

PROCESS FOR IMPORTING ESTIMATOR ESTIMATES TO CES

7/28/2010

STEP ONE: creating the Estimator Export file

- ❖ Open the Estimator file and make sure all the information is in the required fields.
 - **Estimate ID:** DES #
 - **Spec Year:** 10 for English, 05 for Metric
 - **Base Date:** Letting Date
 - **Unit System:** E for English, M for Metric
 - **Description:** The project description. should match the description in SPMS.
 - Make sure there is also a **Group Description** for each group in the estimate
 - Select **Export** from the **File** menu. Estimator it will prompt you to select a file location.
 - The File name should be the **Estimate ID/DES** number.
 - The “Save as type” should be **XML estimate file**.

STEP TWO: preparing CES to receive the Estimate

- ❖ Open CES
- ❖ Open the **Jobs** window
- ❖ Go to the DES number.
 - Set the **Spec Year** to match the Estimator file, if necessary
 - Check the Item tab to see if an estimate has been uploaded already.
 - Set the **Item Bid History** library to the Bid History Library you wish to use.

STEP THREE: uploading the XML export file into the database

- ❖ select **Upload File>Process I/O File** from the **Utilities** menu
- ❖ Select the XML export file that you created in step one and click **Open**.
- ❖ Select the **qpjportdir** directory in the **Save Process I/O file As** dialogue and make sure that the file name in the left column is the DES# followed by .XML (Hint: You can use the “Ctrl C” shortcut keys to copy this file name for use in the next step)
- ❖ Click **Okay**.

STEP FOUR: Importing the Estimator Estimate into the CES job

- ❖ Go to CES again and select **Run Process** from the File menu
- ❖ Select the **Import New Projects** process to run
- ❖ Enter the file name for the XML import file in the appropriate field on **Import Data Options** dialog and select the import options you desire. The file name should be the same as the DES number plus “.XML” and must be the same as the CES Job number and the Estimator Estimate ID. If you copied the file name during the previous step you can paste it into the field using Ctrl V.
- ❖ Make sure the “**Group number**” matches the group number assigned to your organization and click **Submit**.
- ❖ Open the CES job and click on the **Items** tab. Your estimate should now be in CES. Estimator prices will appear as Reference Prices in CES.