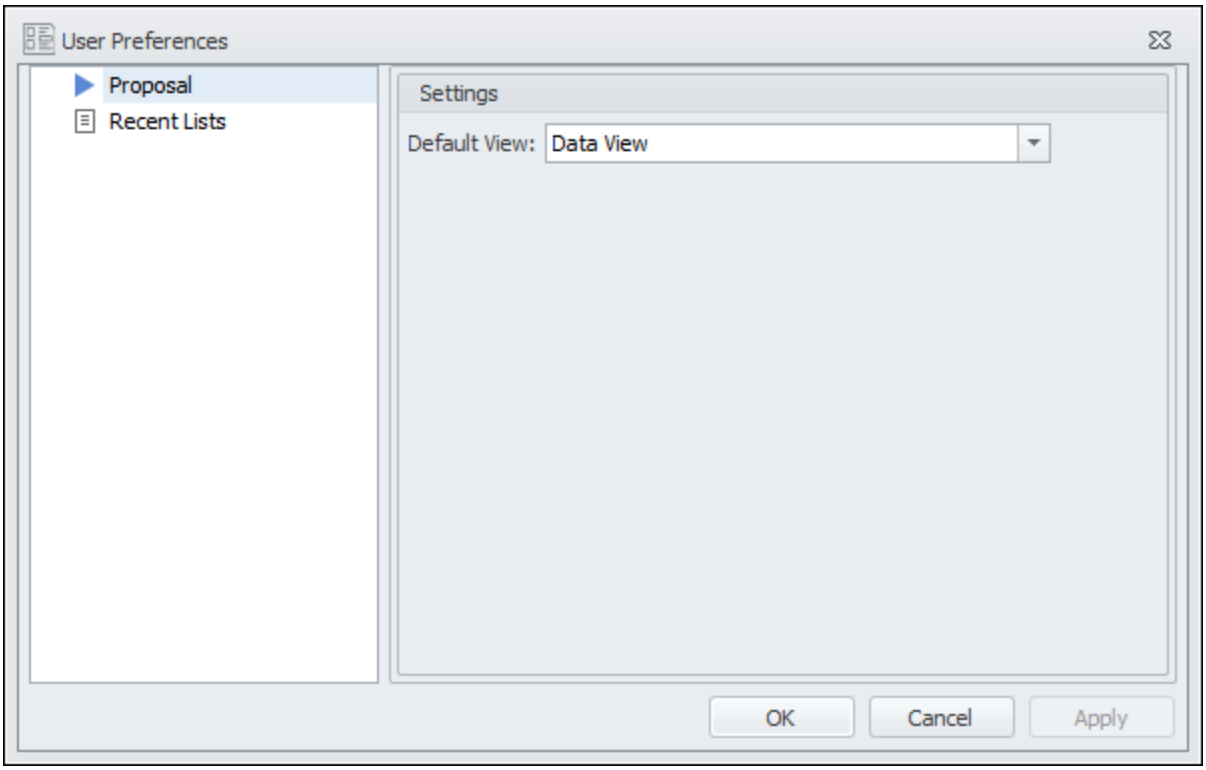


- **Open in New Tab** creates a new tab.
- **Open in Current Tab** replaces the item you have open.
- **Open in New Window** creates a detached window.

You can also split the Workspace horizontally and vertically.

User Preferences
Proposal Page

The Proposal page of the User Preferences controls your default proposal view.

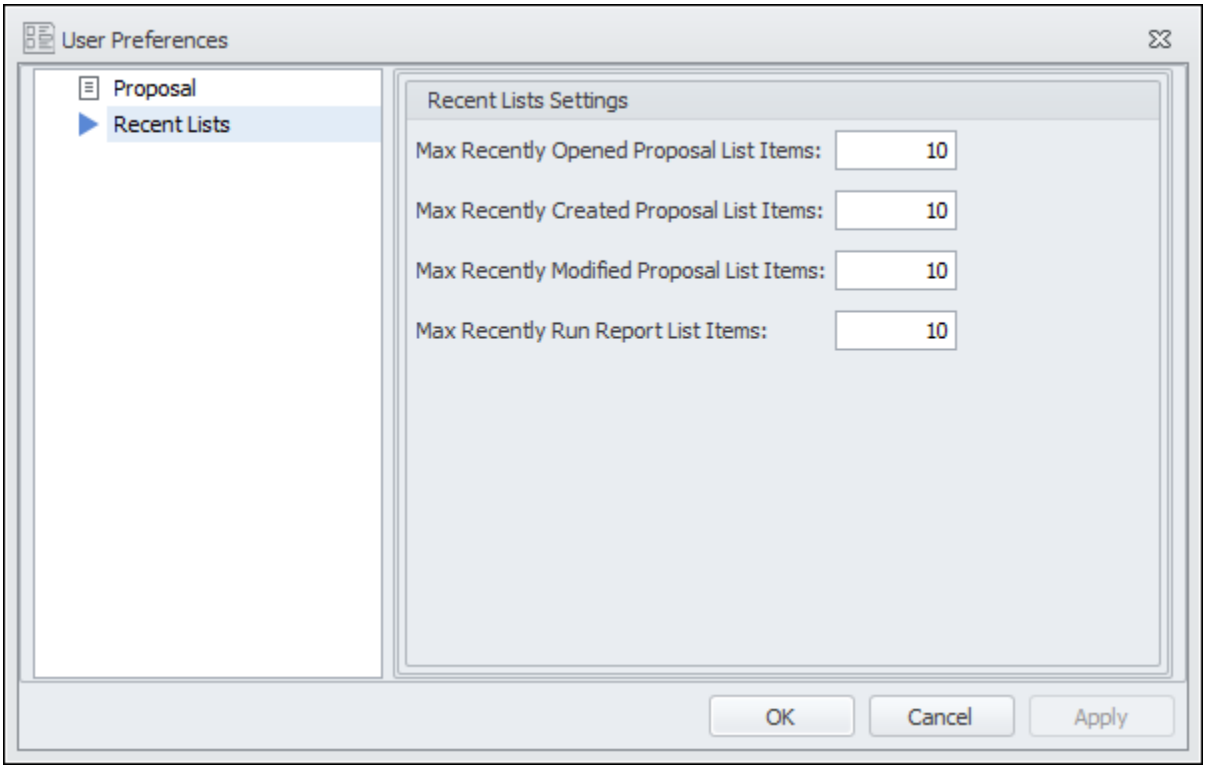


Default View

Select your default proposal view. The default view appears as a button on the Proposal ribbon, and it is used when you open a proposal from the Navigation Pane.

Recent Lists Page

The Recent Lists page of the User Preferences controls the lists of items in your User Dashboard.



Your User Dashboard has four lists related to the proposals and reports you have worked on recently:

- Recently Opened Proposals
- Recently Created Proposals
- Recently Modified Proposals
- Recently Run Reports

For each of these lists, you can set the maximum number of items to show.

Views
Activity View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Activity View shows the proposal's activities and how they spread resources throughout tasks. You can find the same information organized differently in Task View with the Activities tab selected.

Activity View is divided into two grids: Activity Input and Resource Input.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Activity Input

In this grid, you can view and edit existing activities and their related task information. You can also add new activities to tasks.

Activity ID

The name of the activity.

Activities

The description of the activity.

Start Date

The start date of the activity. The default for a new activity is the start date of the task.

End Date

The end date of the activity. The default for a new activity is the end date of the task.

TASK ID

The name of the task that the activity is in. It cannot be edited in Activity View.

Task Description

The explanation of the task. It cannot be edited in Activity View.

Summary Fields

Specific details about the task (for example, the person bidding the task, the WBS code, CLIN, etc.). They cannot be edited in Activity View.

Resource Input

This is the same grid found on the **Activities** tab of Task View. It shows how resources in existing activities are spread throughout tasks. You can edit the spread information of those resources, and you can add other resources to the activities.

For detailed descriptions of the columns in this grid, see the Activities Tab help topic.

*Note: You can do any of the following to quickly switch the timescale when the **Distribution** columns are shown in the grid:*

- *At the top of the grid, click the name of the timescale currently displayed, and then select an option.*
- *Right-click anywhere in the grid, go to **View** > **Timescale**, and then select an option.*
- *Press **Ctrl**+**T** to select the next option.*
- *Press **Ctrl**+**Shift**+**T** to select the previous option.*

- *Press **Alt+T** to open the **Timescale** menu, and then select an option.*

Allocation View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Allocation View shows the resource allocations and equipment/ODC allocations in a proposal. All data in this view is read-only. You can find the same information organized differently in Task View with the Allocations Tab selected.

Allocation View is divided into two grids: Resource Allocations and Resource Assignments.

Resource Allocations

This is the same grid found on the **Allocations** tab of Task View. It shows the resource allocations that have been added to the Proposal Properties.

For detailed descriptions of the columns in this grid, see the Allocations Tab help topic.

Resource Assignments

This grid shows how the selected allocation assigned resources to tasks.

TASK ID

The name of the task that the resource is assigned to.

Task Description

The explanation of the task.

Summary Fields

Specific details about the task (for example, the person bidding the task, the WBS code, CLIN, etc.).

Resource

The assigned resource.

Resource Fields

Additional information about the resource.

Indirect Pool

The indirect pool entered for the resource. This column is hidden by default.

Profit/Fee

The profit/fee entered for the resource. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource's assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Total Amount

The hours/units/cost allocated.

Distribution

The hours/units/cost allocated to the task for that month/quarter/year.

Months/Years

The hours/units/cost allocated to the task for that month/year.

BOE View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

BOE View allows you to quickly add and update basis of estimate text in a summary field, such as *WBS*, *CLIN*, *Bidder*, etc. The summary field that drives BOE View can be set on the Proposal Input page of the Proposal Properties.

While reviewing BOE text in this view, you can click the input tabs to see the task and resource data associated with a selected summary field value. The text will remain visible as you switch tabs and edit data.

The input tabs in BOE View have the same data as the ones in Task View. When applicable, the tabs in BOE View also show data to help identify tasks (for example, task names and descriptions). To learn more about the tabs and the information they contain, see the Task Input help topic.

The BOE View grid is read-only and contains the following columns:

Summary Field

The values of the summary field selected on the Proposal Input page of the Proposal Properties. BOE View organizes proposal data based on this summary field, and the column header reflects the field's name.

Description

The description of the summary field.

Start Date

The earliest start date of all tasks with the summary field value assigned to it.

End Date

The latest start date of all tasks with the summary field value assigned to it.

CER View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

CER View shows all the CERs in the proposal and the tasks they are in. You can find the same information organized differently in Task View with the CERs tab selected.

CER View, like the CERs tab of Task View, has two display modes: Data and Structure. Press **Ctrl**+**D**, or right-click a grid and go to **View** > **Display Mode**, to switch modes.

The information shown in CER View depends on the display mode. Data mode shows Proposal CERs and Task CERs with their base and derivative resources. Structure mode shows Task CERs and allows their structure to be modified, but it does not show Proposal CERs since they can only be modified in the Proposal Properties.

CER View is divided into three grids: CERs (Data)/CERs (Structure), Bases, and Derivative Resources.

*Note: Pasting copied text in input grids (**Ctrl**+**V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Display Mode: Data

CERs (Data)

TASK ID

The name of the task that the CER is in. It cannot be edited in CER View.

Task Description

The explanation of the task. It cannot be edited in CER View.

Summary Fields

Specific details about the task (for example, the person bidding the task, the WBS code, CLIN, etc.). They cannot be edited in CER View.

CER ID

A task-specific identifier for assigned CERs. The default ID matches the CER's name, but you can change it for Task CERs. For Proposal CERs, it cannot be edited. CER IDs are useful when you need multiple instances of a CER in a task.

CER

The name of the CER. You can enter other Task CERs.

Type

Indicates how the CER was added to a task. Task CERs are added on a task-by-task basis. Proposal CERs come from the Proposal Properties and are automatically added to all tasks.

Task Selection

The selection of tasks whose resources will be the base resources of the CER. When a CER is assigned to a summary task and a task selection is used, its name appears in this column.

Base Start Date

Used in conjunction with **Base End Date**, these two columns show the period that will be used for the base resources to calculate the input values of the derivative resources.

Base End Date

Used in conjunction with **Base Start Date**, these two columns show the period that will be used for the base resources to calculate the input values of the derivative resources.

Base Level

This determines whether the input values of the derivative resources will be based on hours only, direct cost, or an indirect element.

CER Factor

Displays the **CER Factor** entered for the CER. It allows you to apply different factors to the input values of the base resource and/or derivative element.

Base Amt. Cap

Displays the **Base Amt. Cap** entered for the CER. It allows you to limit the calculation of derivative resource input values when the base amount reaches the cap.

Cap Timescale

Displays the **Cap Timescale** entered for the CER. If there is a base amount cap, the timescale determines how it is applied.

Bases

This is the same grid found on the **CERs** tab of Task View. It shows the base resources entered for the CER.

For detailed descriptions of the columns in this grid, see the CERs Tab (Data) help topic.

Derivative Resources

This is the same grid found on the **CERs** tab of Task View. It shows the derivative resources entered for the CER.

For detailed descriptions of the columns in this grid, see the CERs Tab (Data) help topic.

Display Mode: Structure

CERs (Structure)

TASK ID

The name of the task that the CER is in. It cannot be edited in CER View.

Task Description

The explanation of the task. It cannot be edited in CER View.

Summary Fields

Specific details about the task (for example, the person bidding the task, the WBS code, CLIN, etc.). They cannot be edited in CER View.

Priority

The calculation order of the CERs. The order of Task CERs can be changed here in the right-click menu. The order of Proposal CERs can be changed in the Proposal Properties.

CER ID

A task-specific identifier for assigned CERs. The default ID matches the CER's name, but you can change it for Task CERs. For Proposal CERs, it cannot be edited. CER IDs are useful when you need multiple instances of a CER in a task.

CER

The name of the Task CER or Proposal CER. You can enter other Task CERs.

Task Selection

For summary tasks, this column shows the selection of tasks whose resources will be the base resources of the CER. Only resources from regular tasks can be used. Leave this field blank if you want to use the base resources from all the regular tasks in the proposal to calculate the input values of the derivative

resources. If no task selection exists, or the appropriate tasks are not included in an existing one, click the ellipsis (...) button to open the **Task Selections** grid and create or modify an existing one.

Since task selections can only be used in summary tasks, this column is blank for regular tasks.

Base Start Date

Used in conjunction with **Base End Date**, these two columns show the period that will be used for the base resources to calculate the input values of the derivative resources.

Base End Date

Used in conjunction with **Base Start Date**, these two columns show the period that will be used for the base resources to calculate the input values of the derivative resources.

Base Level

This determines whether the input values of the derivative resources will be based on hours only, direct cost, or an indirect element.

CER Factor

Displays the **CER Factor** entered for the CER in the proposal's CER Table. However, you can change it.

Base Amt. Cap

Displays the **Base Amt. Cap** entered for the CER in the proposal's CER Table. However, you can change it. It allows you to limit the calculation of derivative resource input values when the base amount reaches the cap.

Cap Timescale

Displays the **Cap Timescale** entered for the CER in the proposal's CER Table. However, you can change it. If there is a base amount cap, the timescale determines how it is applied.

Bases

This is the same grid found on the **CERs** tab of Task View. It shows the base resources entered for the CER.

For detailed descriptions of the columns in this grid, see the CERs Tab (Structure) help topic.

Derivative Resources

This is the same grid found on the **CERs** tab of Task View. It shows the derivative resources entered for the CER.

For detailed descriptions of the columns in this grid, see the CERs Tab (Structure) help topic.

Data View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Data View is ideal for streamlining your proposal review process. Initially, the default options provide a top-level perspective of the proposal with the data grouped by resource type. Selecting additional options instantly narrows the data down to any desired level of detail.

While working in Data View, you can edit the hours/units/cost values of resources that were added to the proposal directly. Once edited, the hours/units/cost will be proportionally redistributed in the spread period. If the original spread amount is zero, then an even distribution will be applied to your new amount.

Note: You can paste hours, units, and cost in Data View after copying the information from a spreadsheet. This is the fastest and most efficient way of editing a group of cells in the grid.

Options

The options in this panel determine what you see in the grid.

Timescale

Enter a timescale to break the data down by year, quarter, month, or phase. With no timescale, the data is summarized for the whole period of performance.

Data

Select the checkboxes to show the columns of data in the grid.

Show Indirect Analysis

Display columns for data related to indirect costs.

Show Direct Cost

Display the Direct Cost column.

Show Hours

Display the Hours column.

Show Units

Display the Units column.

Show Cost

Display the Cost column.

Show Totals

Display the Grand Total row at the bottom of the grid. This checkbox must be cleared before pasting spreadsheet data in the Hours, Units, and Cost columns.

Summary Field Groupings

Select a checkbox to group the data by that summary field. To show checkboxes for summary field descriptions, right-click anywhere in this section and select **Show Descriptions**.

Resource Groupings

Select a checkbox to group the data according to the resources and their characteristics. To show checkboxes for resource descriptions and resource fields, right-click anywhere in this section and select **Show Descriptions** or **Show Resource Fields**, respectively.

Save Layout

After setting up Data View, you can save your layout to quickly reuse it instead of selecting all the options again. Saved layouts appear in the **Layout** menu.

Reset

Click to revert to the default options.

Grid

In Data View, the grid is comparatively more flexible than in other views.

By rearranging the grid components and filtering the data, you can examine just the proposal information you want to see.

If the hours/units/cost values need adjustment, you can edit the direct input data.

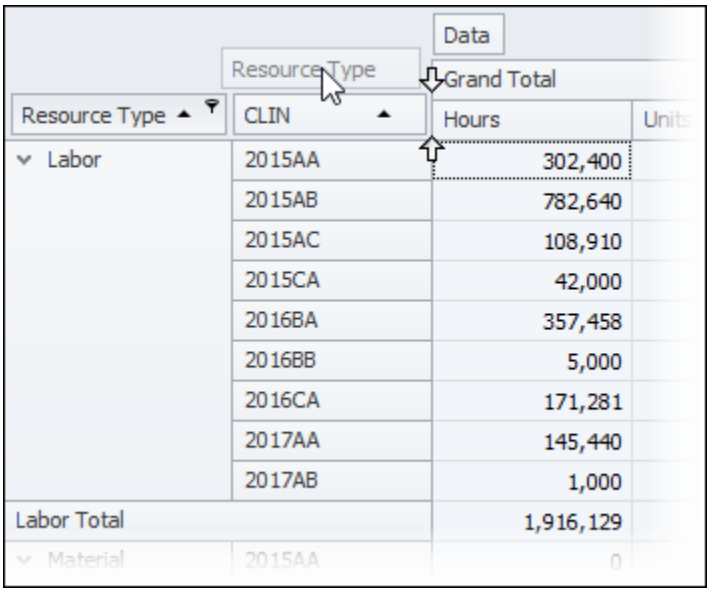
Note: Right-click anywhere in the grid to print or export it.

Arrange the Data View Grid

Quickly analyze a proposal in Data View by rearranging the fields in the grid. You can drag them to different positions, filter them, and sort them in ascending or descending order.

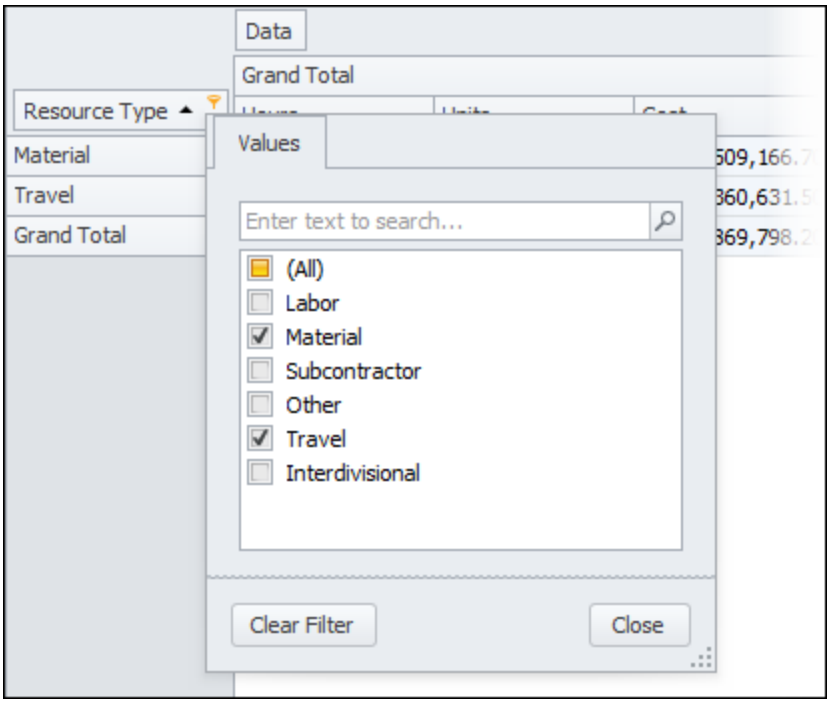
Example: Drag and Drop

In this example, a field is being dragged to the position indicated by double arrows. After we drop the field, our data will be broken down first by **CLIN**, then by **Resource Type**.

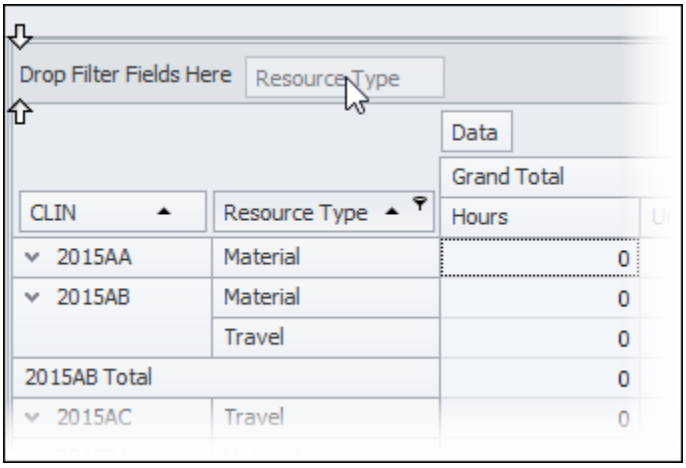


Example: Filter

You can filter the fields to better examine the data in the grid. In this example, we clicked the **Filter** icon on the **Resource Type** field and selected two types of resources. As a result, the grid only shows the **Material** and **Travel** data.



If you filter a field, you might find it helpful to drag it to the area above the grid labeled **Drop Filter Fields Here**. The filter will remain active, but the field will no longer group the data.



Example: Sort

Fields can be sorted in ascending or descending order. Each time you click a field, the sort order changes. In this example, we clicked **TASK ID** to sort it in descending order, while **Resource Class** remains sorted in ascending order.

		Data		
		Grand Total		
TASK ID	Resource Class	Hours	Units	Cost
TANK 008 03	Engineering	42,000	0	$0
	Supplies	0	0	$180,000
TANK 008 03 Total		42,000	0	$180,000
TANK 008 02	Engineering	42,000	0	$0
	Supplies	0	0	$180,000
TANK 008 02 Total		42,000	0	$180,000
TANK 008 01	Engineering	37,440	0	$0
	Manufacturing	72,000	0	$0
	Other Costs	0	0	$120,000
	Specialist	36,000	0	$0
	Supplies	0	0	$80,000
TANK 008 01 Total		145,440	0	$200,000
TANK 007 01	Engineering	37,440	0	$0
	Manufacturing	72,000	0	$0

Edit Hours/Units/Cost in Data View

After opening a proposal in Data View, you can change the direct resource input hours/units/cost at any level. Keep in mind that hours/units/cost from CERs, associated costs, etc. are not editable.

There are different ways to make changes in Data View. You can edit the cells individually or paste hours/units/cost from a spreadsheet in a group of cells.

Edit a Cell

1. Open a proposal in **Data View**.
2. In the **Hours**, **Units**, or **Cost** column, double-click a cell. A dialog box will appear that separately shows the total amount and editable amount of hours/units/cost.
3. In the **Editable** field, enter the new amount.
4. Click **Process**.

Paste Spreadsheet Data in a Group of Cells

Before this procedure, it's a good idea to clear the **Show Indirect Analysis** and **Show Direct Cost** checkboxes. Hiding the read-only columns will improve overall performance, especially in large proposals.

1. Open a proposal in **Data View**.
2. In the **Options** panel, clear the **Show Totals** checkbox. The totals at the bottom of the grid must be hidden before adjusting the data.
3. Open your spreadsheet and select a group of consecutive cells containing hours/units/cost values. Then press **Ctrl**+**C** to copy the values.

4. In **Data View**, under the **Hours**, **Units**, and/or **Cost** columns, select a group of consecutive cells that matches the group you copied. Then press **Ctrl+V** to paste the copied values in the selected cells.

5. In the dialog box that appears, you can preview the data adjustments that will be made. When you are ready to change the proposal, click **Process**.

Formula View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Formula View shows which tasks in the proposal have formulas, and it shows how resources are spread throughout those tasks. If a formula includes justification text, it is also displayed in this view. You can find the same information organized differently in Task View with the Formulas tab selected.

Formula View is divided into three sections: Formula Elements, Resource Input, and Justification.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Formula Elements

In this grid, you can view and edit existing formulas and their related task information. You can also add new formulas to tasks.

TASK ID

The name of the task that the formula is in. It cannot be edited in Formula View.

Task Description

The explanation of the task. It cannot be edited in Formula View.

Summary Fields

Specific details about the task (for example, the person bidding the task, the WBS code, CLIN, etc.). They cannot be edited in Formula View.

Formula ID

The name of the formula.

Description

The description of the formula.

Formula

Type the formula or click to open the **Formula Editor** dialog box. If you type the formula, make sure to add spaces between numbers and operators; that is, five times six divided by two should be typed *5 * 6 / 2*. Words are ignored.

Result

The result of the formula. It cannot be edited.

Spread Amount

As you enter percentages in the **Resource Input** grid, this column will show a running total of the amount of hours/units/cost spread. It cannot be edited.

Remaining

The difference between the result and the spread amount.

Resource Input

This is the same grid found on the Formulas tab of Task View. It shows how resources are spread throughout tasks to meet the level of effort calculated by the formulas. You can edit the spread information of those resources, and you can add other resources to the tasks.

For detailed descriptions of the columns in this grid, see the Formulas Tab help topic.

Justification

This is the same section found on the Formulas tab of Task View. You can edit the justification text of existing formulas, and you can add supporting information to new formulas.

For detailed descriptions of the functions in this section, see the Formulas Tab help topic.

Material View

In Material View, you can assign tasks to the products in the proposal. You can also add parts and sub-assemblies to the products.

The grid will show a tab for each product, as well as a Miscellaneous tab, which you can use to assign additional parts and assemblies to tasks. Any part or assembly you assign to a task on the Miscellaneous tab appears on the Material tab of Task View. Likewise, the Miscellaneous tab shows all materials assigned to tasks on the Material tab. Any change you make in one place is reflected in the other.

In proposals, you can change the information that came from the library by entering proposal-specific information for a part or assembly instead. If you update material in a proposal, or consolidate material unit costs in a proposal, the changes revert to the library information.

The view is divided into multiple grids: Material Input, Material Distribution, Timephased Base Unit Cost, and Associated Costs. If you click a specific product tab, the grid shows the top-level assembly and its components.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Material Input

This grid is where you assign materials to the tasks.

Note: The Material tab and Material View have two display modes: Hierarchical and Flat. Hierarchical mode shows the structure of assemblies and allows you to expand and collapse each level. Flat mode provides an expanded list of all the materials and

allows you to group data in the grid. To switch modes, right-click anywhere in the ***Material Input*** *grid > **Display Mode** > select an option. Or press **Ctrl+D**.*

*Note: After editing a part or an assembly, you can apply your changes to matching materials in the proposal. Right-click the material > **Replicate Material Changes**.*

Level

This column shows the position of the element in the assembly. Click the icon in the small square box to the left of the level number to expand or collapse the assembly. You can also use the **Expand** and **Collapse** options available on the shortcut menu, which allow you to expand/collapse the current assembly, the entire subtree, or all the assemblies in the grid.

Task

Enter the task you want to assign to the assembly or part.

Product tab

The task you assign to the top-level assembly will be assigned to all the sub-elements. You can, however, assign different tasks to the sub-assemblies and/or parts, as long as the task period of the sub-assembly or part falls within the task period of the parent assembly. If you assign a task to a sub-element and then change the task of the parent assembly, the task of the sub-element will not change.

Miscellaneous tab

The task you assign to an assembly will be assigned to all the components. You cannot assign different tasks to the sub-assemblies or individual parts.

Summary Fields

All the summary fields defined in the Proposal Properties appear as a separate column. They show the summary field values that were entered when a task was created in Task View.

Material ID

Enter an ID for the material. If you enter the assembly/part first, ProPricer will enter an ID for the assembly/part in this column. You can accept it or enter a new one.

Description

Enter a description for the material ID.

Parent

This column only appears when you display materials in Flat mode. If a material has no parent element because it is at the top level of an assembly, then the column will be blank. It cannot be edited.

Comment

This column shows any comment entered for the part or assembly in the library.

Source Library

Enter the name of the library that contains the part or assembly you want to use. You can also enter *(None)* if you want to enter a task-specific part.

Type

Once you select the material from the library, this column will show if it's a part or assembly.

Source Material

Select a part or assembly from your material libraries. The material's information will appear in the other columns automatically.

Assembly/Part

Enter the name of the part or assembly you want to use. If you are entering a task-specific part, type a name for the part or assembly.

Part Number

This column shows the number entered for the part/assembly in the library. If you are entering a task-specific part, type a number for the part or assembly.

Part Description

This column shows the description entered for the part/assembly in the library. If you are entering a task-specific part, type a description for the part or assembly.

Material Fields

These columns appear if assembly/part material fields have been defined. Enter the appropriate text or number. You can hide any material field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

If you enter a material field value or resource field value at the top level of an assembly, you can copy that value to all lower-level components with the Fill Down function. Right-click the cell containing the field value, and then click **Fill Down**. You will be prompted to overwrite the existing values.

Resource

There are two scenarios for this column:

Part

This column will show the resource entered for the part in the library. If no resource was entered in the library or you are creating a task-specific part, you will need to enter one here. If the part is an element of an assembly for which the **Override** checkbox is selected, you can ignore this column. This is because ProPricer will ignore any resource entered for the part in the library and use the resource entered for the assembly.

Assembly

Normally this column will be blank because ProPricer uses the resources entered for the child elements and associated costs. If a resource was entered for the assembly in the library, it will appear, but it will not come into play unless the **Override** checkbox is selected. Selecting the **Override** checkbox tells ProPricer to ignore all the resources assigned to the child elements and associated costs and use this one.

Note: If you enter an overriding base unit cost, the resource will be displayed in blue.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter the resource field value you want to use. You can hide any resource field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

If you enter a material field value or resource field value at the top level of an assembly, you can copy that value to all lower-level components with the Fill Down function. Right-click the cell containing the field value, and then click **Fill Down**. You will be prompted to overwrite the existing values.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource.

Profit/Fee

This column allows you to enter a different profit/fee rate for the material. This rate overrides any rate entered for the task, in **Proposal Properties**, the **Indirect Rate Overrides** grid, and the proposal's Indirect Rate Table.

Rate Band

This column appears only if you have assigned a Rate Band Table to the proposal’s Direct Rate Table and have selected it from the **Show** submenu. It allows you to enter a rate band for the resource. If you do not assign a rate band at this level, ProPricer will use the resource rates from the proposal’s Direct Rate Table during pricing.

Override

This checkbox only applies to assemblies. It allows you to override the base unit cost and material factors of the assembly.

If the checkbox is selected, you will need to enter a resource for the assembly in the **Resource** column. ProPricer will no longer consider the resources assigned to the child elements or associated costs, nor the unit costs calculated for the child elements. If the checkbox is clear, the unit cost of the assembly will be updated every time there is a modification to a child element.

Make/Buy

This column indicates whether the part/assembly is made or bought, as specified in the Parts Library or Assemblies Library.

UM

This column shows the unit of measurement entered for the part in the library. If you are entering a task-specific part, enter the unit of measurement for the part.

Base Unit Cost

There are two scenarios for this column:

Part

This column will show the cost entered for a single unit in the library.

Assembly

This column will be blank unless you select the **Override** checkbox. This is because ProPricer uses the base unit costs of the child elements to calculate the unit cost of the assembly. Selecting the **Override** checkbox tells ProPricer to ignore the base unit costs entered for the child elements and use the base unit cost entered here to calculate the unit cost of the assembly. If you enter an overriding base unit cost, it will be displayed in blue.

Currency

This column appears only if the **Multi-Currency** checkbox is selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. It shows the currency entered for the part in the library. You have to select the **Ovrd** checkbox to change the currency of an assembly.

Escalation Factor

This column shows the value from the Escalation Table associated with the part. The default is 1.

Target Factor

Enter the factor you want to apply to the base unit cost in order to meet a target cost. You can enter a value between 0 and 100. The default is 1.

Volume Factor

Enter the factor you want to apply to the base unit cost to adjust for quantity differences. You can enter a value between 0 and 100. The default is 1.

Unit Cost

The cost obtained by multiplying the base unit cost, escalation factor, target factor, and volume factor.

Unit List Cost

The cost obtained by adding the associated cost per unit to the unit cost.

Unit Price

The price obtained by adding all indirect costs to the unit cost.

Cost Type

After a consolidation of the unit costs is performed for the materials assigned to the proposal tasks, ProPricer automatically enters the cost type that was used for the consolidation.

Cost Source

This column shows the cost source generated by cost consolidation, or it shows the source entered in the Parts Library or Assemblies Library.

If a part from the library has multiple quotes, purchase orders, or miscellaneous cost sources, you can click to view the cost source details and select a different source. In the cost source details, you can also add a new source to a material library directly from your proposal.

The base unit cost updates automatically when the cost source changes. If the selected cost source has its own associated costs in the material libraries, they are applied to the part/assembly.

Months Expired

Displays the number of months since the selected cost source expired.

Cost From Date and Cost To Date

These columns show when the part/assembly cost is valid. For example, if the cost source is a purchase order, then the dates indicate when it was written and when it expires.

Vendor Library

This column shows which product or common library the vendor came from.

Vendor

This column show the name of the vendor that is supplying the part/assembly.

Rule ID

This column appears if a rule ID type is selected for the proposal's consolidation rule set. It shows the automatically generated name of the cost consolidation rule or the manually entered name, depending on the rule ID type. If the base unit cost of the part is changed, the data in this column is erased, allowing you to manually enter the appropriate rule.

Quantity

This column shows the number of part/sub-assembly units in an assembly. If the quantity of a part is unknown, it is not required. However, the quantity is required for sub-assemblies. Parts with no quantity are excluded from material cost consolidation.

Delivery/Ship Qty

Enter the delivery/shipment quantity for the material. The shipment quantity for a child element of an assembly is calculated by multiplying the unit quantity by the delivery/shipment quantity specified for its parent. The **Delivery/Ship Qty** column is not available for editing if you select **Distributed** as the Delivery/Ship Qty Input Mode.

To switch between the input modes, go to the top of the grid and select the one you want. Or right-click the grid, go to **View** > **Delivery/Ship Qty Input Mode**, and then select an option.

Upgrade Qty

This column shows the result of multiplying the quantity by the total manufacturing start quantity of the parent structure.

Inventory Qty

This column shows the inventory quantity entered for the part or assembly in the library.

Adjusted Upgrade Qty

This column shows the difference obtained from subtracting the inventory quantity from the upgrade quantity.

Mfg Yield Factor

This column shows the manufacturing yield factor entered for the part or assembly in the library.

Mfg Yield Qty

This column shows the result of subtracting the adjusted upgrade quantity from the manufacturing start quantity.

Mfg Start Qty

This column shows the result of dividing the adjusted upgrade quantity by the manufacturing yield factor.

Destr Eval Qty

This column shows the destructive evaluation quantity entered in the library for the part or assembly.

Total Mfg Start Qty

ProPricer calculates the amount for the material ID based on the data in the **Material Distribution** grid and displays the total here. The total manufacturing start quantity is equal to either the spread amount or to the sum of the monthly/quarterly/yearly units.

Extended Cost

ProPricer calculates the extended cost for the material ID and shows the value here. The value is equal to the total manufacturing start quantity multiplied by the unit cost. If you entered different currencies for the parts/assemblies, the amount is in the currency defined for the proposal. The currency of the proposal appears in parentheses.

Extended List Price

This column shows the price obtained by adding the associated cost of all units to the extended cost.

Extended Price

This column shows the price obtained by adding all indirect costs to the extended cost.

Material Distribution

This grid is where you enter spread information for the material. It contains the following columns:

Material ID

The material ID is taken from the input grid above. It cannot be edited.

Curve

Enter the name of the spread curve you want to use to distribute the units/cost of the material. You can choose from:

None

Select this option if you want to input the material units/cost manually.

Curves

Select a curve to spread the material units/cost. This can be a system or user-defined curve.

Load

Select this option to spread the same amount of units/cost in each month/quarter/year.

Even

Select this option to evenly spread the units/cost in the specified period.

Note: The default curve is Even.

Note: To input units/cost discretely, none of the spread parameters are required.

Spread Method

Enter the spread method that defines how the curve will be applied over the spread period. There are three options you can choose from:

Repeating Average

Select this method to repeat the curve every 12 months/quarters/years.

Loading Curve

Select this method to load monthly, quarterly, or annual units/cost based on the curve's weighting in the Spread Curve Library.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

Note: The default spread method is Weighted Average.

Start Date

Enter the date you want the distribution of the material units/cost to start. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the start date of the task.

End Date

Enter the date you want the distribution to stop. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the end date of the task.

Spread Amount

Enter the number of units/cost you want to spread for the material. This value will change to zero if the units/cost are distributed manually.

Fiscal Year Factors

In these columns you can enter specific percent values in decimal format for each year of the task period. These values define the spread amount of the material for that year. The sum of the values must equal 1. If you leave the columns blank, ProPricer will distribute the total quantity over the task period using the curve and spread method specified in the **Curve** and **Spread Method** columns of the grid. If you enter factor values, each quantity, defined by the respective factor, will be distributed over the task period, using the specified curve and method, but for a

distribution period that corresponds to the task's fiscal year. The selected curve and spread method are applied to all fiscal years. Only the material quantities are different for the different years of the task period.

Note: *If you define proposal fiscal year factors and, at the same time, enter a discrete rate for a certain month, the fiscal year factors will be cleared.*

Distribution

Each column represents a month/quarter/year in the spread period and shows the number of material units assigned to the task.

Note: *You can hide and display the spread period as a whole. Individual months/quarters/years cannot be hidden*

Note: *Months/Quarters/Years are arranged in calendar order and cannot be rearranged.*

Timephased Base Unit Cost

This grid allows you to enter a base unit cost for a part or an assembly in specific periods. Each value should be different than the base unit cost in the **Material Input** grid.

From Date

Select the date that the base unit cost changes.

Value

Enter the base unit cost that begins on the selected date.

Associated Costs

This grid shows the additional expenses defined for the specific part or assembly in the respective library. You can change this information if necessary, or add new reference IDs.

If the cost source selected for a part or assembly has its own associated costs in the material libraries, they are applied to the part/assembly.

Source

This column shows the source of the associated costs. Associated costs can be entered at the material level or the cost source level.

Reference ID

This column shows the reference ID entered in the library.

Resource

This column shows the resource entered for the reference ID in the library.

Description

This column shows the description entered for the resource in the Resource Library or Direct Rate Overrides.

Type

This column shows the type entered for the resource in the library.

Class

This column shows the class assigned to the resource in the rate table.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter the resource field value you want to use. You can hide any resource field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource.

Profit/Fee

This column allows you to enter a different profit/fee rate for the resource. This rate overrides any rate entered for the task, in **Proposal Properties**, the **Indirect Rate Overrides** grid, and the proposal's Indirect Rate Table.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears only if a Rate Band Table has been assigned to the proposal’s Direct Rate Table. It shows the rate band entered for the resource. If a rate band has not been assigned, ProPricer will use the resource rates from the proposal’s Direct Rate Table during pricing.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column will show the proposal currency of resources whose rate type is *Cost*.

Hours/Units/Cost

This column shows the hours/units/cost entered for the reference ID.

Link Qty

None

The associated cost is not linked to any material quantity. It is applied as a one-time charge when a part/assembly is added to a task.

Total Qty

The associated cost is linked to the total manufacturing start quantity of the material. It is applied each time the part/assembly is added to a task.

Period

The associated cost is linked to periods that have a quantity of one or more for the material. It is applied for each month, quarter, or year that has any quantity of the part/assembly.

Period Qty

The associated cost is linked to the value entered in the **Link Qty Amount** column. It is applied to each set of the specified amount.

For example, if **Link Qty Amount** is 50, then the associated cost is applied to every 50 units.

Link Qty Amount

To enter a quantity amount, **Period Qty** must be selected in the **Link Qty** column. This links associated costs of the part/assembly to the quantity amount you enter.

Link Spread

Select this checkbox to spread the hours/units/cost of the associated cost resource using the same curve that the part/assembly uses. The checkbox is clear by default.

LCurve

This column shows the type of learning curve applied.

Slope

This column shows the slope percentage of the learning curve. You can change it.

Start Ref. Unit and End Ref. Unit

When a learning curve is used, the reference units determine the lot size for the total hours, units, or cost. Based on the starting unit, ProPricer will calculate how much of the amount remains for that original lot. It also calculates what the new amount of hours, units, or cost would be, based on the slope and how many units have already been completed.

Starting Unit

Enter the unit number of the first item in the lot to be estimated.

Total Amount

The value in this column varies, depending on whether you have chosen to link the hours/units/cost of the associated cost to the total manufacturing start quantity of the material or not. If the **Link Qty** checkbox is selected, the total amount is equal to the hours/units/cost multiplied by the total manufacturing start quantity. If the **Link Qty** checkbox is clear, the total amount is equivalent to the hours/units/cost entered for the associated cost.

Curve

This column displays the curve that will be used to spread resource hours/units/cost. There are two possible scenarios for the value in this column:

- The **Link Spread** checkbox is selected for the reference ID. You cannot change the spread curve. ProPricer will spread the hours/units/cost of the associated resource using the same curve that the material uses.
- The **Link Spread** checkbox is clear. You can change the spread curve.

Spread Method

This column shows how the curve will be applied over the spread period. You can edit this field only if the **Link Spread** checkbox is clear.

Start Date

This column shows the date the distribution will start. By default, it is equal to the start date of the task. You can change it only if the **Link Spread** checkbox is clear.

End Date

This column shows the date the distribution will stop. By default, it is equal to the end date of the task. You can change it only if the **Link Spread** checkbox is clear.

Spread Amount

This column displays the hours/units/cost that will be spread for the resource. The spread amount is equal to the total amount and cannot be changed.

Fiscal Year Factors

In these columns, you can enter specific percent values in decimal format for each year of the task period. These values define the spread amount of the associated cost for that year. The sum of the values must equal 1. If you leave the columns blank, ProPricer will distribute the total quantity over the task period using the spread curve and spread method specified in the Curve and Spread Method columns of the grid. If you enter factor values, each quantity, defined by the respective factor, will be distributed over the task period, using the specified curve and method, but for the distribution period that corresponds to the task's fiscal year. The selected curve and spread method are applied to all fiscal years.

Note: If you define proposal fiscal year factors and, at the same time, enter a discrete rate for a certain month, the fiscal year factors will be cleared.

Distribution

Each column represents a month/quarter/year in the spread period and shows the number of resource hours/units/cost assigned to the task.

Resource Set View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Resource Set View shows which tasks in the proposal have resource sets, and it shows how the resource sets are spread throughout the tasks. You can find the same information organized differently in Task View with the Resource Sets tab selected.

Resource Set View is divided into two grids: Resource Set Input and Resource Set Summary.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resource Set Input

In this grid, you can view and edit existing resource sets and their related task information. You can also add new resource sets to tasks. The resource sets available to you will depend on the Resource Set Table assigned to the proposal.

You can also make proposal-specific changes to the resource set elements. These changes will not alter the data in the proposal's Resource Set Table.

Level

The position of a resource in the resource set. The icon to the left of the level number expands or collapses the resource set.

TASK ID

The name of the task that the resource set is in. It cannot be edited in Resource Set View.

Task Description

The explanation of the task. It cannot be edited in Resource Set View.

Summary Fields

Specific details about the task (for example, the person bidding the task, the WBS code, CLIN, etc.). They cannot be edited in Resource Set View.

Resource Set ID

A task-specific identifier for assigned resource sets. The default ID matches the resource set's name, but you can change it. Resource set IDs are useful when you need multiple instances of a resource set in a task.

Resource Set

Enter the resource set to add to the task.

Resource

The name of each element in the resource set.

Resource Fields

These columns appear if there are resource fields defined in the Proposal Properties. Enter a value in the resource field.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

This column shows the indirect pool entered in the Direct Rate Table of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

This column allows you to enter a different profit/fee rate for the individual resources in the set. This rate overrides any rate entered for the task, in Proposal Properties, the Indirect Rate Overrides grid, as well as the proposal's Indirect Rate Table. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal’s Direct Rate Table. It shows the rate band entered for the individual resources. You can change it. This column is hidden by default.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of Proposal Properties. The column will show the proposal currency of individual resources whose rate type is *Cost*. You can change it.

Amount

The amount of hours/units/cost entered for the element in the Resource Set Table. You can change it.

LCurve

The type of learning curve applied to the hours/units/cost amount of each resource in the set.

Slope

The slope percentage of the learning curve.

Start Ref. Unit and End Ref. Unit

When a learning curve is used, the reference units determine the lot size for the total hours, units, or cost in the **Amount** column. Based on the starting unit, ProPricer will calculate how much of the amount remains for that original lot. It also calculates what the new amount of hours, units, or cost would be, based on the slope and how many units have already been completed.

Starting Unit

When a learning curve is used, enter the unit number of the first item in the lot to be estimated.

Curve

Select the spread curve you want to use to distribute the resource set. You can choose from:

None

Select this option if you want to spread the resource set discretely.

Curves

Select a specific type of curve. This can be a system or user-defined curve.

Load

Select this option to spread the same amount of resource sets in each month/quarter/year.

Even

Select this option to evenly spread the resource set in the specified period.

Notes:

The default curve is Even.

If you want to input resource sets discretely, you do not have to specify any of the spread parameters. You can hide them and enter values in the months/quarters/years.

Spread Method

How the curve will be applied over the spread period. This column is hidden by default. There are three options you can choose from:

Repeating Average

Select this method to repeat the curve every 12 months/quarters/years.

Loading Curve

Select this method to load monthly, quarterly, or annual hours/units/cost based on the curve's weighting in the Spread Curve Library.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

Note: The default spread method is Weighted Average.

Start Date

Enter the date you want the distribution of the resource set to start. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the start date of the task.

End Date

The date the distribution of the hours/units/cost stops. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the end date of the task.

Spread Amount

Enter the amount of times to spread the resource set in the task. This value will change to zero if the values are entered discretely.

Distribution

Each column represents a month/quarter/year in the spread period.

Resource Set Summary

This grid is for information only. It displays an overview of the resource sets and the individual resources they contain. It also shows the task information related to each resource set.

Level

The position of a resource in the resource set.

TASK ID

The name of the task that the resource set is in.

Task Description

The explanation of the task.

Summary Fields

Specific details about the task.

Resource Set ID

The ID of the resource set.

Resource Set

The name of the resource set.

Resource

The name of an individual resource.

Description

The description of an individual resource.

Type

The type of an individual resource.

Class

The class of an individual resource.

Resource Fields

Additional information about an individual resource.

Indirect Pool

The indirect pool assigned to an individual resource. This column is hidden by default.

Profit/Fee

Any overridden profit/fee rate that will be applied to an individual resource. This column is hidden by default.

Accounting Calendar

The name of the accounting calendar assigned to an individual resource. This column is hidden by default.

Rate Band

The name of the rate band assigned to an individual resource. This column is hidden by default.

Currency

The currency entered for resources whose rate type is *Cost*.

Amount

The amount of hours/units/cost entered for a resource set element. It can be entered in the resource set table or the task.

Total Amount

The amount of times the resource set is spread in the task.

Average Rate

This column appears if you have been granted access to view it, and it is hidden by default.

It shows the average rate of the individual resources, which is the sum of the rates for the resource from the Direct Rate Table divided by the number of months, quarters, or years that the resource is used in the task. If the proposal timescale is *Annual (Fiscal)*, then the average is calculated with fiscal year direct rates instead of calendar year rates.

Direct Cost

This column appears if you have been granted access to view it. It shows the direct cost calculated for an individual resource.

Resource View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Resource View shows the task assignment of every resource from the Resources tab in the proposal. It is divided into two grids: Resource Input and Resource Summary.

The Resource Input grid can be edited. In it, you can assign a resource to an existing task or a new task, make changes to resources, and run what-ifs.

The Resource Summary grid is for information only.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resource Input

This grid shows the task assignment of every resource from the **Resources** tab in the proposal.

*Note: You can do any of the following to quickly switch the timescale when the **Distribution** columns are shown in the grid:*

- *At the top of the grid, click the name of the timescale currently displayed, and then select an option.*
- *Right-click anywhere in the grid, go to **View** > **Timescale**, and then select an option.*
- *Press **Ctrl+T** to select the next option.*
- *Press **Ctrl+Shift+T** to select the previous option.*

- *Press **Alt+T** to open the **Timescale** menu, and then select an option.*

Task ID

This column shows the name of the task.

You can create a task in Resource View when you select a resource in the **Resource** column. ProPricer will prompt you to assign the resource to an existing task or a new one.

Task Description

This column shows the description entered for the task. This column is hidden by default.

Summary Fields

All the summary fields from the Proposal Properties appear as a separate column. They show specific details about the task; for example, the person bidding the task, the WBS code, OBS code, CLIN, and type of task. These columns are hidden by default.

Resource ID

This column appears when AutoNumbering is enabled in the proposal. The ID is a unique resource name, so you can repeatedly use a single resource in the same task.

Resource

Select a resource from the proposal's Direct Rate Table. In Services-type proposals, labor categories from the Rate Card can also be selected.

If resource fields are mapped in the proposal, then you can only enter specific combinations of resource information. All possible combinations are provided in the drop-down menu.

BOE Source

If you restore a proposal from BOE Pro (a separate estimating product by ProPricer), its name is shown here.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. They show the value entered for the resource.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Direct Rate

This column allows you to enter a different direct rate for the individual resources. The rate overrides the resource's rate in the Direct Rate Table. This column is hidden by default.

Profit/Fee

This column allows you to enter a different profit/fee rate for the individual resources. This rate overrides any rate entered for the task, in Proposal Properties, the **Indirect Rate Overrides** grid, as well as the proposal's Indirect Rate Table. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears only if a Rate Band Table has been assigned to the proposal's Direct Rate Table. It shows the rate band entered for the resource. This column is hidden by default.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column shows the currency of the resource whose rate type is *Cost*. You can change it.

Scheduled Rate

This column appears only if a Scheduled Rate Table has been assigned to the proposal. It shows the scheduled rate entered for the resource.

Discount

This column appears only if a Scheduled Rate Table has been assigned to the proposal. It shows the discount value.

Comment

This column shows any comment entered. This column is hidden by default.

Curve

This column shows the name of the used to distribute the hours/units/cost.

Spread Method

If a curve was used, this column shows how the curve was applied over the spread period. This column is hidden by default.

Start Date

This column shows the date the distribution of the resource hours/units/cost starts.

End Date

This column shows the date the distribution of the resource hours/units/cost end.

Spread Amount

Enter the hours/units/cost you want to spread. This value will change to zero if the values are discretely entered in months, quarters, or years.

If your proposal is set up with an hours/units/cost modifier, ProPricer will automatically apply it to this amount, and the calculated result will appear in the **Total Amount** column.

Distribution

Each column represents a month, quarter, or year in the spread period. They show the number of resource hours/units/cost assigned to the task for that particular month, quarter, or year.

Total Amount

This column shows the hours/units/cost total calculated by ProPricer. The values appear in green text and are read-only.

If your proposal is set up with an hours/units/cost modifier, ProPricer will automatically apply it to the value in the **Spread Amount** column, and the calculated result will appear in this column.

Resource Summary

The columns in this grid are for information only. They display summary information for the resource selected in the **Resource Input** grid.

Task ID

This column shows the name of the task.

Task Description

This column shows the description entered for the task. This column is hidden by default.

Summary Fields

All the summary fields from the Proposal Properties appear as a separate column. They show specific details about the task; for example, the person bidding the task, the WBS code, OBS code, CLIN, and type of task. These columns are hidden by default.

Resource ID

A unique resource name that ProPricer creates when AutoNumbering is enabled in the proposal.

Resource

This column shows the resource selected.

Description

This column shows the resource description entered in the Resource Library.

Type

This column shows the resource type.

Class

This column shows the resource class.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. They show the value entered for the resource.

Indirect Pool

This column shows the name of the indirect pool assigned to the resource. This column is hidden by default.

Profit/Fee

This column shows the overridden profit/fee rate for the individual resources.

Rate Band

This column shows the name of the rate band if one has been assigned to the resource. This column is hidden by default.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column shows the currency of the resource whose rate type is *Cost*.

Hours/Units/Cost

These columns show the number of hours the direct resource is used in the task if the rate type of the resource is *Hours*, units if the rate type of the resource is *Units*, or cost if the rate type of the resource is *Cost*. The heading of the **Hours** column changes to **Equiv. Heads** when you are working in Equivalent Heads view.

Average Rate

This column appears if you have been granted access to view it, and it is hidden by default.

It shows the average rate of the resource, which is the sum of the rates for the resource from the Direct Rate Table divided by the number of months, quarters, or years that the resource is used in the task. If the proposal timescale is *Annual (Fiscal)*, then the average is calculated with fiscal year direct rates instead of calendar year rates.

In Services-type proposals, ProPricer uses the information in the Rate Card to calculate the average rate of resources and labor categories.

Direct Cost

This column appears if you have been granted access to view it. It shows the direct cost calculated for the resource.

Indirect Elements

These columns appear if you have been granted access to view them. They show the indirect elements from the Algorithm with their respective costs.

SOW View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

SOW View allows you to quickly add and update statement of work text in a summary field, such as *WBS*, *CLIN*, *Bidder*, etc. The summary field that drives SOW View can be set on the Proposal Input page of the Proposal Properties.

While reviewing SOW text in this view, you can click the input tabs to see the task and resource data associated with a selected summary field value. The text will remain visible as you switch tabs and edit data.

The input tabs in SOW View have the same data as the ones in Task View. When applicable, the tabs in SOW View also show data to help identify tasks (for example, task names and descriptions). To learn more about the tabs and the information they contain, see the Task Input help topic.

The SOW View grid is read-only and contains the following columns:

Summary Field

The values of the summary field selected on the Proposal Input page of the Proposal Properties. SOW View organizes proposal data based on this summary field, and the column header reflects the field's name.

Description

The description of the summary field.

Start Date

The earliest start date of all tasks with the summary field value assigned to it.

End Date

The latest start date of all tasks with the summary field value assigned to it.

Summary View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Summary View shows summarized information of all resources used in the proposal. It is for information only and cannot be edited.

*Note: You can do any of the following to quickly switch the timescale when the **Distribution** columns are shown in the grid:*

- *At the top of the grid, click the name of the timescale currently displayed, and then select an option.*
- *Right-click anywhere in the grid, go to **View** > **Timescale**, and then select an option.*
- *Press **Ctrl**+**T** to select the next option.*
- *Press **Ctrl**+**Shift**+**T** to select the previous option.*
- *Press **Alt**+**T** to open the **Timescale** menu, and then select an option.*

Resource Assignments

Task ID

This column shows the name of the task.

Task Description

This column shows the description of the task. It is hidden by default.

Summary Fields

All the summary fields defined on the **Summary Fields** page in the **Proposal** folder of **Proposal Properties** appear as a separate column. These columns are hidden by default.

Source Type

This column indicates how the resource was added to the task. Source types include:

Activity

The resources was entered on the **Activities** tab.

CER

The resource was entered on the **CERs** tab.

Direct

The resource was entered on the **Resource** tab.

Formula

The resource was entered on the **Formulas** tab.

Material

The resource was entered on the **Material** tab.

Resource Set

The resource was entered on the **Resource Sets** tab.

Travel

the resource was entered on the **Travel** tab.

Source

This column shows the ID of the activity, CER, formula, material, resource set, or trip that added the resource.

Source Item

If the source type is *Travel*, this column shows the specific travel expense that added the resource.

If the source type is *Material*, this column shows the reference ID of the associated cost.

Resource

This column shows the name of the resource.

Description

This column shows the description entered for the resource in the Resource Library, Direct Rate Overrides, or Rate Card.

Type

This column shows the resource type.

Class

This column shows the resource class.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. They show the value entered for the resource.

Indirect Pool

This column shows the indirect pool assigned to the resource in the task. It is hidden by default.

Profit/Fee

This column shows any overridden profit/fee rate entered for the resource. It is hidden by default.

Accounting Calendar

This column shows the accounting calendar assigned to the resource.

Rate Band

This column shows the name of the rate band assigned to the resource. It is hidden by default.

Currency

This column shows the currency of the resource whose rate type is *Cost*. It is hidden by default.

Curve

This column shows the spread curve used to distribute the hours/units/cost of the resource.

Spread Method

This column shows how the spread curve is applied over the spread period.

Start Date

This column shows the start date of the spread period.

End Date

This column shows the end date of the spread period.

Spread Amount

This column shows the amount of hours/units/cost that is spread for the resource.

Distribution

These columns are the months/quarters/years in the spread period. They show how the resource's hours/units/cost amount is distributed in the task.

Hours

This column shows the total number of hours spread for the resource. ProPricer converts hours to equivalent heads based on the proposal's default accounting hours or the hours in a selected accounting calendar.

Equiv Heads

This column shows the total number of full-time equivalent heads spread for the resource. ProPricer converts equivalent heads to hours based on the proposal's default accounting hours or the hours in a selected accounting calendar.

Units

This column shows the total number of units entered for the resource.

Cost

This column shows the total cost values entered for the resource.

Average Rate

This column appears if you have been granted access to view it, and it is hidden by default.

It shows the average rate of the resource, which is the sum of the rates for the resource from the Direct Rate Table divided by the number of months, quarters, or years that the resource is used in the task. If the proposal timescale is *Annual (Fiscal)*, then the average is calculated with fiscal year direct rates instead of calendar year rates.

In Services-type proposals, ProPricer uses the information in the Rate Card to calculate the average rate of resources and labor categories.

Direct Cost

This column appears if you have been granted access to view it. It shows the direct cost calculated for the resource.

Indirect Elements

These columns appear if you have been granted access to view them. They show the indirect elements from the Algorithm with their respective costs.

Total Bar

This bar appears immediately above the navigation tools. It shows the sum of all the values entered in the respective columns.

Task View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Task View is where you create the tasks for your proposal by entering their names, descriptions, start and end dates, and other general details. After creating one in the **Tasks** grid, you can add resources, trips, and other kinds of data to it with the various input tabs. You can create as many tasks as needed to fulfill the requirement.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Task ID

Enter a code or name that uniquely identifies the task in the proposal. If tasks are AutoNumbered, then ProPricer creates task IDs for you.

Description

Enter a short explanation of the task.

Type

There are two types of tasks you can choose from: *Regular* and *Summary*. A regular task allows you to assign resources to the task on the **Resources**, **Travel**, **Material**, **CERs**, **Resource Sets**, and **Formulas** tabs. A summary task only allows you to assign a CER to the task on the **CERs** tab. It enables you to create a single task for the derivatives from all tasks where the base resource exists. The default type is *Regular*. This column is hidden by default.

Start Date

Enter the start date of the task. By default, it is the same as the start date of the proposal.

End Date

Enter the end date of the task. By default, it is the same as the end date of the proposal.

Notes:

ProPricer processes a task faster if its duration is short. To reduce processing time, limit the duration of the task to the time needed to complete it. For example, if the proposal period is three years, and the task requires three months, do not make the task three years long.

The start/end dates of the task must fall within the proposal period. If you discover that you need more time complete the task, you can use the what-if called ***Flex/Shift*** *to change the end date of the proposal.*

You cannot enter start and end dates for summary tasks.

Indirect Pool

This column allows you to set the default indirect pool of the task. ProPricer will assign this indirect pool to all the resources you assign to the task that do not have an indirect pool assigned to it in the Direct Rate Table. This rate overrides any rate entered in the Proposal Properties, the **Indirect Rate Overrides** grid, as well as the proposal's Indirect Rate Table. This column is hidden by default.

Quantity

Enter the number of units represented by this task. This column is hidden by default.

Profit/Fee

This column allows you to specify a task-level profit/fee rate. The rate will be applied to all the resources in this task. It does not affect the resources of other tasks. This column is hidden by default.

Best Case Factor

If Three-Point Estimating is enabled in the Proposal Properties, you can enter a task-specific Best Case factor in this column. Then ProPricer will recalculate the data displayed in the **Three-Point Estimating** tab (and in Three-Point Estimating View) accordingly. This column is hidden by default.

Worst Case Factor

If Three-Point Estimating is enabled in the Proposal Properties, you can enter a task-specific Worst Case factor in this column. Then ProPricer will recalculate the data displayed in the **Three-Point Estimating** tab (and in Three-Point Estimating View) accordingly. This column is hidden by default.

Predecessors

This column shows predecessor data imported from a Microsoft Project file. It is hidden by default.

Workflow Columns

If Workflow is enabled in the proposal, you will see the following:

Status

This column shows the current step of the task.

Workflow User(s)

This column shows every associated user assigned to the role that is responsible for the step. However, if a user is assigned to the role at the task level, then the column only displays that user's name.

Due Date

Enter the date the step should be completed.

Last Action Comment

This column shows the last comment entered when someone performed a Workflow tracking action, such as advancing or rejecting a step.

Workflow Role

Enter an associated user to assign that person to the role at the task level. The number of columns and the column headers that appear are determined by the Workflow roles entered in the Proposal Properties.

Note: Try running the Workflow Log Report to check your team's current Workflow in a proposal.

Summary Fields

All the summary fields defined in the Proposal Properties appear as a separate column. They allow you to enter specific details about the task (for example, the person bidding the task, the WBS code, CLIN, etc.). If a Title Table is assigned to the summary field, you can:

- Enter only the specific values from the Title Table if you have chosen to validate entries in the summary field.
- Enter a value from the Title Table or type your own value if you have chosen not to validate entries in the summary field.

Task Input

In Task View, you create tasks and input different kinds of data (resources, travel, material, CERs, resource sets, explanatory text, etc.) for each one.

Note: Your ProPricer installation includes the ProPricer Import/Export Tool. It works with most types of data in your proposals, tables, and global libraries.

Task View is split into two sections. The top half is the **Tasks** grid. The bottom half is divided into tabs where you assign the resources, trips, materials, etc. to the task selected in the **Tasks** grid. The tabs include:

- Activities
- Allocations
- BOE
- CERs
- Formulas
- Material
- Notes
- Resource Sets
- Resources
- SOW
- Summary
- Three-Point Estimating
- Travel

A green check mark in front of a tab label indicates that the tab contains data.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

Every field that requires data from a list has an AutoComplete feature. When you type a few identifying characters, ProPricer will suggest the closest available match. For example, when you type *en* in the Resource cell, AutoComplete will suggest *ENG01*. To accept the suggestion, press **Enter** or **Tab**.

Any grid containing data can be printed or exported as it is seen or with a custom design. You may find this helpful when sharing proposal information in meetings, e-mails, reports, etc. To learn more, see Print or Export Data in a Grid.

Activities Tab

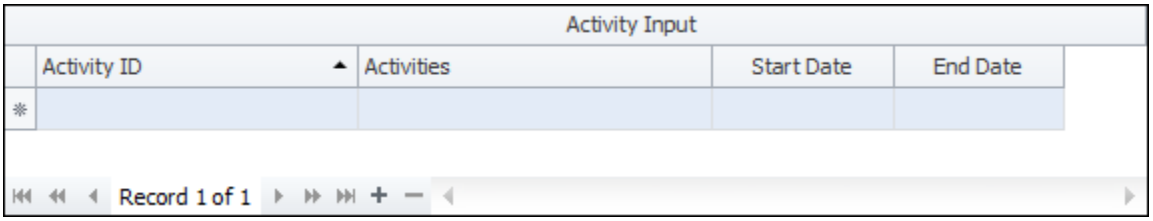
The Activities tab is where you create activities to assign resources to tasks. A green check mark in front of the tab label indicates that resource data has been entered for the selected task. The Activities tab is divided into two grids: Activity Input and Resource Input.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Activity Input

Here is where you create the reference numbers and associated activities.



Activity ID

Enter a unique identifier for the activity.

Activities

Enter the descriptive text of the activity.

Start Date

Enter the start date of the activity. By default, it is the same as the start date of the task.

End Date

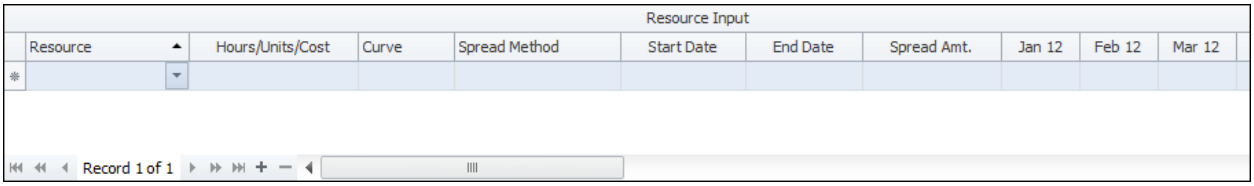
Enter the end date of the activity. By default, it is the same as the end date of the task.

Resource Input

Here is where you add the resources associated with activity to the task.

*Note: You can do any of the following to quickly switch the timescale when the **Distribution** columns are shown in the grid:*

- *At the top of the grid, click the name of the timescale currently displayed, and then select an option.*
- *Right-click anywhere in the grid, go to **View** > **Timescale**, and then select an option.*
- *Press **Ctrl+T** to select the next option.*
- *Press **Ctrl+Shift+T** to select the previous option.*
- *Press **Alt+T** to open the **Timescale** menu, and then select an option.*



Resource

Enter the name of the resource you want to spread in the task.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter a value in the resource field.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

This column allows you to enter a different profit/fee rate for the individual resources. This rate overrides any rate entered for the task, in the Proposal Properties, the Indirect Rate Overrides, as well as the proposal's Indirect Rate Table. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal’s Direct Rate Table. It shows the rate band entered for the resource. You can change it. This column is hidden by default.

Currency

This column appears if the **Multi-Currency** checkbox has been selected on the **Currency** page of the Proposal Properties. The column will show the proposal currency of resources whose rate type is *Cost*. You can change it.

Scheduled Rate

This column appears if a Scheduled Rate Table has been assigned to the proposal. It allows you to associate the resource with a specific scheduled rate.

Discount

This column appears if a Scheduled Rate Table has been assigned to the proposal. When you select a scheduled rate, ProPricer automatically enters the discount from the respective table. However, you can change it.

Note: Overriding discount values are displayed in blue.

Hours/Units/Cost

These columns show the number of hours the direct resource is used in the task if the rate type of the resource is *Hours*, units if the rate type of the resource is *Units*, or cost if the rate type of the resource is *Cost*. The heading of the **Hours** column changes to **Equiv. Heads** when you are working in Equivalent Heads view.

Curve

Enter the name of the curve you want to use to distribute the hours/units/cost of the resource. You can choose from:

None

Select this option if you want to input the resource hours/units/cost manually.

Curves

Select a curve to spread the resource hours/units/cost. This can be a system or user-defined curve.

Load

Select this option to spread the same amount of hours/units/cost in each month/quarter/year.

Even

Select this option to distribute the resource hours/units/cost over the specified period.

Notes:

The default curve is Even.

If you want to input hours/units/cost discretely, you do not have to specify any of the spread parameters. You can hide them and enter values in the months/quarters/years.

Spread Method

Enter the spread method that defines how the curve will be applied over the spread period. This column is hidden by default. There are three options you can choose from:

Repeating Average

Select this method to repeat the curve every 12 months/quarters/years.

Loading Curve

Select this method to load monthly, quarterly, or annual hours/units/cost based on the curve's weighting in the Spread Curve Library.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

Note: The default spread method is Weighted Average.

Start Date

Enter the date you want the distribution of the resource hours/units/cost to start. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the start date of the task.

End Date

Enter the date you want the distribution to stop. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the end date of the task.

Spread Amount

Enter the hours/units/cost you want to spread. This value will change to zero if the values are discretely entered in months, quarters, or years.

If your proposal is set up with an hours/units/cost modifier, ProPricer will automatically apply it to this spread amount, and the calculated result will appear in the **Total Amount** column.

Distribution

Each column represents a month/quarter/year in the spread period and shows the number of resource hours/units/cost assigned to the task. ProPricer uses these values to calculate the direct and indirect expenses for each period the resource is used.

Total Amount

This column shows the hours/units/cost total calculated by ProPricer. The values appear in green text and are read-only.

If your proposal is set up with an hours/units/cost modifier, ProPricer will automatically apply it to the value in the **Spread Amount** column, and the calculated result will appear in this column.

Allocations Tab

The Allocations tab shows:

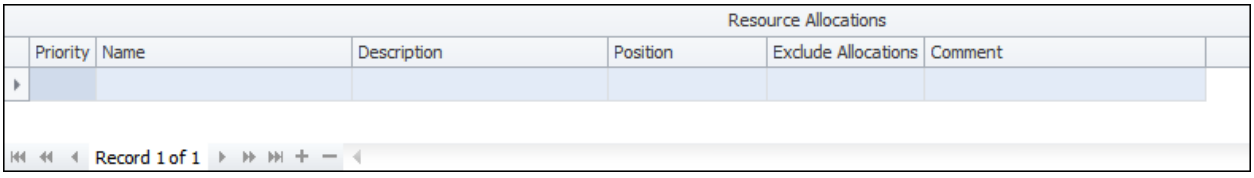
- The resources assigned to the task through the Resource Allocations page of the Proposal Properties.
- The below the line (BTL) expenses assigned to the task through the proposal's equipment/ODC allocations.

The data in this tab is for information only and cannot be edited. A green check mark in front of the tab label indicates that data has been entered for the selected task. The tab is divided into two grids: Resource Allocations and Resource Assignments.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

Resource Allocations

This grid shows the allocations.



Priority

This field indicates the order in which resource allocations were added to the proposal.

Name

Shows the name of the resource allocation.

Description

Shows the description of the resource allocation.

Position

Indicates if the allocated resource will be included in the calculation of the derivative resource (Before CERs), or excluded from the calculation (After CERs). See *Allocated Resource Position* to learn more.

Exclude Allocations

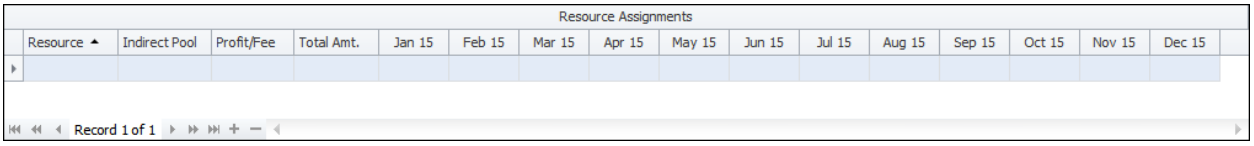
If the checkbox is selected, the resources from previous allocations will not be included in the allocation.

Comment

Shows any comment entered.

Resource Assignments

This grid shows the resources assigned to the task.



Resource

Shows the assigned resource.

Resource Fields

Shows additional information about the resource.

Indirect Pool

Shows the indirect pool entered for the resource. This column is hidden by default.

Profit/Fee

Shows the profit/fee entered for the resource. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource's assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Total Amount

Shows the hours/units/cost allocated.

Distribution

Shows the hours/units/cost allocated to the task for that particular month/quarter/year.

BOE Tab

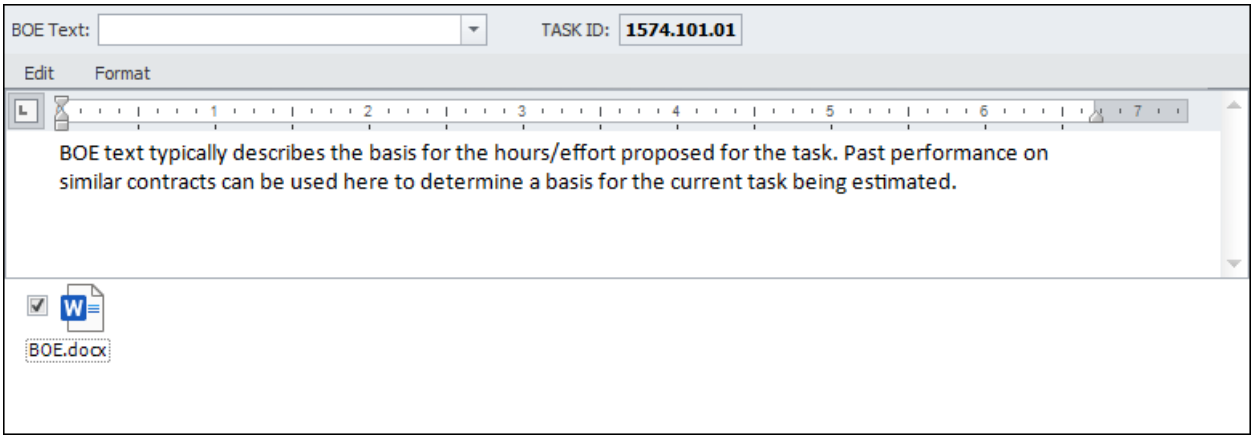
The BOE tab is where you enter text that describes the task's cost build-up.

The basis of estimate (BOE) determines the functional activities (for example, design, test, and production) in a task, and it approximates the time and costs for doing the work to complete the task.

There are three ways to enter BOE information. You can enter text manually, use pre-defined text from the BOE Text Library, and add external documents as attachments.

A check mark in front of the BOE tab label indicates that the tab contains text or file attachments for the task. The tab has a text area with its own ribbon and an attachment area.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*



BOE Text

Select a BOE entry from the BOE Text Library. Leave this field blank to enter your own text.

Note: If the text was provided by a source proposal, it will be read-only in the text editor, but you can still attach files.

Summary Field

The name of the summary field that BOE information is linked to in the Proposal Properties appears here. It indicates which summary field element the BOE belongs to. For example, if BOE information is linked to *TASK ID*, then you will see *TASK ID* followed by the specific task name.

When BOE information is linked to a summary field like *WBS* or *CLIN* instead of the task level, you can still edit the BOE for any task. If you do enter a task-specific BOE, the summary field name that appears will change accordingly. For example, if BOE information is linked to *WBS* instead of *TASK ID*, then *WBS* will become *TASK ID* when you edit the BOE for a task.

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in the Summary Element Detail Report or Bid Cost Worksheet Report. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox. The files will print in the order they appear. When you export Bid Cost Worksheet data, the Word document will only include text and picture files. Any other files will appear as icons.

CERs Tab

The CERs tab is where you view and assign CERs to the task. A green check mark in front of the tab indicates that a Task CER or Proposal CER has been assigned to the task.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

The CERs tab has two display modes: Structure and Data. CERs you assign directly to a task appear in both modes. Proposal CERs, however, only appear in Data mode since you cannot modify their structure on the CERs tab. If you see a green check mark but no CER in the Structure mode, then a Proposal CER has been assigned to the task. The CERs tab opens in Data mode by default. The following table shows the different options available for each mode. To switch from one mode to the other, right-click anywhere in the grid, go to **View** > **Display Mode**, and then click the mode you want. Alternatively, press **Ctrl**+**D**.

Option	Structure Mode	Data Mode
Add/Remove CERs	x	x
Modify CERs	x	
View Proposal CERs		x

*Note: Proposal CERs cannot be modified on the CERs tab. If the changes you need to make are specific to the proposal you are working on, you can modify the Proposal CER on the Proposal CERs page in the Proposal folder of the Proposal Properties. If the changes you need to make pertain to all proposals that use the same CER Table, you can modify the CER in the table, and then click the **Update Current Proposal** button in the **Update** group on the **Proposal** ribbon. Make sure to select the **Update Cost Estimating Relationships** checkbox.*

CERs Tab (Data)

The CERs tab in the Data display mode shows the Task CERs and Proposal CERs assigned to the task. You can add and remove CERs, as well as change the calculation order of the CERs. You cannot modify a CER in this mode. If you want to modify a CER to meet the specific needs of this task, right-click anywhere in the grid, go to **View** > **Display Mode**, and then click **Structure**. Alternatively, press **Ctrl**+**D**.

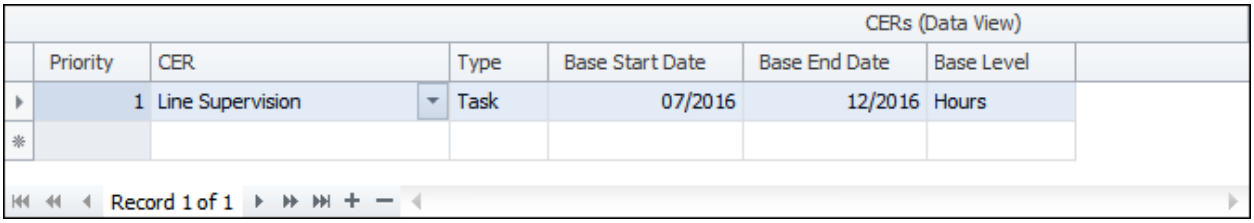
The CERs tab in the Data display mode is divided into three grids: CERs (Data), Bases, and Derivative Resources.

Note: The Bases and Derivative Resources grids of a Proposal CER will be empty if the resources assigned to the task do not meet the specifications of the base resources.

Note: Proposal CERs cannot be modified on the CERs tab. If the changes you need to make are specific to the proposal you are working on, you can modify the Proposal CER on the Proposal CERs page in the Proposal folder of Proposal Properties. If the changes you need to make pertain to all proposals that use the same CER Table, you can modify the CER in the table, and then click the ***Update Current Proposal*** *button in the* ***Update*** *group on the* ***Proposal*** *ribbon. Make sure to select the* ***Update Cost Estimating Relationships*** *checkbox.*

CERs (Data)

In this grid, you can review the general information of any Task CER or Proposal CER assigned to the task. You can also add and remove CERs. Once you save a CER to the task, the **Bases** and **Derivative Resources** grids will show the base and derivative resources, respectively, as well as the input values calculated for the derivative resources. The grid contains the following columns:



Priority

Displays the calculation order of the CERs. The order of Task CERs can be changed here in the right-click menu. The order of Proposal CERs can be changed in the Proposal Properties.

CER ID

Displays a task-specific identifier for assigned CERs. The default ID matches the CER's name, but you can change it for Task CERs. For Proposal CERs, it cannot be edited. CER IDs are useful when you need multiple instances of a CER in a task.

CER

Displays the name of the Task CER or Proposal CER. You can enter other Task CERs.

Type

Indicates how the CER was added to a task. Task CERs are added on a task-by-task basis. Proposal CERs come from the Proposal Properties and are automatically added to all tasks.

Task Selection

This column appears in summary tasks. It shows the selection of tasks whose resources will be the base resources of the CER.

Base Start Date

Used in conjunction with **Base End Date**, these two columns show the period that will be used for the base resources to calculate the input values of the derivative resources.

Base End Date

Used in conjunction with **Base Start Date**, these two columns show the period that will be used for the base resources to calculate the input values of the derivative resources.

Base Level

Displays the **Base Level** entered for the CER. It determines whether the input values of the derivative resources will be based on hours, equivalent heads, direct cost, or an indirect element.

CER Factor

Displays the **CER Factor** entered for the CER. It allows you to apply different factors to the input values of the base resource and/or derivative element.

Base Amt. Cap

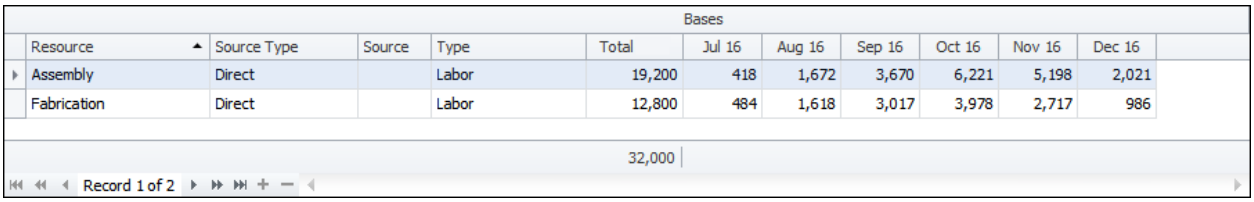
Displays the **Base Amt. Cap** entered for the CER. It allows you to limit the calculation of derivative resource input values when the base amount reaches the cap.

Cap Timescale

Displays the **Cap Timescale** entered for the CER. If there is a base amount cap, the timescale determines how it is applied.

Bases

This grid shows the base resources entered for the CER.



Resource

Displays the name of the base resource entered for the CER.

Resource Fields

These columns appear if there are resource fields defined in the Resource Field Library or Proposal Properties. They show the value entered for the base resource.

Indirect Pool

Displays the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource. If an indirect pool has not been assigned in either of these places, then this column will be blank. It cannot be edited, and it is hidden by default.

Profit/Fee

Displays any overridden rate that will be applied to the resource. It is hidden by default.

Rate Band

This column appears only if a Rate Band Table is assigned to the proposal's Direct Rate Table. It shows the rate band entered for the resource. This column is hidden by default.

Source Type

Indicates how the resource was added to the task.

Source

If the **Source Type** is **CER**, this column shows the name of the CER that added the resource.

Type

Displays the **Type** entered for the resource in the Resource Library.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column shows the proposal currency of resources whose rate type is *Cost*.

Total

Displays the sum of the values spread for the base resource. Depending on the **Base Level** entered for the CER, this number may represent hours only, direct cost, or an indirect element. For example: If the **Base Level** is **Hours**, the value represents the hours spread for the resource. If the **Base Level** is **O/H**, the value includes the Overhead expense.

Distribution

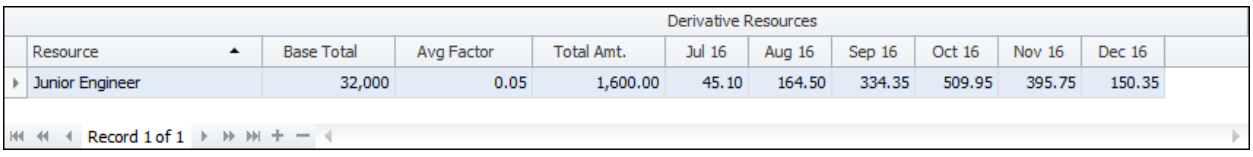
Each column represents a month/quarter/year in the spread period defined by the task's start/end dates or the base start/end dates. The columns show the hours/units/cost spread for the base resource.

Total Bar

This bar appears immediately above the Navigation Tools. It shows the sum of all the values entered in the **Total Amount** column.

Derivative Resources

This grid shows the derivative resources entered for the CER.



Resource

Displays the derivative resource entered for the CER.

Resource Fields

These columns appear if there are resource fields defined in the Resource Field Library or Proposal Properties. They show the value entered for the derivative resource.

Indirect Pool

Displays the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource. If an indirect pool has not been assigned in either of these places, then this column will be blank. It cannot be edited, and it is hidden by default.

Profit/Fee

Displays any overridden rate that will be applied to the resource It is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource's assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears only if you have assigned a Rate Band Table to the proposal's Direct Rate Table. It shows the rate band entered for the resource. This column is hidden by default.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column shows the proposal currency of resources whose rate type is *Cost*.

Base Total

Displays the sum of the values spread for the base resource, based on the **Base Level** entered for the CER.

Average Factor

The **Total Amount** divided by **Base Total**.

Total Amount

Displays the sum of the values spread for the derivative resource. It is the hours/units/cost spread for the base resource multiplied by the **Factor** or **CER Factor** of the derivative resource.

Distribution

Each column represents a month/quarter/year in the spread period defined by the task's start/end dates or the base start/end dates. The columns show the hours/units/cost spread for the base resource.

CERs Tab (Structure)

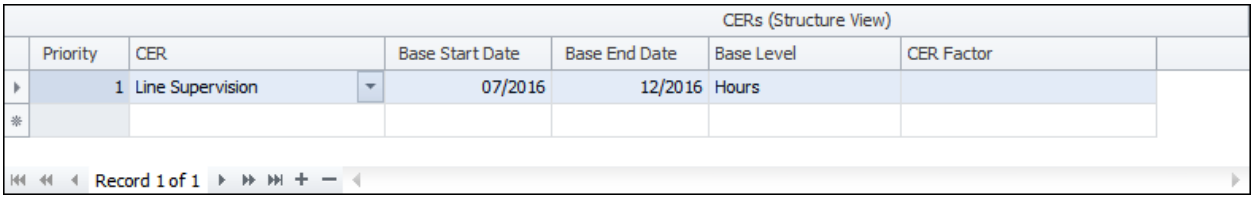
The CERs tab in the Structure display mode is where you add CERs to or remove CERs from the task. You can also change the calculation order and structure of the CERs to meet the specific needs of the task. This mode does not show Proposal CERs. To see the Proposal CERs assigned to the task, right-click anywhere in the grid, go to **View** > **Display Mode**, and then click **Data**. Alternatively, press **Ctrl**+**D**.

The CERs tab in Structure mode is divided into three grids: CERs (Structure), Bases, and Derivative Resources.

*Note: Pasting copied text in input grids (**Ctrl**+**V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

CERs (Structure)

Here you select the CER you want to add to the task. Once you save the CER to the task, the **Bases** and **Derivative Resources** grids will show the base and derivative resources, respectively, as well as the input values calculated for the derivative resources. You can also modify the structure of a CER.



Priority

Displays the calculation order of the CERs. It cannot be edited.

CER ID

Displays a task-specific identifier for assigned CERs. The default ID matches the CER's name, but you can change it for Task CERs. For Proposal CERs, it cannot

be edited. CER IDs are useful when you need multiple instances of a CER in a task.

CER

Enter the CER you want to assign to the task.

Task Selection

This column appears only if you are assigning a CER to a summary task. It allows you to choose the tasks you want to use as the base resources of the CER. Only resources from regular tasks can be used. Leave this field blank if you want to use the base resources from all the regular tasks in the proposal to calculate the input values of the derivative resources. If no task selection exists, or the appropriate tasks are not included in an existing one, click the ellipsis (...) button to open the **Task Selections** grid and create or modify an existing one.

Base Start Date

Displays the task's **Start Date** by default. However, you change it if you need to limit the period of the base resources that will be used to calculate the input values of the derivative resources.

Base End Date

Displays the task's **End Date** by default. However, you can change it if you need to limit the period of the base resources that will be used to calculate the input values of the derivative resources.

Base Level

Displays the **Base Level** entered for the CER in the proposal's CER Table by default. However, you can change it. The level you select determines whether the input values of the derivative resources will be based on hours, equivalent heads, direct cost, or an indirect element.

CER Factor

Displays the **CER Factor** entered for the CER in the proposal's CER Table. However, you can change it.

Base Amt. Cap

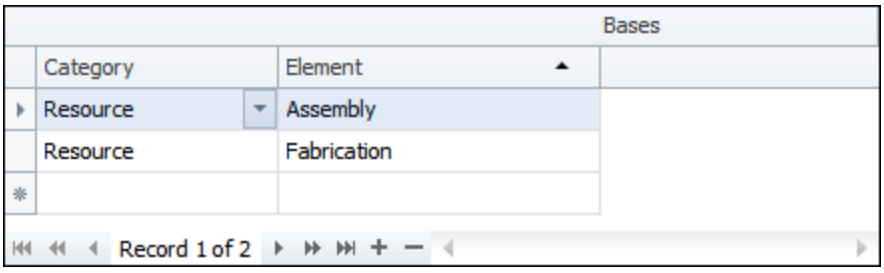
Displays the **Base Amt. Cap** entered for the CER in the proposal's CER Table. However, you can change it. It allows you to limit the calculation of derivative resource input values when the base amount reaches the cap.

Cap Timescale

Displays the **Cap Timescale** entered for the CER in the proposal's CER Table. However, you can change it. If there is a base amount cap, the timescale determines how it is applied.

Bases

This grid shows the base resources entered for the CER in the proposal's CER Table.



Action

Displays the **Action** entered for the CER in the proposal's CER Table. However, you can change it.

Category

Displays the **Category** entered for the CER in the proposal's CER Table. However, you can change it.

Element

Displays the **Element** entered for the CER in the proposal's CER Table. However, you can change it.

Resource Fields

These columns appear if there are resource fields defined in the Resource Field Library or Proposal Properties. They show the value entered in the proposal's CER Table. However, you can change it.

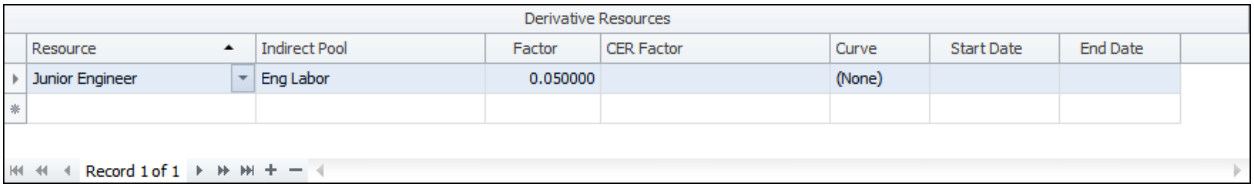
Entering a value in a resource field tells ProPricer to use resources with that particular resource field value. You can enter a partial value with the asterisk * wildcard to summarize multiple values containing the same string of characters (for example, *AAA** to account for all values that start with *AAA*, such as *AAA123* and *AAAXYZ*).

(Any) appears as a possible resource field value. **(Any)** means that the values calculated for the derivative elements of the CER will be based on the values of all resources from the selected category, regardless of the entries in their resource fields.

Resources with empty resource fields are included as well. If a resource field is empty, the values of the derivative elements are calculated based on the values of the resources that have no entries in that particular field.

Derivative Resources

This grid shows the derivative resources entered for the CER in the proposal's CER Table.



Resource

Displays the derivative resource entered for the CER in the proposal's CER Table. However, you can change it.

Resource Fields

These columns appear if there are resource fields defined in the proposal's CER Table or the Proposal Properties. They show the value entered in the CER Table. However, you can change it.

*Note: **(Match)** will also appear as a possible resource field value. **(Match)** means that the values will be the same as those in the **Bases** grid.*

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

This column allows you to enter a different profit/fee rate for the derivative resources. This rate overrides any rate entered for the task, in Proposal Properties, in the Indirect Rate Overrides grid, and in the proposal's Indirect Rate Table. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal's Direct Rate Table. It shows the rate band entered for the resource. You can change it. This column is hidden by default.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column shows the proposal currency of resources whose rate type is *Cost*. You can change it.

Factor

Displays the factor entered for the derivative resource in the proposal's CER Table. However, you can change it.

CER Factor

Displays the CER factor entered for the derivative resource or CER in the proposal's CER Table. However, you can change it.

In the next four columns, you can enter different spread parameters for the derivative resources. By default, the distribution of the input values calculated for the derivative resources will be the same as that of the base resources. The time flex capability in ProPricer, however, allows you to distribute the input values of the derivative resources independently of the base resources.

Curve

Enter the name of the curve you want to use to distribute the hours/units/cost of the derivative resource. You can choose from:

None

Select this option if you want to input the resource hours/units/cost manually.

Curves

Select a curve to spread the resource hours/units/cost. This can be a system or user-defined curve.

Even

Select this option to evenly spread the hours/units/cost in the specified period.

Spread Method

Enter the spread method that defines how the curve will be applied over the spread period. This column is hidden by default. You can choose from:

Repeating Average

Select this method to repeat the curve every 12 months/quarters/years.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

Start Date

Enter the date you want to start the distribution of the hours/units/cost of the derivative resource. The date cannot be before the start date of the task.

End Date

Enter the date you want the distribution to stop. The date cannot be after the end date of the task.

Formulas Tab

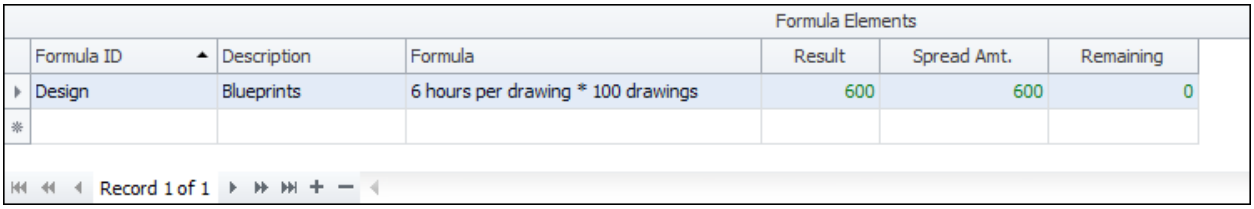
The Formulas tab is where you create equations to add resources to a task. A green check mark in front of the tab label indicates that the tab contains formulas for the selected task. The tab is divided into three sections: Formula Elements, Resource Input, and Justification.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Formula Elements

Here you enter the formulas.



Formula ID

Enter a name for the formula.

Description

Type a description for the formula.

Formula

Type the formula or click ... to open the **Formula Editor** dialog box. If you type the formula, make sure to add spaces between numbers and operators; that is, five times six divided by two should be typed *5 * 6 / 2*. Words are ignored.

Result

This column shows the result of the formula. It cannot be edited.

Spread Amount

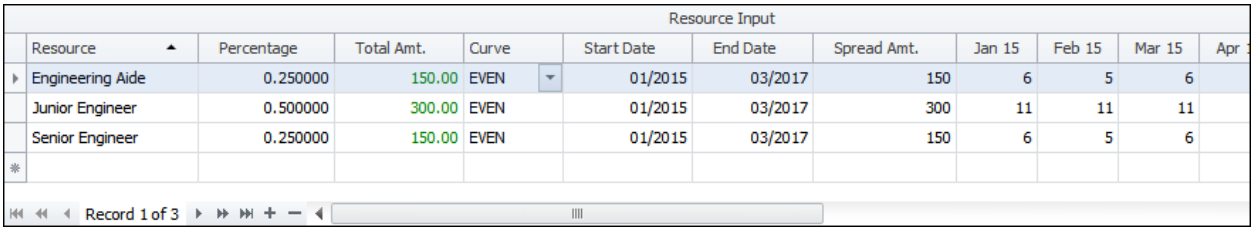
As you enter percentages in the **Resource Input** grid, this column will show a running total of the amount of hours/units/cost spread. It cannot be edited.

Remaining

The difference between the result and the spread amount.

Resource Input

Here you add the resources. The resources added here will automatically be added to the task.



Resource

Enter the name of the resource.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter a value in the resource field.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to

change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

This column allows you to enter a different profit/fee rate for the resources. This rate overrides any rate entered for the task, in Proposal Properties, the **Indirect Rate Overrides** grid, as well as the proposal's Indirect Rate Table. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal’s Direct Rate Table. It shows the rate band entered for the resource. You can change it. This column is hidden by default.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column will show the proposal currency of resources whose rate type is *Cost*. You can change it.

Percentage

Enter the percentage of the result that corresponds to the resource. ProPricer will automatically enter the total amount and the spread amount. If you manually enter values in the months/quarters/years, ProPricer will calculate the percentage.

Total Amount

Once you enter the percentage, ProPricer will enter the total amount of hours/units/cost spread for the resource. It cannot be edited. If you change one of the monthly/quarterly/yearly values, ProPricer will adjust the value.

Curve

Enter the name of the curve you want to use to distribute the hours/units/cost of the resource. You can choose from:

None

Select this option if you want to input the resource hours/units/cost manually.

Curves

Select a curve to spread the resource hours/units/cost. This can be a system or user-defined curve.

Load

Select this option to spread the same amount of hours/units/cost in each month/quarter/year.

Even

Select this option to evenly spread the hours/units/cost in the specified period.

Notes:

The default curve is Even.

If you want to input hours/units/cost discretely, you do not have to specify any of the spread parameters. You can hide them and enter values in the months/quarters/years.

Spread Method

Enter the spread method that defines how the curve will be applied over the spread period. This column is hidden by default. There are three options you can choose from:

Repeating Average

Select this method to repeat the curve every 12 months/quarters/years.

Loading Curve

Select this method to load monthly, quarterly, or annual hours/units/cost based on the curve's weighting in the Spread Curve Library.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

Note: The default spread method is Weighted Average.

Start Date

Enter the date you want the distribution of the resource hours/units/cost to start. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the start date of the task.

End Date

Enter the date you want the distribution to stop. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the end date of the task.

Spread Amount

Once you enter the percentage, ProPricer will enter the amount of hours/units/cost spread for the resource. If you change the value, ProPricer will change the percentage and total amount. If you change one of the monthly/quarterly/yearly values, the spread amount will be zero because ProPricer no longer recognizes the spread parameters.

Distribution

Each column represents a month/quarter/year in the spread period and shows the number of resource hours/units/cost assigned to the task. ProPricer uses these values to calculate the direct and indirect expenses for each period the resource is used.

Justification

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Material Tab

The Material tab is where you assign parts and assemblies to your tasks, and distribute cost and spread information for the assigned material. Due to the two-way functionality of material assignments, you can also view and edit all the parts and assemblies assigned to tasks in Material View. A green check mark in front of the tab label indicates that material is assigned to the selected task.

In proposals, you can change the information that came from the library by entering proposal-specific information for a part or assembly instead. If you update material in a proposal, or consolidate material unit costs in a proposal, the changes revert to the library information.

The tab is divided into multiple grids: Material Input, Material Distribution, Timephased Base Unit Cost, Associated Costs, Cost Source, and Cost Source Details.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

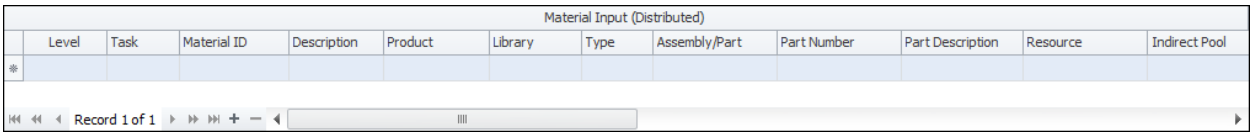
*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Material Input

This grid is where you assign materials to the tasks.

*Note: The Material tab and Material View have two display modes: Hierarchical and Flat. Hierarchical mode shows the structure of assemblies and allows you to expand and collapse each level. Flat mode provides an expanded list of all the materials and allows you to group data in the grid. To switch modes, right-click anywhere in the **Material Input** grid > **Display Mode** > select an option. Or press **Ctrl+D**.*

Note: After editing a part or an assembly, you can apply your changes to matching materials in the proposal. Right-click the material > ***Replicate Material Changes****.*



Level

This column shows the position of the child element in the assembly. The plus or minus sign, displayed in a small square box to the left of the level number, allows you to expand or collapse the assembly. You can also use the **Expand** and **Collapse** options available on the shortcut menu, which allow you to expand/collapse the current assembly, the entire subtree, or all the assemblies in the grid.

Task

You can edit this field only if you are assigning a task to a child element of a product assigned to the proposal. ProPricer allows you to assign different tasks to the parts and sub-assemblies of a product. This field cannot be edited if you are assigning materials from the material libraries.

Note: You can quickly consolidate material unit costs in a specific task. Right-click the task > ***Consolidate*** *>* ***Selected Materials****.*

Summary Fields

All the summary fields defined in the Proposal Properties appear as a separate column. They show the summary field values that were entered when a task was created in Task View.

Material ID

Enter an ID for the material. If you enter the assembly/part first, ProPricer will enter an ID for the assembly/part in this column. You can accept it or enter a new one.

Description

Enter a description for the material ID.

Parent

This column only appears when you display materials in Flat mode. If a material has no parent element because it is at the top level of an assembly, then the column will be blank. It cannot be edited.

Comment

This column shows any comment entered for the part or assembly in the library.

Product

This column shows the name of the product to which the assembly/part belongs.

Source Library

Enter the name of the library that contains the part or assembly you want to add to the task. Choose *(None)* if you want to enter a task-specific part. If a product has been assigned to the task, this column will show the name of the library the assembly/part belongs to.

Type

Once you select the material from the library, this column will show if it's a part or assembly.

Source Material

Select a part or assembly from your material libraries. The material's information will appear in the other columns automatically.

Assembly/Part

Enter the name of the part or assembly you want to use. If you are entering a task-specific part, type a name for the part or assembly.

Part Number

This column shows the number entered for the part/assembly in the library. If you are entering a task-specific part, type a number for the part or assembly.

Part Description

This column shows the description entered for the part/assembly in the library. If you are entering a task-specific part, type a description for the part or assembly.

Material Fields

These columns appear if assembly/part material fields have been defined. Enter the appropriate text or number. You can hide any material field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

If you enter a material field value or resource field value at the top level of an assembly, you can copy that value to all lower-level components with the Fill Down function. Right-click the cell containing the field value, and then click **Fill Down**. You will be prompted to overwrite the existing values.

Resource

There are two scenarios for this column:

Part

This column will show the resource entered for the part in the library. If no resource was entered in the library or you are creating a task-specific part, you will need to enter one here. If the part is an element of an assembly for which the **Override** checkbox is selected, you can ignore this column. This is because ProPricer will ignore any resource entered for the part in the library and use the resource entered for the assembly.

Assembly

Normally this column will be blank because ProPricer uses the resources entered for the child elements and associated costs. If a resource was entered for the assembly in the library, it will appear, but it will not come into play unless the **Override** checkbox is selected. Selecting the **Override**

checkbox tells ProPricer to ignore all the resources assigned to the child elements and associated costs and use this one.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter the resource field value you want to use. You can hide any resource field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

If you enter a material field value or resource field value at the top level of an assembly, you can copy that value to all lower-level components with the Fill Down function. Right-click the cell containing the field value, and then click **Fill Down**. You will be prompted to overwrite the existing values.

Indirect Pool

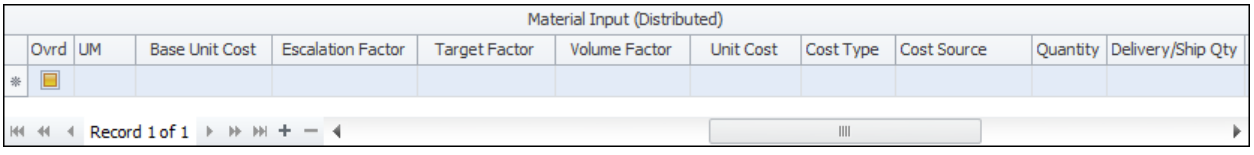
This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource.

Profit/Fee

This column allows you to enter a different profit/fee rate for the material. This rate overrides any rate entered for the task, in Proposal Properties, the Indirect Rate Overrides grid, and the proposal's Indirect Rate Table.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal's Direct Rate Table. It shows the rate band entered for the resource. You can change it.



Override

This checkbox only applies to assemblies. It allows you to override the base unit cost and material factors of the assembly. If the checkbox is selected, you will need to enter a resource for the assembly in the **Resource** column, because ProPricer will no longer consider the resources assigned to the child elements or associated costs nor the unit costs calculated for the child elements. If the checkbox is clear, the unit cost of the assembly will be updated every time there is a modification to a child element.

UM

This column shows the unit of measurement entered for the part in the library. If you are entering a task-specific part, enter the unit of measurement for the part.

Make/Buy

This column indicates whether the part/assembly is made or bought, as specified in the Parts Library or Assemblies Library. You can change it in the proposal.

Base Unit Cost

There are two scenarios for this column:

Part

This column will show the cost entered for a single unit in the library.

Assembly

This column will be blank unless you select the **Override** checkbox. This is because ProPricer uses the base unit costs of the child elements to calculate the unit cost of the assembly. Selecting the **Override** checkbox tells ProPricer to ignore the base unit costs entered for the child elements and use the base unit cost entered here to calculate the unit cost of the assembly. If you enter an overriding base unit cost, it will be displayed in blue.

Currency

This column appears only if the **Multi-Currency** checkbox is selected on the **Currency** page in the **Proposal** folder of Proposal Properties. It shows the currency entered for the part in the library. You can change it if necessary. You have to select the **Ovrd** checkbox to change the currency of an assembly.

Escalation Factor

This column shows the value from the Escalation Table associated with the part. The default is 1.

Target Factor

Enter the factor you want to apply to the base unit cost in order to meet a target cost. You can enter a value between 0 and 100. The default is 1.

Volume Factor

Enter the factor you want to apply to the base unit cost to adjust for quantity differences. You can enter a value between 0 and 100. The default is 1.

Unit Cost

The cost obtained by multiplying the base unit cost, escalation factor, target factor, volume factor.

Unit List Cost

The cost obtained by adding the associated cost per unit to unit cost.

Unit Price

The price obtained by adding all indirect costs to the unit cost.

Cost Type

After a consolidation of the unit costs is performed for the materials assigned to the proposal tasks, ProPricer automatically enters the cost type that was used for the consolidation.

Cost Source

This column shows the cost source generated by cost consolidation, or it shows the source entered in the Parts Library or Assemblies Library.

If a part from the library has multiple quotes, purchase orders, or miscellaneous cost sources, you can click to view the cost source details and select a different source. In the cost source details, you can also add a new source to a material library directly from your proposal.

The base unit cost updates automatically when the cost source changes. If the selected cost source has its own associated costs in the material libraries, they are applied to the part/assembly.

Months Expired

Displays the number of months since the selected cost source expired.

Cost From Date and Cost To Date

These columns show when the part/assembly cost is valid. For example, if the cost source is a purchase order, then the dates indicate when it was written and when it expires.

Vendor Library

This column shows which product or common library the vendor came from.

Vendor

This column show the name of the vendor that is supplying the part/assembly.

Rule ID

This column appears if a rule ID type is selected for the proposal's consolidation rule set. It shows the automatically generated name of the cost consolidation rule or the manually entered name, depending on the rule ID type. If the base unit cost of the part is changed, the data in this column is erased, allowing you to manually enter the appropriate rule.

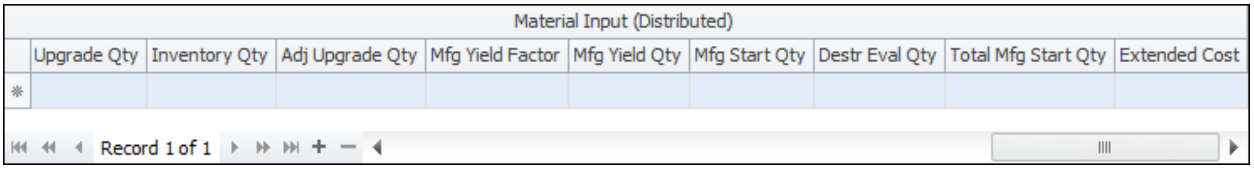
Quantity

This column shows the number of part/sub-assembly units in an assembly. If the quantity of a part is unknown, it is not required. However, the quantity is required for sub-assemblies. Parts with no quantity are excluded from material cost consolidation.

Delivery/Ship Quantity

Enter the delivery/shipment quantity for the material. The shipment quantity for a child element of an assembly is calculated by multiplying its unit quantity by the delivery/shipment quantity specified for its parent. The **Delivery/Ship Qty** column is not available for editing if you select **Distributed** as the Delivery/Ship Quantity Input Mode.

To switch between the input modes, go to the top of the grid and select the one you want. Or right-click the grid, go to **View** > **Delivery/Ship Qty Input Mode**, and then select an option.



Upgrade Qty

This column shows the result of multiplying the quantity by the total manufacturing start quantity of the parent structure.

Inventory Qty

This column shows the inventory quantity entered for the part or assembly in the library.

Adjusted Upgrade Qty

This column shows the difference obtained from subtracting the inventory quantity from the upgrade quantity.

Mfg Yield Factor

This column shows the manufacturing yield factor entered for the part or assembly in the library.

Mfg Yield Qty

This column shows the result of subtracting the adjusted upgrade quantity from the manufacturing start quantity.

Mfg Start Qty

This column shows the result of dividing the adjusted upgrade quantity by the manufacturing yield factor.

Destr Eval Qty

This column shows the destructive evaluation quantity entered in the library for the part or assembly.

Total Mfg Start Qty

ProPricer calculates the amount for the material ID based on the data in the **Material Distribution** grid and displays the total here. The total manufacturing start quantity is equal to either the spread amount or to the sum of the monthly/quarterly/yearly units.

Extended Cost

ProPricer calculates the extended cost for the material ID and shows the value here. The value is equal to the total manufacturing start quantity multiplied by the unit cost. If you entered different currencies for the parts/assemblies, the amount is in the currency defined for the proposal. The currency of the proposal appears in parentheses.

Extended List Price

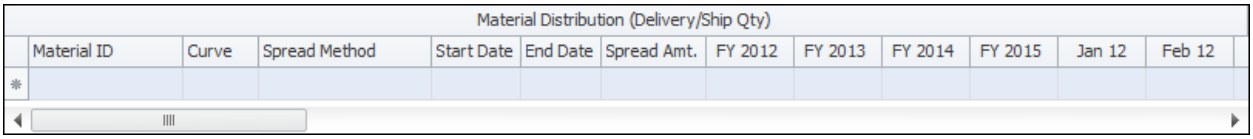
This column shows the price obtained by adding the associated cost of all units to the extended cost.

Extended Price

This column shows the price obtained by adding all indirect costs to the extended cost.

Material Distribution

This grid is where you enter spread information for the material.



Material ID

The material ID is taken from the input grid above. It cannot be edited.

Curve

Enter the name of the spread curve you want to use to distribute the units/cost of the material. You can choose from:

None

Select this option if you want to input the material units/cost manually.

Curves

Select a curve to spread the material units/cost. This can be a system or user-defined curve.

Load

Select this option to spread the same amount of units/cost in each month/quarter/year.

Even

Select this option to evenly spread the units/cost in the specified period.

Note: The default curve is Even.

Note: To input units/cost discretely, none of the spread parameters are required.

Spread Method

Enter the spread method that defines how the spread curve will be applied over the spread period. There are three options you can choose from:

Repeating Average

Select this method to repeat the curve every 12 months/quarters/years.

Loading Curve

Select this method to load monthly, quarterly, or annual units/cost based on the curve's weighting in the Spread Curve Library.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

Note: The default spread method is Weighted Average.

Start Date

Enter the date you want the distribution of the material units/cost to start. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the start date of the task.

End Date

Enter the date you want the distribution to stop. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the end date of the task.

Spread Amount

Enter the number of units/cost you want to spread for the material. This value will change to zero if the units/cost are distributed manually.

Fiscal Year Factors

In these columns, you can enter specific percent values in decimal format for each year of the task period. These values define the spread amount of the material for

that particular year. The sum of the values must equal 1. If you leave the columns blank, ProPricer will distribute the total quantity over the task period using the spread curve and spread method specified in the **Curve** and **Spread Method** columns of the grid. If you enter factor values, each quantity, defined by the respective factor, will be distributed over the task period, using the specified curve and method, but for a distribution period that corresponds to the task's fiscal year. The selected curve and spread method are applied to all fiscal years. Only the material quantities are different for the different years of the task period.

Note: *If you define proposal fiscal year factors and, at the same time, enter a discrete rate for a certain month, the fiscal year factors will be cleared.*

Distribution

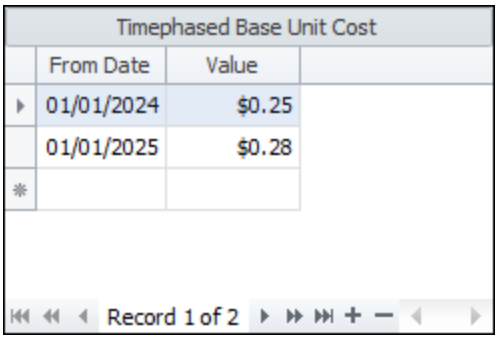
Each column represents a month/quarter/year in the spread period and shows the number of material units assigned to the task.

Note: *You can hide and display the spread period as a whole. Individual months/quarters/years cannot be hidden.*

Note: *Months/Quarters/Years are arranged in calendar order and cannot be rearranged.*

Timephased Base Unit Cost

This grid allows you to enter a base unit cost for a part or an assembly in specific periods. Each value should be different than the base unit cost in the **Material Input** grid.



From Date

Select the date that the base unit cost changes.

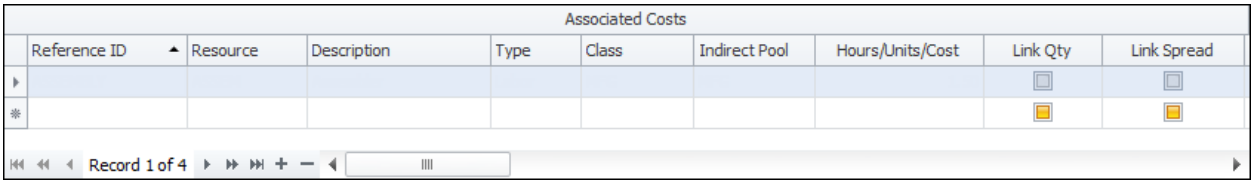
Value

Enter the base unit cost that begins on the selected date.

Associated Costs

This grid shows the additional expenses defined for the specific part or assembly in the respective library. You can change this information if necessary, or add new reference IDs.

If the cost source selected for a part or assembly has its own associated costs in the material libraries, they are applied to the part/assembly.



Source

This column shows the source of the associated costs. Associated costs can be entered at the material level or the cost source level.

Reference ID

This column shows the reference ID entered in the library.

Resource

This column shows the resource entered for the reference ID in the library.

Description

This column shows the description entered for the resource in the Resource Library, Direct Rate Overrides, or Rate Card.

Type

This column shows the type entered for the resource in the library.

Class

This column shows the class assigned to the resource in the rate table.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter the resource field value you want to use. You can hide any resource field that is not applicable. Right-click the field you want to hide, and then click **Hide** on the shortcut menu.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource.

Profit/Fee

This column allows you to enter a different profit/fee rate for the resource. This rate overrides any rate entered for the task, in Proposal Properties, the Indirect Rate Overrides grid, and the proposal's Indirect Rate Table.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource's assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears only if a Rate Band Table has been assigned to the proposal's Direct Rate Table. It shows the rate band entered for the resource. If a rate band has not been assigned, ProPricer will use the resource rates from the proposal's Direct Rate Table during pricing.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of Proposal Properties. The column will show the proposal currency of resources whose rate type is *Cost*.

Hours/Units/Cost

This column shows the hours/units/cost entered for the reference ID.

Link Qty

None

The associated cost is not linked to any material quantity. It is applied as a one-time charge when a part/assembly is added to a task.

Total Qty

The associated cost is linked to the total manufacturing start quantity of the material. It is applied each time the part/assembly is added to a task.

Period

The associated cost is linked to periods that have a quantity of one or more for the material. It is applied for each month, quarter, or year that has any quantity of the part/assembly.

Period Qty

The associated cost is linked to the value entered in the **Link Qty Amount** column. It is applied to each set of the specified amount.

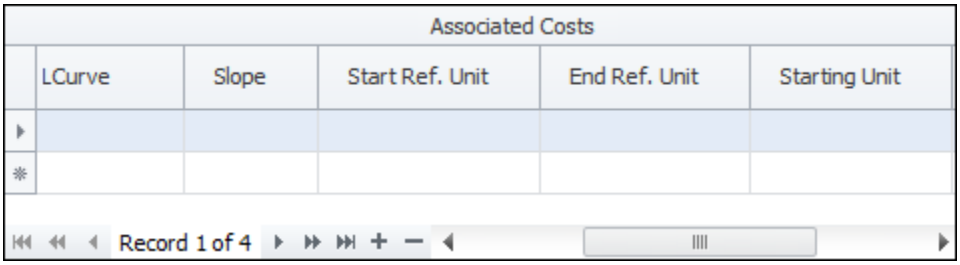
For example, if **Link Qty Amount** is 50, then the associated cost is applied to every 50 units.

Link Qty Amount

To enter a quantity amount, **Period Qty** must be selected in the **Link Qty** column. This links associated costs of the part/assembly to the quantity amount you enter.

Link Spread

Select this checkbox to spread the hours/units/cost of the associated cost resource using the same curve that the part/assembly uses. The checkbox is clear by default.



LCurve

This column shows the type of learning curve applied.

Slope

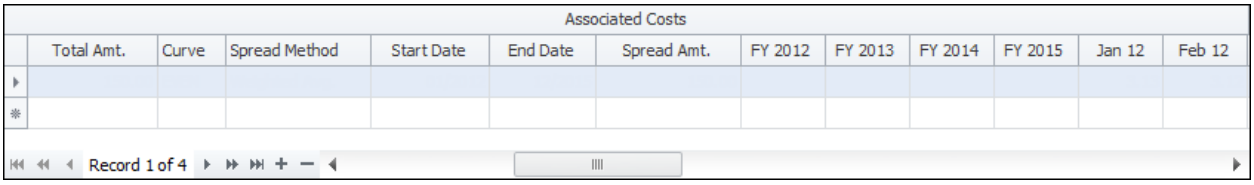
This column shows the slope percentage of the learning curve. You can change it.

Start Ref. Unit and End Ref. Unit

When a learning curve is used, the reference units determine the lot size for the total hours, units, or cost. Based on the starting unit, ProPricer will calculate how much of the amount remains for that original lot. It also calculates what the new amount of hours, units, or cost would be, based on the slope and how many units have already been completed.

Starting Unit

Enter the unit number of the first item in the lot to be estimated.



Total Amount

The value in this column varies, depending on whether you have chosen to link the hours/units/cost of the associated cost to the total manufacturing start quantity of the material or not. If the **Link Qty** checkbox is selected, the total amount is equal to the hours/units/cost multiplied by the total manufacturing start quantity. If the **Link Qty** checkbox is clear, the total amount is equivalent to the hours/units/cost entered for the associated cost.

Curve

This column displays the curve that will be used to spread the resource hours/units/cost. There are two possible scenarios for the value in this column:

- The **Link Spread** checkbox is selected for the reference ID. You cannot change the spread curve. ProPricer will spread the hours/units/cost of the associated resource using the same curve that the material uses.
- The **Link Spread** checkbox is clear. You can change the spread curve.

Spread Method

This column shows how the curve will be applied over the spread period. You can edit this field only if the **Link Spread** checkbox is clear.

Start Date

This column shows the date the distribution will start. By default, it is equal to the start date of the task. You can change it only if the **Link Spread** checkbox is clear.

End Date

This column shows the date the distribution will stop. By default, it is equal to the end date of the task. You can change it only if the **Link Spread** checkbox is clear.

Spread Amount

This column displays the hours/units/cost that will be spread for the resource. The spread amount is equal to the total amount and cannot be changed.

Fiscal Year Factors

In these columns, you can enter specific percent values in decimal format for each year of the task period. These values define the spread amount of the associated cost for that particular year. The sum of the values must equal 1. If you leave the columns blank, ProPricer will distribute the total quantity over the task period using the spread curve and spread method specified in the Curve and Spread Method columns of the grid. If you enter factor values, each quantity, defined by the respective factor, will be distributed over the task period, using the specified curve and method, but for the distribution period that corresponds to the task's fiscal year. The selected curve and spread method are applied to all fiscal years.

Note: If you define proposal fiscal year factors and, at the same time, enter a discrete rate for a certain month, the fiscal year factors will be cleared.

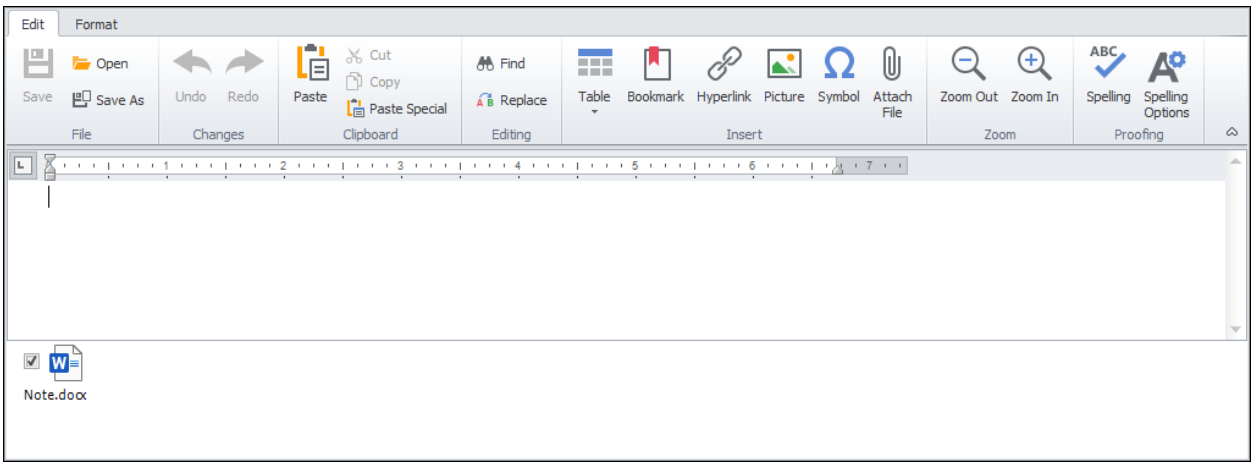
Distribution

Each column represents a month/quarter/year in the spread period and shows the number of resource hours/units/cost assigned to the task.

Notes Tab

This tab is where you enter additional text pertinent to the task. A check mark in front of the Notes tab label indicates that the tab contains text or attachments.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*



Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in the Summary Element Detail Report or Bid Cost Worksheet Report. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox. The files will print in the order they appear. When you export Bid Cost Worksheet data,

the Word document will only include text and picture files. Any other files will appear as icons.

Resource Sets Tab

The Resource Sets tab is where you spread resource sets in tasks. A green check mark in front of the tab label indicates that resource sets have been entered for the selected task. The Resource Sets tab is divided into two grids: Resource Set Input and Resource Set Summary.

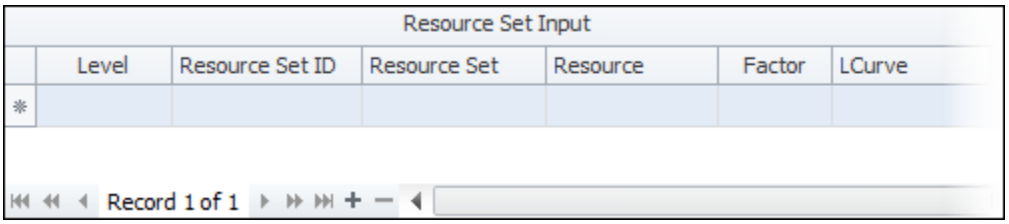
*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resource Set Input

This is where you add resource sets to tasks. The resource sets available to you will depend on the Resource Set Table assigned to the proposal.

In this grid, you can also make proposal-specific changes to the resource set elements. These changes will not alter the data in the proposal's Resource Set Table.



Level

This column shows the position of a resource in the resource set. The icon to the left of the level number expands or collapses the resource set.

Resource Set ID

Displays a task-specific identifier for assigned resource sets. The default ID matches the resource set's name, but you can change it. Resource set IDs are useful when you need multiple instances of a resource set in a task.

Resource Set

Enter the resource set to add to the task.

Resource

This column shows the name of each element in the resource set.

Resource Fields

These columns appear if there are resource fields defined in the Proposal Properties. Enter a value in the resource field.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

This column allows you to enter a different profit/fee rate for the individual resources in the set. This rate overrides any rate entered for the task, in Proposal Properties, the Indirect Rate Overrides grid, as well as the proposal's Indirect Rate Table. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your

proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal's Direct Rate Table. It shows the rate band entered for the individual resources. You can change it. This column is hidden by default.

Currency

This column appears only if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of Proposal Properties. The column will show the proposal currency of individual resources whose rate type is *Cost*. You can change it.

Amount

The amount of hours/units/cost entered for the element in the Resource Set Table. You can change it.

LCurve

The type of learning curve applied to the hours/units/cost amount of each resource in the set.

Slope

The slope percentage of the learning curve.

Start Ref. Unit and End Ref. Unit

When a learning curve is used, the reference units determine the lot size for the total hours, units, or cost in the **Amount** column. Based on the starting unit, ProPricer will calculate how much of the amount remains for that original lot. It also calculates what the new amount of hours, units, or cost would be, based on the slope and how many units have already been completed.

Starting Unit

When a learning curve is used, enter the unit number of the first item in the lot to be estimated.

Curve

Select the spread curve you want to use to distribute the resource set. You can choose from:

None

Select this option if you want to spread the resource set discretely.

Curves

Select a specific type of curve. This can be a system or user-defined curve.

Load

Select this option to spread the same amount of resource sets in each month/quarter/year.

Even

Select this option to evenly spread the resource set in the specified period.

Notes:

The default curve is Even.

If you want to input resource sets discretely, you do not have to specify any of the spread parameters. You can hide them and enter values in the months/quarters/years.

Spread Method

How the curve will be applied over the spread period. This column is hidden by default. There are three options you can choose from:

Repeating Average

Select this method to repeat the curve every 12 months/quarters/years.

Loading Curve

Select this method to load monthly, quarterly, or annual hours/units/cost based on the curve's weighting in the Spread Curve Library.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

Note: The default spread method is Weighted Average.

Start Date

Enter the date you want the distribution of the resource set to start. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the start date of the task.

End Date

Enter the date you want the distribution to stop. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the end date of the task.

Spread Amount

Enter the amount of times to spread the resource set in the task. This value will change to zero if the values are entered discretely.

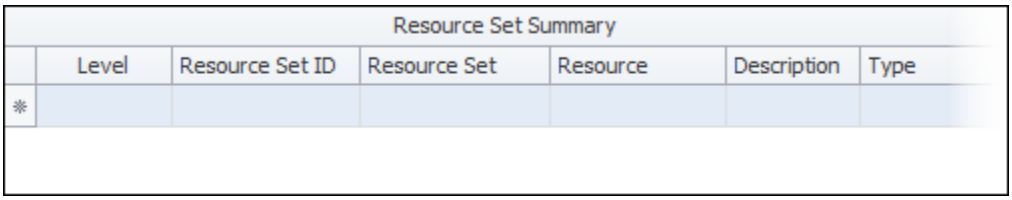
Distribution

Each column represents a month/quarter/year in the spread period.

- You can hide and display the spread period as a whole. Individual months/quarters/years cannot be hidden.
- Periods are arranged in calendar order and cannot be rearranged.

Resource Set Summary

This grid is for information only. It displays an overview of each resource set and the individual resources they contain.



Level

The position of a resource in the resource set.

TASK ID

The name of the task that the resource set is in.

Task Description

The explanation of the task.

Summary Fields

Specific details about the task.

Resource Set ID

The ID of the resource set.

Resource Set

The name of the resource set.

Resource

The name of an individual resource.

Description

The description of an individual resource.

Type

The type of an individual resource.

Class

The class of an individual resource.

Resource Fields

Additional information about an individual resource.

Indirect Pool

The indirect pool assigned to an individual resource. This column is hidden by default.

Profit/Fee

Any overridden profit/fee rate that will be applied to an individual resource. This column is hidden by default.

Accounting Calendar

The name of the accounting calendar assigned to an individual resource. This column is hidden by default.

Rate Band

The name of the rate band assigned to an individual resource. This column is hidden by default.

Currency

The currency entered for resources whose rate type is *Cost*.

Amount

The amount of hours/units/cost entered for a resource set element. It can be entered in the resource set table or the task.

Total Amount

The amount of times the resource set is spread in the task.

Average Rate

This column appears if you have been granted access to view it, and it is hidden by default.

It shows the average rate of the individual resources, which is the sum of the rates for the resource from the Direct Rate Table divided by the number of months, quarters, or years that the resource is used in the task. If the proposal timescale is *Annual (Fiscal)*, then the average is calculated with fiscal year direct rates instead of calendar year rates.

Direct Cost

This column appears if you have been granted access to view it. It shows the direct cost calculated for an individual resource.

Resources Tab

The Resources tab is where you assign resources and labor categories to the tasks. A green check mark in front of the tab label indicates that resource data has been entered for the selected task. The Resources tab is divided into two grids: Resource Input and Resource Summary.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

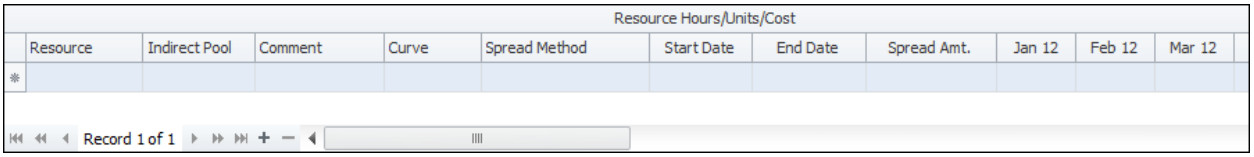
*Note: Pasting copied text in input grids (**Ctrl**+**V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Resource Input

In this grid, you add direct resources and labor categories to the task.

*Note: You can do any of the following to quickly switch the timescale when the **Distribution** columns are shown in the grid:*

- *At the top of the grid, click the name of the timescale currently displayed, and then select an option.*
- *Right-click anywhere in the grid, go to **View** > **Timescale**, and then select an option.*
- *Press **Ctrl**+**T** to select the next option.*
- *Press **Ctrl**+**Shift**+**T** to select the previous option.*
- *Press **Alt**+**T** to open the **Timescale** menu, and then select an option.*



Resource ID

This column appears when AutoNumbering is enabled in the proposal. The ID is a unique resource name, so you can repeatedly use a single resource in the same task.

Resource

Select a resource from the proposal's Direct Rate Table. In Services-type proposals, labor categories from the Rate Card can also be selected.

If resource fields are mapped in the proposal, then you can only enter specific combinations of resource information. All possible combinations are provided in the drop-down menu.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. Enter a value in the resource field.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

This column allows you to enter a different profit/fee rate for the individual resources. The rate overrides any rate entered for the task in the Proposal Properties, the **Indirect Rate Overrides** grid, and the proposal's Indirect Rate Table. This column is hidden by default.

Direct Rate

This column allows you to enter a different direct rate for the individual resources. The rate overrides the resource's rate in the Direct Rate Table. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal’s Direct Rate Table. It shows the rate band entered for the resource. If a rate band has not been assigned, ProPricer will use the resource rates from the proposal’s Direct Rate Table during pricing. This column is hidden by default.

Currency

This column appears if the **Multi-Currency** checkbox has been selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column will show the proposal currency of resources whose rate type is *Cost*. You can change it.

Scheduled Rate

This column appears if a Scheduled Rate Table has been assigned to the proposal. It allows you to associate the resource or labor category with a specific scheduled rate.

Discount

This column appears if a Scheduled Rate Table has been assigned to the proposal. When you select a scheduled rate, ProPricer automatically enters the discount from the respective table. However, you can change it.

Note: Overriding discount values are displayed in blue.

Comment

Enter any applicable comment. If you need more room, click the down arrow to open a text box. This column is hidden by default.

Curve

Enter the name of the curve you want to use to distribute the hours/units/cost of the resource. You can choose from:

None

Select this option if you want to input the hours/units/cost manually.

Curves

Select a curve to spread the hours/units/cost. This can be a system or user-defined curve.

Load

Select this option to spread the same amount of hours/units/cost in each month/quarter/year.

Even

Select this option to evenly spread the hours/units/cost in the specified period.

Notes:

The default curve is Even.

If you want to input hours/units/cost discretely, you do not have to specify any of the spread parameters. You can hide them and enter values in the months/quarters/years.

Spread Method

Enter the spread method that defines how the curve will be applied over the spread period. This column is hidden by default. There are three options you can choose from:

Repeating Average

Select this method to repeat the curve every 12 months/quarters/years.

Loading Curve

Select this method to load monthly, quarterly, or annual hours/units/cost based on the curve's weighting in the Spread Curve Library.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

Note: The default spread method is Weighted Average.

Start Date

Enter the date you want the distribution of the hours/units/cost to start. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the start date of the task.

End Date

Enter the date you want the distribution to stop. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the end date of the task.

Spread Amount

Enter the hours/units/cost you want to spread. This value will change to zero if the values are discretely entered in months, quarters, or years.

If your proposal is set up with an hours/units/cost modifier, ProPricer will automatically apply it to the value in the **Spread Amount** column, and the calculated result will appear in the **Total Amount** column.

Distribution

Each column represents a month/quarter/year in the spread period and shows the amount of resource hours/units/cost assigned to the task. ProPricer uses these values to calculate the direct and indirect expenses of using a resource. You can view the expenses (and turn them into actuals, if needed) for a particular month/quarter/year by right-clicking it and then clicking **Edit Actuals** on the shortcut menu.

- ProPricer displays estimates in black and actuals in blue.
- You can hide and display the spread period as a whole. Individual months/quarters/years cannot be hidden.
- Periods are arranged in calendar order and cannot be rearranged.
- You can view the monthly/quarterly/annual values of resources with rate type *Hours* as hours or as equivalent heads.

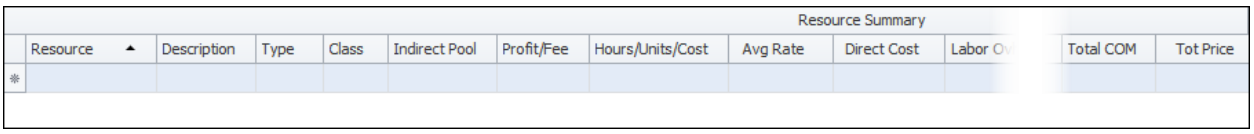
Total Amount

This column shows the hours/units/cost total calculated by ProPricer. The values appear in green text and are read-only.

If your proposal is set up with an hours/units/cost modifier, ProPricer will automatically apply it to the value in the **Spread Amount** column, and the calculated result will appear in the **Total Amount** column.

Resource Summary

The columns in this grid are for information only. They display summary information for the resource or labor category selected in the **Resource Input** grid.



Resource ID

A unique resource name that ProPricer creates when AutoNumbering is enabled in the proposal.

Resource

This column shows the resource selected.

Description

This column shows the description entered for the resource in the Resource Library or Direct Rate Overrides.

Type

This column shows the resource type.

Class

This column shows the resource class.

Resource Fields

This column shows the value entered in the resource field.

Indirect Pool

This column shows the name of the indirect pool assigned to the resource. This column is hidden by default.

Profit/Fee

This column shows any overridden rate that will be applied to the resource. It is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource's assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal's Direct Rate Table. It shows the rate band entered for the resource. You can change it. This column is hidden by default.

Currency

This column appears if the **Multi-Currency** checkbox is selected on the **Currency** page in the **Proposal** folder of **Proposal Properties**. The column will show the currency of resources whose rate type is *Cost*.

Hours/Units/Cost

These columns show the number of hours the direct resource is used in the task if the rate type of the resource is *Hours*, units if the rate type of the resource is *Units*, or cost if the rate type of the resource is *Cost*. The heading of the **Hours** column changes to **Equiv. Heads** when you are working in Equivalent Heads view.

Average Rate

This column appears if you have been granted access to view it, and it is hidden by default.

It shows the average rate of the resource, which is the sum of the rates for the resource from the Direct Rate Table divided by the number of months, quarters, or years that the resource is used in the task. If the proposal timescale is *Annual (Fiscal)*, then the average is calculated with fiscal year direct rates instead of calendar year rates.

In Services-type proposals, ProPricer uses the information in the Rate Card to calculate the average rate of resources and labor categories.

Direct Cost

This column appears if you have been granted access to view it. It shows the direct cost calculated for the resource or labor category.

Indirect Elements

These columns appear if you have been granted access to view them. They show the indirect elements from the Algorithm with their respective costs.

SOW Tab

The SOW tab is where you enter text that describes the scope of the effort to be performed on a task.

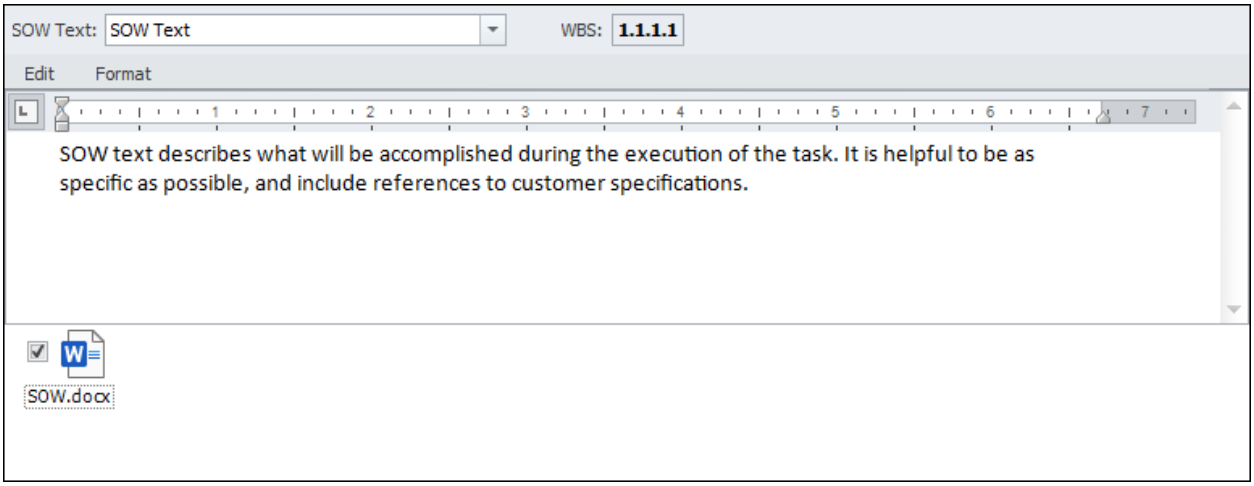
The statement of work (SOW) defines the items to be produced and delivered (for example, specifications, code, end product) and the activities to be performed (for example, customer meetings, scheduled reviews) during the task period.

There are three ways to enter SOW information. You can enter text manually, use pre-defined text from the SOW Text Library, and add external documents as attachments.

A check mark in front of the SOW tab label indicates that the tab contains text and/or external documents attached to the task.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

The SOW tab has a text area with its own ribbon and an attachment area.



SOW Text

Enter the name of the SOW entry from the library you want to use. Leave this field blank to enter your own text.

Summary Field

The name of the summary field that SOW information is linked to in the Proposal Properties appears here. It indicates which summary field element the SOW belongs to. For example, if SOW information is linked to *TASK ID*, then you will see *TASK ID* followed by the specific task name.

When SOW information is linked to a summary field like *WBS* or *CLIN* instead of the task level, you can still edit the SOW for any task. If you do enter a task-specific SOW, the summary field name that appears will change accordingly. For example, if SOW information is linked to *WBS* instead of *TASK ID*, then *WBS* will become *TASK ID* when you edit the SOW for a task.

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

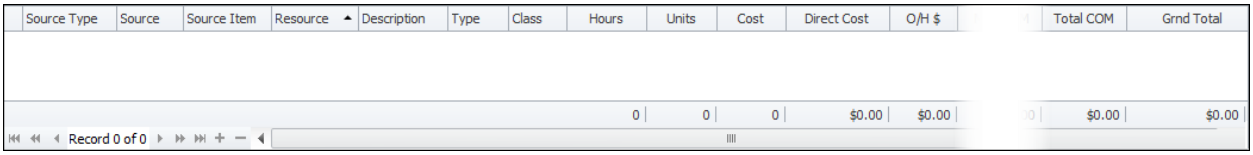
Select an attachment to include the file name in the Summary Element Detail Report or Bid Cost Worksheet Report. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox. The files will print in the order they appear. When you export Bid Cost Worksheet data, the Word document will only include text and picture files. Any other files will appear as icons.

Summary Tab

The Summary tab shows detailed information about the resources assigned to the tasks. Depending upon your Access Rights, you will also see direct and indirect cost information. In the Total Bar at the bottom of the tab, you can view the sum of the values in individual columns. If you group your data, you will see a Subtotal Bar under each group.

*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*



Source Type

This column indicates how the resource was added to the task. Source Types include:

Activity

The resource was entered on the **Activities** tab.

CER

The resource was entered on the **CERs** tab.

Direct

The resource was entered on the **Resources** tab.

Formula

The resource was entered on the **Formulas** tab.

Material

The resource was entered on the **Material** tab.

Resource Set

The resource was entered on the **Resource Sets** tab.

Travel

The resource was entered on the **Travel** tab.

Allocation

The resource was added with an allocation on the **Resource Allocation** page in the **Proposal** folder of **Proposal Properties**.

Source

If the Source Type is *CER*, *Formula*, *Material*, *Resource Set*, *Activity*, or *Travel*, this column shows the name of the CER, formula, material, resource set, activity, or trip that added the resource.

Source Item

If the Source Type is *Travel*, this column shows the specific travel expense that added the resource to the trip.

If the Source Type is *Material*, this column shows the Reference ID of the associated cost.

Resource

This column shows the name of the resource.

Description

This column shows the resource description.

Type

This column shows the resource type.

Class

This column shows the resource class.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. They show the value entered for the resource.

Indirect Pool

This column shows the name of the indirect pool assigned to the resource. It is hidden by default.

Profit/Fee

This column shows any overridden rate that will be applied to the resource. It is hidden by default.

Accounting Calendar

This column shows the accounting calendar assigned to the resource.

Rate Band

This column shows the name of the rate band assigned to the resource. It is hidden by default.

Currency

This column shows the currency of the resource if its rate type is *Cost*. It only appears if Multi-Currency is enabled in the Proposal Properties.

Hours

This column shows the total number of hours spread for the resource. The amount of hours is converted in the **Equiv Heads** column.

Equiv Heads

This column shows the total number of equivalent heads spread for the resource. The amount of heads is converted in the **Hours** column.

Units

This column shows the total number of units entered for the resource.

Cost

This column shows the cost entered for the resource.

Average Rate

This column appears if you have been granted access to view it. It shows the average rate of the resource, which is the sum of the rates for the resource from the Direct Rate Table divided by the number of months, quarters, or years that the resource is used in the task. If the proposal timescale is *Annual (Fiscal)*, then the average is calculated with fiscal year direct rates instead of calendar year rates. This column is hidden by default.

Direct Cost

This column appears if you have been granted access to view it. It shows the direct cost of the resource.

Indirect Elements

These columns appear if you have been granted access to view them. They show the indirect elements from the Algorithm with their respective costs.

Total Bar

This bar appears immediately above the navigation tools. It shows the sum of all the values entered in the respective columns.

Three-Point Estimating Tab

This input tab shows the Best Case, Most Likely, and Worst Case estimates for each resource in a task. It also displays the resulting expected values, and it provides detailed information about the resources. In the Total Bar at the bottom of the tab, you can view the sum of the values in individual columns. If you group data in the grid, you will see a Subtotal Bar under each group.

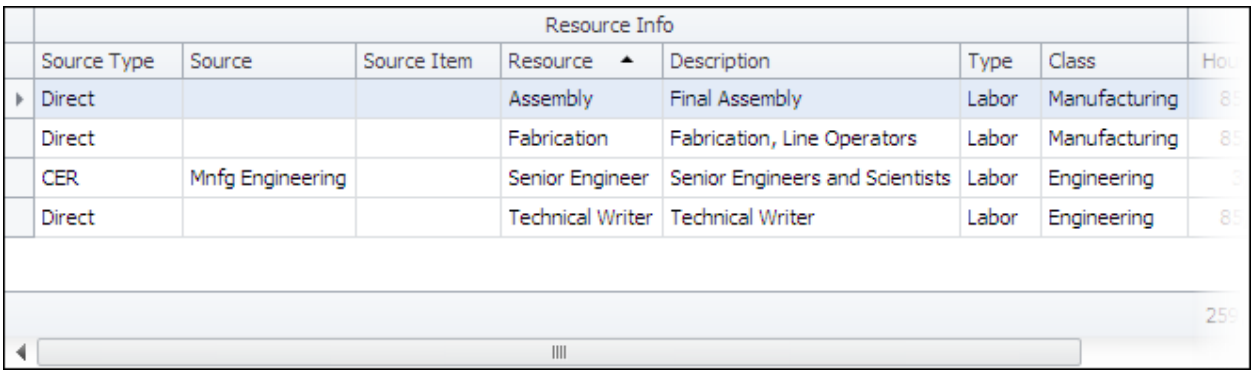
*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

*Note: In the **Tasks** grid, you can override the proposal-level Best Case and Worst Case factors for individual tasks.*

*Note: In proposals, there is a quick way to check your Best Case and Worst Case estimates while working on the Most Likely estimates. If a grid shows distribution data for direct resources, like in the **Resources** tab, look for a **Most Likely** button at the top of the grid. Clicking the button will switch the display of estimates instantly, and the button name will change to reflect the data you are viewing.*

Resource Info

The columns in this section provide details about the resources in the task.



Source Type

This column indicates how the resource was added to the task.

Activity

The resource was entered on the **Activities** tab.

CER

The resource was entered on the **CERs** tab.

Direct

The resource was entered on the **Resources** tab.

Formula

The resource was entered on the **Formulas** tab.

Material

The resource was entered on the **Material** tab.

Resource Set

The resource was entered on the **Resource Sets** tab.

Travel

The resource was entered on the **Travel** tab.

Allocation

The resource was added with an allocation on the **Resource Allocation** page in the **Proposal** folder of **Proposal Properties**.

Source

If the source type is *CER*, *Formula*, *Material*, *Resource Set*, *Activity*, or *Travel*, this column shows the name of the CER, formula, material, resource set, activity, or trip that added the resource.

Source Item

If the source type is *Travel*, this column shows the specific travel expense that added the resource.

If the source type is *Material*, this column shows the reference ID of the associated cost.

Resource

This column shows the name of the resource.

Description

This column shows the resource description entered in the Resource Library or Direct Rate Overrides.

Type

This column shows the resource type.

Class

This column shows the resource class.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. They show the value entered for the resource.

Indirect Pool

This column shows the name of the indirect pool assigned to the resource. It is hidden by default.

Profit/Fee

This column shows any overridden rate that will be applied to the resource. It is hidden by default.

Accounting Calendar

This column shows the accounting calendar assigned to the resource. It is hidden by default.

Rate Band

This column shows the name of the rate band assigned to the resource. It is hidden by default.

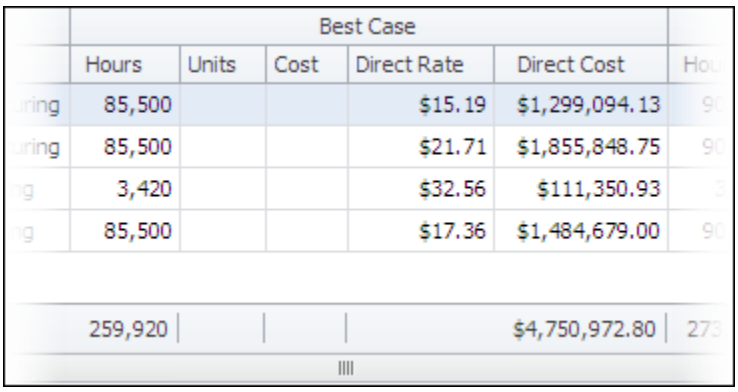
Currency

This column shows the currency of the resource if its rate type is *Cost*. It only appears if Multi-Currency is enabled in the proposal.

Best Case/Most Likely/Worst Case/Expected

The columns in the **Best Case**, **Most Likely**, and **Worst Case** sections show the three-point estimates for each resource.

The columns in the **Expected** section show the expected values for each resource. These values are calculated using the three-point estimates. The calculation is [*Best Case* + (4 * *Most Likely*) + *Worst Case*] / 6 = *Expected Value*.



	Best Case					
	Hours	Units	Cost	Direct Rate	Direct Cost	Hou
ring	85,500			$15.19	$1,299,094.13	9
ring	85,500			$21.71	$1,855,848.75	9
g	3,420			$32.56	$111,350.93	
g	85,500			$17.36	$1,484,679.00	9
	259,920				$4,750,972.80	27

Hours

This column shows the number of hours spread for the resource.

Units

This column shows the number of resource units used.

Cost

This column shows the cost entered for the resource.

Direct Rate

This column shows the average direct rate of the resource, which is the sum of the resource's rates from the Direct Rate Table divided by the number of months the resource is used in the task.

Direct Cost

This column shows the direct cost of the resource.

Total Price Rate

This column shows the rate that fully accounts for the resource's indirect costs. The column header is determined by the name of the Total Price Element in the Algorithm.

Total Price

This column shows the total price of the resource. The column header is determined by the name of the Total Price Element in the Algorithm.

Total Bar

This bar shows the sum of all the values entered in the respective columns.

Travel Tab

The Travel tab is for the trips people will take to complete the work in a task. A trip can go to a destination from the Travel Library, or it can go to a task-specific destination that doesn't exist in the library. If you enter a task-specific destination when you add a trip, you must also enter the travel expense rate information that typically comes from the proposal's Travel Rate Table.

A green check mark in front of the tab label indicates that travel data has been entered for the selected task. The Travel tab is divided into two grids: Travel Input and Trip Distribution.

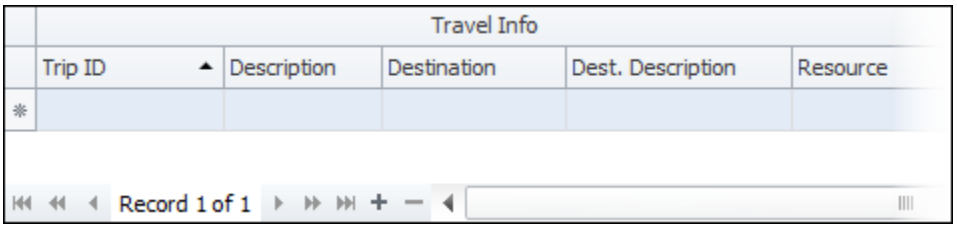
*Note: To show or hide a tab in Task View, right-click the **Tasks** grid, go to **View** > **Show**, and then select the tab name.*

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Travel Input

This grid is where you add trips to tasks. It is subdivided into several groups: **Travel Info**, **Travel Summary**, and each travel expense (**Airfare**, **Per Diem**, **Rental Car**, **Mileage**, **Hotel**, and **Miscellaneous**). User-defined expenses created in the Travel Expense Library also appear as individual groups.

Travel Info



Trip ID

Enter a unique ID for the trip.

Description

Enter a description for the trip.

Destination

Enter the destination you want to use. The lookup grid lists all the destinations from the Travel Library. When you select a destination, ProPricer will enter the description of the destination from the Travel Library. If you enter a destination that does not exist in the Travel Library, ProPricer will ask you to confirm that you want to create a task-specific destination. The task-specific destination will not be added to the Travel Library and will only be used in the current task.

Destination Description

This column shows the description of the destination entered in the Travel Library. If you are entering a task-specific destination, type the appropriate text.

Resource

This column shows the resource assigned to the destination in the Travel Rate Table. If you are entering a task-specific destination, or need to change the default resource, enter the resource you want to use. The lookup grid lists all the resources from the Direct Rate Table. If you change the default resource, all the travel expense resources will be replaced.

Resource Fields

These columns appear if there are resource fields defined in the Resource Field Library or on the **Resource Fields** page of **Proposal Properties**. They show the value entered in the Travel Rate Table. You can change the value.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

This column allows you to enter a different profit/fee rate for the trip. This rate overrides any rate entered in the task, in the **Proposal Properties**, in the Indirect Rate Overrides grid, and in the proposal's Indirect Rate Table. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal’s Direct Rate Table. It shows the rate band entered for the resource. You can change it. This column is hidden by default.

Currency

This column appears only if the **Multi-Currency** checkbox is selected on the **Currency** page in the **Proposal** folder of the **Proposal Properties**. It will show the proposal currency unless a different currency was entered for the destination in the Travel Rate Table.

Comment

This column shows the comment entered for the destination in the Travel Rate Table. You can modify it.

People

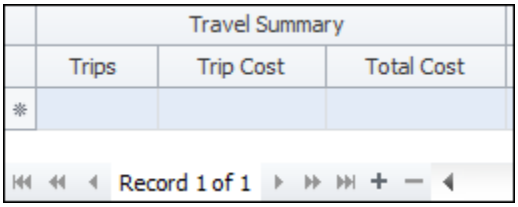
Enter the number of people who will be taking the trip.

Days

Enter the number of days the people will be on the trip.

Travel Summary

This group displays the trip cost information. Values calculated by ProPricer appear in green text.



Trips

ProPricer will calculate the number of trips for the Trip ID and display the total here.

Trip Cost

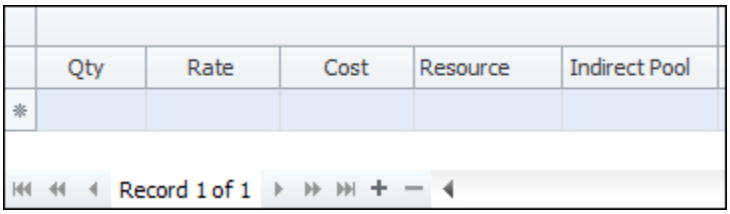
The cost of a single trip is equal to the sum of the costs of all travel expenses for the trip. If you entered different currencies for the travel expenses, the amount is shown in the currency defined for the proposal. The name of the currency appears in parentheses.

Total Cost

The value entered here is equal to the number of trips multiplied by the trip cost. If you entered different currencies for the travel expenses, the amount is shown in the currency defined for the proposal. The name of the currency appears in parentheses.

Travel Expenses

ProPricer automatically loads the rates and resources of each travel expense from the Travel Rate Table when you select a destination. However, you can change the data for a particular trip. The data for every expense includes:



Qty

The quantity of each travel expense. If ProPricer calculates a quantity automatically, it appears in green text. To see the quantity formula for system-defined expenses, or to change the formula for user-defined expenses, go to the Travel Expense Library.

- Airfare - The number of people taking the trip.
- Per Diem - The number of people multiplied by the trip duration.
- Rental Car - The number of rented cars multiplied by the trip duration. The number of cars is based on the number of people per car and the number of people taking the trip. Depending on the Travel Rate Table properties, there could be separate **Daily Qty**, **Weekly Qty**, and **Monthly Qty** columns, instead of a single **Qty** column.
- Mileage - The number of miles that a person will travel during the trip. ProPricer does not automatically calculate mileage, so you must enter a number.
- Hotel - The number of people taking the trip multiplied by a one-day reduction of the trip duration. For example, if three people take a trip for three days, the Hotel quantity equals six.
- Miscellaneous - The number calculated by the Miscellaneous Quantity Formula.

- User-Defined Travel Expense - The number calculated by the expense's Default Quantity Formula in the Travel Expense Library.

Rate

The travel expense rate from the Travel Rate Table. Depending on the Travel Rate Table properties, the Rental Car expense could have separate **Daily Rate**, **Weekly Rate**, and **Monthly Rate** columns, instead of a single **Rate** column.

Currency

This column appears only if the **Multi-Currency** checkbox is selected on the **Currency** page in the **Proposal** folder of the **Proposal Properties**. It will show the proposal currency unless a different currency was entered for a travel expense in the Travel Rate Table.

Cost

The **Cost** columns cannot be edited, indicated by the green color of the values. The cost of every travel expense is calculated as the quantity times the rate of the respective travel expense. If the per diem percent for the first day is less than 100, the per diem cost is smaller.

Resource

This column shows the resources assigned to the travel expenses in the Travel Rate Table. You can specify different resources. This column is hidden by default.

Resource Fields

These columns appear if there are resource fields defined in the Resource Field Library or on the **Resource Fields** page of **Proposal Properties**. They show the value entered in the Travel Rate Table. You can change the value.

Indirect Pool

This column shows the indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the

task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

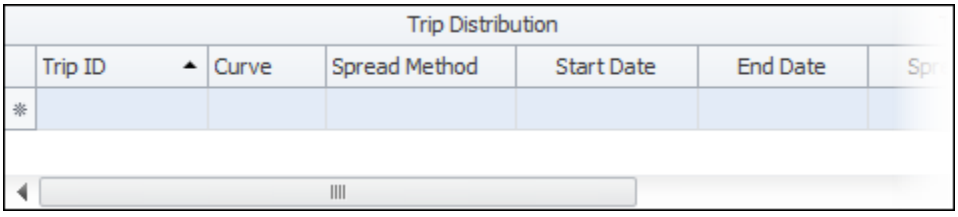
This column allows you to enter a different profit/fee rate for the trip. This rate overrides any rate entered in the task, in the **Proposal Properties**, in the Indirect Rate Overrides grid, and in the proposal's Indirect Rate Table. This column is hidden by default.

Rate Band

This column appears if a Rate Band Table has been assigned to the proposal's Direct Rate Table. It shows the rate band entered for the resource. You can change it. This column is hidden by default.

Trip Distribution

This grid allows you to spread trips over the duration of the task. It shows all trips added to the task. The trip selected in the input grid is automatically selected in this grid.



Trip ID

This column shows the name of the trip and cannot be edited.

Curve

Enter the name of the curve you want to use to distribute the trips. You can choose from:

None

Select this option if you want to input the trips manually.

Curves

Select a curve to spread the trips. This can be a system or user-defined curve.

Load

Select this option to spread the same amount of trips in each month/quarter/year.

Even

Select this option to distribute the trips over the specified period.

*Note: The default curve is **Even**.*

Spread Method

Enter the spread method that defines how the curve will be applied over the spread period. This column is hidden by default. There are three options you can choose from:

Repeating Average

This method repeats the curve every 12 periods.

Loading Curve

Select this method to load monthly, quarterly, or annual trips based on the curve's weighting in the Spread Curve Library.

Weighted Average

Select this method to average the curve over the duration of the task, based on the quarterly, monthly, or annual weighting of the curve.

*Note: The default spread method is **Weighted Average**.*

Start Date

Enter the date you want the distribution of the trips to start. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the start date of the task.

End Date

Enter the date you want the distribution to stop. This date cannot be before the start date of the task, or after the end date of the task. By default, this date is the same as the end date of the task.

Spread Amount

Enter the number of trips you want to spread. The value changes to zero if the trips are distributed manually.

Note: If you want to input trips manually, you can hide the spread parameters and then enter discrete values in the appropriate periods.

Distribution

Each column represents a month/quarter/year in the spread period and shows the number of trips assigned to the task for that particular month/quarter/year.

Notes:

You can hide and display periods as a whole. Individual months/quarters/years cannot be hidden.

Months/Quarters/Years are arranged in calendar order and cannot be rearranged.

Three-Point Estimating View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Three-Point Estimating View shows estimates, expected values, and summarized information for all resources used in the proposal. It is for information only and cannot be edited.

Note: When your proposal is open in Task View instead of Three-Point Estimating View, you can enter unique Best Case and Worst Case factors for specific tasks.

*Note: In proposals, there is a quick way to check your Best Case and Worst Case estimates while working on the Most Likely estimates. If a grid shows distribution data for direct resources, like in the **Resources** tab, look for a **Most Likely** button at the top of the grid. Clicking the button will switch the display of estimates instantly, and the button name will change to reflect the data you are viewing.*

Resource Info

The columns in this section provide details about the resources in the proposal.

Source Type

This column indicates how the resource was added to the task. Source types include:

Activity

The resource was entered on the **Activities** tab.

CER

The resource was entered on the **CERs** tab.

Direct

The resource was entered on the **Resources** tab.

Formula

The resource was entered on the **Formulas** tab.

Material

The resource was entered on the **Material** tab.

Resource Set

The resource was entered on the **Resource Sets** tab.

Travel

The resource was entered on the **Travel** tab.

Allocation

The resource was added with an allocation on the **Resource Allocation** page in the **Proposal** folder of **Proposal Properties**.

Source

If the source type is *CER*, *Formula*, *Material*, *Resource Set*, *Activity*, or *Travel*, this column shows the name of the CER, formula, material, resource set, activity, or trip that added the resource.

Source Item

If the source type is *Travel*, this column shows the specific travel expense that added the resource.

If the source type is *Material*, this column shows the reference ID of the associated cost.

Resource

This column shows the name of the resource.

Description

This column shows the resource description entered in the Resource Library, Rate Card, or Direct Rate Overrides.

Type

This column shows the resource type.

Class

This column shows the resource class.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. They show the value entered for the resource.

TASK ID

This column shows the name of the task.

Task Description

This column shows the description of the task. It is hidden by default.

Summary Fields

All the summary fields defined in **Proposal Properties** appear as a separate column. These columns are hidden by default.

Indirect Pool

This column shows the name of the indirect pool assigned to the resource. It is hidden by default.

Profit/Fee

This column shows any overridden rate that will be applied to the resource. It is hidden by default.

Accounting Calendar

This column shows the accounting calendar assigned to the resource. It is hidden by default.

Rate Band

This column shows the name of the rate band assigned to the resource. It is hidden by default.

Currency

This column shows the currency of the resource if its rate type is *Cost*. It only appears if Multi-Currency is enabled in the proposal.

Best Case/Most Likely/Worst Case/Expected

The columns in the **Best Case**, **Most Likely**, and **Worst Case** sections show the three-point estimates for each resource.

In the **Expected** section, the columns show the expected values for each resource. These values are calculated using the three-point estimates. The calculation is [*Best Case* + (4 * *Most Likely*) + *Worst Case*] / 6 = *Expected Value*.

Hours

This column shows the number of hours spread for the resource.

Units

This column shows the number of resource units used.

Cost

This column shows the cost entered for the resource.

Direct Rate

This column shows the average direct rate of the resource, which is the sum of the resource's rates from the Direct Rate Table divided by the number of months the resource is used in the task.

Direct Cost

This column shows the direct cost of the resource.

Total Price Rate

This column shows the rate that fully accounts for the resource's indirect costs. The column header is determined by the name of the Total Price Element in the Algorithm.

Total Price

This column shows the total price of the resource. The column header is determined by the name of the Total Price Element in the Algorithm.

Total Bar

This bar shows the sum of all the values entered in the respective columns.

Travel View

The proposal views are available in a menu on the Proposal ribbon. You can also right-click a proposal in the Navigation Pane and select a view.

Travel View shows all your proposal's trips, the tasks they are in, and the resources assigned to them. As in the Travel tab of Task View, you can add, edit, and delete trips here as well.

This view is divided into three grids: Travel Input, Trip Distribution, and Resource Assignments.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Travel Input

Travel Info

This group of columns contains informative details about the trips.

Task ID

Name of the task.

Task Description

Description of the task. This column is hidden by default.

Summary Fields

Any summary fields from the **Summary Fields** page of **Proposal Properties**. Each summary field is as a separate column. These columns are hidden by default.

Trip ID

Name of the trip.

Description

Description of the trip.

Destination

Name of the destination.

Destination Description

Description of the destination.

Resource

Resource assigned to the destination in the Travel Rate Table. This column is hidden by default.

Resource Fields

Any resource fields from the Resource Field Library and the **Resource Fields** page of **Proposal Properties**. Each resource field is a separate column. These columns are hidden by default.

Indirect Pool

The indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

Any overridden profit/fee rate entered for the resource. This column is hidden by default.

Accounting Calendar

This column shows the name of the accounting calendar assigned to the resource in the Resource Library. If a different one should be used in a specific task, you can override the resource’s assigned calendar here.

Accounting calendars are used in Work Schedule Tables to set up the schedules and rate modifiers for resources. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Rate Band

Rate band assigned to the resource. This column is hidden by default.

Comment

Comment entered for the destination in the Travel Rate Table.

People

Number of people taking the trip.

Days

Number of days in the trip.

Travel Summary

This group displays the trip cost data. The green text indicates that the data cannot be edited.

Trips

Total number of trips for the Trip ID.

Trip Cost

Cost of one trip, equal to the sum of the trip's travel expenses (**Airfare**, **Per Diem**, **Rental Car**, **Mileage**, **Hotel**, **Miscellaneous**, and any expenses created in the Travel Expense Library). The amount is shown in the proposal's currency, regardless of the expenses' currencies.

Total Cost

Total cost of the trip, equal to the number of trips multiplied by the cost of one trip. The amount is shown in the proposal's currency, regardless of the expenses' currencies.

Travel Expenses

This group contains sub-groups for each travel expense (**Airfare**, **Per Diem**, **Rental Car**, **Mileage**, **Hotel**, **Miscellaneous**, and any expenses created in the Travel Expense Library). The rates and resources for each travel expense are automatically loaded from the Travel Rate Table. The green text indicates that the data cannot be edited.

Qty

The quantity of each travel expense. If ProPricer calculates a quantity automatically, it appears in green text. To see the quantity formula for system-defined expenses, or to change the formula for user-defined expenses, go to the Travel Expense Library.

- Airfare - The number of people taking the trip.
- Per Diem - The number of people multiplied by the trip duration.
- Rental Car - The number of rented cars multiplied by the trip duration. The number of cars is based on the number of people per car and the number of people taking the trip. Depending on the Travel Rate Table properties, there could be separate **Daily Qty**, **Weekly Qty**, and **Monthly Qty** columns, instead of a single **Qty** column.
- Mileage - The number of miles that a person will travel during the trip. ProPricer does not automatically calculate mileage, so you must enter a number.
- Hotel - The number of people taking the trip multiplied by a one-day reduction of the trip duration. For example, if three people take a trip for three days, the Hotel quantity equals six.
- Miscellaneous - The number calculated by the Miscellaneous Quantity Formula.
- User-Defined Travel Expense - The number calculated by the expense's Default Quantity Formula in the Travel Expense Library.

Rate

The travel expense rate from the Travel Rate Table. Depending on the Travel Rate Table properties, the Rental Car expense could have separate **Daily Rate**, **Weekly Rate**, and **Monthly Rate** columns, instead of a single **Rate** column.

Cost

Cost of the travel expense, equal to the quantity multiplied by the rate.

Resource

Resource assigned to the travel expense in the Travel Rate Table.

Resource Fields

Any resource fields from the Resource Field Library and the **Resource Fields** page of **Proposal Properties**. Each resource field is a separate column. These columns are hidden by default.

Indirect Pool

The indirect pool entered in the Direct Rate Table or Rate Card of the proposal for the resource, or the indirect pool assigned to the task. If an indirect pool has not been assigned in either of these places, or if you need to change it, enter the indirect pool you want to use to price the indirect expenses of the resource. This column is hidden by default.

Profit/Fee

Any overridden profit/fee rate entered for the resource. This column is hidden by default.

Rate Band

Rate band assigned to the resource. This column is hidden by default.

Trip Distribution

Trip ID

Name of the trip.

Curve

Curve chosen to spread the hours/units/cost of the resource.

Spread Method

How the spread curve is applied over the spread period. This column is hidden by default.

Start Date

Date the spread of the resource hours/units/cost starts.

End Date

Date the spread of the resource hours/units/cost ends.

Spread Amount

Number of hours/units/cost spread for the resource.

Distribution

These columns show the number of trips assigned to the task for that particular month, quarter, or year.

Resource Assignments

Source Item

This column shows the specific travel expense that added the resource to the trip.

Resource

This column shows the name of the resource.

Currency

This column shows the currency of the resource if its rate type is *Cost*. It only appears if Multi-Currency is enabled in the Proposal Properties.

Distribution

These columns show the resource's hours/units/cost for that particular month, quarter, or year of the trip.

Total Amount

This column shows the resource's total hours/units/cost for the entire trip.

What-Ifs

What-ifs are a series of options that change a proposal when you need to analyze risk, prepare for internal management reviews and negotiations, make Best and Final Offer (BAFO) updates simpler, or just see how a proposal changes if you change a date or replace one resource with another.

Each what-if changes the proposal, and it might be difficult or impossible to revert back to the original data. To maintain the integrity of your proposal, use the **Copy** function available with each what-if. The copy becomes the active proposal, and ProPricer will apply the what-if to the copy. Having a copy of the proposal also allows you to compare the original data with new data created by the what-if.

The What-Ifs Log keeps a record of every what-if that you run in a proposal. It is enabled at the proposal level in the Proposal Properties, and it can be viewed on the **Proposal** ribbon. In the log, you can see who ran the what-if, when it was run, and how it changed the proposal's hours, direct cost, and total price.

The what-ifs include:

- Field Editing (task)
- Field Editing (resource)
- Field Editing (travel)
- Flex/Shift
- Resource Changes
- Resource Distribution
- Resource Switching
- Target Pricing
- Target Profit/Fee
- Travel Switching

Note: There is an additional Field Editing (material) what-if for parts and assemblies that is separate from the other what-ifs.

Field Editing (resource)

The Field Editing (resource) what-if allows you to replace existing values in resource fields with new ones. You can apply the Field Editing (resource) what-if to all the tasks and resources in the proposal, or to only those included in a task selection or resource selection. You could use this what-if to change the indirect pool assigned to a resource, or you could change a fee factor for a resource, due to changes in the contract. Instead of searching for the resources and modifying them one-by-one, you can use this what-if to make all changes at the same time.

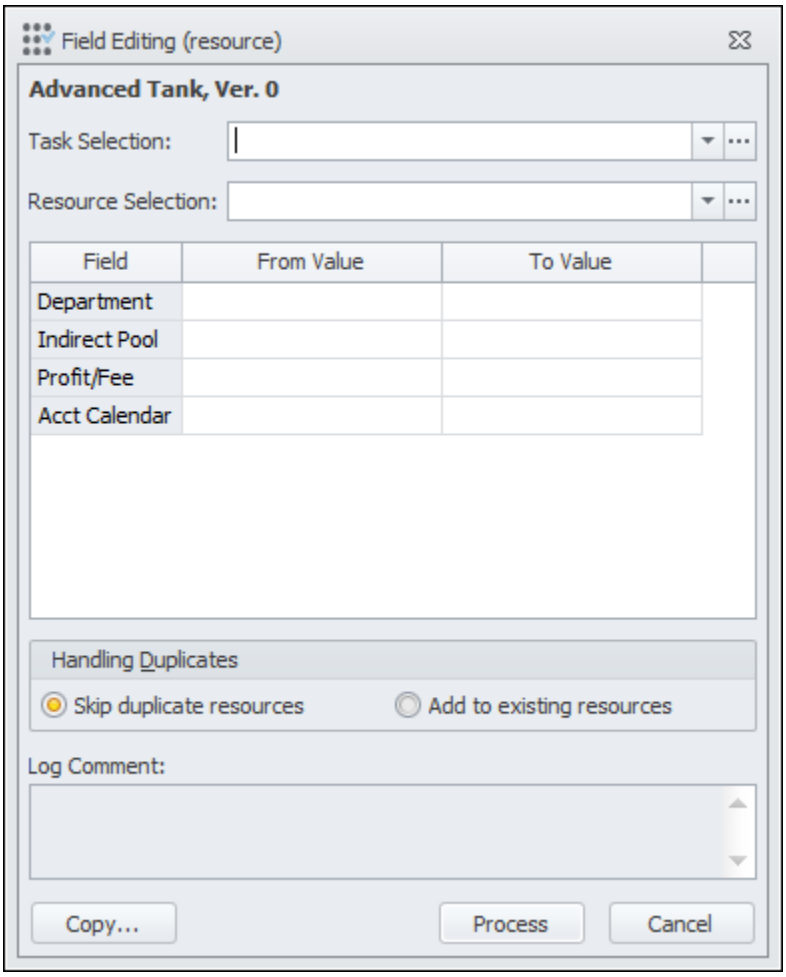
All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

Run the Field Editing (resource) What-If

1. Open the proposal.
2. Do one of the following to open the what-if:
   - On the **Proposal** ribbon, in the **What-Ifs** group, click **More**, and then click **Field Editing (resource)**.
   - In **Task View**, right-click a task, point to **What-Ifs**, and then click **Field Editing (resource)** to run it with a task selection.
   - In **Task View**, on the **Resources** tab, right-click a resource in the **Resource Input** grid, point to **What-Ifs**, and then click **Field Editing (resource)** to run it with a task and resource selection.
   - In **Resource View**, right-click a resource in the **Resource Input** grid, point to **What-Ifs**, and then click **Field Editing (resource)** to run it with a task and resource selection.

3. *(Optional)* Make a copy of the proposal before performing the what-if.
4. Enter a **Task Selection**, or leave this field blank to process all the tasks.
5. Enter a **Resource Selection**, or leave this field blank to process all the resources.
6. In **From Value**, enter the current value you want to change.
7. In **To Value**, enter the new value.
8. Select an option for handling duplicate resources.
9. Click **Process**.

Field Editing (resource) Dialog Box



Proposal

Displays the name and version of the proposal selected in the Navigation Pane.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Field Editing (resource)** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

Resource Selection

Enter a resource selection to limit the what-if to those resources. Leave this field blank to process all the resources in the proposal. If no resource selection exists, or the appropriate resources are not included in an existing one, click to open the **Resource Selections** grid to create or modify an existing one.

Field

This column displays the names of the fields you can edit. These are the same fields that appear in Resource View and the Resources tab of Task View.

From Value

Enter the current value of each field you want to edit. You can type an asterisk (*) for a wildcard and include more values. All values that meet the criterion will be changed to the new value.

To Value

Enter the new value for the field.

Handling Duplicates

Select how you want ProPricer to proceed when all the field values of a processed resource match the values of a resource that is already assigned to the task.

Skip duplicate resources

No changes will be made to the resource field values.

Add to existing resources

The spread data of the processed resource will be merged with the data of the existing resource. This leaves a single, correctly distributed resource whose fields contain the desired values.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Field Editing (resource) what-if modifies the current proposal. Copying the proposal before performing this what-if is recommended.

Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will edit the fields of the copy. If you want to edit the fields of the original proposal, close the **Field Editing (resource)** dialog box, select the proposal in the Navigation Pane, and start the what-if again.

*Note: The **Copy** option is not available if you accessed the **Field Editing (resource)** dialog box from the **Tasks** grid.*

Process

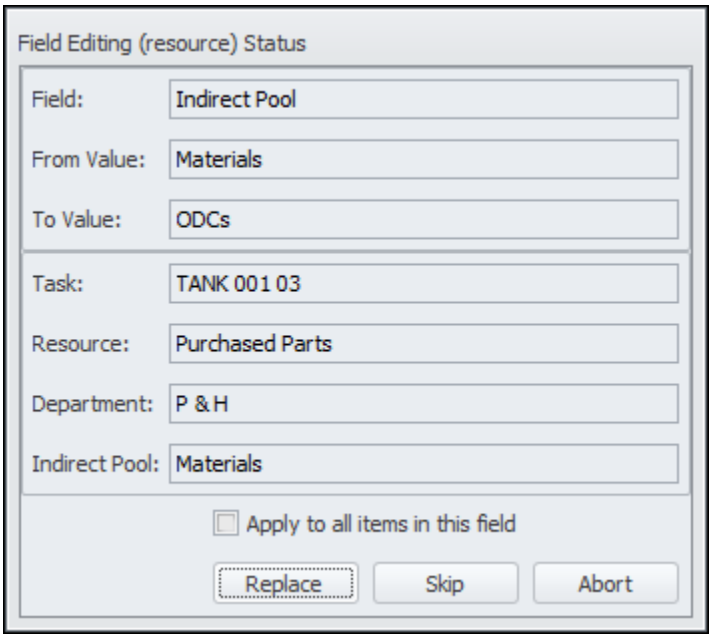
Click this button to start the what-if. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

Field Editing (resource) Status Dialog Box

The **Field Editing (resource) Status** dialog box appears during the editing process. It allows you to double-check the changes before they are made.



Field

The name of the field that is currently being processed.

From Value

The current value in the specified field.

To Value

The new value the specified field will have after the change.

Task

The name of the task in which the change will be made.

Resource

The name of the resource that will be changed.

Resource Fields

The field values entered for the resource. Proposal-specific resource fields from the Proposal Properties are included.

Apply to all items in this field

This checkbox allows you to replace or skip all items that have not been processed. If it is selected and you click **Replace**, all remaining items will be changed without further confirmation. Likewise, if you click **Skip**, all remaining items will retain their current value.

Replace

Click this button to change the old value (**From Value**) to the new value (**To Value**).

Skip

Click this button to skip the item without changing its value.

Abort

Click this button to stop the Field Editing (resource) what-if. Any changes made before the abort command will not change back to their original values.

Field Editing (task)

The Field Editing (task) what-if allows you to replace the existing values in the task fields with new ones. You can apply the Field Editing (task) what-if to all the tasks in the proposal, or to only those included in a task selection. You could use this what-if to reassign the tasks assigned to Bidder 1 to Bidder 2, or to change a fee factor you defined for certain tasks, due to changes in the contract. Instead of searching for the tasks and modifying them one by one, you can use this what-if to make all changes at the same time.

All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

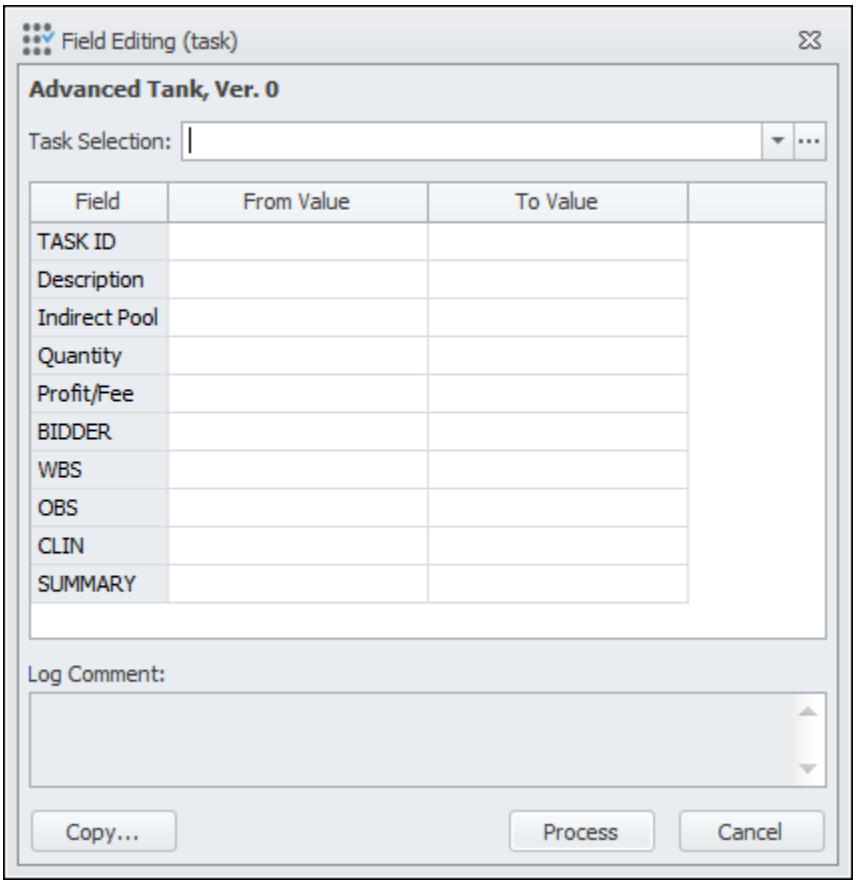
Run the Field Editing (task) What-If

1. Select the proposal.
2. Click the **Proposal** ribbon, and then click **Field Editing (task)** on the **More** submenu in the **What-Ifs** group.
3. *(Optional)* Make a copy of the proposal before performing the what-if.
4. Enter a task selection, or leave this field blank to process all the tasks.
5. In **From Value**, enter the current value you want to change.
6. In **To Value**, enter the new value.
7. Click **Process**.
8. Do one of the following:

- In the **Field Editing (task) Status** dialog box, select the appropriate option for each value that meets the specified criteria.
- In the **Tasks** grid, right-click the task or tasks whose fields you want to edit, point to **What-Ifs**, and then click **Field Editing (task)** on the shortcut menu.

9. Repeat preceding steps as needed.

Field Editing (task) Dialog Box



Proposal

Displays the name and version of the proposal selected in the Navigation Pane.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Field Editing (task)** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

Field

This column displays the names of the fields you can edit. These are the same fields that appear in Task View.

From Value

Enter the current value of each field you want to edit. You can type an asterisk * for a wildcard and include more values. All values that meet the criterion will be changed.

To Value

Enter the new value for the field.

*Note: You cannot replace a summary field that has the **Required** option selected with an empty summary field.*

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Field Editing (task) what-if modifies the current proposal. Copying the proposal before performing this what-if is recommended.

Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will edit the fields of the copy. If you want to edit the fields of the original proposal, close the **Field Editing (task)** dialog box, select the proposal in the Navigation Pane, and start the what-if again.

*Note: The **Copy** option is not available if you accessed the **Field Editing (task)** dialog box from the **Tasks** grid.*

Process

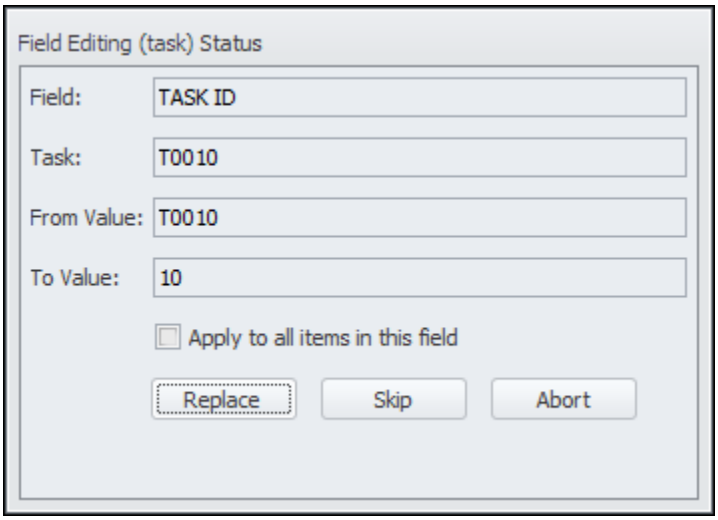
Click this button to process the what-if and edit the fields. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

Field Editing (task) Status Dialog Box

The **Field Editing (task) Status** dialog box appears during the editing process. It allows you to double-check the changes before they are made.



Field

The name of the field that is currently being processed.

Task

The name of the task that will be changed.

From Value

The current value in the specified field.

To Value

The new value the specified field will have after the change.

Apply to all items in this field

This checkbox allows you to replace or skip all items that have not been processed. If it is selected and you click **Replace**, all remaining items will be changed without further confirmation. Likewise, if you click **Skip**, all remaining items will retain their current value.

Replace

Click this button to change the old value (**From Value**) to the new value (**To Value**).

Skip

Click this button to skip the item without changing its value.

Abort

Click this button to stop the Field Editing (task) what-if. Any changes made before the abort command will not change back to their original values.

Field Editing (travel)

The Field Editing (travel) what-if is for the trips and their travel expenses in proposal tasks. It allows you to replace existing values in travel-related resource fields with new ones. You can apply the Field Editing (travel) what-if to all the tasks in the proposal, or to only those included in a task selection. Instead of searching for the trips in tasks and modifying them one-by-one, you can use this what-if to make all changes at the same time.

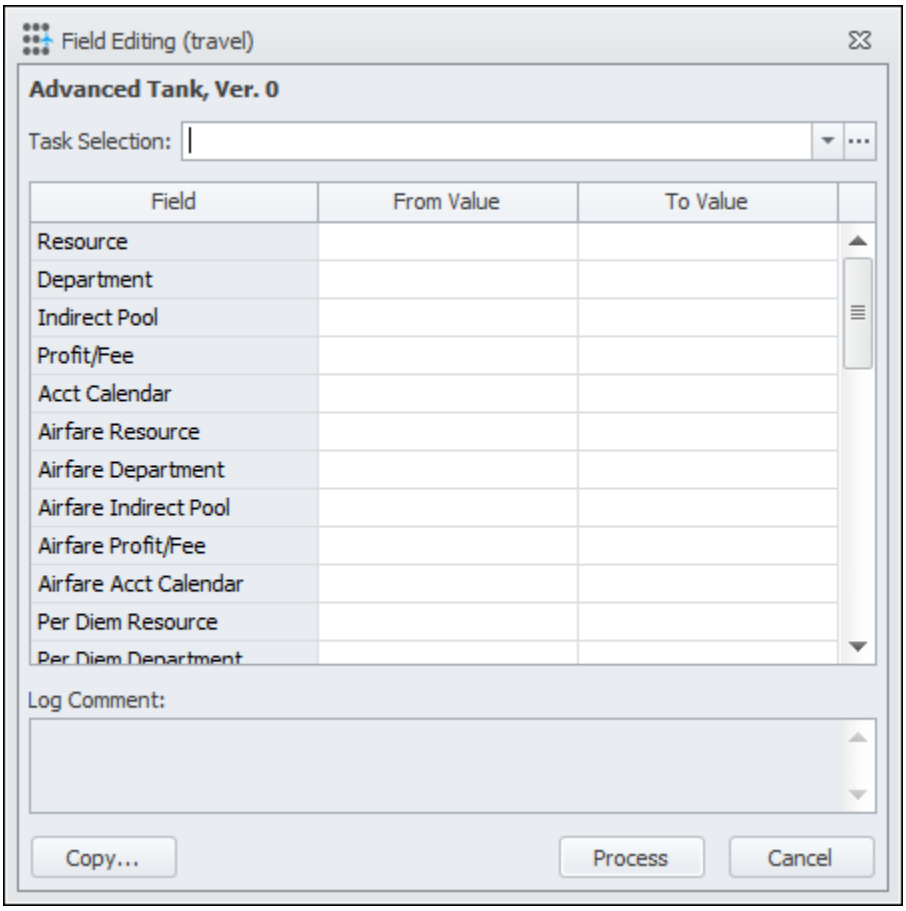
All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

Run the Field Editing (travel) What-If

1. Open the proposal.
2. Do one of the following to open the what-if:
    - On the **Proposal** ribbon, in the **What-Ifs** group, click **More**, and then click **Field Editing (travel)**.
    - In **Task View**, right-click a task, point to **What-Ifs**, and then click **Field Editing (travel)** to run it with a task selection.
    - In **Task View**, on the **Travel** tab, right-click a trip in the **Travel Info** grid, and then click **Field Editing** to run it with a task and travel selection.
    - In **Travel View**, right-click a trip in the **Travel Info** grid, and then click **Field Editing** to run it with a task and travel selection.
3. *(Optional)* Make a copy of the proposal before performing the what-if.

4. Enter a **Task Selection**, or leave this field blank to process all the tasks.
5. In **From Value**, enter the current value you want to change.
6. In **To Value**, enter the new value.
7. Click **Process**.

Field Editing (travel) Dialog Box



Proposal

Displays the name and version of the proposal selected in the Navigation Pane.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Field Editing (travel)** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

Field

This column displays the names of the fields you can edit. These are the same fields that appear in Travel View and the Travel tab of Task View.

From Value

Enter the current value of each field you want to edit. You can type an asterisk * for a wildcard and include more values. All values that meet the criterion will be changed to the new value.

To Value

Enter the new value for the field.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Field Editing (travel) what-if modifies the current proposal. Copying the proposal before performing this what-if is recommended.

Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will edit the fields of the copy. If you want to edit the fields of the original proposal, close the **Field Editing (travel)** dialog box, select the proposal in the Navigation Pane, and start the what-if again.

*Note: The **Copy** button is not available if you accessed the **Field Editing (travel)** dialog box from the **Tasks** grid.*

Process

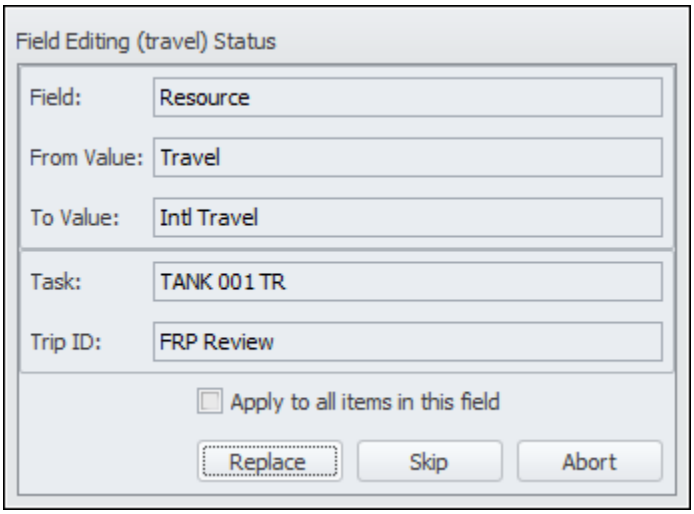
Click this button to process the what-if and edit the fields. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

Field Editing (travel) Status Dialog Box

The **Field Editing (travel) Status** dialog box appears during the editing process. It allows you to double-check the changes before they are made.



Field

The name of the field that is currently being processed.

From Value

The current value in the specified field.

To Value

The new value the specified field will have after the change.

Task

The name of the task in which the change will be made.

Trip ID

The name of the trip that will be changed.

Apply to all items in this field

This checkbox allows you to replace or skip all items that have not been processed. If it is selected and you click **Replace**, all remaining items will be

changed without further confirmation. Likewise, if you click **Skip**, all remaining items will retain their current value.

Replace

Click this button to change the old value (**From Value**) to the new value (**To Value**).

Skip

Click this button to skip the item without changing its value.

Abort

Click this button to stop the Field Editing (travel) what-if. Any changes made before the abort command will not change back to their original values.

Flex/Shift

The Flex/Shift what-if allows you to modify the start and/or end dates of a proposal. You can apply the Flex/Shift what-if to all the tasks in the proposal, or to only those included in a task selection and/or resource selection.

Note: If you copy task data to another task, Flex/Shift options are also available during that process.

You can:

- Move the proposal data forward or backward in time and keep the performance period constant by increasing or decreasing the start and end dates.
- Extend or compress the performance period by modifying the start and/or end dates.
- Change the spread curve of the resources, without changing the performance period.

Since the Flex/Shift what-if can affect the performance period dates, ProPricer offers you the following options to distribute the resource data in the new period.

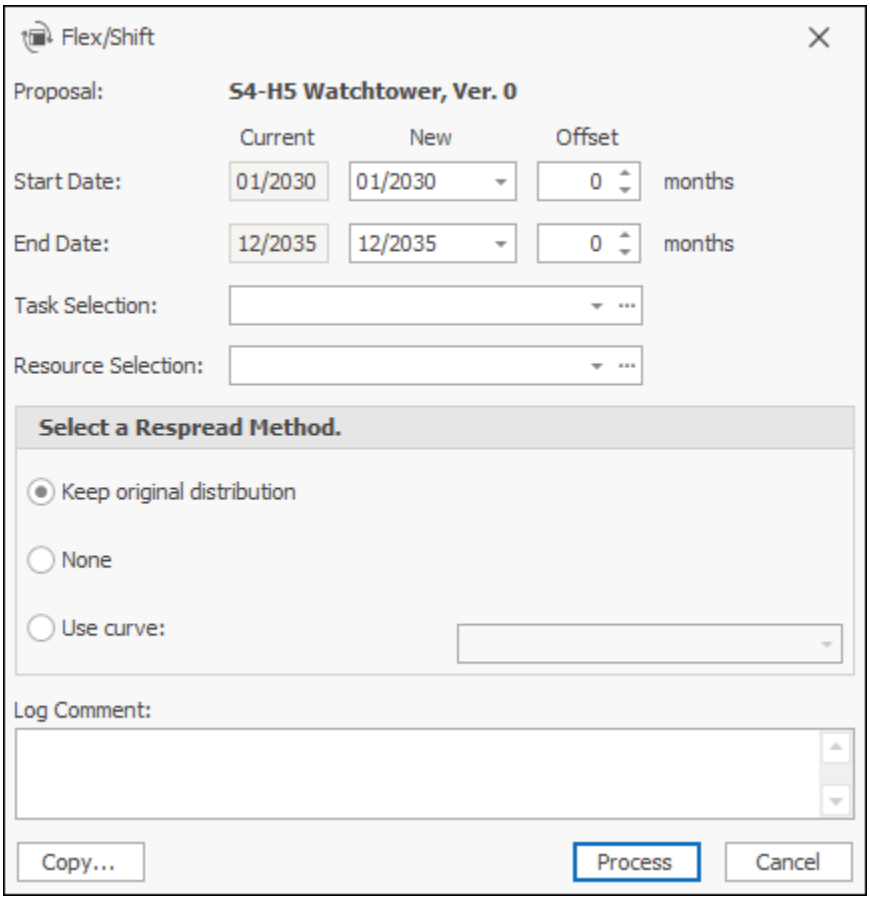
- Redistribute the hours/units/cost over the new period.
- Change the period without changing the distribution of the hours/units/cost.
- Use a new curve to redistribute the data over the new period.

All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

Run the Flex/Shift What-If

1. Open the proposal.
2. Do one of the following to open the what-if:
    - On the **Proposal** ribbon, in the **What-Ifs** group, click **More**, and then click **Flex/Shift**.
    - In **Task View**, right-click a task, point to **What-Ifs**, and then click **Flex/Shift** to run it with a task selection.
    - In **Task View**, on the **Resources** tab, right-click a resource in the **Resource Input** grid, point to **What-Ifs**, and then click **Flex/Shift** to run it with a task and resource selection.
    - In **Resource View**, right-click a resource in the **Resource Input** grid, point to **What-Ifs**, and then click **Flex/Shift** to run it with a task and resource selection.
3. *(Optional)* Make a copy of the proposal before performing this what-if.
4. Enter the new start and/or end date in the appropriate **New** column. You can also use the spin button in the **Offset** column to move the dates accordingly.
5. *(Optional)* Enter a task selection to change the distribution periods of selected tasks.
6. *(Optional)* Enter a resource selection to change the distribution periods of selected resources.
7. Select how you want to respread the hours/units/cost of the resources.
8. Click **Process**.

Flex/Shift Dialog Box



Proposal

Displays the name and version of the proposal.

Start Date

Current

Shows the current start date of the proposal.

New

Enter the new start date of the proposal.

Offset

Type or use the spin button to select the number of months by which you want to increase or decrease the start date of the proposal.

End Date

Current

Shows the current end date of the proposal.

New

Enter the new end date of the proposal.

Offset

Type or use the spin button to select the number of months by which you want to shorten or lengthen the end date of the proposal.

*Note: If you enter a **New** date, the **Offset** will automatically be calculated. Conversely, entering an **Offset** will automatically change the **New** date.*

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Flex/Shift** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

Resource Selection

Enter a resource selection to limit the what-if to those resources. Leave this field blank to process all the resources in the proposal. If no resource selection exists, or the appropriate resources are not included in an existing one, click to open the **Resource Selections** grid to create or modify an existing one.

Respread Method

Keep original distribution

Select this option to respread the existing hours/units/cost of the resource in the new period with the same distribution curve.

None

Select this option if you want to change the period without respreading the hours/units/cost. If you lengthen the proposal period, the new months will be added, but not contain any data. If you shorten the proposal period, the curve will change to (None), and the Spread Amount will change to 0 (zero). However, the hours/units/cost that existed in a month prior to performing the what-if will still be there if the month falls within the new period.

Notes:

- *You could lose data if you select this option and shorten the period.*
- *If you shorten the period of a task that uses materials whose distribution of associated costs is not linked to the distribution of the respective material, the curve of the associated costs will change to (None), and the hour/units/cost will equal the sum of the monthly values in the new period.*

Use curve

Enter the new curve you want to use to respread the hours/units/cost. This only applies to hours/units/cost that were originally spread with a curve. It will not change loaded hours/units/cost or discrete values. If you want to replace all the curves in a proposal without changing the period, select the curve you want to use, but do not change any of the other criteria.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Flex/Shift what-if will modify the proposal. We recommend you make a copy of the proposal prior to performing the what-if. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will flex/shift the copy. If you want to flex/shift the original proposal, you need to close the **Flex/Shift Proposal Data** dialog box, select the proposal from the Navigation Pane, and choose the Flex/Shift what-if again.

*Note: The **Copy** option is not available if you accessed the **Flex/Shift Proposal Data** dialog box from the **Tasks** grid.*

Process

Click this button to start the what-if. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

Resource Changes

The Resource Changes what-if allows you to make pricing changes by modifying the hours/units/cost assigned to a resource. You can apply the Resource Changes what-if to all the tasks in the proposal, or only to those included in a task selection. You can modify individual resources, or resources of a specific type or class. Please note that only direct resources can be modified.

You use a factor, expressed as a percentage of change, to increase or decrease the hours/units/cost of a resource. For example:

- A factor of 1.0 (100%) equals the input amount.
- A factor of 1.10 results in a 10% increase.
- A factor of 0.9 results in a 10% decrease.
- A factor of 0 will remove all instances of the resource.

All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

Run the Resource Changes What-If

1. Do one of the following:
    - Select the proposal, click the **Proposal** ribbon, and then click **Resource Changes** in the **What-Ifs** group.
    - Open the proposal. In the **Tasks** grid of Task View, right-click the task or tasks whose resources you want to change, point to **What-Ifs**, and then click **Resource Changes** on the shortcut menu.

2. *(Optional)* Make a copy of the proposal before applying the what-if.
3. Enter the start and end dates of the period for which you want the changes made, or leave them blank to process the entire proposal period.
4. Enter a task selection, or leave the field blank to process all the tasks.
5. Enter the category and then the name of the resource to be changed. Categories include:
   - Resource - to change a single resource.
   - Class - to change all the resources of the specified class.
   - Type - to change all the resources of the specified type.
6. *(Optional)* Enter values in the resource fields to change just the input of the resources that have that value entered as well. Enter (Any) to change the input of all the resources from the selected category, regardless of the values entered in the resource fields. If you leave a resource field empty, ProPricer will only change the input of the resources that do not have a value entered in that field.
7. *(Optional)* Enter an indirect pool to change just the input of the resources that have that indirect pool assigned as well. Enter (Any) to change the input of all the resources from the category selected, regardless of the indirect pool assigned to them. If you leave this column empty, ProPricer will only change the input of the resources that do not have an indirect pool assigned to them. Please note that ProPricer does not distinguish between the indirect pool entered in the Direct Rate Table and an overridden Indirect Pool.
8. If a Rate Band Table is assigned to the Direct Rate Table, a **Rate Band** column will appear. You can enter a rate band to change the input of just the resources that have been assigned that rate band. Enter (Any) to change the input of all resources from the category selected, regardless of the rate band assigned to them. If the field is empty, ProPricer will only change the input of the resources that have do not have a rate band assigned to them. Please note that ProPricer

does not distinguish between the rate band entered in the Direct Rate Table and an overridden rate band.

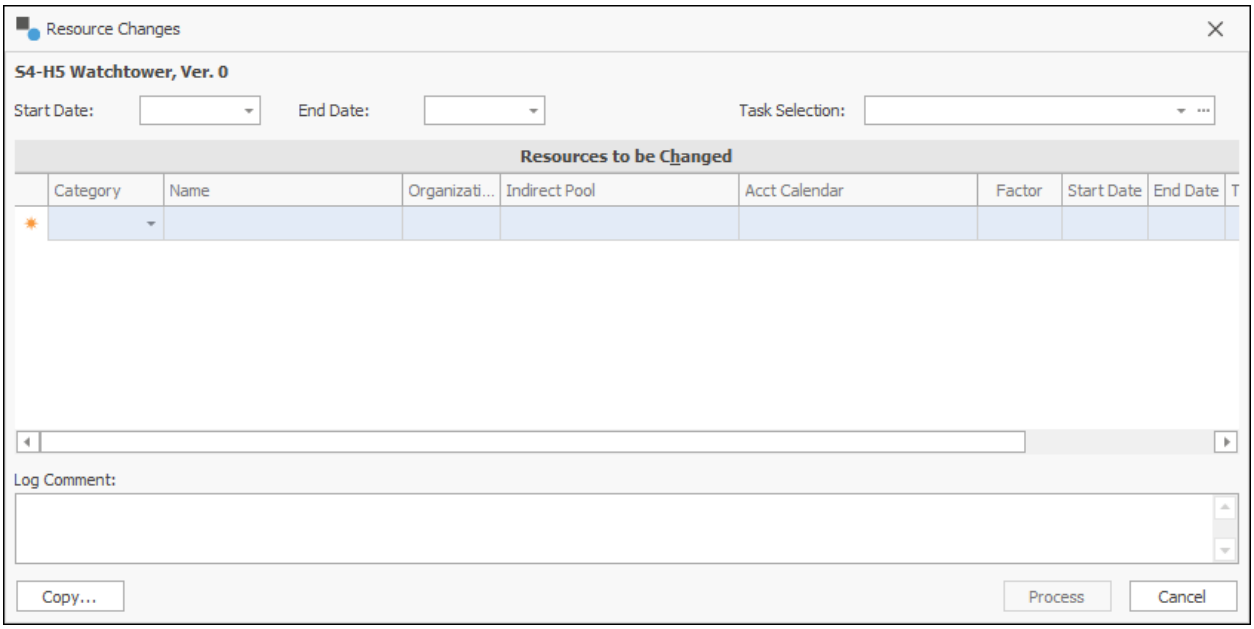
9. If Multi-Currency is enabled for the proposal, a **Currency** column will appear. You can enter a currency for resources with Rate Type *Cost* to change the input of just those resources. It does not change resources with rate type *Hours* or *Units*. Enter (Any) to change the input of all resources from the category selected, regardless of the currency assigned to them. If you leave this column empty, ProPricer will only change the input of the resources that do not have a currency assigned to them.

10. Enter the factor to be applied to the existing values.
    - A factor of 1.0 (100%) equals the input amount.
    - A factor of 1.10 results in a 10% increase.
    - A factor of 0.9 results in a 10% decrease.
    - A factor of 0 will remove all hours/units/cost of the resource.

11. *(Optional)* Enter a resource-specific start date, end date, and/or task selection.

12. Click **Process**.

Resource Changes Dialog Box



Proposal

Displays the name and version of the current proposal.

Start Date/End Date

Enter the dates that define the period for which you want the changes made, or leave the fields blank to process the entire proposal period.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Resource Changes** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

Resources to be Changed

Category

Enter the category you want changed. Categories include:

- Resource - to change a single resource.
- Class - to change all the resources of the specified class.
- Type - to change all the resources of the specified type.

Name

Enter the name of the resource, class, type, or selection you want to change.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. If you enter a value in the resource field, ProPricer will only change the input of the resources that have that value entered as well. Enter (Any) to change the input of all the resources from the category selected, regardless of the value entered in the resource field. If you leave the resource field empty, ProPricer will only change the input of the resources that do not have a value entered in that resource field.

Indirect Pool

If you enter an indirect pool, ProPricer will only change the input of the resources assigned that indirect pool. Enter (Any) to change the input of all the resources from the category selected, regardless of the indirect pool assigned to them. If you leave this field empty, ProPricer will only change the input of the resources that do not have an indirect pool assigned to them. Please note that ProPricer does not distinguish between the indirect pool entered in the Direct Rate Table and an overridden indirect pool.

Accounting Calendar

If you enter an accounting calendar, ProPricer will only change the input of the resources assigned that calendar. Enter (Any) to change the input of all the resources from the category selected, regardless of the calendar assigned to them. If you leave this field empty, ProPricer will only change the input of the resources that do not have a calendar assigned to them. Please

note that ProPricer does not distinguish between the calendar entered in the Direct Rate Table and an overridden calendar.

Rate Band

This column appears if there is a Rate Band Table assigned to the Direct Rate Table. If you enter a rate band, ProPricer will only change the input of the resources assigned that rate band. Enter (Any) to change the input of all resources from the category selected, regardless of the rate band assigned to them. If you leave this field empty, ProPricer will only change the input of the resources that do not have a rate band assigned to them. Please note that ProPricer does not distinguish between the rate band entered in the Direct Rate Table and an overridden rate band ID.

Currency

This column appears if Multi-Currency is enabled for the proposal. You can use it as a filter to change resources with Rate Type *Cost*. It does not apply to resources with Rate Type *Hours* or *Units*. If you enter a currency, only the resources assigned that currency will be changed. Enter (Any) to change the input of all resources from the category selected, regardless of the currency assigned to them. If the field is empty, ProPricer will only change the input of the resources that do not have a currency assigned to them.

Factor

Enter the factor to be applied to the resource or resources from the selected category. A factor of 1.0 results in no change. A factor of 1.10 results in a 10% increase. A factor of 0.9 results in a 10% decrease. A factor of 0 will remove all hours/units/cost of the respective resources from the specified task if the entire task period is covered by the change.

Start Date

Enter the date to start the change.

End Date

Enter the date to end the change.

Task Selection

Enter the task selection for which you want changes to be made.

*Note: The **Start Date**, **End Date**, and **Task Selection** specified here override the same entries above.*

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Resource Changes what-if will modify the current proposal. We recommend you make a copy of the proposal prior to performing this what-if. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will change the resources in the copy. To change the resources in the original proposal, close the **Resource Changes** dialog box, select the proposal from the Navigation Pane, and choose the **Resource Changes** option again.

*Note: The **Copy** option is not available if you accessed the **Resource Changes** dialog box from the **Tasks** grid.*

Process

Click this button to start the what-if. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

Resource Distribution

The Resource Distribution what-if allows you to distribute direct resources simultaneously across multiple tasks. You can apply the Resource Distribution what-if to all the tasks, or to only those included in a task selection. You can distribute individual resources, or resources of a specific type or class. If you choose to distribute by type or class, all the resources from the respective category defined in the Direct Rate Table of the proposal will be added to the tasks.

You can distribute the hours/units/cost of the resource as direct values, or as a percentage of the hours or direct cost already assigned to the tasks. For example, you could use Resource Distribution to add the program management effort to all tasks. You could do this directly by adding 100 hours to each task, or prorate the management hours against the total hours or direct cost in the tasks.

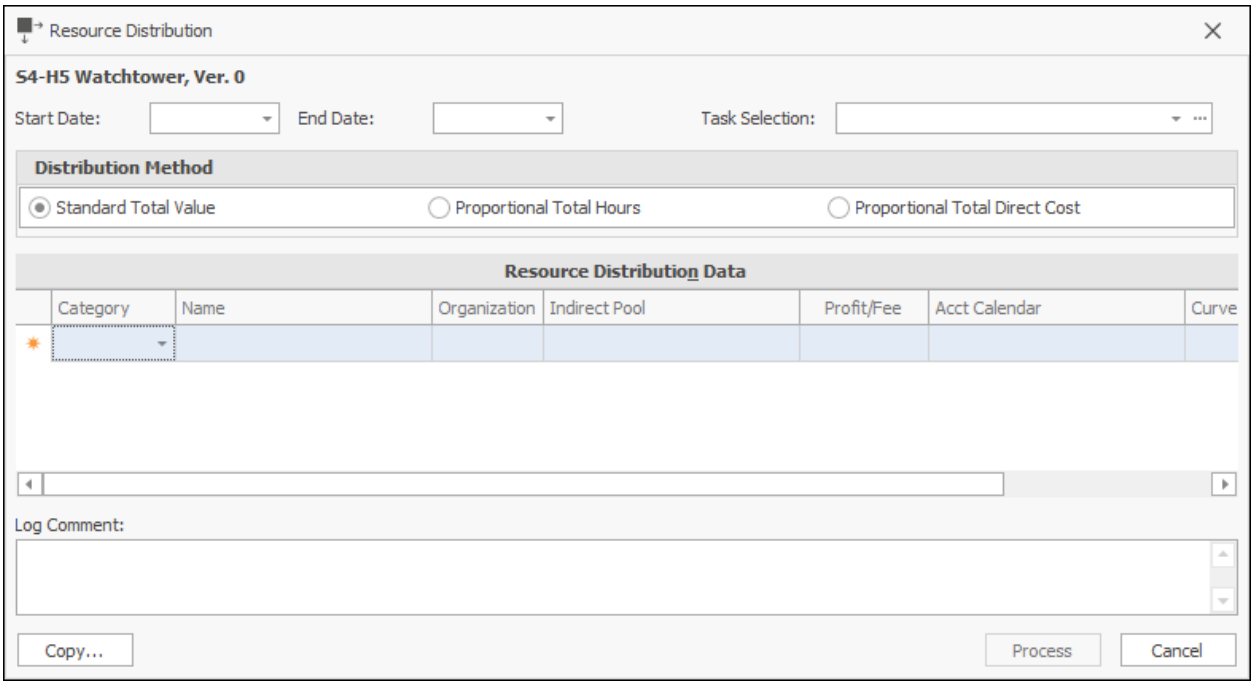
All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

Run the Resource Distribution What-If

1. Do one of the following:
    - Select the proposal. Click the **Proposal** ribbon, and then click **Resource Distribution** on the **More** submenu in the **What-Ifs** group.
    - Open the proposal. In the **Tasks** grid, right-click the task or tasks to which you want to distribute resources, point to **What-Ifs**, and then click **Resource Distribution**.
2. *(Optional)* Make a copy of the proposal before performing this what-if.

3. Enter the start and end dates of the period for which you want the changes made, or leave them blank to process the entire proposal period.
4. Enter a task selection, or leave the field blank to process all the tasks.
5. Select the method to distribute the hours/units/cost of the new resources.
6. Enter the resource category.
7. Enter the name of the resource, class, or type.
8. If resource fields are defined for the defined in the library or for the proposal, you can enter a resource field value to distribute the resources with the value entered.
9. *(Optional)* Enter an indirect pool for the resources.
10. *(Optional)* Enter an overriding profit/fee rate for the resources.
11. If a Rate Band Table is assigned to the Direct Rate Table, a **Rate Band** column will appear. You can enter a rate band to distribute the resources with the rate band entered.
12. If Multi-Currency is enabled for the proposal, a **Currency** column will appear. You can enter a currency for resources with rate type *Cost* to distribute the resources with the currency entered.
13. Select the curve you want to use to distribute the hours/units/cost of the resource.
14. Type the hours/units/cost you want to distribute.
15. Select if you want to overwrite or append the hours/units/cost.
16. Click **Process**.

Resource Distribution Dialog Box



Proposal

Displays the name and version of the current proposal.

Start Date and End Date

Enter the dates that define the period for which you want the changes made, or leave the fields blank to process the entire proposal period.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Resource Distribution** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

Distribution Method

Standard Total Value

Select this option to distribute a given quantity to each task. (Example: Distribute 100 hours of a given resource to each task.)

Proportional Total Hours

Select this option to prorate the new amounts against total hours.

Example: Two tasks will be affected with the distribution of 100 hours. Task 1 has 40 hours, and Task 2 has 60 hours. Task 1 will receive 40 hours, or 40% of the distribution, and Task 2 will receive 60 hours, or 60% of the distribution.

Proportional Total Direct Cost

Select this option to prorate the new amounts against total direct cost.

Example: Two tasks are affected with the distribution of 100 hours. Task 1 has $300.00, and Task 2 has $700.00. Task 1 will receive 30 hours, or 30% of the distribution and Task 2 will receive 70 hours, or 70% of the distribution.

Resource Distribution Data

If the resource exists in any task exactly as entered in this grid, the hours/units/cost will be appended/overwritten. If it differs in any way, the resource will be created.

Category

Enter the category you want to distribute. Categories include:

Resource

Add a single resource.

Class

Add all resources from the specified class.

Type

Add all resources from the specified Type.

Name

Depending on the category selected, Enter the name of the resource, resource class, or resource type you want to distribute. Only resources included in the Direct Rate Table of the proposal can be distributed.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. If you enter a value in the resource field, ProPricer will change the distribution of the resources that have that value entered. If you leave the resource field empty, ProPricer will change the distribution of the resources that do not have a value entered in that resource field.

Indirect Pool

If the Category is *Resource*, ProPricer will enter the name of the indirect pool assigned to the resource in the Direct Rate Table. You can accept the default, or change it. If you change it, the name of the indirect pool will appear in blue, indicating an override. Furthermore, if you assign a resource without an indirect pool (either in the Direct Rate Table, or in this grid) to a task that has been assigned an indirect pool, the resource will be created with the indirect pool assigned to the task.

Accounting Calendar

Enter the accounting calendar you want the resources to use. If a Work Schedule Table is assigned to your proposal, you can apply a work schedule to a resource by selecting the calendar that the schedule is based on.

Profit/Fee

Enter the overriding profit/fee rate you want the resources to use.

Rate Band

If there is a Rate Band Table associated with the proposal, ProPricer will show the name of the rate band assigned to the resource in the Direct Rate Table. You can change it. If you change it, the name of the rate band will appear in blue, indicating an override.

Currency

If Multi-Currency is enabled for the proposal, ProPricer will show the currency entered for resources with rate type *Cost*. You can change the currency . If you change it, the name of the currency will appear in blue, indicating an override.

Curve

Enter the name of the curve you want to use to distribute the hours/units/cost of the resource or resources from the selected category.

Amount

Enter the hours/units/cost to be distributed.

Edit Method

There are two edit methods: *Overwrite* and *Append*. If you select *Overwrite*, the new values replace the existing resource values. If you select *Append*, the new values are added to the existing resource hours/units/cost.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Resource Distribution what-if will modify the current proposal. We recommend you make a copy of the proposal prior to performing this what-if. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will distribute the resources in the copy. If you want to add resources to the original proposal, close the **Resource Distribution** dialog box, select the proposal from the Navigation Pane, and choose the Resource Distribution what-if again.

*Note: The **Copy** option is not available if you accessed the **Resource Distribution** dialog box from the **Tasks** grid.*

Process

Click this button to start the what-if. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

Resource Switching

The Resource Switching what-if allows you to replace one direct resource with another resource from the Direct Rate Table assigned to the proposal. It also allows you to reallocate part of the hours/units/cost of one resource to another. You can apply the Resource Switching what-if to all the tasks in the proposal, or to only those included in a task selection.

Switching 100% of the hours/units/cost assigned to one resource to another resource can affect the proposal price, but not the schedule nor loading. In other words, the Start/End Dates, Curve, and Spread Amount of the *From Resource* will be transferred to the *To Resource*.

Reallocating part of the hours/units/cost of one resource to another can also affect the proposal price, as well as the schedule and loading. If the Start/End Dates and Curve are the same for both resources, the hours will be reallocated without changing the schedule or curve. If, however, the Start/End Dates and/or Curve differ, ProPricer will calculate how the hours/units/cost will be reallocated to the *To Resource*, based on the schedule of the *From Resource*. The hours/units/cost reallocated to the *To Resource* will appear as discrete values; **Start/End Date** columns will be blank, the **Curve** column will show (None), and the **Spread Amount** column will show 0.

All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

Run the Resource Switching What-If

1. Do one of the following:

- Select the proposal. Click the **Proposal** ribbon, and then click **Resource Switching** on the **More** submenu in the **What-Ifs** group.
- Open the proposal. In the **Tasks** grid, right-click the task or tasks whose resources you want to switch, point to **What-Ifs**, and then click **Resource Switching** on the shortcut menu.

2. *(Optional)* Make a copy of the proposal before performing the what-if.
3. Enter the **Start** and **End Dates** of the period for which you want the changes made, or leave them blank to process the entire proposal period.
4. Enter a **Task Selection**, or leave the field blank to process all the tasks.
5. Select the **From Resource**.
6. *(Optional)* Enter values in the **Resource Fields** to switch only the resources that have that value as well. Enter **(Any)** to reallocate the input of the resource from the category selected, regardless of the entry in the resource field. If you leave the resource field empty, ProPricer will only switch the resources that do not have a value entered in that resource field.
7. *(Optional)* Select an **Indirect Pool** to switch only the resources assigned that indirect pool. Enter **(Any)** to switch the resources, regardless of the indirect pool assigned to them. If you leave this field empty, ProPricer will only switch the resources that do not have an indirect pool assigned to them.
8. *(Optional)* Enter an overriding **Profit/Fee** rate for the resources.
9. If there is a Rate Band Table associated with the proposal, enter a **Rate Band** to switch only the resources assigned that rate band ID. Enter **(Any)** to switch the resources, regardless of the rate band assigned to them. If you leave this field empty, ProPricer will only switch the resources that do not have a rate band assigned to them.

10. If Multi-Currency is enabled for the proposal, you can enter a currency for resources with rate type *Cost* to switch the cost of the resources that have that currency entered for them. If you leave the field empty, ProPricer will only switch the hours/units/cost of the resources that do not have a currency entered for them.

11. Select the **To Resource**.

12. *(Optional)* Enter values in the **Resource Field** to switch the hours/units/cost to the resources that have that value entered as well. Enter **(Any)** to switch the hours/units/cost to all the resources, regardless of the entry in the resource field. Enter **(Match)** to have ProPricer use the resource field values entered for the From Resource. If you leave the resource field empty, ProPricer will only switch hours/units/cost to the resources that do not have a value entered in that resource field.

13. *(Optional) S*elect an **Indirect Pool** to switch the hours/units/cost to the resources that have that indirect pool assigned to them. Enter **(Any)** to switch the hours/units/cost to all the resources, regardless of the indirect pool assigned to them. If you leave this field empty, ProPricer will only switch the hours/units/cost to the resources that do not have an indirect pool assigned to them.

14. If there is a Rate Band Table associated with the proposal, enter a **Rate Band** to switch the hours/units/cost to the resources that have that rate band assigned to them. Enter **(Any)** to switch the hours/units/cost to all resources, regardless of the rate band assigned to them. If you leave the field empty, ProPricer will only switch the hours/units/cost to the resources that do not have a rate band assigned to them.

15. If Multi-Currency is enabled for the proposal, you can enter a currency for resources with rate type *Cost* to switch the cost to the resources that have that currency entered for them. If you leave the field empty, ProPricer will only switch

the hours/units/cost to the resources that do not have a currency entered for them.

16. Type the factor. The factor must be greater than 0 and less than or equal to 1.
17. Click **Process**.

Examples of Resource Switching

You may want to look at the following examples covering some of the most common cases of resource switching. All examples are given in the format of the **Resources to be switched** grid: *From Resource*, *To Resource*, and *Factor*.

Replace one resource with another resource:

Res 1 Res 2 factor = 1

Completely reallocate the hours/units/cost of one resource to two other resources:

Res 1 Res 2 factor = 0.5

Res 1 Res 3 factor = 1

Completely reallocate the hours/units/cost of one resource to three other resources:

Res 1 Res 2 factor = 0.3333

Res 1 Res 3 factor = 0.5

Res 1 Res 4 factor = 1

Reallocate part of the hours/units/cost of one resource to another resource:

Res 1 Res 2 0 < factor < 1

Reallocate the hours/units/cost of two resources to one resource:

Res 1 Res 3 0 < factor < 1

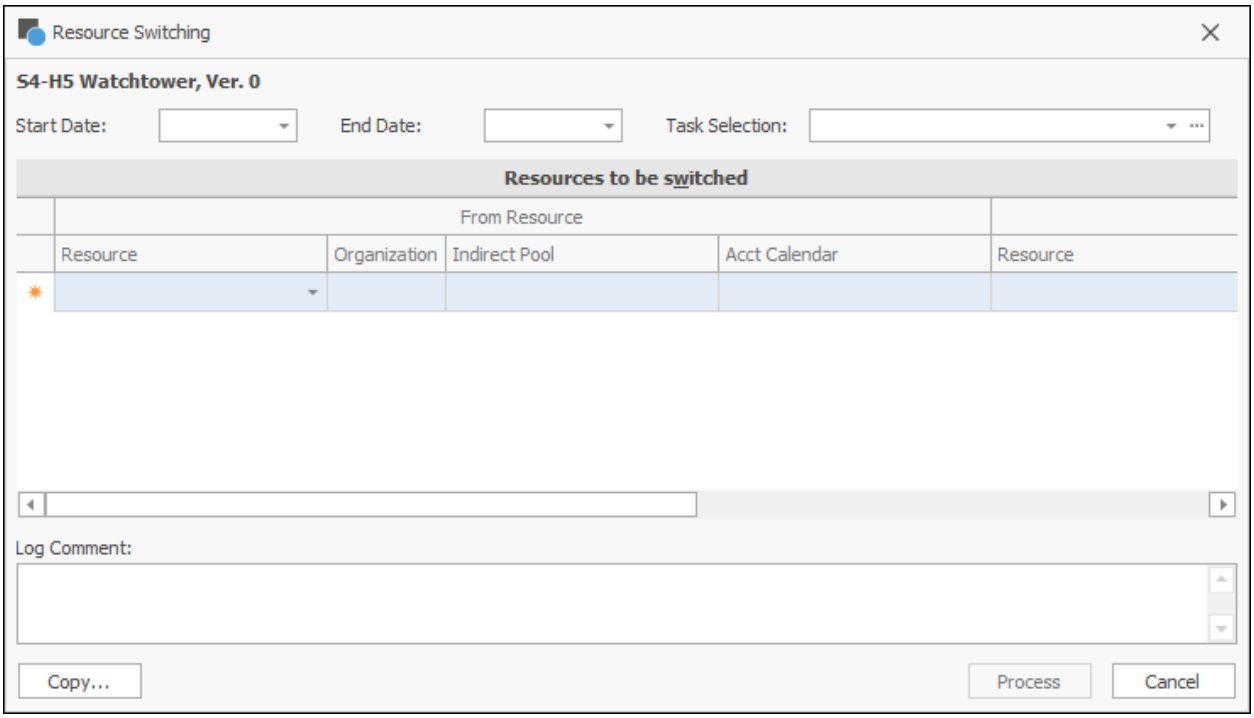
Res 2 Res 3 0 < factor < 1

If you enter the following, ProPricer will reallocate all hours/units/cost of Res 1 to Res 2. No hours/units/cost will be reallocated to Res 3:

Res 1 Res 2 factor = 1

Res 1 Res 3 any factor

Resource Switching Dialog Box



Proposal

This field displays the name and version of the current proposal.

Start Date and End Date

Enter the dates that define the period for which you want the changes made, or leave the fields blank to process the entire proposal period.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Resource Switching** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

From Resource

Resource

Enter the resource you want to switch.

Note: You can only switch direct resources.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. If you enter a value in the resource field, ProPricer will only switch the resources that have that value entered as well. Enter (Any) to reallocate the input of the resource from the category selected, regardless of the entry in the resource field. If you leave the resource field empty, ProPricer will only switch the resources that do not have a value entered in that resource field.

Indirect Pool

If you select an indirect pool, ProPricer will only switch the resources assigned that indirect pool. Enter (Any) to switch the resources, regardless of the indirect pool assigned to them. If you leave this field empty, ProPricer will only switch the resources that do not have an indirect pool assigned to them. Please note that ProPricer does not distinguish between the indirect pool entered in the Direct Rate Table and an overridden indirect pool.

Accounting Calendar

If you enter an accounting calendar, ProPricer will only change the input of the resources assigned that calendar. Enter (Any) to change the input of all the resources from the category selected, regardless of the calendar assigned to them. If you leave this field empty, ProPricer will only change the input of the resources that do not have a calendar assigned to them. Please note that ProPricer does not distinguish between the calendar entered in the Direct Rate Table and an overridden calendar.

Rate Band

This column appears if there is a Rate Band Table assigned to the Direct Rate Table. If you select a rate band, ProPricer will only switch the

resources assigned that rate band. Enter (Any) to switch the resources, regardless of the rate band assigned to them. If you leave this field empty, ProPricer will only switch the resources that do not have a rate band assigned to them. Please note that ProPricer does not distinguish between the rate band entered in the Direct Rate Table and an overridden rate band.

Currency

This column appears if Multi-Currency is enabled for the proposal. You can only change the currency of the resources with rate type *Cost*. If you enter a currency, ProPricer will only switch the resources assigned that currency. The value (Any) allows you to switch all resources, regardless of the currency assigned to them.

To Resource

Resource

Enter the resource to which you want to switch hours/units/cost. The *To Resource* must differ from the *From Resource* and exist in the Direct Rate Tale assigned to the proposal. You can switch multiple resources in the same session.

Resource Fields

These columns appear if there are resource fields defined in the library or for the proposal. If you enter a value in the resource field, ProPricer will only switch the hours/units/cost to the resources that have that value entered as well. Enter (Any) to switch the hours/units/cost to all the resources, regardless of the entry in the resource field. Enter (Match) to have ProPricer use the resource field values entered for the From Resource. If you leave the resource field empty, ProPricer will only switch hours/units/cost to the resources that do not have a value entered in that resource field.

Accounting Calendar

If you select an accounting calendar, ProPricer will only switch the hours/units/cost to the resources that have that calendar assigned to them.

Enter (Any) to switch the hours/units/cost to all the resources, regardless of the calendar assigned to them. If you leave this field empty, ProPricer will only switch the hours/units/cost to the resources that do not have an accounting calendar assigned to them. Please note that ProPricer does not distinguish between the calendar entered in the Direct Rate Table and an overridden calendar.

Indirect Pool

If you select an indirect pool, ProPricer will only switch the hours/units/cost to the resources that have that indirect pool assigned to them. Enter (Any) to switch the hours/units/cost to all the resources, regardless of the indirect pool assigned to them. If you leave this field empty, ProPricer will only switch the hours/units/cost to the resources that do not have an indirect pool assigned to them. Please note that ProPricer does not distinguish between the indirect pool entered in the Direct Rate Table and an overridden indirect pool.

Profit/Fee

If you enter a rate, ProPricer will enter the overriding rate for the switched resource.

Rate Band

This column appears if there is a Rate Band Table assigned to the Direct Rate Table. If you select a rate band, ProPricer will only switch the hours/units/cost to the resources that have that rate band assigned to them. Enter (Any) to switch the hours/units/cost to all resources, regardless of the Rate Band assigned to them. If you leave the field empty, ProPricer will only switch the hours/units/cost to the resources that do not have a rate band assigned to them. Please note that ProPricer does not distinguish between the rate band entered in the Direct Rate Table and an overridden Rate Band ID.

Currency

This column appears if Multi-Currency is enabled for the proposal. You can only change the currency of the resources with rate type *Cost*. If you enter a currency, ProPricer will only switch the hours/units/cost to the resources assigned that currency. The value (Any) allows you to switch the hours/units/cost to all the resources, regardless of the currency assigned to them.

Factor

Specify what part of the resource input you want to switch. The factor must be greater than 0 and less than or equal to 1.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Resource Switching what-if will modify the current proposal. We recommend you make a copy of the proposal prior to performing this what-if. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will switch the resources in the copy. To switch the resources in the original proposal, close the **Resource Switching** dialog box, select the proposal from the Navigation Pane, and choose the Resource Switching what-if again.

*Note: The **Copy** option is not available if you accessed the **Resource Switching** dialog box from the **Tasks** grid.*

Process

Click this button to start the what-if. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

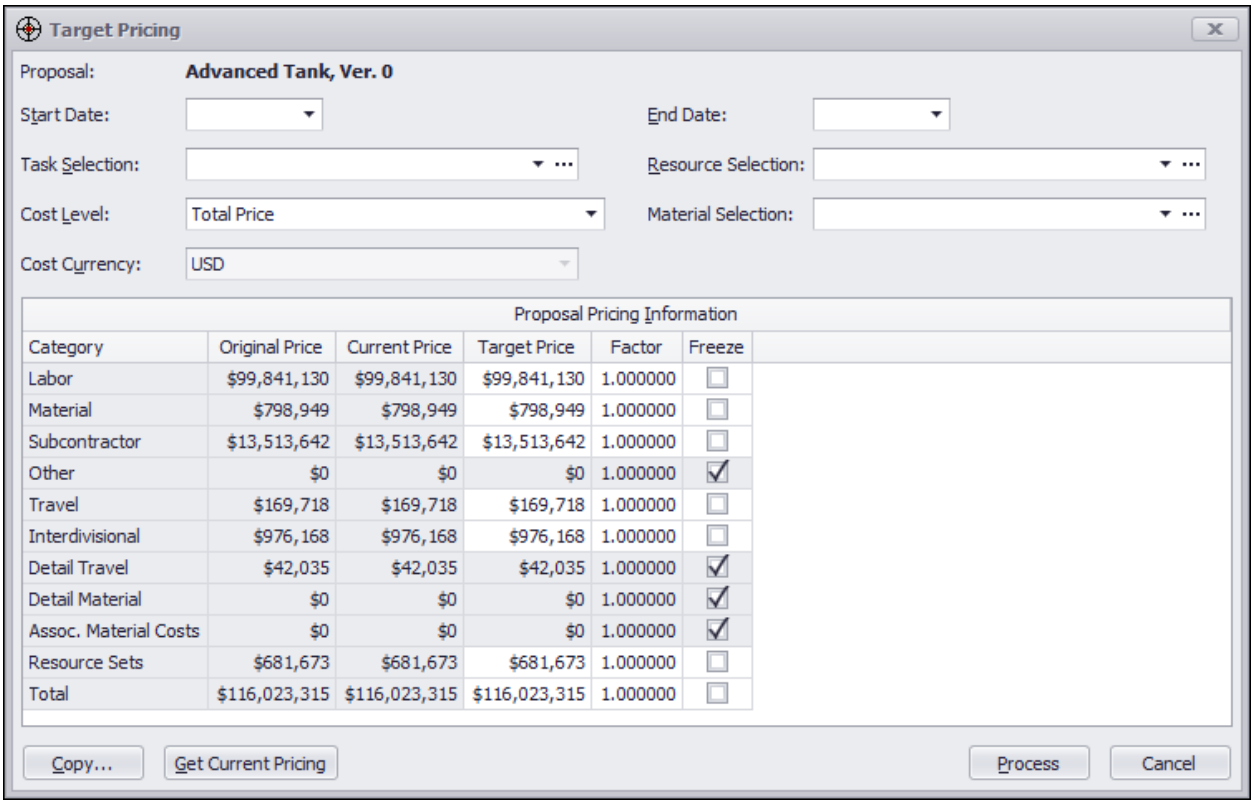
Target Pricing

The Target Pricing what-if allows you to adjust the cost of a proposal to approach a target price. Depending upon the categories you select to change, this what-if will affect the input of the resources on the **Resources** tab, the derivative resources on the **CERs** tab if the base resource is affected, the resource assigned to an associated cost of a part/assembly, as well as the unit cost of a part/assembly on the **Material** tab. It does not apply to resources entered on the **Formulas** tab or **Travel** tab. The **Detail Travel** row shows their participation in the total, but you cannot change any of the values.

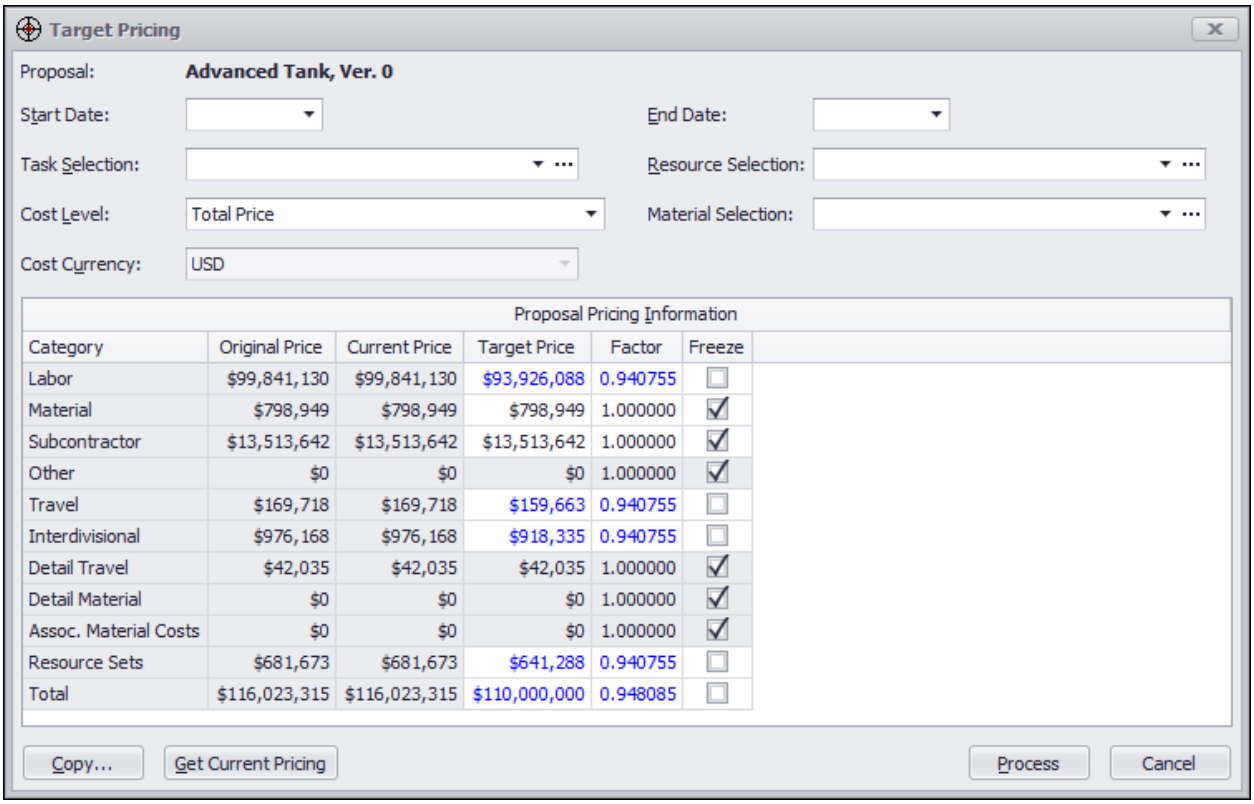
This what-if can adjust the input values of all direct resources in the proposal or only the direct resources specified in a task selection, resource selection, and/or material selection. It also allows you to freeze any cost you want to remain fixed.

There are different ways you can approximate the target price. If you want to make across-the-board adjustments, you can change the target price or factor in the **Total** row. ProPricer will then recalculate the input values of the applicable resources (the **Freeze** checkbox is not selected, the resources are not excluded by a task selection, etc.). You can also make category-specific adjustments (only labor resources, for example). ProPricer will then recalculate the input values of the resources from the specific category and show the adjusted target price. The **Cost Level** field allows you to modify the input values of the resources for a specific indirect element or subtotal.

Suppose you are working on a proposal, and the proposal manager tells you that the total price of the proposal should not exceed $110,000,000. Material and subcontractor costs are fixed and cannot change.

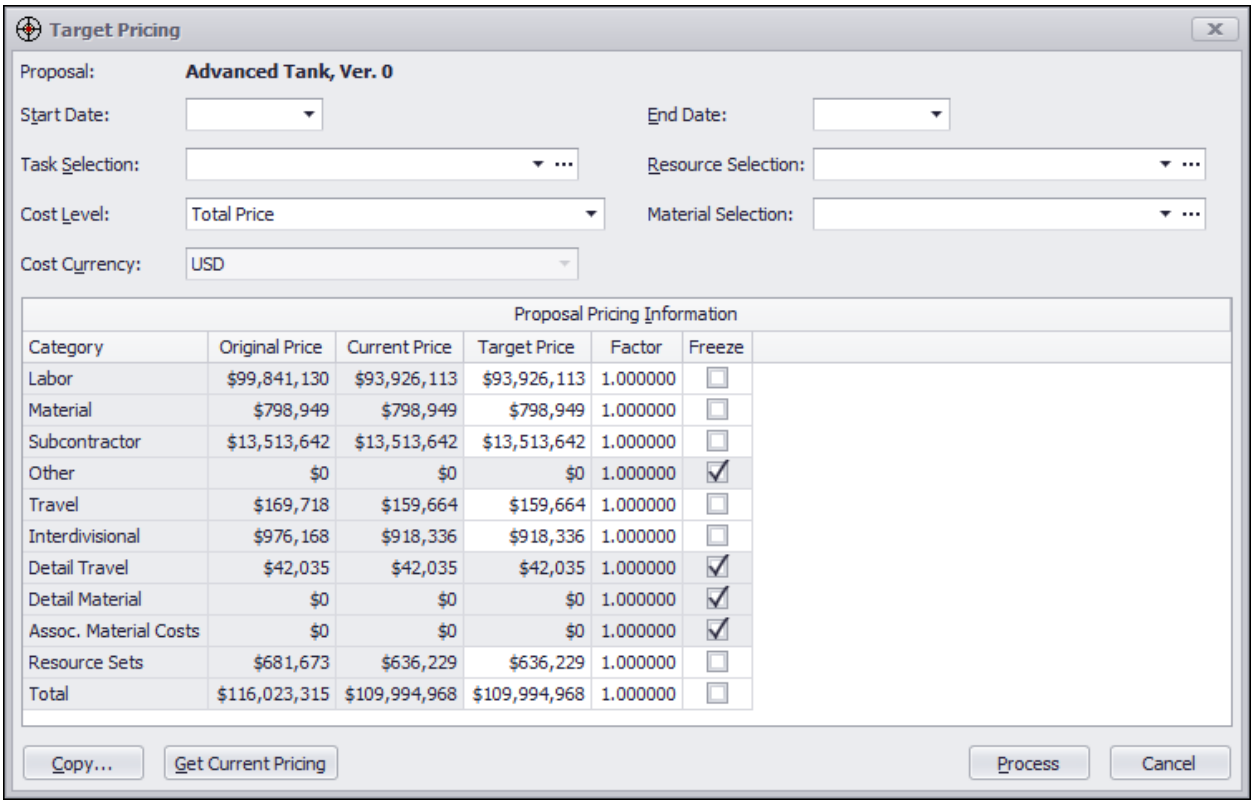


This is the information that appears after we click **Get Current Pricing**. The current price is *$116,023,315*. The **Other** category is frozen because there are no direct resources of this type assigned to any task in this proposal. The **Detail Material** and **Associated Material Costs** categories are frozen because there is no material assigned to any task on the **Material** tab. The **Freeze** checkbox of the **Detail Travel** category is always selected and cannot be cleared because you cannot change any of the values. It simply allows you to see the travel costs in the proposal. Since **Material** and **Subcontractor** are fixed costs, we will select the corresponding **Freeze** checkboxes. Then we will modify the total target price. ProPricer automatically makes the necessary adjustments in the factors and target prices of the categories that are not frozen.



Category	Original Price	Current Price	Target Price	Factor	Freeze
Labor	$99,841,130	$99,841,130	$93,926,088	0.940755	☐
Material	$798,949	$798,949	$798,949	1.000000	☑
Subcontractor	$13,513,642	$13,513,642	$13,513,642	1.000000	☑
Other	$0	$0	$0	1.000000	☑
Travel	$169,718	$169,718	$159,663	0.940755	☐
Interdivisional	$976,168	$976,168	$918,335	0.940755	☐
Detail Travel	$42,035	$42,035	$42,035	1.000000	☑
Detail Material	$0	$0	$0	1.000000	☑
Assoc. Material Costs	$0	$0	$0	1.000000	☑
Resource Sets	$681,673	$681,673	$641,288	0.940755	☐
Total	$116,023,315	$116,023,315	$110,000,000	0.948085	☐

ProPricer will now apply the factor of *0.940755* to **Labor**, **Travel**, **Interdivisional**, and **Resource Sets**, and then recalculate the new total. This is what we see once we click **Process**:



Note: The results of the what-if may differ with a specific target price entered, due to rounding.

All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

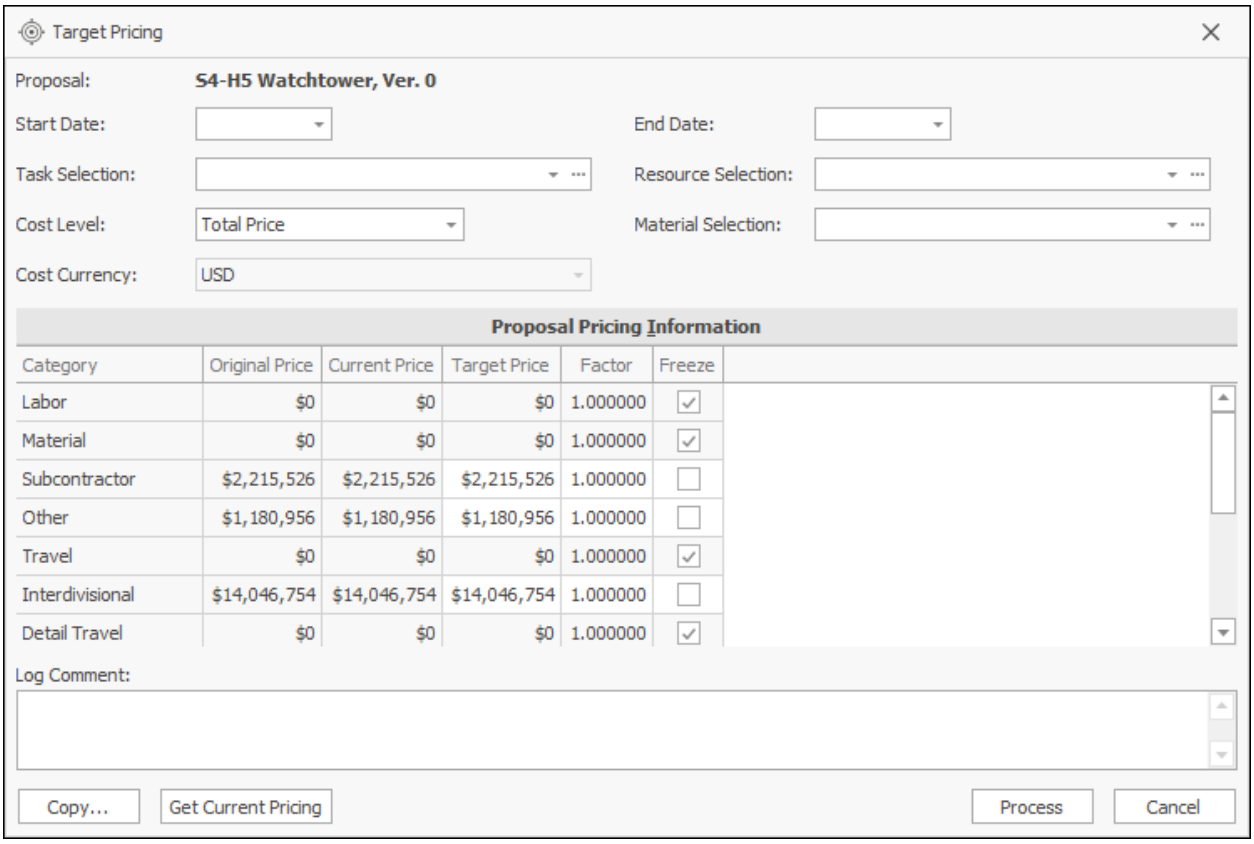
Run the Target Pricing What-If

1. Do one of the following:
    - Select a proposal in the Navigation Pane, click the **Proposal** ribbon, and then click **Target Pricing** in the **What-Ifs** group.

- Open a proposal, right-click the task or tasks for which you want to perform target pricing, point to **What-Ifs**, and then click **Target Pricing** on the shortcut menu.

2. *(Optional)* Make a copy of the proposal before applying the what-if.
3. Enter the start and end dates of the period for which you want the changes made, or leave them blank to process the entire proposal period.
4. Enter a task selection to change the target price of the resources of the selected tasks, or leave the field blank to process all the resource all the tasks.
5. Enter a resource selection to change the target price of the selected resources, or leave the field blank to process all the resources.
6. Enter a material selection to change the target price of the parts or assemblies selected, or leave the field blank to process all the parts or assemblies.
7. Select a cost level.
8. If there is an Exchange Rate Table assigned to the proposal, you can enter a cost currency to convert the **Current Price** and **Target Price** values to the currency entered.
9. Click **Get Current Pricing** to display the current price information.
10. Select the **Freeze** checkbox for the elements whose values you do not want modified.
11. Enter a specific target price or factor for each applicable cost element. When you change a price or a factor, move to another cell in the grid. ProPricer will recalculate all affected prices and factors.
12. When you are satisfied with the results, click **Process** to apply the target price to the proposal.

Target Pricing Dialog Box



Proposal

This field shows the name and version of the current proposal.

Start Date and End Date

Enter the dates that define the period for which you want the changes made, or leave the fields blank to process the entire proposal period.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Target Pricing** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

Resource Selection

Enter a resource selection to limit the what-if to those resources. Leave this field blank to process all the resources in the proposal. If no resource selection exists, or the appropriate resources are not included in an existing one, click to open the **Resource Selections** grid to create or modify an existing one.

Note: The Resource Sets category cannot be edited if a resource selection is entered. This is because a resource set represents a single unit of work and, therefore, it would not be appropriate to modify the cost of only some of the resources from the resource set (if they are included in the resource selection) and leave others unchanged.

Material Selection

Enter a material selection to limit the what-if to those materials. Leave this field blank to process all the materials in the proposal. If no material selection exists, or the appropriate materials are not included in an existing one, click to open the **Material Selections** grid to create or modify an existing one.

Cost Level

If you are permitted to view indirect cost information, you can specify how much of it will be included in the cost totals and subtotals. You can change it once you click the **Get Current Pricing** button. If you cannot see indirect cost information, the only level available is *Direct Cost*.

Cost Currency

If there is an Exchange Rate Table assigned to the proposal, this option allows you to enter a Cost Currency to convert the Current Price and Target Price values to the currency entered.

Proposal Pricing Information

Click **Get Current Pricing** to display the information.

Category

This column lists the different resource categories. It is for information only.

Original Price

This column displays the price of each category before any changes have been made to the proposal. It is for information only.

Current Price

This column lists the current price of each category. It will be the same as the original price before applying the what-if, and the same as the target price once the what-if has been applied. It is for information only.

Target Price

Enter a specific amount of money for any or all categories. ProPricer will calculate the new total price if you change the price of any category, or it will calculate all new category prices if you change the total price.

Factor

Enter a factor for any or all categories.

- 0 < Factor < 1: Reduce the current price.
- Factor = 1: Keep the current price.
- Factor > 1: Increase the current price.

Freeze

Select this checkbox if you want to keep a specific category from being changed when you modify other target prices.

*Note: The **Freeze** checkbox will be selected and cannot be cleared for the following categories:*

- *Any category that does not have resources of that type assigned to any task in the proposal.*

- *Detail Travel.*

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Running the Target Pricing what-if will modify the current proposal. We recommend you make a copy of the proposal prior to running the what-if. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will change the price of the copy. If you want to change the price of the original proposal, close the **Target Pricing** dialog box, select the proposal in the Navigation Pane, and run the Target Pricing what-if again.

*Note: The **Copy** option is not available if you accessed the **Target Pricing** dialog box from the **Tasks** grid in Task View.*

Get Current Pricing

Click this button to show the current prices and enable the cells of the **Target Price**, **Factor,** and **Freeze** columns for editing.

Process

Click this button to run the what-if. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if.

Target/Profit Fee

The Target Profit/Fee what-if allows you to adjust the profit percentage of the proposal, or of individual resource types in the proposal, by a specific factor to approach a target fee.

This what-if can change the input profit/fee rates of all direct resources in the proposal or only the direct resources specified in a task selection, resource selection, and/or material selection. In the proposal, the new resource-level rates calculated by the what-if will appear in blue text to indicate an override.

All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

Run the Target Profit/Fee What-If

1. Do one of the following:
   - Select a proposal in the Navigation Pane, click the **Proposal** ribbon, and then click **Target Profit/Fee** in the **What-Ifs** group.
   - Open a proposal, right-click the task or tasks for which you want to perform target pricing, point to **What-Ifs**, and then click **Target Profit/Fee** on the shortcut menu.
2. *(Optional)* Make a copy of the proposal before applying the what-if.
3. Enter a task selection to change the target fee of the resources of the selected tasks, or leave the field blank to process all the resources in all the tasks.

4. Enter a resource selection to change the target fee of the selected resources, or leave the field blank to process all the resources.

5. Enter a material selection to change the target fee of the parts or assemblies selected, or leave the field blank to process all the parts or assemblies.

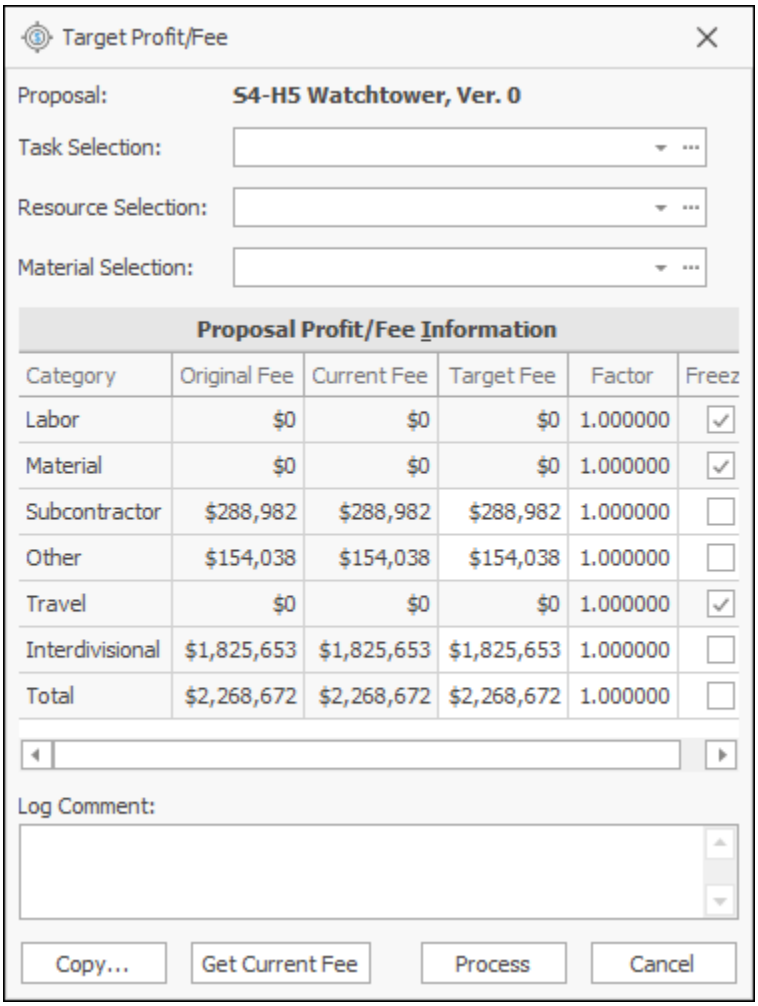
6. Click **Get Current Fee** to display the proposal's profit/fee information.

7. Select the **Freeze** checkbox for the elements whose values you do not want modified.

8. Enter a specific target fee or factor for each applicable resource type or for the entire proposal. When you change a fee or a factor, move to another cell in the grid. ProPricer will recalculate all affected fees and factors.

9. When you are satisfied with the results, click **Process** to apply the target fee to the proposal.

Target Profit/Fee Dialog Box



Proposal

This field shows the name and version of the current proposal.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Target Profit/Fee** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

Resource Selection

Enter a resource selection to limit the what-if to those resources. Leave this field blank to process all the resources in the proposal. If no resource selection exists, or the appropriate resources are not included in an existing one, click to open the **Resource Selections** grid to create or modify an existing one.

Material Selection

Enter a material selection to limit the what-if to those materials. Leave this field blank to process all the materials in the proposal. If no material selection exists, or the appropriate materials are not included in an existing one, click to open the **Material Selections** grid to create or modify an existing one.

Proposal Profit/Fee Information

Click **Get Current Fee** to display the information.

Category

This column lists the different resource categories. It is for information only.

Original Fee

This column displays the fee of each category before any changes have been made to the proposal. It is for information only.

Current Fee

This column lists the current fee of each category. It will be the same as the original fee before applying the what-if, and the same as the target fee once the what-if has been applied. It is for information only.

Target Fee

Enter a specific amount of money for any or all categories. ProPricer will calculate the new total fee if you change the fee of any category, or it will calculate all new category fees if you change the total fee.

Factor

Enter a factor for any or all categories.

- 0 < Factor < 1: Reduce the current fee.
- Factor = 1: Keep the current fee.
- Factor > 1: Increase the current fee.

Freeze

Select this checkbox if you want to keep a specific category from being changed when you modify other target fees.

*Note: The **Freeze** checkbox will be selected and cannot be cleared for any category that does not have resources of that type assigned to any task in the proposal.*

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Running the Target Profit/Fee what-if will modify the current proposal. We recommend you make a copy of the proposal prior to running the what-if. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will change the profit/fee of the copy. If you want to change the profit/fee of the original proposal, close the **Target Profit/Fee** dialog box, select the proposal in the Navigation Pane, and run the Target Profit/Fee what-if again.

*Note: The **Copy** option is not available if you accessed the **Target Profit/Fee** dialog box from the **Tasks** grid in Task View.*

Get Current Fee

Click this button to show the current fees and enable the cells of the **Target Fee**, **Factor,** and **Freeze** columns for editing.

Process

Click this button to run what-if. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if.

Travel Switching

The Travel Switching what-if allows you to replace a travel destination in the proposal with another one from the Travel Library. You can apply the Travel Switching what-if to all the tasks in the proposal, or to only those included in a task selection. Only complete destinations can be switched. You cannot replace part of the travel expenses of a destination with those of another.

Switching destinations can affect the proposal price, but not the schedule nor loading of the trip. In other words, the Start/End Dates, Curve, and Spread Amount of the trip remain the same.

All what-if scenarios modify your proposal. To prevent changes in your original proposal, you should copy it before running a what-if. Once you are satisfied with the results in the copy, you can go back and apply the what-if to the original. All the what-if dialog boxes have a **Copy** button that allows you to copy your proposal from within the what-if. The copy becomes the active proposal.

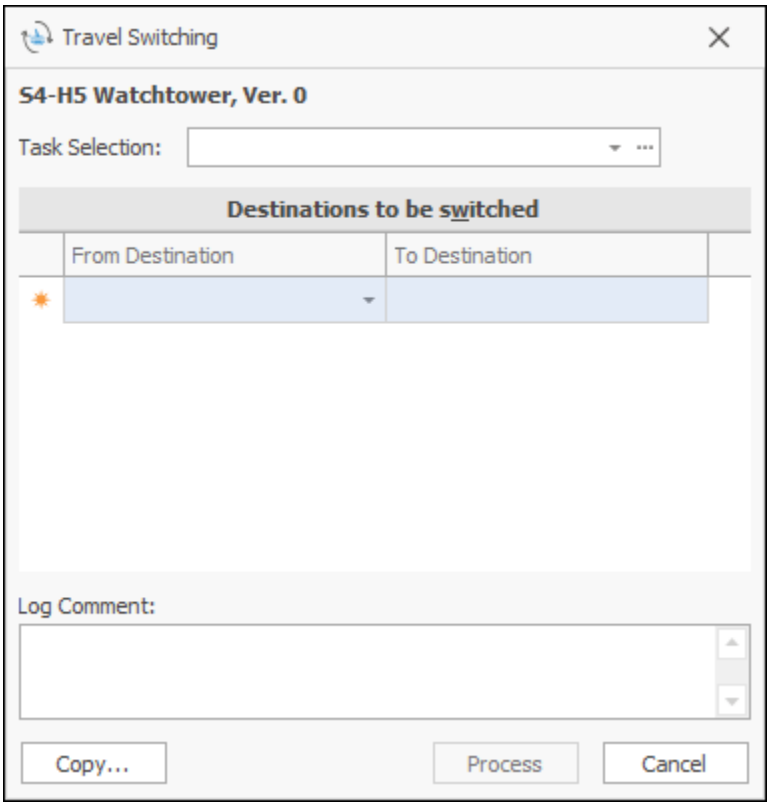
Run the Travel Switching What-If

1. Do one of the following:
   - Select the proposal. Click the **Proposal** ribbon, and then click **Travel Switching** on the **More** submenu in the **What-Ifs** group.
   - Open the proposal. In the **Tasks** grid, right-click the task or tasks whose destinations you want to switch, point to **What-Ifs**, and then click **Travel Switching** on the shortcut menu.
2. *(Optional)* Make a copy of the proposal before performing the what-if.
3. Enter a task selection, or leave the field blank to process all the tasks.
4. Enter the destination you want to switch in the **From Destination** column.

5. Enter the new destination in the **To Destination** column.

6. Click **Process**.

Travel Switching Dialog Box



Proposal

This field displays the name and version of the current proposal.

Task Selection

Enter a task selection to limit the what-if to those tasks. Leave this field blank to process all the tasks in the proposal. If no task selection exists, or the appropriate tasks are not included in an existing one, click ... to open the **Task Selections** grid to create or modify an existing one.

*Note: If you accessed the **Travel Switching** dialog box from the **Tasks** grid, the task selected will appear here and cannot be changed.*

From Destination

Enter the destination you want to switch.

To Destination

Enter the destination that will replace the original one. The *To Destination* must differ from the *From Destination*, and use a resource that exists in the Direct Rate Table assigned to the proposal. You can switch multiple destinations in the same session.

Log Comment

Enter notes or additional information about the changes being made to the proposal. The What-Ifs Log records your comments.

Copy

Performing the Travel Switching what-if will modify the current proposal. We recommend you make a copy of the proposal prior to performing this what-if. Click this button to copy the proposal and create a new one. The copy becomes the active proposal, and ProPricer will switch the destinations in the copy. To replace destinations in the original proposal, close the **Travel Switching** dialog box, select the proposal from the Navigation Pane, and choose the Travel Switching what-if again.

*Note: The **Copy** option is not available if you accessed the **Travel Switching** dialog box from the **Tasks** grid.*

Process

Click this button to start the what-if. The dialog box will remain open during the process.

Cancel

Click this button to cancel the what-if and close the dialog box.

What-Ifs Log

The What-Ifs Log captures every occurrence of a successfully processed what-if in a proposal. It records the name of the what-if, the exact moment it was processed, and the user who performed it. The log also shows how the hours, direct cost, and total price of the proposal were affected by the what-if, as well as any log comments typed in the what-if setup.

Note: ProPricer keeps track of what-ifs at the system level in the Change Log.

Enable the What-Ifs Log

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. On the **Pricing** page, select **Enable What-Ifs Log**.
3. *(Optional)* Select **Copy Log When the Proposal is Copied** to retain the log any time the proposal is duplicated.
4. Click **OK**.

View the What-Ifs Log

1. In the Navigation Pane, click a proposal that has been changed by a what-if process.

2. On the **Proposal** ribbon, click **What-Ifs Log**.

Note: You can right-click a grid to print or export its data.

Work Schedule Tables

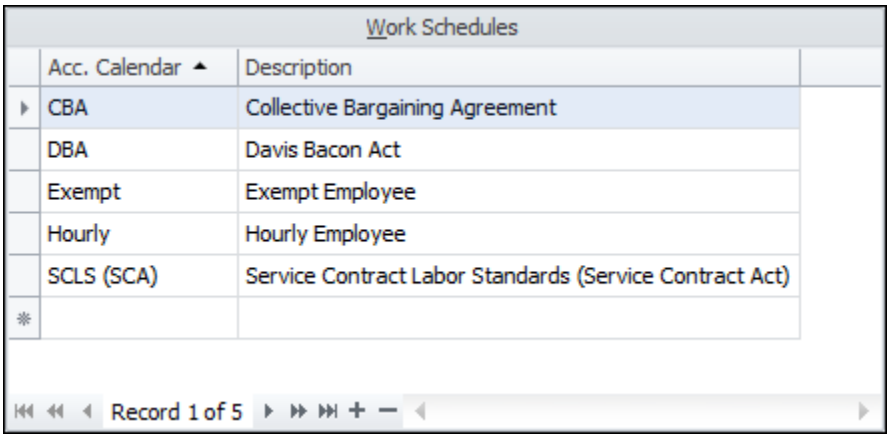
Work Schedule Tables let you use accounting calendars to define a variety of work schedules. You can override the hours provided by an accounting calendar, and you can create direct rate modifiers for schedules. To apply work schedule hours and rate modifiers to resources and labor categories, you must attach a Work Schedule Table to your proposal.

Like Indirect Rate Tables, Work Schedule Tables need an assigned Algorithm. For the two tables to function together correctly in a proposal, the same Algorithm must be assigned to the proposal's Indirect Rate Table and Work Schedule Table.

*Note: Pasting copied text in input grids (**Ctrl+V** or right-click > **Paste**) cuts down on data entry time. If a grid in a library, rate table, proposal, etc. is not read-only, you can paste valid data in the editable cells.*

Work Schedules

Work schedules are based on the hours in an existing accounting calendar. In this grid, pick which calendar to use for a schedule. To modify a schedule's hours or set up its rate modifiers, click the appropriate tab below the **Work Schedules** grid.



Accounting Calendar

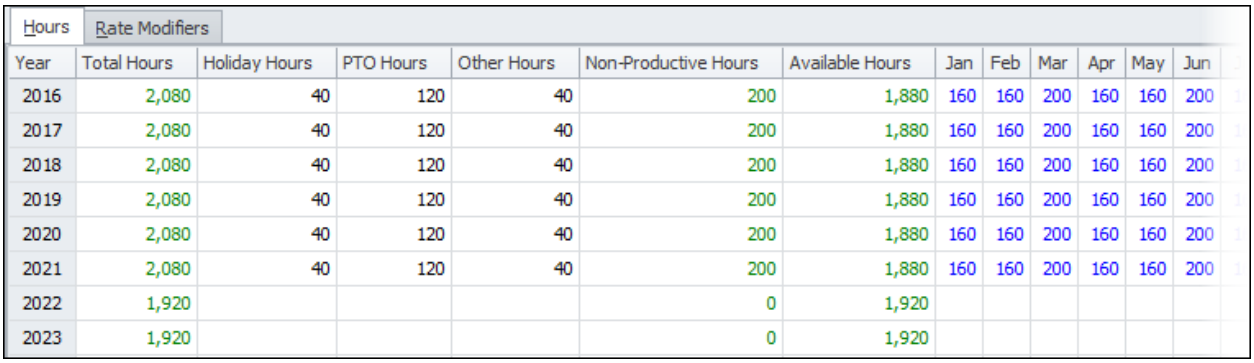
Select an accounting calendar from the Accounting Calendar Library. If you type a calendar name that does not exist, a prompt appears to help you add it to library without exiting the Work Schedule Table.

Description

ProPricer extracts the description from the Accounting Calendar Library and displays it here. If you create a new calendar, you can also enter a new description.

Hours

This grid is for modifying the hours in a work schedule. Depending on the accounting calendar selected in the **Work Schedules** grid, some columns here may already contain data. Automatically calculated amounts appear in green text, and overriding data appears in blue text.



Hours | Rate Modifiers

Year	Total Hours	Holiday Hours	PTO Hours	Other Hours	Non-Productive Hours	Available Hours	Jan	Feb	Mar	Apr	May	Jun
2016	2,080	40	120	40	200	1,880	160	160	200	160	160	200
2017	2,080	40	120	40	200	1,880	160	160	200	160	160	200
2018	2,080	40	120	40	200	1,880	160	160	200	160	160	200
2019	2,080	40	120	40	200	1,880	160	160	200	160	160	200
2020	2,080	40	120	40	200	1,880	160	160	200	160	160	200
2021	2,080	40	120	40	200	1,880	160	160	200	160	160	200
2022	1,920				0	1,920						
2023	1,920				0	1,920						

Year

The years displayed are determined by the **Base Year** and **Total Years** settings in your System Options.

Total Hours

This column shows the total accounting hours per year. If you change the hours in any months of a year, the total hours adjust automatically. You can also enter the total hours directly in this column.

Holiday Hours

Enter the number of holiday hours to subtract from the remaining available hours.

PTO Hours

Enter the number of paid time off hours to subtract from the remaining available hours.

Other Hours

Enter the number of miscellaneous hours to subtract from the remaining available hours.

Note: Unlike the Holiday Hours and PTO Hours columns, you can enter a negative value in the Other Hours column. A positive value decreases the available hours, and a negative value increases them.

Non-Productive Hours

This column shows the sum of the holiday, PTO, and other hours in each year.

Available Hours

This column shows the hours that are available for work in each year. Available hours are calculated by subtracting non-productive hours from the total hours.

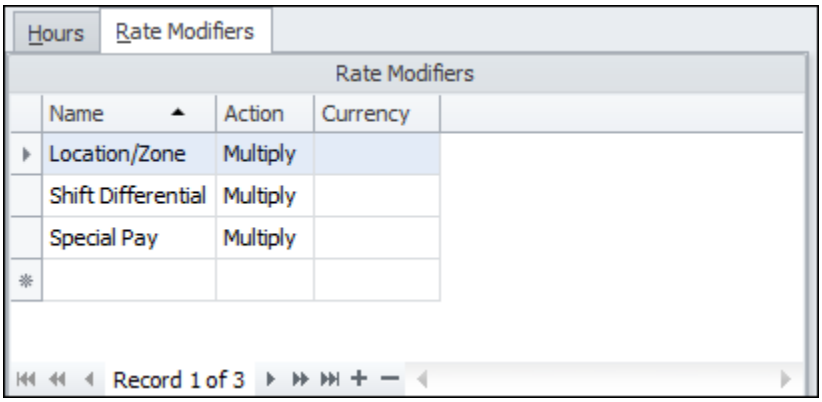
Months

These columns are for overriding the number of accounting hours per month, which cannot be less than 0 nor more than 744. If the selected accounting calendar provides monthly hours, or if you enter any in the month columns, the total hours and available hours adjust automatically. When you override monthly hours, the data in the accounting calendar will not be changed.

Rate Modifiers

Each item added to the **Rate Modifiers** grid is a rate modifier category. The items in the **Rate Modifier Values** grid are the different kinds of modifications available within that category.

To select a rate modifier and enter default information for it here, it must already be an element in the Algorithm assigned to the Work Schedule Table. Every *Rate Modifier* element in the Algorithm is linked to a global resource field, so you will be able to apply multiple modifiers to a single resource in a proposal task.



Name

Select a rate modifier from the Algorithm assigned to the Work Schedule Table. To find out which Algorithm is being used, check the table properties.

Action

Specify how the number in the **Value** column of the **Rate Modifier Values** grid is included in the direct rate calculation.

There are two options:

- **Add** - The number is added as units of currency to the direct rate for every hour spread with the rate modifier. This option enables the **Currency** column.
- **Multiply** - The direct rate is multiplied by the number for every hour spread with the rate modifier. With this option, the number represents a

mathematical factor rather than units of currency. Consequently, the **Multiply** option and the **Currency** column are mutually exclusive.

Currency

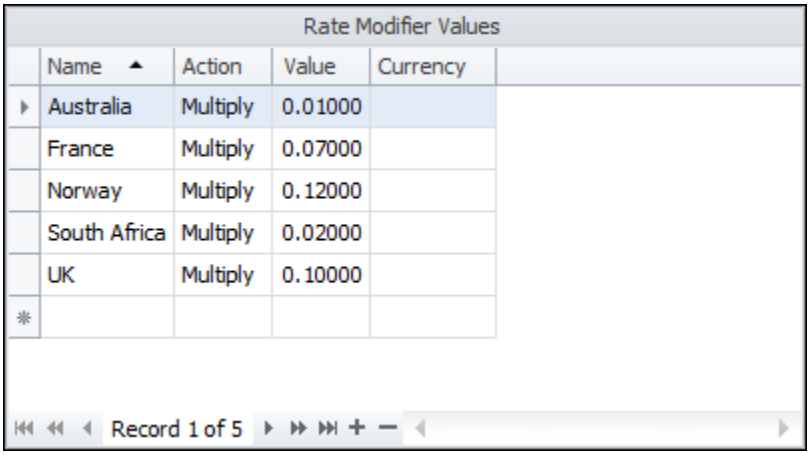
Select a type of currency for the rate modifier. You can change the currency only if the modifier's action is **Add**.

If you leave the **Currency** column blank, then the system currency is used by default. If you select a currency that is different than the system currency, then the number being added by the rate modifier will be converted according to the proposal's Exchange Rate Table.

Rate Modifier Values

This is where you set up the values for the rate modifier category selected in the **Rate Modifiers** grid. These values determine how a rate modifier affects a resource's direct rate, so each modifier should have at least one value.

Defining multiple values for a single modifier lets you decide how the rate modifier will work when you apply it to a resource in a proposal task. In proposals, each rate modifier will appear as a separate resource field, and in that field, you will be able to choose one of the rate modifier values.



Name

Select a rate modifier value. You can define multiple values so that each one modifies a resource's direct rate differently.

The values you can select in this column depend on the resource field assigned to the rate modifier in the Algorithm. That resource field has a set of values in the Resource Field Library, and those values can be selected here.

Action

This column shows the default action selected in the **Rate Modifiers** grid. You can override it here.

Value

Enter a numerical value. The options in the **Action** column determine whether this number is added to or multiplied by a resource's direct rate.

Currency

This column shows the default currency selected in the **Rate Modifiers** grid. You can override it here.

Assign a Work Schedule Table to a Proposal

1. In the Navigation Pane, click the **Proposals** button, right-click a proposal, and then click **Properties** in the shortcut menu.
2. In the **Proposal** folder, click the **Calendar** page.
3. In the **Work Schedule Table** field, enter the name of the table.
4. Click **OK**.

Copy a Work Schedule Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
   - Expand the **Work Schedule Tables** folder.
   - Double-click the **Work Schedule Tables** folder to open the list of Work Schedule Tables.
3. Right-click the Work Schedule Table you want to copy, and then click **Copy** on the shortcut menu.
4. Enter where you want to store the copy.
5. Enter a name and description for the copy that will be created.
6. *(Optional)* Leave the **Open After Copy** checkbox selected to automatically open the new table in the Workspace.
7. Click **OK**.

Note: If you enter the name of an existing table, ProPricer will ask you to confirm that you want to replace it with the copy. You will not be able to replace it if it is used anywhere in the system.

Create a Work Schedule Table

You can create a Work Schedule Table after you create an Algorithm.

1. In the Navigation Pane, click the **Rates/Tables** button, right-click the **Work Schedule Tables** folder, and then click **New Work Schedule Table** on the shortcut menu.
2. Enter a name and description for the new table.
3. Enter the name of the Algorithm you want to use. The Algorithm provides the names in the **Rate Modifiers** grid of the table.
4. Click **OK**. The **Work Schedule Table** grid will open in a new Workspace tab.

Note: If a Work Schedule Table and an Indirect Rate Table are assigned to the same proposal, then both tables should use the same Algorithm.

Delete a Work Schedule Table

1. In the Navigation Pane, click the **Rates/Tables** button.
2. Do one of the following:
    - Expand the **Work Schedule Tables** folder.
    - Double-click the **Work Schedule Tables** folder to open the list of Work Schedule Tables.
3. Right-click the table you want to delete, and then click **Delete** on the shortcut menu.
4. Confirm the deletion when asked.

*Note: You can only delete a Work Schedule Table that is not used anywhere in the system. If the table is used, ProPricer will display the **Item Usage Info** box instead.*

Work Schedule Table Properties

The **Work Schedule Table Properties** dialog box is where you define the table. You can also type notes and attach files to the table.

Properties

Name

Enter a name for the table.

Description

Enter a description for the table.

Algorithm

Select an Algorithm to assign it to the table. The Algorithm determines which rate modifiers you can use in the table, and it provides the pricing formula for your proposal.

Note: The same Algorithm must be assigned to the proposal's Indirect Rate Table and Work Schedule Table.

Notes

Edit and Format

The text editor has a wide range of standard word processing features available on the Edit and Format ribbons. You can also right-click the text area to quickly reach some of the most common ones.

Attachments

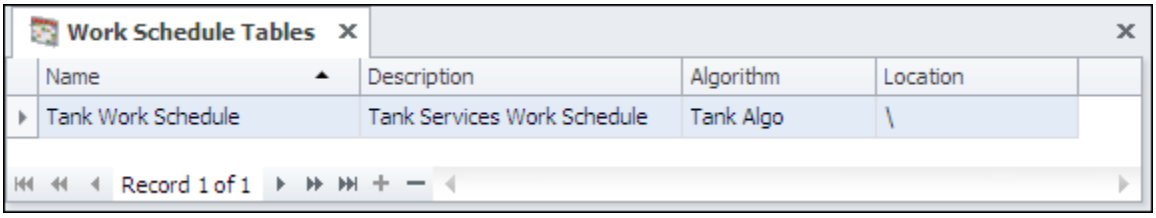
The attachment area is visible only after you attach a file. To do so, drag the file to the text editor, or click **Edit** > **Attach File**.

Select an attachment to include the file name in rate reports. It will appear in angle brackets (for example, <filename.docx>).

You can print the content of the attachment in a report by selecting the **Print to Word** report option, and then selecting the **Print Attachments** checkbox.

Work Schedule Tables List

The Work Schedule Tables List shows all the Work Schedule Tables that exist. It is also a convenient place to copy and delete tables.



Name

This column shows the name of the table.

Description

This column shows the description of the table.

Algorithm

This column shows the Algorithm assigned to the table.

Location

This column shows the folder in which the table is stored. If there is no folder name after the backslash, the table is stored in the root **Work Schedule Tables** folder.

*Note: To move something to a different folder and change its save location, right-click the item and select **Move to Folder**. You can perform this action in the Navigation Pane or in the list.*

Access Tags

The access tags assigned to the item. Users who have one of the same tags can view and work with the item. To learn more, see Assign Access Tags to an Item and Assign Access Tags to a User.

Workflow

Workflow allows you to track the progress and status of your proposal. Workflow consists of steps and roles. Steps are the phases a task passes through, and roles are the users in charge of the steps. There are system-level steps and roles that are the default settings for every new proposal you create, and there are proposal-level steps and roles. The tracking process consists of the following actions: **Advance**, **Reject**, **Action Request**, **Action Done**, **Lock**, **Unlock**, and **Override**. These are granted on a role-by-role basis.

To advance a step, right-click the task, point to **Task Status,** and then click the appropriate action.

If Workflow is enabled, Task View will show the following additional columns:

- Status - Shows the current step. In addition to the steps you define, you will see Open and Complete. These are program defaults.
- Workflow User(s) - Shows the name of the person or people assigned to the role that is in charge of the step. When a specific user is assigned to that role in the task, the column automatically shows only the name of the assigned user.
- Due Date - Shows the date the step should be completed.
- Workflow Role - A column appears for every Workflow role entered on the **Roles** page of **Proposal Properties**. Each column shows the associated user who is assigned to the role at the task level.

Another important feature of Workflow is the **Notification** option. You can set up the Workflow to automatically notify specific people via email when the status of a step changes.

When you copy a proposal, the status of all tasks and the Workflow Log Report data are reset by default. You can change this by selecting **Copy Workflow Status** on the **Copy Proposal** dialog box.

Assign a User to a Workflow Role

Roles represent the person or persons who will be in charge of the step. Users are assigned to roles which, in turn, are assigned to steps.

You can assign more than one user to a role. You can also assign users to roles at the proposal level and task level.

Assign a User to a Proposal-Level Workflow Role

1. In the Navigation Pane, click the **Proposals** button. Right-click the appropriate proposal, and then click **Properties**.
2. In the **Workflow** folder, click the **Roles** page.
3. Select the role.
4. In the **Associated Users** grid, enter the name of the person you are assigning to the role.
5. Click **OK**.

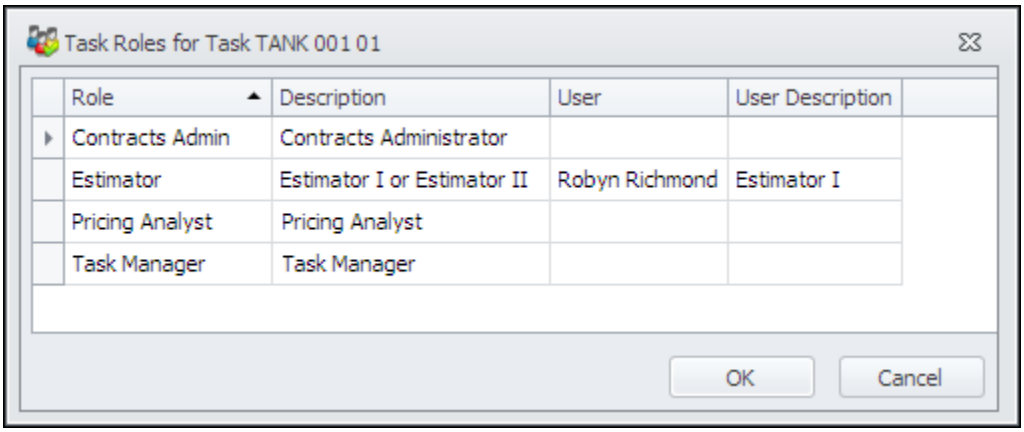
Assign a User to a Task-Level Workflow Role

1. Open a proposal in Task View.
2. In the **Tasks** grid, right-click a task, and then click **Task Roles**.
3. In the **Task Roles** dialog box, each role that has been created appears on a separate row. In the **User** column, select a user to assign that person to a role.
4. Click **OK**.

Task Roles Dialog Box

This dialog box appears when you right-click a task or selection of tasks, and then click **Task Roles**. It allows you to assign a specific associated user to a role at the task level.

*Note: To use **Task Roles** with a selection of tasks, you must first highlight each task in the **Tasks** grid. Hold **Shift**, click a task, and then click another task before or after it. This highlights both tasks and every task between them. You can also hold **Ctrl**, click a task, and then click individual tasks in any order. This highlights only the tasks you clicked.*



Role

Shows the name of the Workflow role.

Description

Shows the description of the Workflow role.

User

Enter the name of an associated user to assign that person to the Workflow role.

User Description

Shows the description of the associated user.

Assign a Workflow Role to a Step

Roles represent the person or persons who will be in charge of the step. Users are assigned to roles which, in turn, are assigned to steps. You can assign more than one role to a step.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Workflow** folder, click the **Steps** page.
3. Click the step.
4. In the **Associated Roles** grid, enter the name of the role who will be in charge of the step.
5. Click **OK**.

Enable Workflow

Workflow allows you to track the progress and status of your proposal process.

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **General** page in the **Workflow** folder.
3. Select the **Enable Workflow** checkbox.
4. Click **OK**.

Set Workflow Roles

Workflow roles are the people in charge of the steps your tasks pass through.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Workflow** folder, click the **Roles** page.
3. Enter a name for the role.
4. Select the **Tracking Actions** the role will be able to perform.
5. In the **Associated Users** section, enter the names of the people who will be given the role.
6. Click **OK**.

Set Workflow Steps

Workflow steps are the phases your tasks pass through.

1. In the Navigation Pane, select a proposal or proposal template, then open its **Properties**.
2. In the **Workflow** folder, click the **Workflow** folder.
3. Enter a name for the step.
4. Enter a description of the step.
5. Select the **Notify** checkbox if you want an email sent to the role assigned to the next step when the status of the step changes.
6. Select the **Auto-Lock** checkbox if you want to prevent the task data from being edited when the step advances.
7. Select the **Signature** checkbox if you want the role assigned to the step to sign off on the step by entering their ProPricer password.
8. In the **Associated Roles** section, enter the name of the role that will be in charge of the step.
9. Click **OK**.

Workflow Notifications

You can set up Workflow to send an email when the status of a step changes. The **Notify** checkbox must be selected for the step on the **Steps** page in the **Workflow** folder of **Proposal Properties**. The email addresses of the users assigned to the roles must also exist in User Information. Task status changes for which an email will be sent are:

- Advance - An email will be sent to the role assigned to the next step.
- Reject - An email will be sent to the role previously assigned to the step.
- Action Request - An email will be sent to the role currently assigned to the step to request some action be performed.
- Action Done - An email will be sent to the role entered in the **Additional E-mail Notifications** section on the **Steps** page in the **Workflow** folder of **Proposal Properties**.
- Lock - An email will be sent to the role currently assigned to the step.
- Unlock - An email will be sent to the role currently assigned to the step.
- Override - An email will be sent to the role assigned to the step entered in the **Next Status** column in the **Task Status Tracking** dialog box.

In addition to the default email recipients, you can enter other email recipients to notify when the status of the step changes.

Enable Workflow Notifications

1. Click the **Proposals** button in the Navigation Pane. Right-click the appropriate proposal, and then click **Properties** on the shortcut menu.
2. Click the **General** page in the **Workflow** folder.
3. Select the **Enable Notifications** checkbox.

4. Click **OK**.

Workflow Tracking Actions

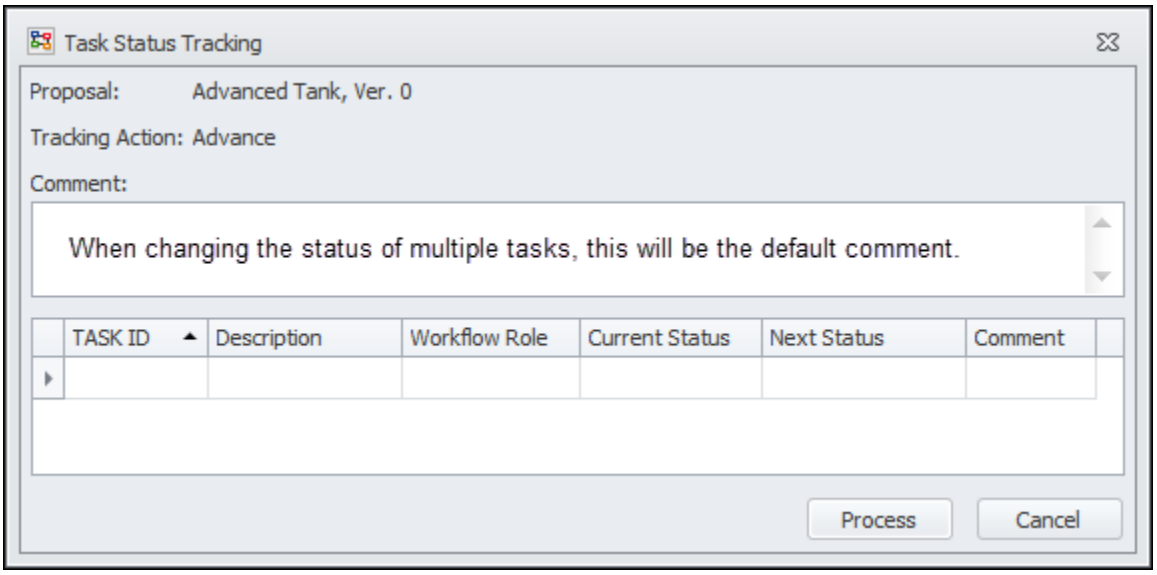
Tracking Actions are the options you will see when you right-click a task and point to **Task Status**. They determine the actions a role can perform and are set on a role-by-role basis. Tracking actions can be granted at the system level and at the proposal level. System-level Tracking Actions will be the default actions for every new proposal you create.

The Tracking Actions include:

- Advance - This allows the role to move to the next step in the task.
- Reject - This allows the role to reject the step and reset it to the previous step.
- Action Request - This allows the role to request some action be performed.
- Action Done - This allows the role to continue the workflow process once the action is performed.
- Lock - This allows the role to prevent changes to the task.
- Unlock - This allows the role to permit changes to the task.
- Override - This allows the role to select a step different from the one that should have followed. Anybody who is permitted to override steps can do it any time.

Task Status Tracking Dialog Box

This dialog box appears when you right-click a task or selection of tasks, point to **Task Status**, and then select a tracking action.



Comment

If you change the status of more than one task at the same time, the text you enter here will be the default comment for all the tasks.

TASK ID

Shows the name of the task.

Description

Shows the description of the task.

Workflow Role

Shows the role who is changing the status.

Current Status

Shows the current status of the task.

Next Status

Shows what the next status will be.

Comment

Enter any comment regarding the change in status.

Appendix: ASCII/Excel Import Files
Activity Distribution File

You can use an Excel or ASCII file to import distribution data of the resources assigned to the activity into the proposal. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tad. Each record in the file should contain the following fields:

Task ID

The name of the task. This field cannot be blank.

Activity ID

The name of the activity. This field cannot be blank.

Resource

The name of the resource for which hours/cost will be imported. This field cannot be blank since it is used to identify duplicates. The resource must be included in the Direct Rate Table of the proposal to which you are importing, otherwise it will be sent to the exception file.

Resource Fields

The resource field value you want to enter for the resource. Importing values is optional. However, the field must exist if there are default or proposal-specific resource fields. Type a delimiter, such as a comma, after each resource field.

Indirect Pool

The name of the indirect pool you want to use to override the indirect pool entered for the resource in the Direct Rate Table. This indirect pool will appear in blue in the **Indirect Pool** column in the **Resources** tab. Leave this field blank to use the one from the Direct Rate Table.

Profit/Fee

The overriding profit/fee that will be entered in the **Profit/Fee** column in the **Activities** tab.

Rate Band

The name of the rate band you want to use to override the rate band entered for the resource in the Direct Rate Table. This rate band will appear in blue in the **Rate Band** column in the **Activities** tab. Leave this field blank to use the one from the Direct Rate Table.

Currency

A currency can be imported for a resource only if Multi-Currency is enabled for the proposal and the rate type of the resource is *Cost*.

Scheduled Rate

The name of the scheduled rate associated with the resource. This field cannot be blank if there is a Scheduled Rate Table assigned to the proposal to which you are importing.

Discount

The discount value applied to the scheduled rate. This field cannot be blank if there is a Scheduled Rate Table assigned to the proposal to which you are importing.

Hours/Equivalent Heads

This field indicates whether the incoming resource data is hours or equivalent heads. Acceptable values are H (Hours) or E (Equivalent Heads). If the field is blank, the resource data is assumed to be Hours.

Spread Code

This field cannot be blank. Valid codes are the names of the system-defined curves and the names of any user-defined curves. If you did not use the letters D, L, E, nor the numbers 1 through 9 as names of curves, you can use these letters/numbers as follows: D for discrete values, L for Load, E for Even, 1 for

10/90, 2 for 20/80, 3 for 30/70, 4 for 40/60, 5 for 50/50, 6 for 60/40, 7 for 70/30, 8 for 80/20, and 9 for 90/10.

If the value is D:

Discrete Start Date

The start date of the distribution. The remaining fields represent the actual amount of hours/cost that will be imported for each month. Every next field represents a subsequent month.

If the value is L, E, or the name of a curve:

Spread Amount

The value to be loaded or spread. This field cannot be blank.

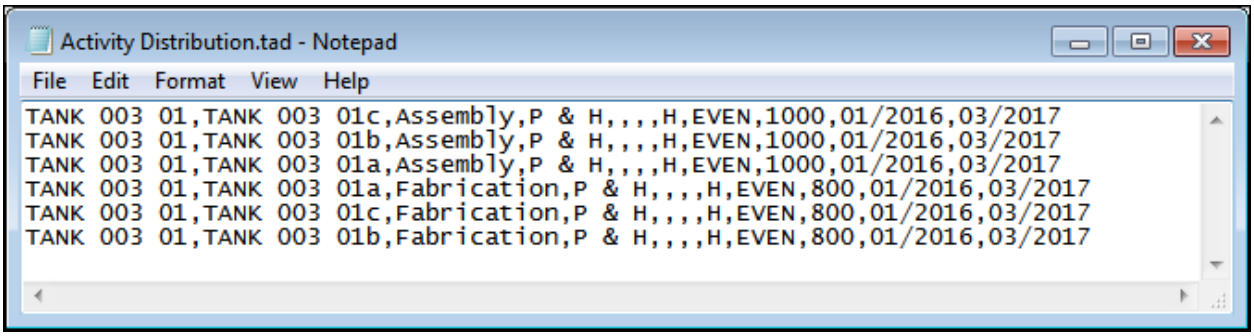
Spread Start Date

The start date of the distribution. If this field is blank, the distribution will begin with the first month of the task period.

Spread End Date

The end date of the distribution. If this field is blank, the distribution will cover the entire task period.

This is an example of a .tad file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	N
1	TANK 003 01	TANK 003 01c	Assembly	P & H				H	EVEN	1000	01/2016	03/2017	
2	TANK 003 01	TANK 003 01b	Assembly	P & H				H	EVEN	1000	01/2016	03/2017	
3	TANK 003 01	TANK 003 01a	Assembly	P & H				H	EVEN	1000	01/2016	03/2017	
4	TANK 003 01	TANK 003 01a	Fabrication	P & H				H	EVEN	800	01/2016	03/2017	
5	TANK 003 01	TANK 003 01c	Fabrication	P & H				H	EVEN	800	01/2016	03/2017	
6	TANK 003 01	TANK 003 01b	Fabrication	P & H				H	EVEN	800	01/2016	03/2017	
7													

Activity Input File

You can use an Excel or ASCII file to import task activities into the proposal. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tai. Each record in the file should contain the following fields:

Task ID

The name of the task. This field cannot be blank.

Activity ID

The name of the activity. This field cannot be blank

Activities

The detailed information about the activity.

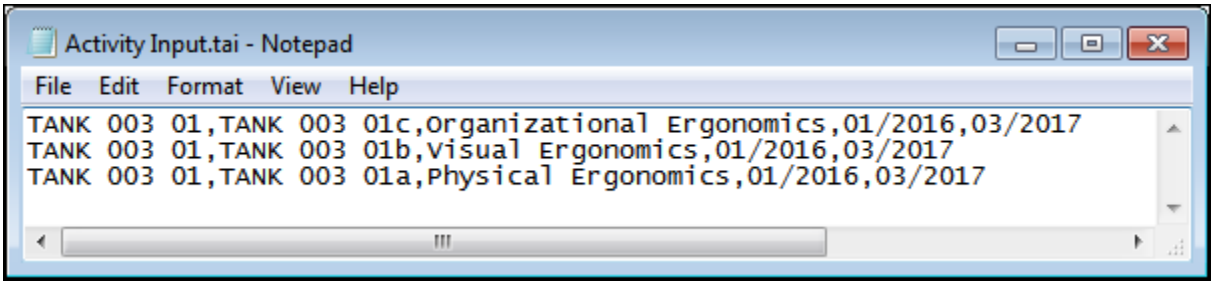
Start Date

The date the activity will start. This field cannot be blank.

End Date

The date the activity will end. This field cannot be blank.

This is an example of a .tai file:



This is an example of a .xls file:

	A	B	C	D	E	
1	TANK 003 01	TANK 003 01c	Organizational Ergonomics	01/2016	03/2017	
2	TANK 003 01	TANK 003 01b	Visual Ergonomics	01/2016	03/2017	
3	TANK 003 01	TANK 003 01a	Physical Ergonomics	01/2016	03/2017	
4						

Assembly Details File

You can use an Excel or ASCII file to import assembly element details. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .prs. Each record in the file should contain the following fields:

Library

The name of the library to which the assembly belongs. A blank field means that the assembly belongs to the Common library.

Assembly

The name of the assembly to which the element details will be imported. This field cannot be blank. The assembly must already exist in ProPricer to be able to import.

Material

The name of the constituent part or assembly. This field cannot be blank. The part or assembly must already in the Parts/Assemblies Library to be able to import.

Quantity

The number of elements needed. This field cannot be blank. Only positive numbers are acceptable.

Inventory Qty

The amount of parts or assemblies you have in stock. This field can be blank.

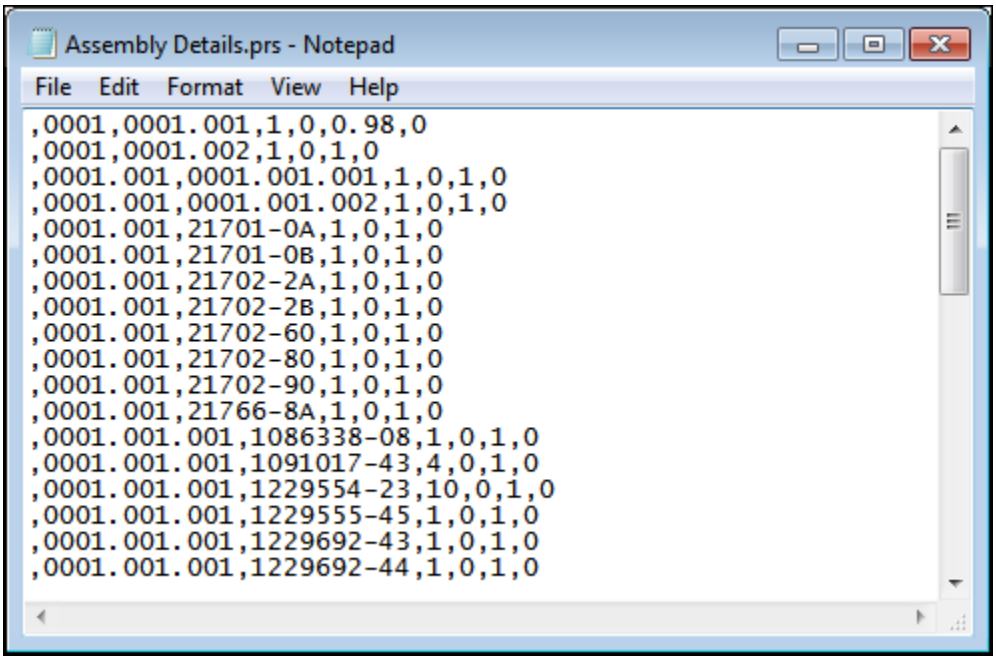
Mfg Yield Factor

The Manufacturing Yield Factor to be applied to the material. This field can be blank.

Destr Eval Qty

The Destructive Evaluation Quantity envisioned. This field can be blank.

This is an example of a .prs file:



This is an example of a .xls file:

	A	B	C	D	E	F	G
1		0001	0001.001	1	0	0.98	0
2		0001	0001.002	1	0	1	0
3		0001.001	0001.001.001	1	0	1	0
4		0001.001	0001.001.002	1	0	1	0
5		0001.001	21701-0A	1	0	1	0
6		0001.001	21701-0B	1	0	1	0
7		0001.001	21702-2A	1	0	1	0
8		0001.001	21702-2B	1	0	1	0
9		0001.001	21702-60	1	0	1	0
10		0001.001	21702-80	1	0	1	0
11		0001.001	21702-90	1	0	1	0
12		0001.001	21766-8A	1	0	1	0
13		0001.001.001	1086338-08	1	0	1	0
14		0001.001.001	1091017-43	4	0	1	0
15		0001.001.001	1229554-23	10	0	1	0
16		0001.001.001	1229555-45	1	0	1	0
17		0001.001.001	1229692-43	1	0	1	0
18		0001.001.001	1229692-44	1	0	1	0

Assembly Library Data File

You can use an Excel or ASCII file to import assemblies. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .prd. Each record in the file should contain the following fields:

Library

The name of the library into which the assembly will be imported. If blank, the assembly will be imported to the Common Library.

Assembly

The name of the assembly that will be imported. This field cannot be blank since it is used to identify duplicates.

Description

The description of the assembly. This field can be blank.

(Base) Unit Cost

The cost of a single assembly. This field can be blank.

Resource

The resource to be applied to the unit cost of the assembly. This field can be blank.

Resource Fields

The resource field value you want to enter for the resource. Importing values is optional. However, the field must exist if there are default or proposal-specific resource fields. One delimiter for each resource field.

Comment

The detailed description of the assembly or applicable comment. This field can be blank.

Make/Buy

The means of providing the assembly. This field can be blank.

Currency

A currency can be imported for an assembly only if Material Multi-Currency Functions are enabled and the **Ovrd** checkbox is selected for the assembly. This field can be blank.

Inventory Quantity

The number of assemblies you have in stock. This field can be blank.

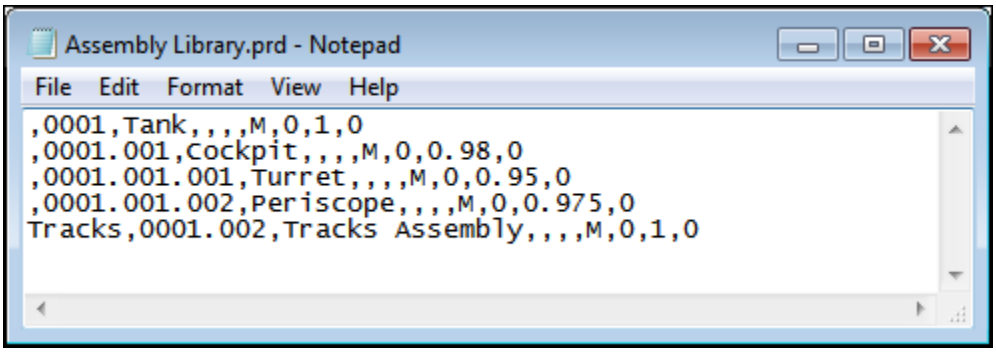
Manufacturing Yield Factor

The Manufacturing Yield Factor to be applied to the material. This field can be blank.

Destructive Evaluation Quantity

The Destructive Evaluation Quantity envisioned. This field can be blank.

This is an example of a .prd file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	
1		0001	Tank				M	0	1	0	
2		0001.001	Cockpit				M	0	0.98	0	
3		0001.001.001	Turret				M	0	0.95	0	
4		0001.001.002	Periscope				M	0	0.975	0	
5	Tracks	0001.002	Tracks Assembly				M	0	1	0	
6											

BOE Text File

You can use an Excel or ASCII file to import text entries into the BOE Text Library. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .boe. Each record in the file should contain the following fields:

Name

The name of the text entry. This field cannot be blank since it is used to identify duplicate texts.

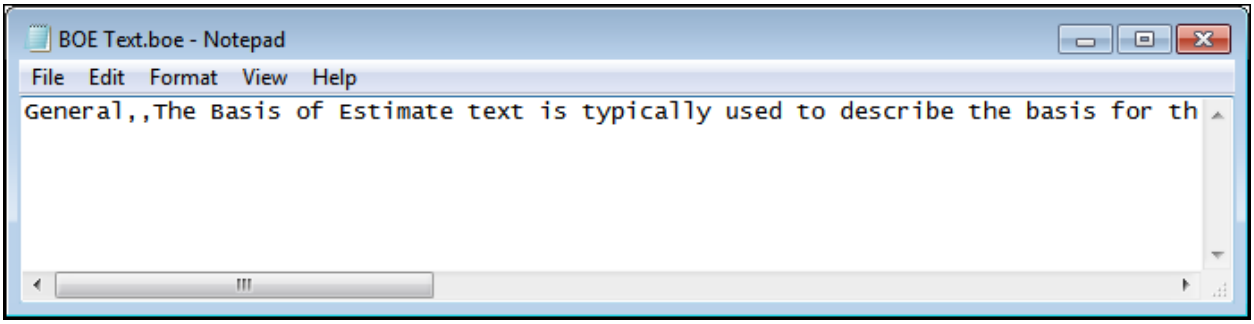
Description

The description of the text entry. This field can be blank.

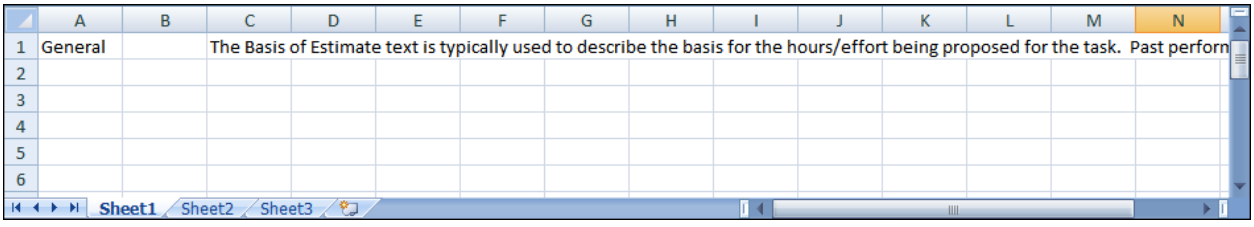
Text

The text that will be imported.

This is an example of a .boe file:



This is an example of a .xls file:



CER Factor Element Overrides File

You can use an Excel or ASCII file to import overriding descriptions of the CER factors. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .cfe. Each record in the file should contain the following fields:

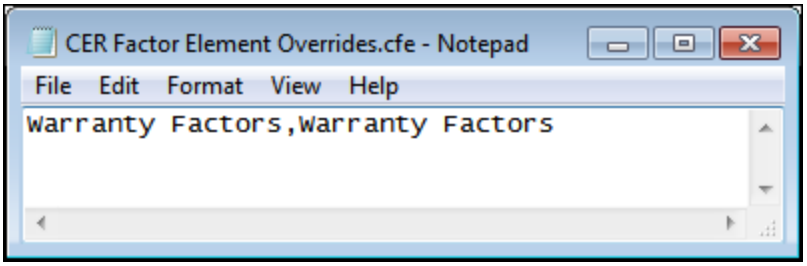
CER Factor

The name given the CER factor. This field cannot be blank

Description

The overriding description of the CER factor.

This is an example of a .cfa file:



This is an example of a .xls file:

	A	B	C
1	Warranty Factors	Warranty Factors	
2			
3			

CER Factor Overrides File

You can use an Excel or ASCII file to import CER factor overrides. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .cfo. Each record in the file should contain the following fields:

CER Factor

The name given the CER factor. This field cannot be blank

Timescale

The timescale of the CER Factor Table. This field cannot be blank.

Date

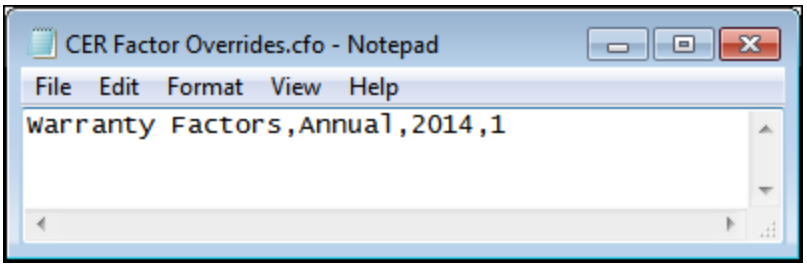
The year, quarter, or month, depending on the timescale of the table. This field cannot be blank. ProPricer expects the following formatting:

- **Years:** four- or two-digit number; for example, 2011 or 11.
- **Quarters:** small or capital letter 'q' followed by the number of the quarter (1, 2, 3, or 4) followed by a slash and the year. For example: q1/11 (the first quarter of 2011) or Q3/2010 (the third quarter of 2010).
- **Months:** one- or two-digit number expressing the month (1, 2, ..., 12) followed by a slash and the year. For example: 1/11 (January 2011) or 02/2010 (February 2010).

Factors

Each overriding factor is imported into a separate column.

This is an example of a .cfo file:



This is an example of a .xls file:

	A	B	C	D	E
1	Warranty Factors	Annual	2014	1	
2					

CER Factors File

You can use an Excel or ASCII file to import CER factors. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .cfa. Each record in the file should contain the following fields:

CER Factor

The name given the CER factor. This field cannot be blank

Description

The description of the CER factor. The actual description does not have to be there, but a delimiter must separate the field.

Timescale

The timescale of the CER Factor Table. This field cannot be blank.

Effective Date

The date the factor takes effect. This is for information only and can be blank.

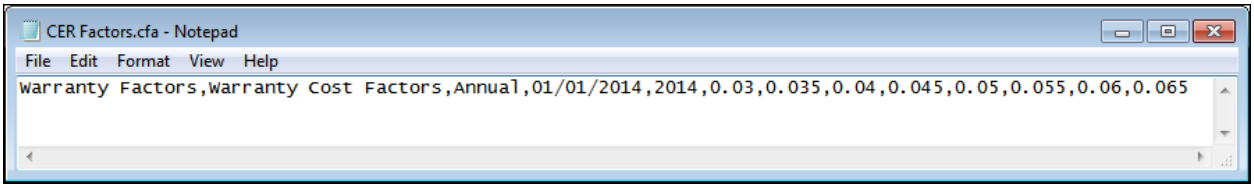
Start Date

The date from which to start importing the factors. This field cannot be blank if there are factors to be imported.

Factors

Each factor is imported into a separate column. The first value is positioned right after the start date.

This is an example of a .cfa file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Warranty Factors	Warranty Cost Factors	Annual	1/1/2014	2014	0.03	0.035	0.04	0.045	0.05	0.055	0.06	0.065	
2														
3														

Direct Rate Element Overrides File

You can use an Excel or ASCII file to import the overriding descriptions of the resources. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .dre. Each record in the file should contain the following fields:

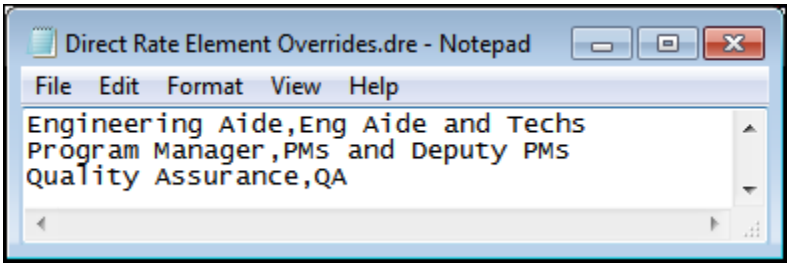
Resource

The name of the resource. This field cannot be blank. The maximum number of characters allowed is 255.

Description

The overriding description of the resource. This field cannot be blank.

This is an example of a .dre file:



This is an example of a .xls file:

	A	B	C
1	Engineering Aide	Eng Aide and Techs	
2	Program Manager	PMs and Deputy PMs	
3	Quality Assurance	QA	
4			

Direct Rate Escalation Set Overrides File

You can use an Excel or ASCII file to import the overriding escalation sets. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .dro. Each record in the file should contain the following fields:

Resource

The name of the resource. This field cannot be blank since it is used to identify duplicate resources.

Base Date

The date the escalation set starts. This field cannot be blank.

Base Rate

The for the first month. This field cannot be blank.

Factor

The percent of escalation for the base rate. This field cannot be blank.

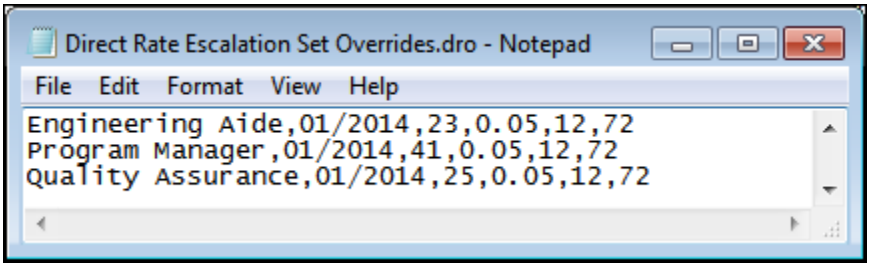
Step

The number of months for which the base rate remains constant until subsequent escalation is applied. This field cannot be blank.

Months to Extend

The number of months the escalation set should cover. This field cannot be blank.

This is an example of a .dro file:



This is an example of a .xls file:

	A	B	C	D	E	F
1	Engineering Aide	01/2014	23	0.05	12	72
2	Program Manager	01/2014	41	0.05	12	72
3	Quality Assurance	01/2014	25	0.05	12	72
4						

Direct Rates File

You can use an Excel or ASCII file to import direct rates. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .dir. Each record in the file should contain the following fields:

Resource Type

There are six valid resource types: Labor, Material, Other, Subcontractor, Travel, and Interdivisional. Please note the spelling. If a resource type is misspelled, abbreviated, or left blank, the respective resource will not be imported.

Start Date

This field is imported as the Base Date. This field cannot be blank since it is used to identify duplicates.

End Date

This field is not imported. It is only used to calculate the Months to Extend. This field cannot be blank.

Resource

The name of the resource. This field cannot be blank since it is used to identify duplicate resources. If a resource with this name does not exist in the Resource Library, you will be prompted to add it or skip it. Skipped records are sent to the exception file.

Description

The description of the resource. This field can be blank.

Resource Class

The resource class assigned to the resource. This field can be blank.

Indirect Pool

The indirect pool assigned to the resource. This field can be blank, but if you do enter an indirect pool, it must exist in the Indirect Pool Library.

Currency

The currency of the rate can be imported only if the **Multi-Currency** checkbox is selected for the table. This field can be blank.

Accounting Calendar

The accounting calendar assigned to the resource. This field can be blank.

Rate Type

There are three valid rate types: Hours, Units, and Cost. This field cannot be blank.

Effective Date

The date the rate takes effect. This is for information only and can be blank.

Base Rate

The for the first month. This field cannot be blank.

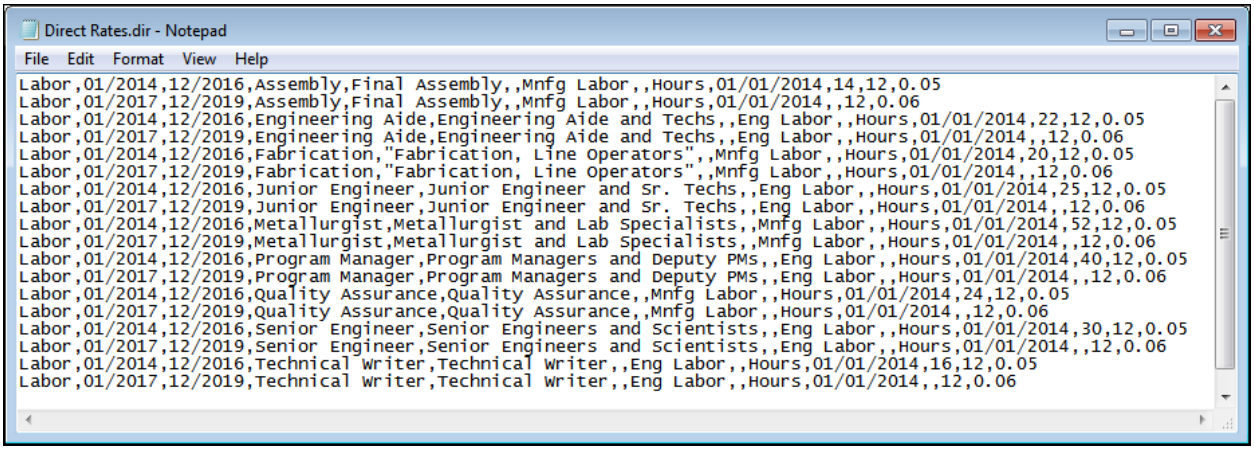
Monthly Step

The number of months for which the base rate remains constant until subsequent escalation is applied. This field cannot be blank.

Escalation Factor

The percent of escalation for the base rate. This field cannot be blank.

This is an example of a .dir file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Labor	01/2014	12/2016	Assembly	Final Assembly		Mnfg Labor		Hours	1/1/2014	14	12	0.05
2	Labor	01/2017	12/2019	Assembly	Final Assembly		Mnfg Labor		Hours	1/1/2014		12	0.06
3	Labor	01/2014	12/2016	Engineering Aide	Engineering Aide and Techs		Eng Labor		Hours	1/1/2014	22	12	0.05
4	Labor	01/2017	12/2019	Engineering Aide	Engineering Aide and Techs		Eng Labor		Hours	1/1/2014		12	0.06
5	Labor	01/2014	12/2016	Fabrication	Fabrication, Line Operators		Mnfg Labor		Hours	1/1/2014	20	12	0.05
6	Labor	01/2017	12/2019	Fabrication	Fabrication, Line Operators		Mnfg Labor		Hours	1/1/2014		12	0.06
7	Labor	01/2014	12/2016	Junior Engineer	Junior Engineer and Sr. Techs		Eng Labor		Hours	1/1/2014	25	12	0.05
8	Labor	01/2017	12/2019	Junior Engineer	Junior Engineer and Sr. Techs		Eng Labor		Hours	1/1/2014		12	0.06
9	Labor	01/2014	12/2016	Metallurgist	Metallurgist and Lab Specialists		Mnfg Labor		Hours	1/1/2014	52	12	0.05
10	Labor	01/2017	12/2019	Metallurgist	Metallurgist and Lab Specialists		Mnfg Labor		Hours	1/1/2014		12	0.06
11	Labor	01/2014	12/2016	Program Manager	Program Managers and Deputy PMs		Eng Labor		Hours	1/1/2014	40	12	0.05
12	Labor	01/2017	12/2019	Program Manager	Program Managers and Deputy PMs		Eng Labor		Hours	1/1/2014		12	0.06
13	Labor	01/2014	12/2016	Quality Assurance	Quality Assurance		Mnfg Labor		Hours	1/1/2014	24	12	0.05
14	Labor	01/2017	12/2019	Quality Assurance	Quality Assurance		Mnfg Labor		Hours	1/1/2014		12	0.06
15	Labor	01/2014	12/2016	Senior Engineer	Senior Engineers and Scientists		Eng Labor		Hours	1/1/2014	30	12	0.05
16	Labor	01/2017	12/2019	Senior Engineer	Senior Engineers and Scientists		Eng Labor		Hours	1/1/2014		12	0.06
17	Labor	01/2014	12/2016	Technical Writer	Technical Writer		Eng Labor		Hours	1/1/2014	16	12	0.05
18	Labor	01/2017	12/2019	Technical Writer	Technical Writer		Eng Labor		Hours	1/1/2014		12	0.06

Direct Rates Using Rate Bands File

You can use an Excel or ASCII file to import direct rates using rate bands. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .drb. Each record in the file should contain the following fields:

Resource Type

There are six valid resource types: Labor, Material, Other, Subcontractor, Travel and Interdivisional. Please note the spelling. If a resource type is misspelled, abbreviated, or left blank, the respective resource will not be imported.

Resource

The name of the resource. This field cannot be blank since it is used to identify duplicates. If a resource with this name does not exist in the Resource Library, you will be prompted to add it or skip it. Skipped records are sent to the exception file.

Description

The description of the resource. This field can be blank.

Rate Band

The name of the rate band associated with the resource. This field cannot be blank.

Resource Class

The resource class assigned to the resource. This field can be blank.

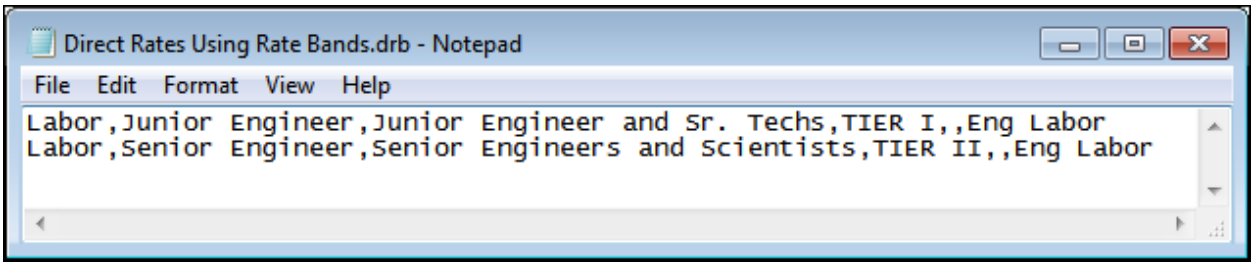
Indirect Pool

The indirect pool assigned to the resource. This field can be blank, but if you do enter an indirect pool, it must exist in the Indirect Pool Library.

Calendar

The accounting calendar assigned to the resource. This field can be blank.

This is an example of a .drb file:



This is an example of a .xls file:

	A	B	C	D	E	F
1	Labor	Junior Engineer	Junior Engineer and Sr. Techs	TIER I		Eng Labor
2	Labor	Senior Engineer	Senior Engineers and Scientists	TIER II		Eng Labor
3						

Discrete Direct Rate Overrides File

You can use an Excel or ASCII file to import the discrete direct rate overrides. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .ddo. Each record in the file should contain the following fields:

Resource

The name of the resource. This field cannot be blank since it is used to identify duplicates. If a resource with this name does not exist in the Resource Library, you will be prompted to add it or skip it. Skipped records are sent to the exception file.

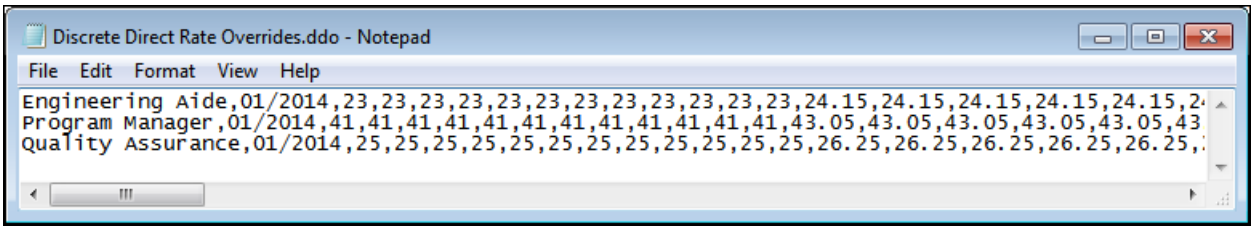
Start Date

The date of the first rate. This field cannot be blank.

Rates

Each discrete direct rate override is imported into a separate column. The value for the first month is positioned right after the start date. The remaining fields contain the direct rate override entered for each month the resource is used.

This is an example of a .ddo file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Engineering Aide	01/2014	23	23	23	23	23	23	23	23	23	23	23	23	24.15	24.15
2	Program Manager	01/2014	41	41	41	41	41	41	41	41	41	41	41	41	43.05	43.05
3	Quality Assurance	01/2014	25	25	25	25	25	25	25	25	25	25	25	25	26.25	26.25
4																
5																

Discrete Direct Rates File

You can use an Excel or ASCII file to import discrete direct rates. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .ddr. Each record in the file should contain the following fields:

Resource

The name of the resource. This field cannot be blank since it is used to identify duplicates. If a resource with this name does not exist in the Resource Library, you will be prompted to add it or skip it. Skipped records are sent to the exception file.

Resource Type

There are six valid resource types: Labor, Material, Other, Subcontractor, Travel, and Interdivisional. If a resource type is misspelled, abbreviated, or left blank, the respective resource will not be imported.

Description

The description of the resource. This field can be blank.

Accounting Calendar

The accounting calendar assigned to the resource. This field can be blank.

Resource Class

The resource class assigned to the resource. This field can be blank.

Indirect Pool

The indirect pool assigned to the resource. This field can be blank, but if you do enter an indirect pool, it must exist in the Indirect Pool Library.

Currency

The currency of the rate can be imported only if the **Multi-Currency** checkbox is selected for the table. This field can be blank.

Rate Type

There are three valid rate types: Hours, Units, and Cost. This field cannot be blank.

Default Rate

The flat rate applied to the resource in the Direct Rate Table. This field can be blank.

Effective Date

The date the rate takes effect. This is for information only and can be blank.

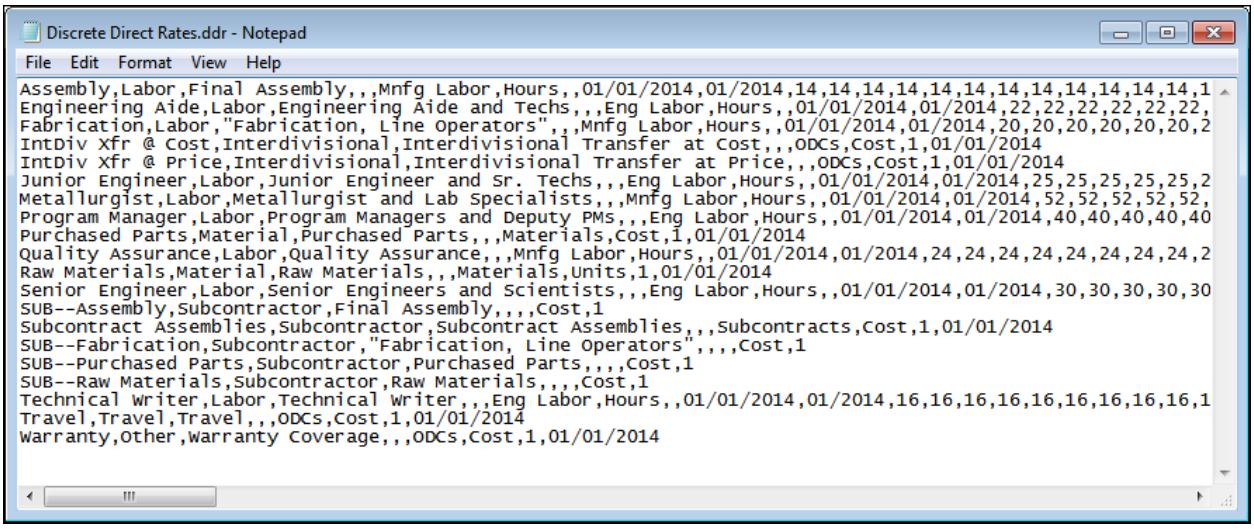
Start Date

This field is imported as the Base Date. This field cannot be blank since it is used to identify duplicates.

Rates

Each discrete is imported into a separate column. The value for the first month is positioned right after the start date. The remaining fields contain the entered for each month the resource is used.

This is an example of a .ddr file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Assembly	Labor	Final Assembly			Mnfg Labor	Hours		1/1/2014	01/2014	14	14	14	14
2	Engineering Aide	Labor	Engineering Aide and Techs			Eng Labor	Hours		1/1/2014	01/2014	22	22	22	22
3	Fabrication	Labor	Fabrication, Line Operators			Mnfg Labor	Hours		1/1/2014	01/2014	20	20	20	20
4	IntDiv Xfr @ Cost	Interdivisional	Interdivisional Transfer at Cost			ODCs	Cost	1	1/1/2014					
5	IntDiv Xfr @ Price	Interdivisional	Interdivisional Transfer at Price			ODCs	Cost	1	1/1/2014					
6	Junior Engineer	Labor	Junior Engineer and Sr. Techs			Eng Labor	Hours		1/1/2014	01/2014	25	25	25	25
7	Metallurgist	Labor	Metallurgist and Lab Specialists			Mnfg Labor	Hours		1/1/2014	01/2014	52	52	52	52
8	Program Manager	Labor	Program Managers and Deputy PMs			Eng Labor	Hours		1/1/2014	01/2014	40	40	40	40
9	Purchased Parts	Material	Purchased Parts			Materials	Cost	1	1/1/2014					
10	Quality Assurance	Labor	Quality Assurance			Mnfg Labor	Hours		1/1/2014	01/2014	24	24	24	24
11	Raw Materials	Material	Raw Materials			Materials	Units	1	1/1/2014					
12	Senior Engineer	Labor	Senior Engineers and Scientists			Eng Labor	Hours		1/1/2014	01/2014	30	30	30	30
13	SUB--Assembly	Subcontractor	Final Assembly				Cost	1						
14	Subcontract Assemblies	Subcontractor	Subcontract Assemblies			Subcontracts	Cost	1	1/1/2014					
15	SUB--Fabrication	Subcontractor	Fabrication, Line Operators				Cost	1						
16	SUB--Purchased Parts	Subcontractor	Purchased Parts				Cost	1						
17	SUB--Raw Materials	Subcontractor	Raw Materials				Cost	1						
18	Technical Writer	Labor	Technical Writer			Eng Labor	Hours		1/1/2014	01/2014	16	16	16	16
19	Travel	Travel	Travel			ODCs	Cost	1	1/1/2014					
20	Warranty	Other	Warranty Coverage			ODCs	Cost	1	1/1/2014					
21														

Discrete Rate Band Overrides File

You can use an Excel or ASCII file to import the discrete rate band overrides. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rbd. Each record in the file should contain the following fields:

Rate Band

The name of the rate band. This field cannot be blank since it is used to identify duplicates.

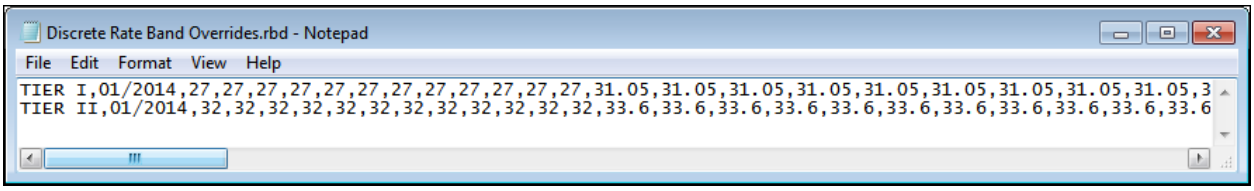
Start Date

The date of the first rate. This field cannot be blank.

Rates

Each rate band rate override is imported into a separate column. The value for the first month is positioned right after the start Date. The remaining fields contain the overriding rate band rate defined for each month.

This is an example of a .rbd file:



The is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	TIER I	01/2014	27	27	27	27	27	27	27	27	27	27	27	27
2	TIER II	01/2014	32	32	32	32	32	32	32	32	32	32	32	32

Discrete Rate Bands File

You can use an Excel or ASCII file to import discrete rate band rates. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .brd. Each record in the file should contain the following fields:

Rate Band

The name of the rate band. This field cannot be blank since it is used to identify duplicates.

Effective Date

The date the rate takes effect. This is for information only and can be blank.

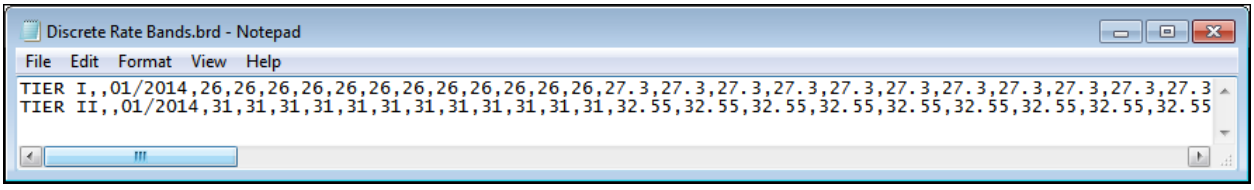
Start Date

This field is imported as the Base Date. This field cannot be blank since it is used to identify duplicates.

Rates

Each rate band rate is imported into a separate column. The value for the first month is positioned right after the start date. The remaining fields contain the rate band rate defined for each month.

This is an example of a .brd file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	TIER I		01/2014	26	26	26	26	26	26	26	26	26	26	26	26
2	TIER II		01/2014	31	31	31	31	31	31	31	31	31	31	31	31
3															

Discrete Scheduled Rate Overrides File

You can use an Excel or ASCII file to import the discrete scheduled rate overrides. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .dso. Each record in the file should contain the following fields:

Scheduled Rate

The name of the scheduled rate. This field cannot be blank

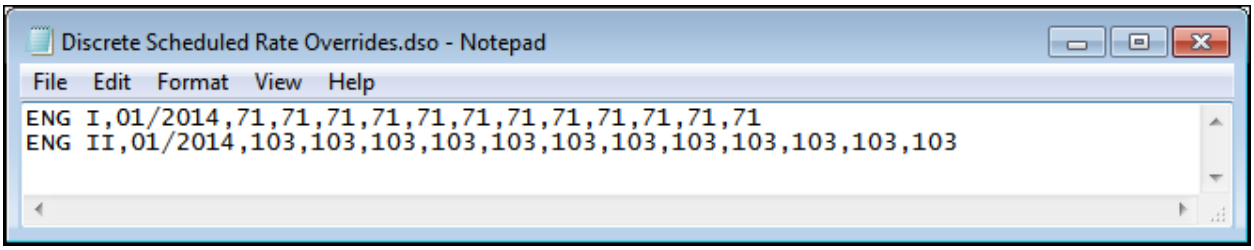
Start Date

This field is imported as the Base Date. This field cannot be blank.

Rates

Each rate is imported into a separate column. The value for the first month is positioned right after the start date. The remaining fields contain the rate defined for each month.

This is an example of a .dso file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	ENG I	01/2014	71	71	71	71	71	71	71	71	71	71	71	71
2	ENG II	01/2014	103	103	103	103	103	103	103	103	103	103	103	103
3														
4														

Discrete Scheduled Rates File

You can use an Excel or ASCII file to import discrete scheduled rates. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .srr. Each record in the file should contain the following fields:

Scheduled Rate

The name of the scheduled rate. This field cannot be blank.

Effective Date

The date the rate takes effect. This is for information only and can be blank.

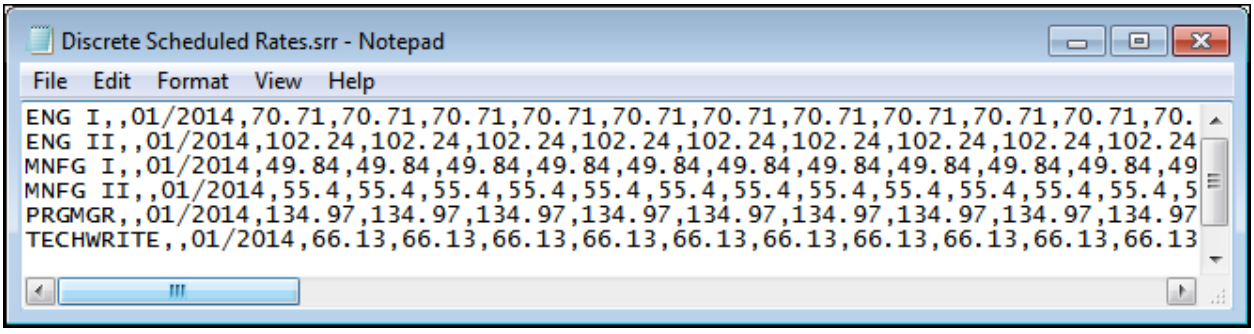
Start Date

This field is imported as the Base Date. This field cannot be blank.

Rates

Each rate is imported into a separate column. The value for the first month is positioned right after the start date. The remaining fields contain the rate defined for each month.

This is an example of a .srr file.



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	ENG I		01/2014	70.71	70.71	70.71	70.71	70.71	70.71	70.71	70.71	70.71	70.71
2	ENG II		01/2014	102.24	102.24	102.24	102.24	102.24	102.24	102.24	102.24	102.24	102.24
3	MNFG I		01/2014	49.84	49.84	49.84	49.84	49.84	49.84	49.84	49.84	49.84	49.84
4	MNFG II		01/2014	55.4	55.4	55.4	55.4	55.4	55.4	55.4	55.4	55.4	55.4
5	PRGMGR		01/2014	134.97	134.97	134.97	134.97	134.97	134.97	134.97	134.97	134.97	134.97
6	TECHWRITE		01/2014	66.13	66.13	66.13	66.13	66.13	66.13	66.13	66.13	66.13	66.13
7													

Indirect Rate Element Overrides File

You can use an Excel or ASCII file to import the overriding descriptions of the indirect pools. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .bre. Each record in the file should contain the following fields:

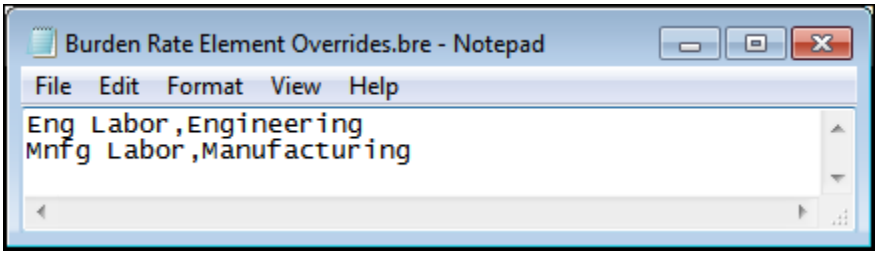
Indirect Pool

The name of the indirect pool. This field cannot be blank. Skipped records are sent to the exception file. The maximum number of characters allowed is 255.

Description

The overriding description of the indirect pool. This field cannot be blank.

This is an example of a .bre file:



This is an example of a .xls file:

	A	B	C	
1	Eng Labor	Engineering		
2	Mnfg Labor	Manufacturing		
3				
4				

Indirect Rate Overrides File

You can use an Excel or ASCII file to import overriding indirect rates. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .bro. Each record in the file should contain the following fields:

Indirect Pool

The name of the indirect pool. This field cannot be blank. If the indirect pool does not exist in the Indirect Pool Library, you will be prompted to add it or skip it. Skipped records are sent to the exception file. The maximum number of characters allowed is 255.

Date

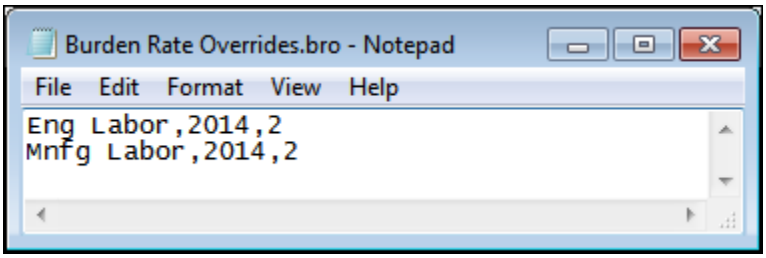
The year, quarter, or month, depending on the timescale of the target Indirect Rate Table. This field cannot be blank. ProPricer expects the following formatting:

- **Years:** four- or two-digit number; for example, 2011 or 11.
- **Quarters:** small or capital letter 'q' followed by the number of the quarter (1, 2, 3, or 4) followed by a slash and the year. For example: q1/11 (the first quarter of 2011) or Q3/2010 (the third quarter of 2010).
- **Months:** one- or two-digit number expressing the month (1, 2, ..., 12) followed by a slash and the year. For example: 1/11 (January 2011) or 02/2010 (February 2010).

Note: If you try to import rates for period Q2/2010 into an Indirect Rate Table with an annual timescale, ProPricer will send the record to the exception file with a message for invalid year.

The remaining fields correspond to overriding rates. Each field corresponds to an indirect element from the Algorithm used by the Indirect Rate Table. The rate fields can be blank, but if they do contain data, it can only be numbers. A single record defines one period only, so a separate record is needed for every period.

This is an example of a .bro file:



This is an example of a .xls file:

	A	B	C	D
1	Eng Labor	2014	2	
2	Mnfg Labor	2014	2	
3				

Indirect Rates File

You can use an Excel or ASCII file to import indirect rates. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .bur. Each record in the file should contain the following fields:

Indirect Pool

The name of the indirect pool. This field cannot be blank. If the indirect pool does not exist in the Indirect Pool Library, you will be prompted to add it or skip it. Skipped records are sent to the exception file. The maximum number of characters allowed is 255.

Description

The description of the indirect pool. This field can be blank. ProPricer will use this information only when the indirect pool is new and has to be added to the Indirect Pool Library; otherwise, it ignores it. The maximum number of characters allowed is 255.

Effective Date

The date the rate will take effect. This is for information only and can be blank.

Date

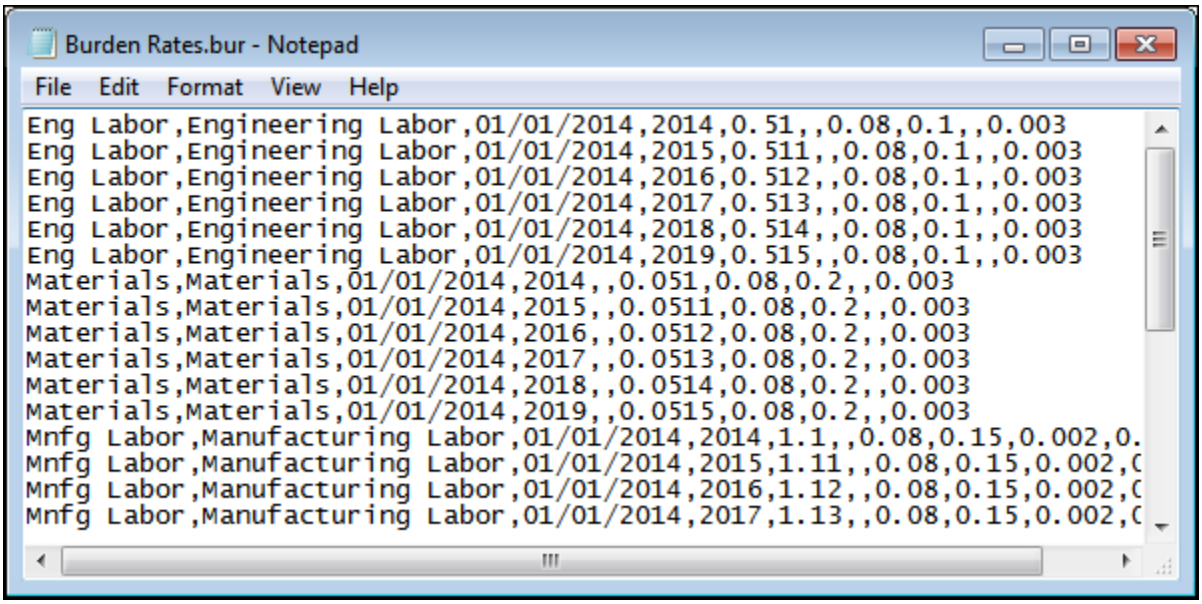
The year, quarter, or month, depending on the timescale of the target Indirect Rate Table. This field cannot be blank. ProPricer expects the following formatting:

- **Years:** four- or two-digit number; for example, 2011 or 11.
- **Quarters:** small or capital letter 'q' followed by the number of the quarter (1, 2, 3, or 4) followed by a slash and the year. For example: q1/11 (the first quarter of 2011) or Q3/2010 (the third quarter of 2010).
- **Months:** one- or two-digit number expressing the month (1, 2, ..., 12) followed by a slash and the year. For example: 1/11 (January 2011) or 02/2010 (February 2010).

> *Note: If you try to import rates for period Q2/2010 into an Indirect Rate Table with an annual timescale, ProPricer will send the record to the exception file with a message for invalid year.*

The remaining fields correspond to rates. Each field corresponds to an indirect element from the Algorithm used by the Indirect Rate Table. The rate fields can be blank, but if they do contain data, it can only be numbers. A single record defines one period only, so a separate record is needed for every period.

This is an example of a .bur file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K
1	Eng Labor	Engineering Labor	1/1/2014	2014	0.51		0.08	0.1		0.003	
2	Eng Labor	Engineering Labor	1/1/2014	2015	0.511		0.08	0.1		0.003	
3	Eng Labor	Engineering Labor	1/1/2014	2016	0.512		0.08	0.1		0.003	
4	Eng Labor	Engineering Labor	1/1/2014	2017	0.513		0.08	0.1		0.003	
5	Eng Labor	Engineering Labor	1/1/2014	2018	0.514		0.08	0.1		0.003	
6	Eng Labor	Engineering Labor	1/1/2014	2019	0.515		0.08	0.1		0.003	
7	Materials	Materials	1/1/2014	2014		0.051	0.08	0.2		0.003	
8	Materials	Materials	1/1/2014	2015		0.0511	0.08	0.2		0.003	
9	Materials	Materials	1/1/2014	2016		0.0512	0.08	0.2		0.003	
10	Materials	Materials	1/1/2014	2017		0.0513	0.08	0.2		0.003	
11	Materials	Materials	1/1/2014	2018		0.0514	0.08	0.2		0.003	
12	Materials	Materials	1/1/2014	2019		0.0515	0.08	0.2		0.003	
13	Mnfg Labor	Manufacturing Labor	1/1/2014	2014	1.1		0.08	0.15	0.002	0.003	
14	Mnfg Labor	Manufacturing Labor	1/1/2014	2015	1.11		0.08	0.15	0.002	0.003	
15	Mnfg Labor	Manufacturing Labor	1/1/2014	2016	1.12		0.08	0.15	0.002	0.003	
16	Mnfg Labor	Manufacturing Labor	1/1/2014	2017	1.13		0.08	0.15	0.002	0.003	

Material Detail Costs File

You can use an Excel or ASCII file to import material data into the tasks of the proposal. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tmt. Each record in the file should contain the following fields:

Task ID

The task into which the material will be imported. This field cannot be blank.

Material ID

The name of the material assignment. This field cannot be blank since it is used to identify duplicates.

Description

The description of the material. This field can be blank.

Library

The name of the library to which the imported material belongs. An empty field designates the Common Library.

Assembly/Part ID

The part or assembly that will be assigned to the task through the Material ID. This field cannot be blank.

Part Number

The number of the imported part/assembly. This field can be blank.

Part Description

The description of the imported part/assembly. This field can be blank.

Resource

The resource that will be applied to the cost of the material. This field cannot be blank.

Resource Fields

The resource field value you want to enter for the resource. Importing values is optional. However, the field must exist if there are default or proposal-specific resource fields. One delimiter for each resource field.

Indirect Pool

The name of the indirect pool you want to use to override the indirect pool entered for the resource in the Direct Rate Table. This indirect pool will appear in blue in the **Indirect Pool** column in the **Material** tab. Leave this field blank to use the one from the Direct Rate Table.

Profit/Fee

The profit/fee you want to import at the resource level on the **Material** tab. This rate overrides any rate entered for the task, in Proposal Properties, the **Indirect Rate Overrides** grid, and the proposal's Indirect Rate Table.

Rate Band

The name of the rate band you want to use to override the rate band entered for the resource in the Direct Rate Table. This rate band will appear in blue in the **Rate Band** column in the **Material** tab. Leave this field blank to use the one from the Direct Rate Table.

Currency

A currency can be imported for a part or assembly only if Multi-Currency is enabled for the proposal. The **Ovrd** checkbox must be selected for the assembly to override its currency.

Comment

The detailed description or applicable comment for the material. This field can be blank.

UM

The Unit of Measurement of the assigned material. This field can be blank.

Unit Cost

The cost of a single unit from the assigned material. This field can be blank.

Inventory Qty

The number of parts or assemblies you have in stock. This field can be blank.

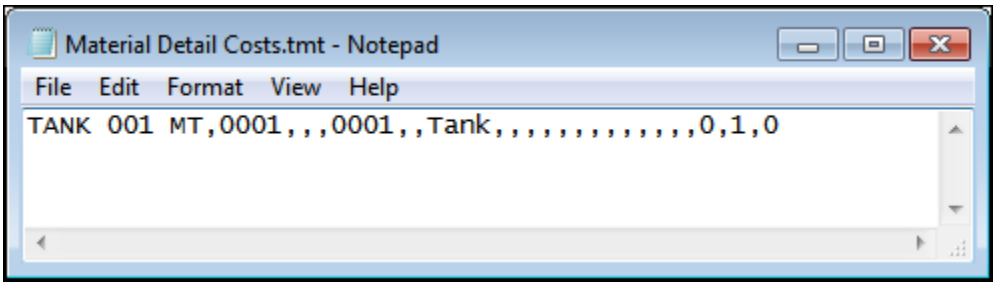
Mfg Yield Factor

The Manufacturing Yield Factor to be applied to the material. This field can be blank.

Destr Eval Qty

The Destructive Evaluation Quantity envisioned. This field can be blank.

This is an example of a .tmt file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1	TANK 001	1			1		Tank													0	1	0
2																						
3																						

Material Distribution File

You can use an Excel or ASCII file to import material distribution data into the tasks of the proposal. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tmd. Each record in the file should contain the following fields:

Task ID

The task into which the data will be imported.

Material ID

The material assignment for which the material units will be spread. You must have created or imported the Material ID in the respective task in advance.

Spread Code

This field cannot be blank. Valid codes are the names of the system-defined curves and the names of any user-defined curves. If you did not use the letters D, L, E, nor the numbers 1 through 9 as names of curves, you can use these letters/numbers as follows: D for discrete values, L for Load, E for Even, 1 for 10/90, 2 for 20/80, 3 for 30/70, 4 for 40/60, 5 for 50/50, 6 for 60/40, 7 for 70/30, 8 for 80/20, and 9 for 90/10.

If the spread code is D:

Field 4

The start date of the distribution. If this field is blank, the distribution will begin with the start date of the task. The remaining fields represent the actual amount of units that will be imported for each month. Every next field represents a subsequent month.

If the spread code is L, E, or the name of a curve:

Field 4

The value to be loaded or spread. This field cannot be blank.

Field 5

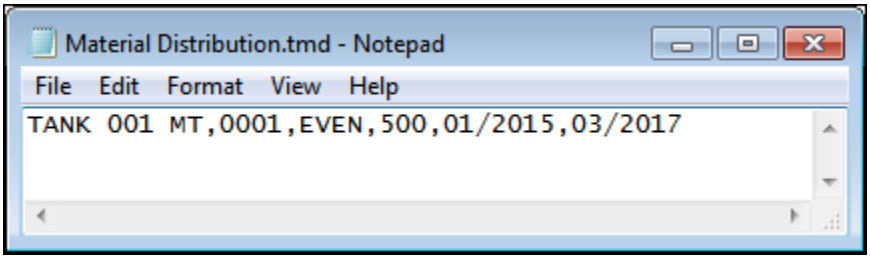
The start date of the distribution. If this field is blank, the distribution will begin with the first month of the task period.

Field 6

The end date of the distribution. If this field is blank, the distribution will cover the entire resource period.

The remaining fields depend on the period of the proposal. There will be a field for each month in the proposal period.

This is an example of a .tmd file:



This is an example of a .xls file:

	A	B	C	D	E	F
1	TANK 001	1	EVEN	500	01/2015	03/2017
2						
3						

Part Library Data File

You can use an Excel or ASCII file to import material distribution data into the tasks of the proposal. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .prt. Each record in the file should contain the following fields:

Library

Name of the library into which the part will be imported. If blank, the part will be imported to the Common Library.

Part

The name of the part that will be imported. This field cannot be blank since it is used to identify duplicates.

Part Number

The number of the imported part. This field can be blank.

Description

The description of the part. This field can be blank.

UM

The Unit of Measurement of the part. This field can be blank.

Base Unit Cost

The cost of a single unit of the part. This field can be blank.

Resource

The resource to be applied to the unit cost of the part. This field can be blank.

Resource Fields

The resource field value you want to enter for the resource. Importing values is optional. However, the field must exist if there are default or proposal-specific resource fields. One delimiter for each resource field.

Comment

The detailed description or applicable comment. This field can be blank.

Make/Buy

The means of providing the part. This field can be blank.

Currency

A currency can be imported for a part only if Material Multi-Currency Functions are enabled. This field can be blank.

Inventory Qty

The number of parts you have in stock. This field can be blank.

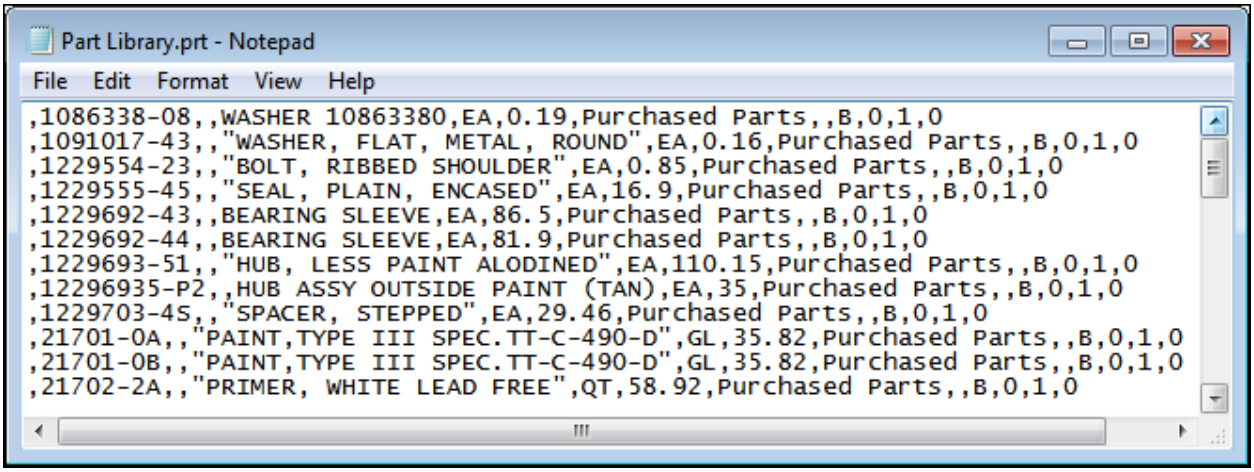
Mfg Yield Factor

The Manufacturing Yield Factor to be applied to the material. This field can be blank.

Destr Eval Qty

The Destructive Evaluation Quantity envisioned. This field can be blank.

This is an example of a .prt file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1		1086338-08		WASHER 10863380	EA	0.19	Purchased Parts		B	0	1	0	
2		1091017-43		WASHER, FLAT, METAL, ROUND	EA	0.16	Purchased Parts		B	0	1	0	
3		1229554-23		BOLT, RIBBED SHOULDER	EA	0.85	Purchased Parts		B	0	1	0	
4		1229555-45		SEAL, PLAIN, ENCASED	EA	16.9	Purchased Parts		B	0	1	0	
5		1229692-43		BEARING SLEEVE	EA	86.5	Purchased Parts		B	0	1	0	
6		1229692-44		BEARING SLEEVE	EA	81.9	Purchased Parts		B	0	1	0	
7		1229693-51		HUB, LESS PAINT ALODINED	EA	110.15	Purchased Parts		B	0	1	0	
8		12296935-P2		HUB ASSY OUTSIDE PAINT (TAN)	EA	35	Purchased Parts		B	0	1	0	
9		1229703-4S		SPACER, STEPPED	EA	29.46	Purchased Parts		B	0	1	0	
10		21701-0A		PAINT,TYPE III SPEC.TT-C-490-D	GL	35.82	Purchased Parts		B	0	1	0	
11		21701-0B		PAINT,TYPE III SPEC.TT-C-490-D	GL	35.82	Purchased Parts		B	0	1	0	
12		21702-2A		PRIMER, WHITE LEAD FREE	QT	58.92	Purchased Parts		B	0	1	0	
13		21702-2B		PRIMER, WHITE LEAD FREE	QT	58.92	Purchased Parts		B	0	1	0	
14		21702-60		15W40 ENGINE OIL	GL	10.41	Purchased Parts		B	0	1	0	
15		21702-80		MIL-PRF-10924-G 6130S	LB	10	Purchased Parts		B	0	1	0	
16		21702-90		SEALANT	PT	43	Purchased Parts		B	0	1	0	

Rate Band Element Overrides File

You can use an Excel or ASCII file to import the overriding descriptions of the rate bands. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rbe. Each record in the file should contain the following fields:

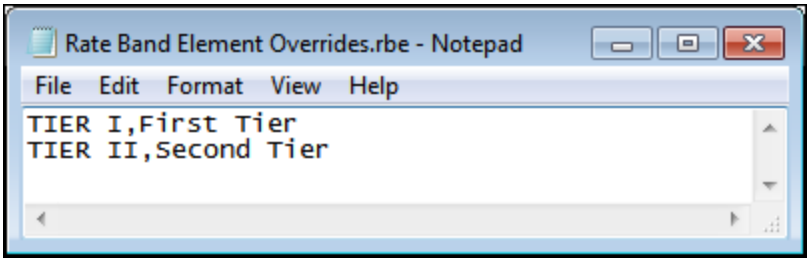
Rate Band

The name of the rate band. This field cannot be blank.

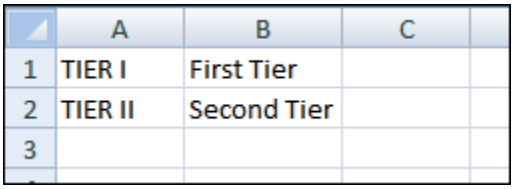
Description

The overriding description of the rate band.

This is an example of a .rbe file:



This is an example of a .xls file:



	A	B	C
1	TIER I	First Tier	
2	TIER II	Second Tier	
3			

Rate Band Escalation Set Overrides File

You can use an Excel or ASCII file to import the overriding rate band escalation sets. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rbo. Each record in the file should contain the following fields:

Rate Band

The name of the rate band. This field cannot be blank since it is used to identify duplicate resources.

Base Date

The date the escalation set starts. This field cannot be blank.

Base Rate

The rate for the first month. This field cannot be blank.

Factor

The percent of escalation for the base rate. This field cannot be blank.

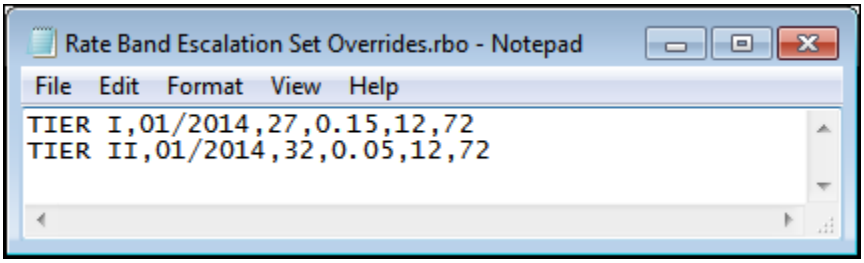
Step

The number of months for which the base rate remains constant until subsequent escalation is applied. This field cannot be blank.

Months to Extend

The number of months the escalation set should cover. This field cannot be blank.

This is an example of a .rbo file:



This is an example of a .xls file:

	A	B	C	D	E	F	G
1	TIER I	01/2014	27	0.15	12	72	
2	TIER II	01/2014	32	0.05	12	72	
3							
4							

Rate Bands File

You can use an Excel or ASCII file to import rate bands. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .bra. Each record in the file should contain the following fields:

Rate Band

The name of the rate band. This field cannot be blank since it is used to identify duplicates.

Description

The description of the rate band. This field can be blank.

Rate Type

There are three valid rate types: Hours, Units, and Cost. This field cannot be blank.

Currency

The currency of the rate can be imported only if the **Multi-Currency** checkbox is selected for the table. This field can be blank.

Band Type

There are two valid Band Types: Direct and Composite. This field cannot be blank.

Default Rate

The flat rate applied to a rate band if the Band Type is *Direct*. This field can be blank.

Effective Date

The date the rate takes effect. This is for information only and can be blank.

Start Date

This field is imported as the Base Date. This field cannot be blank since it is used to identify duplicates.

End Date

This field is not imported. It is only used to calculate the Months to Extend. This field cannot be blank.

Base Rate/Base Rate Band

Imported as Base Rate if the Band Type is *Direct*, or as Base Rate Band ID if the Band Type is *Composite*. This field cannot be blank.

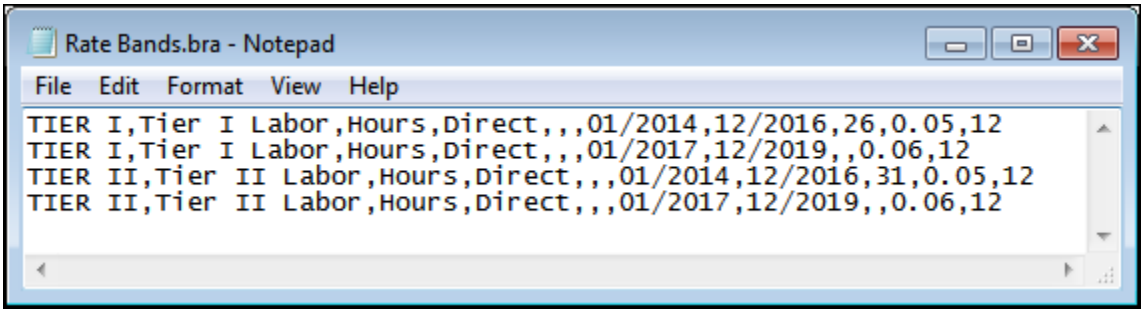
Factor

The percent of escalation for the Base Rate if the Band Type is *Direct*. The multiplier to be applied to the rates of the Base rate band if the Band Type is *Composite*. This field can be blank.

Monthly Step

The number of months for which the Base Rate remains constant until subsequent escalation is applied if the Band Type is *Direct*. This field can be blank.

This is an example of a .bra file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L
1	TIER I	Tier I Labor	Hours	Direct			01/2014	12/2016	26	0.05	12	
2	TIER I	Tier I Labor	Hours	Direct			01/2017	12/2019		0.06	12	
3	TIER II	Tier II Labor	Hours	Direct			01/2014	12/2016	31	0.05	12	
4	TIER II	Tier II Labor	Hours	Direct			01/2017	12/2019		0.06	12	
5												

Resource Actuals File

You can use an Excel or ASCII file to import resource actuals. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .acs. Each record in the file should contain the following fields:

Task ID

The name of the task into which the actuals will be imported. This field cannot be blank since it is used to identify duplicates.

Resource

The name of the resource to which the actuals will be imported. This field cannot be blank since it is used to identify duplicates. The resource must be included in the Direct Rate Table of the proposal to which you are importing, otherwise it will be sent to the exception file.

Resource Fields

The resource field value you want to enter for the resource. Importing values is optional. However, the field must exist if there are default or proposal-specific resource fields. One delimiter for each resource field.

Indirect Pool

The name of the indirect pool you want to use to override the indirect pool entered for the resource in the Direct Rate Table. This indirect pool will appear in blue in the **Indirect Pool** column in the **Resources** tab. Leave this field blank to use the one from the Direct Rate Table.

Profit/Fee

The profit/fee you want to import at the resource level on the **Resources** tab. This rate overrides any rate entered for the task, in **Proposal Properties**, the **Indirect Rate Overrides** grid, and the proposal's Indirect Rate Table.

Rate Band

The name of the rate band you want to use to override the rate band entered for the resource in the Direct Rate Table. This rate band will appear in blue in the **Rate Band** column in the **Resources** tab. Leave this field blank to use the one from the Direct Rate Table.

Currency

A currency can be imported for a resource only if Multi-Currency is enabled for the proposal and the rate type of the resource is *Cost*.

Calendar

The name of the accounting calendar you want to assign to the resource. The calendar must be included in the Work Schedule Table of the proposal to which you are importing, otherwise it will be sent to the exception file. If this field is blank, a calendar will not be assigned to the resource.

Date

The month to which the actuals will be imported. This field cannot be blank since it is used to identify duplicates.

Hours/Units/Cost

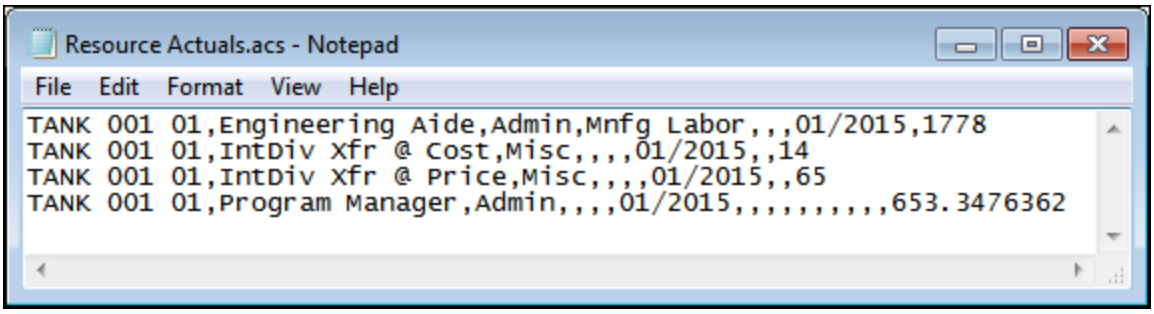
The number of hours/hours/cost to be imported as actuals. This field can be blank.

Direct Cost

The amount of money to be imported as actuals. This field can be blank.

The remaining fields correspond to the indirect elements defined in the Algorithm of the current proposal. There is a field for every indirect element, but they can be blank.

This is an example of a .acs file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	TANK 001 01	Engineering Aide	Admin	Mnfg Labor			01/2015	1778									
2	TANK 001 01	IntDiv Xfr @ Cost	Misc				01/2015		14								
3	TANK 001 01	IntDiv Xfr @ Price	Misc				01/2015		65								
4	TANK 001 01	Program Manager	Admin				01/2015										653.3476
5																	

Resource Field Values (Library Level) File

You can use an Excel or ASCII file to import resource field values into the library. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rfv. Each record in the file should contain the following fields:

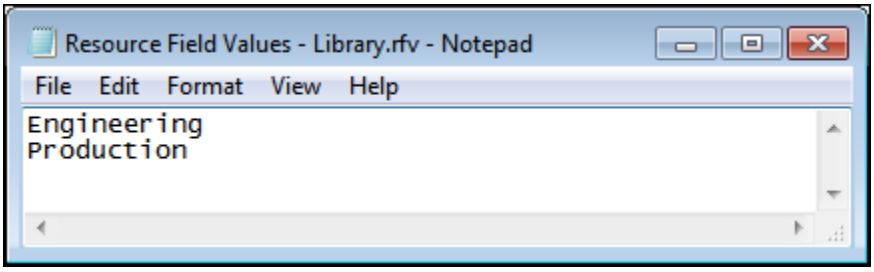
Value

The resource field value. This field cannot be blank.

Description

The description of the Value. This field can be blank.

This is an example of a .rfv file:



This is an example of a .xls file:

	A	B
1	Engineering	
2	Production	
3		

Resource Field Values (Proposal Level) File

You can use an Excel or ASCII file to import resource field values into the proposal. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .rfv. Each record in the file should contain the following fields:

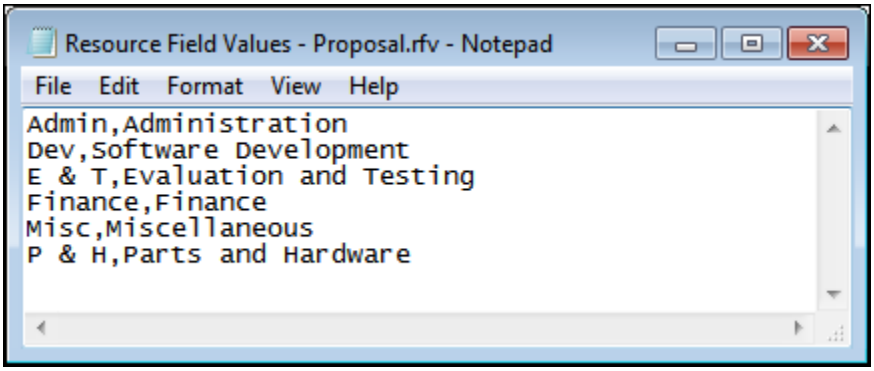
Value

The resource field value. This field cannot be blank.

Description

The description of the Value. This field can be blank.

This is an example of a .rfv file:



This is an example of a .xls file:

	A	B	C
1	Admin	Administration	
2	Dev	Software Development	
3	E & T	Evaluation and Testing	
4	Finance	Finance	
5	Misc	Miscellaneous	
6	P & H	Parts and Hardware	
7			

Resource Hours/Cost File

You can use an Excel or ASCII file to import resource hours or cost. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .res. Each record in the file should contain the following fields:

Task ID

The name of the task for which resource hours/cost will be imported. This field cannot be blank.

Resource

The name of the resource for which hours/cost will be imported. This field cannot be blank since it is used to identify duplicates. The resource must be included in the Direct Rate Table of the proposal to which you are importing, otherwise it will be sent to the exception file.

Resource Fields

The resource field value you want to enter for the resource. Importing values is optional. However, the field must exist if there are default or proposal-specific resource fields. Type a delimiter, such as a comma, after each resource field.

Indirect Pool

The name of the indirect pool you want to use to override the indirect pool entered for the resource in the Direct Rate Table. This indirect pool will appear in blue in the **Indirect Pool** column in the **Resources** tab. Leave this field blank to use the one from the Direct Rate Table.

Profit/Fee

The overriding profit/fee that will be entered in the **Profit/Fee** column in the **Resources** tab.

Rate Band

The name of the rate band you want to use to override the rate band entered for the resource in the Direct Rate Table. This rate band will appear in blue in the **Rate Band** column in the **Resources** tab. Leave this field blank to use the one from the Direct Rate Table.

Currency

A currency can be imported for a resource only if Multi-Currency is enabled for the proposal and the rate type of the resource is *Cost*.

Calendar

The name of the accounting calendar you want to assign to the resource. The calendar must be included in the Work Schedule Table of the proposal to which you are importing, otherwise it will be sent to the exception file. If this field is blank, a calendar will not be assigned to the resource.

Scheduled Rate

The name of the scheduled rate associated with the resource. This field cannot be blank if there is a Scheduled Rate Table assigned to the proposal to which you are importing.

Discount

The discount value applied to the scheduled rate. This field cannot be blank if there is a Scheduled Rate Table assigned to the proposal to which you are importing.

Hours/Equivalent Heads

This field indicates whether the incoming resource data is hours or equivalent heads. Acceptable values are H (Hours) or E (Equivalent Heads). If the field is blank, the resource data is assumed to be Hours.

Spread Code

This field cannot be blank. Valid codes are the names of the system-defined curves and the names of any user-defined curves. If you did not use the letters D,

L, E, nor the numbers 1 through 9 as names of curves, you can use these letters/numbers as follows: D for discrete values, L for Load, E for Even, 1 for 10/90, 2 for 20/80, 3 for 30/70, 4 for 40/60, 5 for 50/50, 6 for 60/40, 7 for 70/30, 8 for 80/20, and 9 for 90/10.

If the value is D:

Discrete Start Date

The start date of the distribution. The remaining fields represent the actual amount of hours/cost that will be imported for each month/quarter/year. Every next field represents a subsequent month/quarter/year.

If the value is L, E, or the name of a curve:

Spread Amount

The value to be loaded or spread. This field cannot be blank.

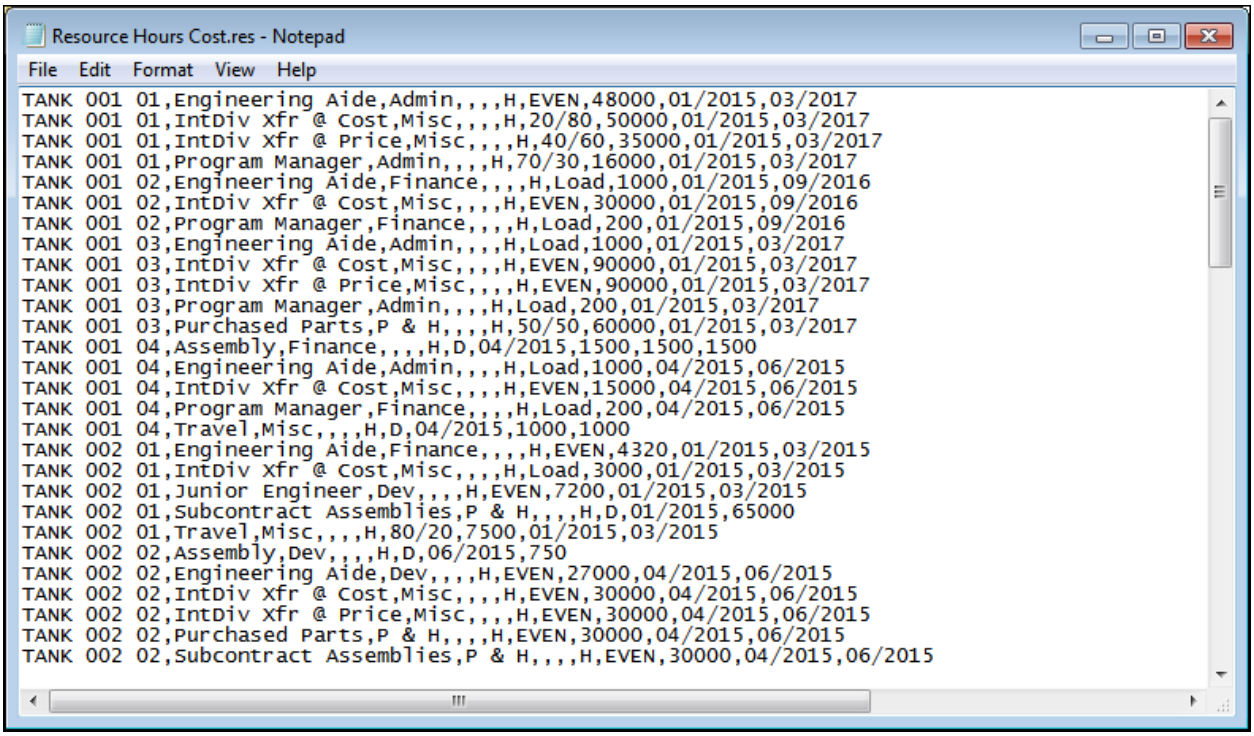
Spread Start Date

The start date of the distribution. If this field is blank, the distribution will begin with the first month/quarter/year of the task period.

Spread End Date

The end date of the distribution. If this field is blank, the distribution will cover the entire task period.

This is an example of a .res file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M
4	TANK 001 01	Program Manager	Admin				H	70/30	16000	01/2015	03/2017		
5	TANK 001 02	Engineering Aide	Finance				H	Load	1000	01/2015	09/2016		
6	TANK 001 02	IntDiv Xfr @ Cost	Misc				H	EVEN	30000	01/2015	09/2016		
7	TANK 001 02	Program Manager	Finance				H	Load	200	01/2015	09/2016		
8	TANK 001 03	Engineering Aide	Admin				H	Load	1000	01/2015	03/2017		
9	TANK 001 03	IntDiv Xfr @ Cost	Misc				H	EVEN	90000	01/2015	03/2017		
10	TANK 001 03	IntDiv Xfr @ Price	Misc				H	EVEN	90000	01/2015	03/2017		
11	TANK 001 03	Program Manager	Admin				H	Load	200	01/2015	03/2017		
12	TANK 001 03	Purchased Parts	P & H				H	50/50	60000	01/2015	03/2017		
13	TANK 001 04	Assembly	Finance				H	D	04/2015	1500	1500	1500	
14	TANK 001 04	Engineering Aide	Admin				H	Load	1000	04/2015	06/2015		
15	TANK 001 04	IntDiv Xfr @ Cost	Misc				H	EVEN	15000	04/2015	06/2015		
16	TANK 001 04	Program Manager	Finance				H	Load	200	04/2015	06/2015		
17	TANK 001 04	Travel	Misc				H	D	04/2015	1000	1000		
18	TANK 002 01	Engineering Aide	Finance				H	EVEN	4320	01/2015	03/2015		
19	TANK 002 01	IntDiv Xfr @ Cost	Misc				H	Load	3000	01/2015	03/2015		
20	TANK 002 01	Junior Engineer	Dev				H	EVEN	7200	01/2015	03/2015		
21	TANK 002 01	Subcontract Assemblies	P & H				H	D	01/2015	65000			

Scheduled Rate Definitions File

You can use an Excel or ASCII file to import Scheduled Rate definitions. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .srd. Each record in the file should contain the following fields:

Scheduled Rate

The name of the scheduled rate. This field cannot be blank.

Description

The description of the scheduled rate. This field can be blank.

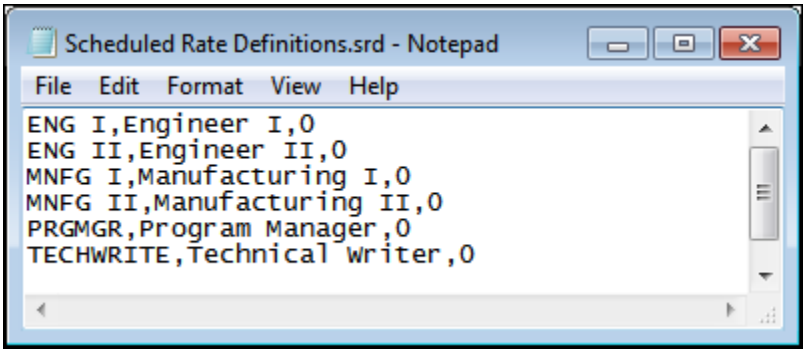
Discount

The discount for the scheduled rate. If entered, the value must be a number between 0 and 1, inclusive.

Effective Date

The date the rate takes effect. This is for information only and can be blank.

This is an example of a .srd file:



This is an example of a .xls file:

	A	B	C	D	
1	ENG I	Engineer I	0		
2	ENG II	Engineer II	0		
3	MNFG I	Manufacturing I	0		
4	MNFG II	Manufacturing II	0		
5	PRGMGR	Program Manager	0		
6	TECHWRITE	Technical Writer	0		
7					
8					

Scheduled Rate Element Overrides File

You can use an Excel or ASCII file to import the overriding descriptions and discounts of the scheduled rates. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .seo. Each record in the file should contain the following fields:

Scheduled Rate

The name of the scheduled rate. This field cannot be blank.

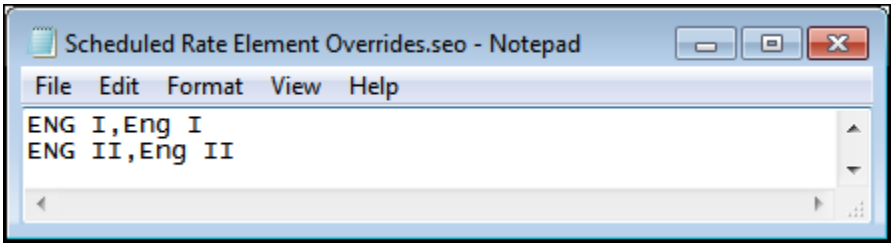
Description

The overriding description of the scheduled rate.

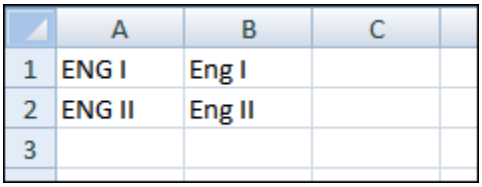
Discount

The overriding discount for the scheduled rate. If entered, the value must be a number between 0 and 1, inclusive.

This is an example of a .seo file:



This is an example of a .xls file:



	A	B	C
1	ENG I	Eng I	
2	ENG II	Eng II	
3			

Scheduled Rate Escalation Set Overrides File

You can use an Excel or ASCII file to import the overriding scheduled rate escalation sets. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .sro. Each record in the file should contain the following fields:

Scheduled Rate

The name of the scheduled rate This field cannot be blank since it is used to identify duplicate resources.

Base Date

The date the escalation set starts. This field cannot be blank.

Base Rate

The rate for the first month. This field cannot be blank.

Factor

The percent of escalation for the base rate. This field cannot be blank.

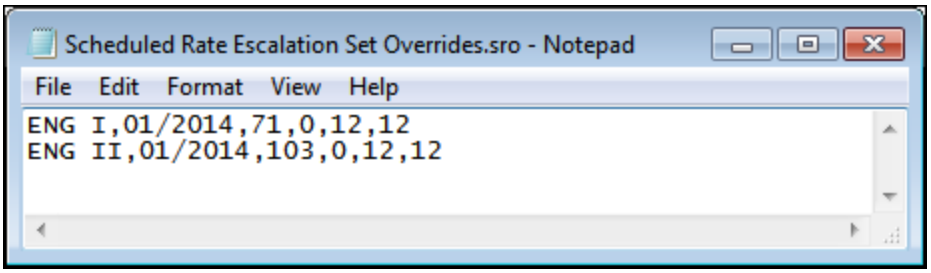
Step

The number of months for which the base rate remains constant until subsequent escalation is applied. This field cannot be blank.

Months to Extend

The number of months the escalation set should cover. This field cannot be blank.

This is an example of a .sro file:



This is an example of a .xls file:

	A	B	C	D	E	F	G
1	ENG I	01/2014	71	0	12	12	
2	ENG II	01/2014	103	0	12	12	
3							
4							

Scheduled Rate Escalation Sets File

You can use an Excel or ASCII file to import scheduled rate escalation sets. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .sre. Each record in the file should contain the following fields:

Scheduled Rate

The name of the scheduled rate. This field cannot be blank.

Base Date

The month and year that mark the beginning of the escalation set. This field cannot be blank.

Base Rate

The rate for the first month. This field can be blank.

Escalation Factor

The percent of escalation for the base rate. This field can be blank.

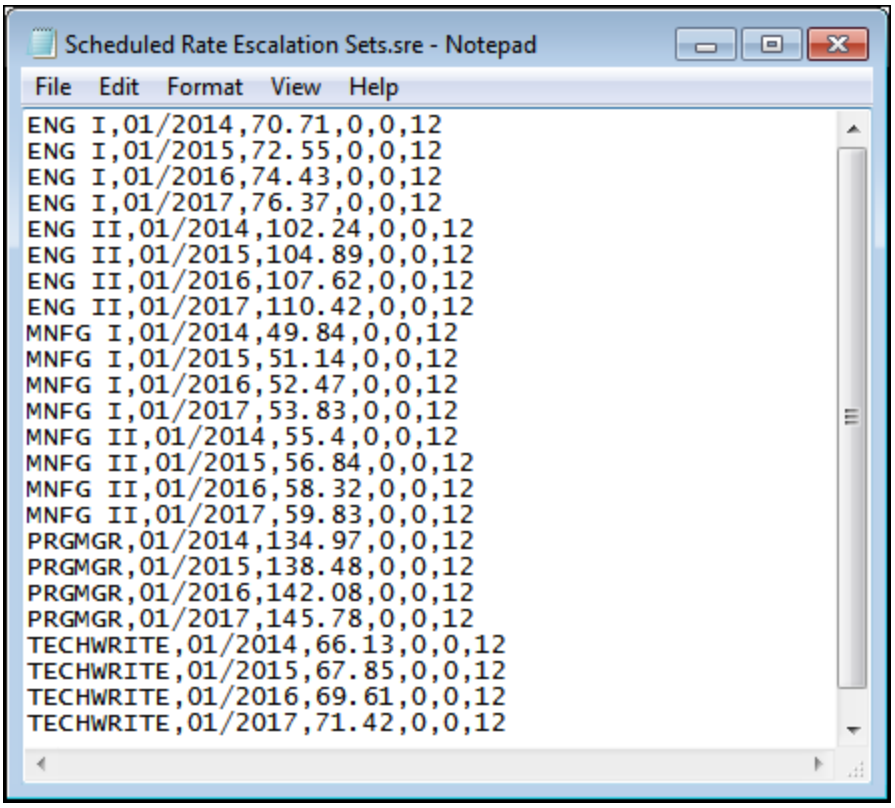
Monthly Step

The number of months for which the base rate remains constant until subsequent escalation is applied. This field can be blank.

Months to Extend

The number of months that the escalation set should last. This field cannot be blank.

This is an example of a .sre file:



This is an example of a .xls file:

	A	B	C	D	E	F
1	MECH ENGR	Jan-12	125	0.035	12	144
2	PGR MGMT	Jan-12	130	0.035	12	144
3	SYS ENGR	Jan-12	135	0.035	12	144

SOW Text File

You can use an Excel or ASCII file to import text entries into the SOW Text Library. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .sow. Each record in the file should contain the following fields:

Name

The name of the text entry. This field cannot be blank since it is used to identify duplicate texts.

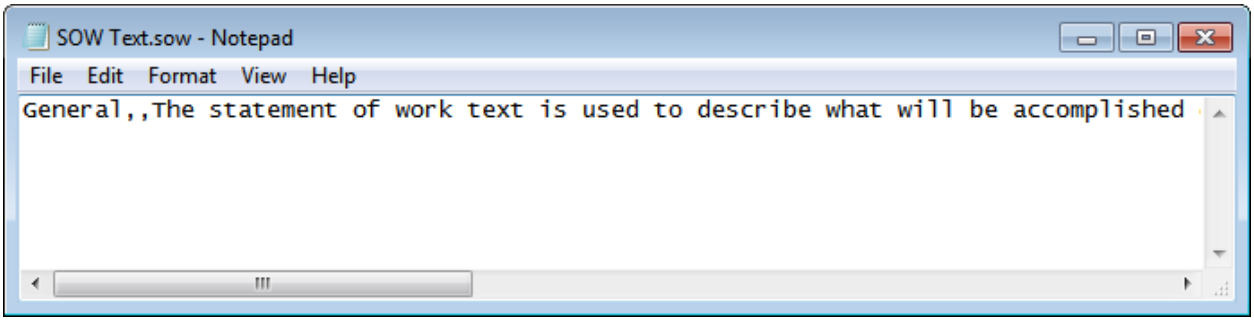
Description

The description of the text entry. This field can be blank.

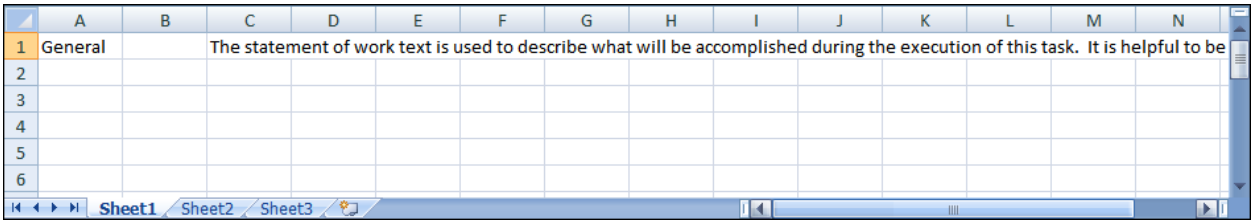
Text

The text that will be imported.

This is an example of a .sow file:



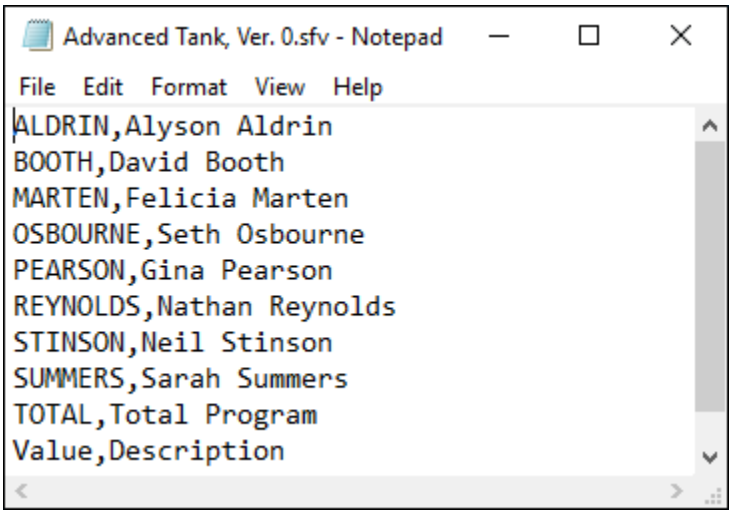
This is an example of a .xls file:



Summary Field Values File

You can use an Excel or ASCII file to import values to a summary field's value list. An Excel file should have a .xls or .xlsx file name extension, while an ASCII file can have any file name extension. However, the first one ProPricer will look for is its default, .sfv.

This is an example of a .sfv file:



Task Data File

You can use an Excel or ASCII file to import tasks into the proposal. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tsk. Each record in the file should contain the following fields:

Task ID

The name of the task. This field cannot be blank since it is used to identify duplicates.

Description

The description of the task. This field can be blank

Start Date

This field cannot be blank. It represents when the task will start.

End Date

This field cannot be blank. It represents when the task will end.

Indirect Pool

This field can be blank. If you enter an indirect pool, it must exist in the Indirect Pool Library. This indirect pool will only be used to price the resources that do not have one assigned it in the Direct Rate Table assigned to proposal.

Quantity

This field can be blank, but if you enter a quantity, it must be a number between 0 and 999,999.

Profit/Fee

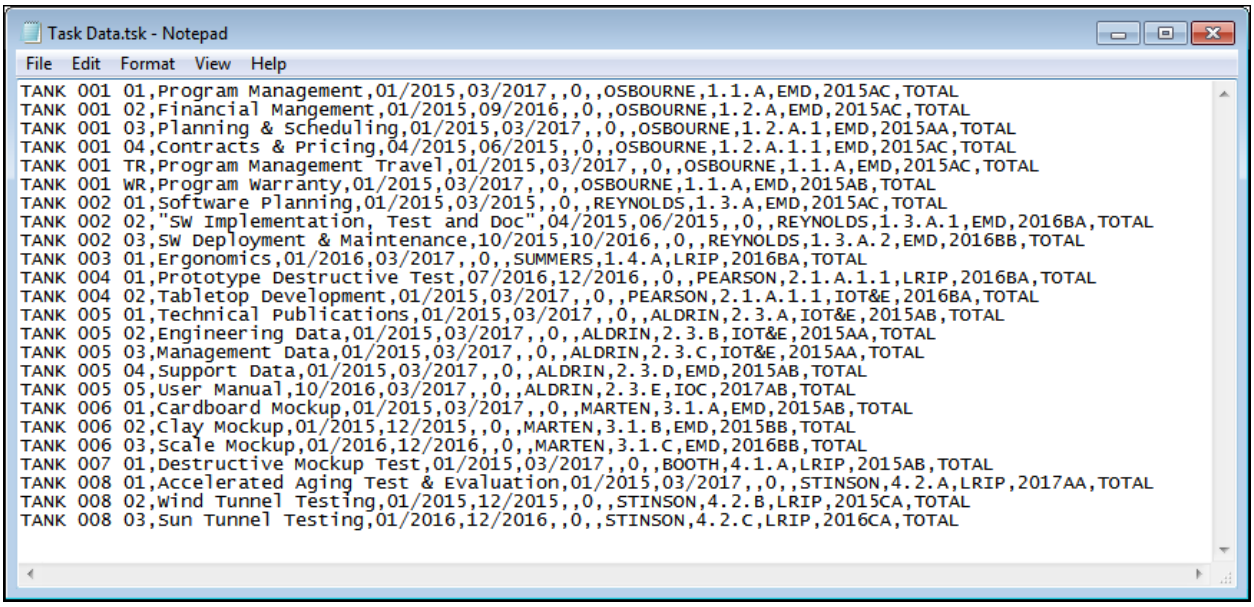
The profit/fee you want to import at the task level. This rate overrides any rate entered in Proposal Properties, the **Indirect Rate Overrides** grid, as well as the proposal's Indirect Rate Table. This field can be blank.

The remaining fields represent the summary fields. These fields can be blank unless the **Required** option for the summary fields of the target proposal is selected. In this case the corresponding summary fields of the source proposal must contain data.

Notes:

- *Make sure the names, order, and number of the summary fields in the .tsk file correspond to the summary elements in the target proposal. If they are different, you will not be able to import the task.*
- *The only mandatory fields are Task ID, Start Date, End Date, and Summary Fields, if the **Required** option is selected for the summary fields of the target proposal.*

This is an example of a .tsk file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L
1	T0010	Program Office	Jan-12	Dec-15		0		Jones	1.1.1	PMO	0001AA	Total
2	T0011	Program Office Support	Jan-12	Dec-15		0		Jones	1.1.2	PMO	0001AB	Total
3	T0020	Design System	Jan-12	Jun-12		0		Smith	1.2.1	ENG	0002AA	Total
4	T0021	Build Prototype	Jul-12	Dec-15		0		Taylor	1.3.1	MFG	0002AB	Total
5	T0022	Test System	Jan-14	Dec-14		0		Nixon	1.2.2	ENG	0002AA	Total
6	T0023	Enhance System	Apr-13	Sep-13		0		Jones	1.2.3	ENG	0003AA	Total
7	T0024	Test Prototype	Oct-13	Dec-13		0		Nixon	1.2.4	ENG	0003AB	Total
8	T0025	Final Test	Oct-13	Dec-13		0		Taylor	1.2.4	ENG	0003AB	Total
9	T0040	Production	Jan-14	Dec-15		0		Taylor	1.3.2	MFG	0003AA	Total
10	T0041	Quality Control	Jan-14	Dec-15		0		Taylor	1.2.5	ENG	0003AA	Total
11	T0042	Tooling & Rework	Jan-15	Dec-15		0		Smith	1.3.3	MFG	0004AA	Total
12	T0050	Materials	Jan-12	Dec-15		0		Taylor	1.4.2	MAT	0004AA	Total
13	T0051	Shipping & Receiving	Jan-12	Dec-15		0		Taylor	1.4.3	MAT	0004AB	Total
14	T0060	Deliverables	Jun-13	Dec-15		0		Taylor	1.5.1	MAT	0005AA	Total

Task Notes File

You can use an ASCII file to import text to the **Notes** tab. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tno. Each record in the file should contain the following fields:

Task ID

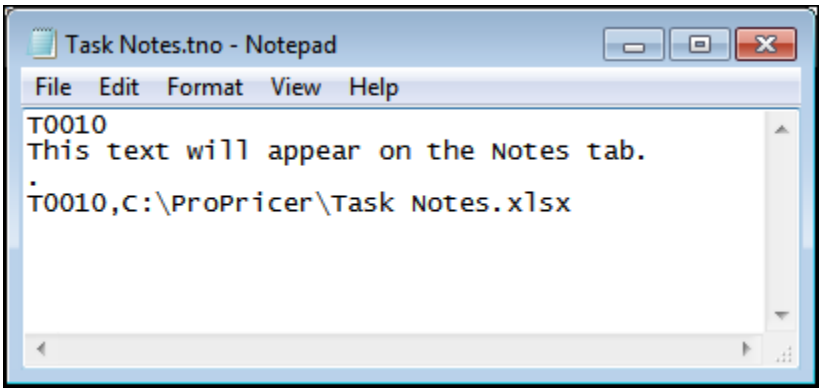
The name of the task to which the text is to be added. This field cannot be blank.

Text

The text, or the full path of an attachment.

- To import an attachment, the file name must continue on the same line and be separated from the Task ID field by a delimiter. You must type its full path; for example, C:\ProPricer\Task Note.xlsx. Every attachment must be specified on a separate line.
- Create separate records for the plain text and attachments if you want to import both.

The is an example of a .tno file:



Task Text File

You can use an ASCII file to import SOW/BOE text into the tasks of your proposal. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .ttx. Each record in the file should contain the following fields:

Task ID

The name of the task to which the text is to be added. This field cannot be blank.

Text Type

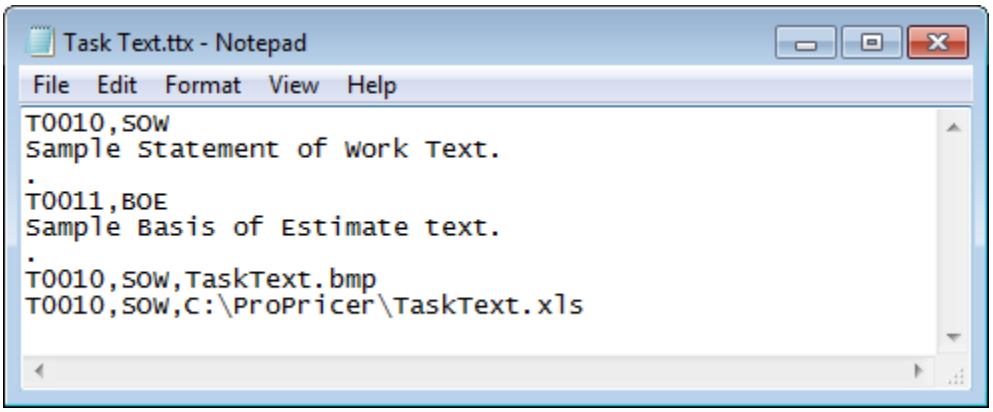
There are two acceptable types: SOW and BOE. This field cannot be blank.

Text

The SOW or BOE text, or the full path of an attachment.

- To import an attachment, the file name must continue on the same line and be separated from the Task ID field by a delimiter. You must type its full path; for example, C:\ProPricer\Task Text.xls. Every attachment must be specified on a separate line.
- Create separate records for the plain text and attachments if you want to import both.

This is an example of a .ttx file:



Title Tables File

You can use an Excel or ASCII file to import a Title Table. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .ttb. Each record in the file should contain the following fields:

Type

There are two possible types: T for table and D for element. A line beginning with T represents a new table. All subsequent lines beginning with D, until the next initial T, represent the elements of the table. This field cannot be blank.

Name

The name of the table or of the element. This field cannot be blank since it is used to identify duplicates..

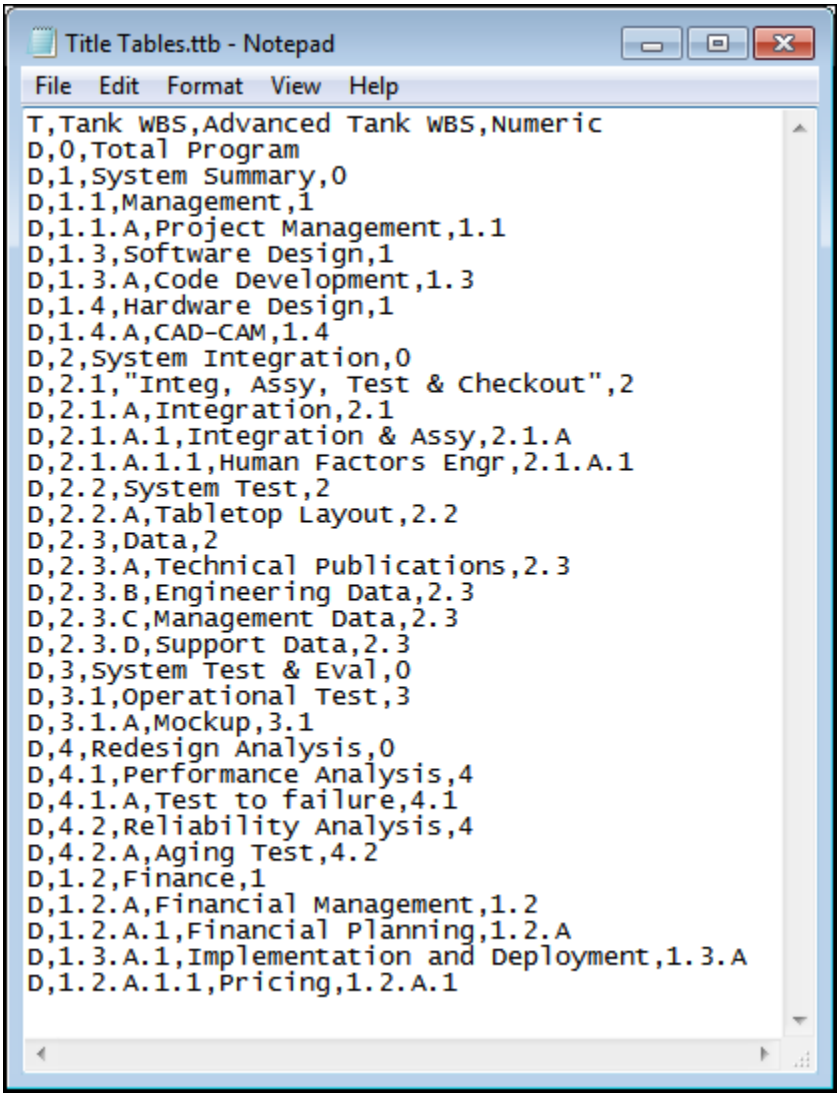
Description

The description of the table or element. This field can be blank.

Sort Order/Parent

If the Import Type is table (T), this field displays the order in which the Title Table elements are sorted in the table (alphabetic or numeric). If the Import Type is element (D), this field contains the name of the higher-order element (the name of the parent) defined for a Title Table Element. Only elements can have parents. Please note that if the parent does not exist as an element, you will not be able to select the **Add to Existing TTB (Safe Mode)** or **Replace All With Imported** options.

This is an example of a .ttb file.



This is an example of a .xls file:

	A	B	C	D
1	T	WBS	Tutorial WBS Title Table	Numeric
2	D	1	Total Program	
3	D	1.1	Management	1
4	D	1.1.1	Program Office	1.1
5	D	1.1.2	Program Office Support	1.1
6	D	1.2	Engineering	1
7	D	1.2.1	Design System	1.2
8	D	1.3	Manufacturing	1
9	D	1.3.1	Build Prototype	1.3
10	D	1.2.2	Test System	1.2
11	D	1.2.3	Enhance System	1.2
12	D	1.2.4	Evaluation	1.2
13	D	1.3.2	Production	1.3
14	D	1.2.5	Quality Control	1.2
15	D	1.3.3	Tooling & Rework	1.3
16	D	1.4	Materials & Subs	1
17	D	1.4.2	Materials	1.4
18	D	1.4.3	Shipping & Receiving	1.4
19	D	1.5	Deliverables	1
20	D	1.5.1	Deliverables	1.5

Travel Details File

You can use an Excel or ASCII file to import travel details into the **Travel Info** grid on the **Travel** tab. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tvl. Each record in the file should contain the following fields:

Task ID

The name of the task to import to. This field cannot be blank since it is used to identify duplicates.

Trip ID

The name of the trip. This field cannot be blank since it is used to identify duplicates.

Trip Description

The description of the trip. Can be blank.

Destination

The destination that will be assigned to the task. Cannot be blank.

Resource

The default resource of the destination. Can be blank. However, if the record is imported, the default resource of the existing destination will be entered.

Resource Fields

The resource field value you want to enter for the resource. Importing values is optional. However, the field must exist if there are default or proposal-specific resource fields. One delimiter for each resource field.

Indirect Pool

The name of the indirect pool you want to use to override the indirect pool entered for the resource in the Direct Rate Table. This indirect pool will appear in blue in

the **Indirect Pool** column of the **Travel** tab. Leave this field blank to use the one from the Direct Rate Table.

Profit/Fee

The profit/fee you want to import at the resource level on the **Travel** tab. This rate overrides any rate entered in the task, in **Proposal Properties**, in the **Indirect Rate Overrides** grid, and in the proposal's Indirect Rate Table.

Rate Band

The name of the rate band you want to use to override the rate band entered for the resource in the Direct Rate Table. This rate band will appear in blue in the **Rate Band** column of the **Travel** tab. Leave this field blank to use the one from the Direct Rate Table.

Currency

This currency assigned to the trip. A currency can be imported only if Multi-Currency is enabled in the proposal.

Comment

Can be blank.

People

The number of people taking the trip. This field cannot be blank.

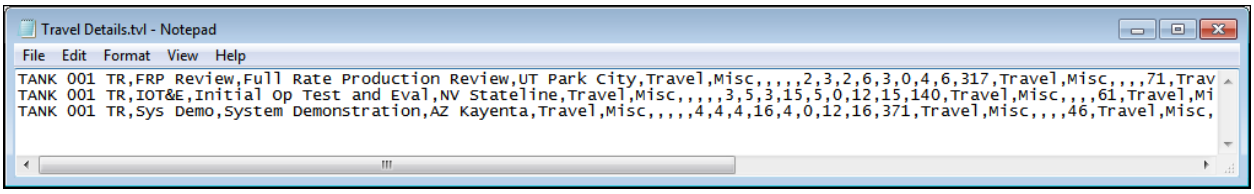
Days

The number of days the people will be on the trip. Cannot be blank.

The remaining fields pertain to the travel expenses and can be blank. The first six are the Quantity column values for Airfare, Per Diem, Rental Car, Mileage, Hotel, Miscellaneous, and any user-defined expenses. The rest are the Rate, Resource, Resource Field, Indirect Pool, and Rate Band columns of the expenses. A Currency column will appear if Multi-Currency is enabled in the proposal. If the destination being imported exists in the Travel Library, these fields can be left blank, and ProPricer will use the values in the Travel library during the import process. Commas (or the chosen

delimiter) must still be used to separate fields. The fields must exist in a single record to be imported correctly.

This is an example of a .tvl file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	A
1	T0010	TRIP A	1st Trip	NY/MIAM	TRAVEL	Misc					1	3	1	3	3	0	2	0	400	TRAVEL	Misc			95	TRAVEL	Misc	
2	T0020	TRIP B	2nd Trip	SD/LA	TRAVEL	Misc					2	3	2	6	6	0	4	0	100	TRAVEL	Misc			50	TRAVEL	Misc	
3	T0021	TRIP C	3rd Trip	LA/DC	TRAVEL	Misc					1	6	1	6	6	0	5	0	1200	TRAVEL	Misc			75	TRAVEL	Misc	

Travel Rates File

You can use an Excel or ASCII file to import rates into a Travel Rate Table. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .trp. Each record in the file should contain the following fields:

Destination

The name of the destination. This field cannot be blank since it is used to identify duplicates.

Description

The description of the trip. Can be blank.

Currency

A currency can be imported for a Destination only if Travel Multi-Currency Functions are enabled. This field can be blank.

Resource

The default resource for the destination. This field cannot be blank. If the specified resource does not exist in the Resource Library, the record is sent to the exception file.

Resource Fields

The resource field value you want to enter for the resource. Importing values is optional. However, the field must exist if there are default or proposal-specific resource fields. One delimiter for each resource field.

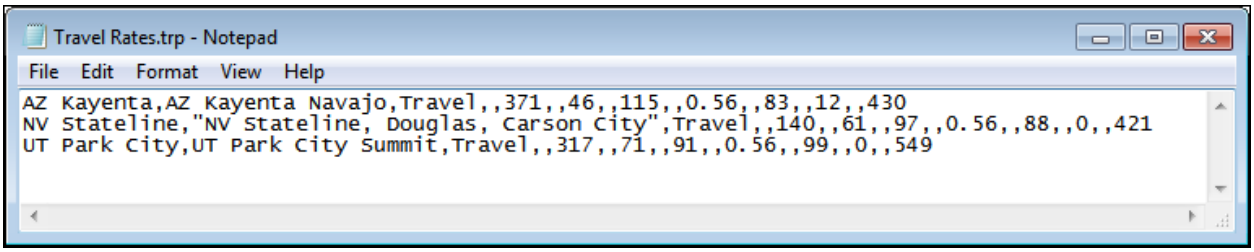
Comment

The explanation or description of the destination. Can be blank.

The remaining fields, except for the last one, correspond to the travel expenses. There are three fields per expense: Rate, Resource, and Resource Field. If Travel Multi-Currency Functions are enabled, there will be a Currency column.

The fields at the end correspond to the weekly and monthly rental car rates. If the records contain data in these fields, and weekly and monthly rental care rates are enabled, the records will be imported. If the records contain data, and weekly and monthly rental car rates are not enabled, ProPricer will inform you of this and ask whether you want to enable them or not. If you enable them, the records will be imported. If you choose not to enable weekly and monthly rental car rates, the records will be sent to the exception file.

This is an example of a .trp file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	LA/DC	Los Angeles - Washington DC	TRAVEL			1200			75			40			0.33			120			0
2	NY/MIAMI	New York - Miami	TRAVEL			400			95			36			0.33			85			0
3	PHOE/SEATTLE	Phoenix - Seattle	TRAVEL			650			90			35			0.33			110			0
4	SD/LA	Sand Diego - Los Angeles	TRAVEL			100			50			50			0			100			0

Trip Distribution File

You can use an Excel or ASCII file to import trips into the **Trip Distribution** grid of the **Travel** tab. Your Excel file should have a .xls or .xlsx file name extension. Your ASCII file can have any file name extension. However, the first one ProPricer will look for is its default .tvd. Each record in the file should contain the following fields:

Task ID

The name of the task. This field cannot be blank since it is used to identify duplicates.

Trip ID

The name of the trip. This field cannot be blank since it is used identify duplicates.

Spread Code

This field cannot be blank. Valid codes are the names of the system-defined curves and the names of any user-defined curves. If you did not use the letters D, L, E, nor the numbers 1 through 9 as names of curves, you can use these letters/numbers as follows: D for discrete values, L for Load, E for Even, 1 for 10/90, 2 for 20/80, 3 for 30/70, 4 for 40/60, 5 for 50/50, 6 for 60/40, 7 for 70/30, 8 for 80/20, and 9 for 90/10.

If the spread code is D:

Field 4

Start date for distributing. The rest of the fields, **Field 5** through the end present the actual number of trips per month to be imported. Every next field stands for a subsequent month. If **Field 4** is blank, the distribution begins with the start date of the task.

If the spread code is L, E, or the name of a curve:

Field 4

Value to be loaded or spread. This field cannot be blank.

Field 5

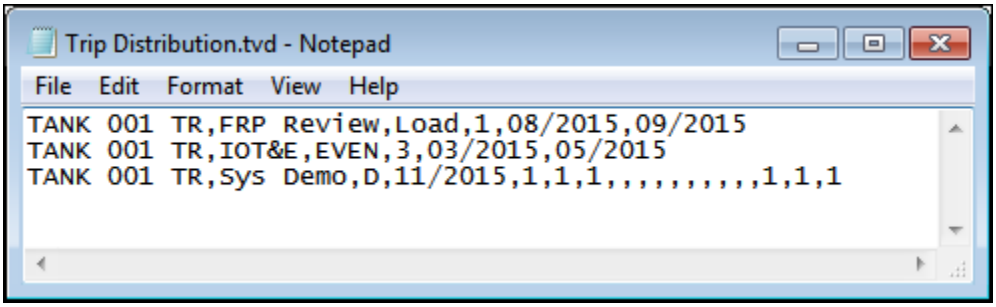
Start date to begin the distribution. If blank, distribution of the trips will begin with the first month of the time-period of the task.

Field 6

End date to stop the distribution. If blank, the distribution will cover all months through the resource period end date.

Note: If Field 5 and Field 6 are both blank, the trips will be spread across the entire period of the task. The rest of the fields, from 7 through the end, are ignored even if there is data in them.

This is an example of a .tvd file:



This is an example of a .xls file:

	A	B	C	D	E	F	G	H	I	J
1	T0010	TRIP A	D	Dec-12	1					
2	T0020	TRIP B	D	Jun-12	1					
3	T0021	TRIP C	D	Dec-12	1					1