

## BOEMax Feature List

### Configuration, Setting Up Core and Historical Data

Feature	Notes
Set up an unlimited number of user defined fields to support project unique data views and reporting requirements	Quickly create codes and fields to match business and project specific needs. Define text, code, flag, Boolean, and date fields that can be added to the estimate view, resource structures, and other structures. User defined fields automatically show up as parameters in reporting.
Import from anywhere using MS Excel	Quickly create common core data such as calendars, rates, resource lists, code structures, and code lists using source data from other systems. Or, import historical actual costs and bill of material (BOM) data.
Establish standard accounting calendar templates	Create it once and proposal teams can use it to quickly set up a new proposal project and tailor the base calendar to fit their needs.
Define project specific reporting calendars as well as resource calendars	Proposal teams can tailor calendar periods to match proposal specific needs.
Establish a standard rate template and rate calculations with ability to create custom expressions	Create it once and proposal teams can use it to quickly set up a new proposal project and tailor the rate structure to meet their needs.
Establish a standard hierarchical resource structure template	Create it once and proposal teams can use it to quickly set up a new proposal project and tailor the set of resources to meet their needs.
Establish a searchable library of historical cost estimates and actual costs	Use the central database in BOEMax to create a searchable library of past cost estimates and historical actual costs imported from the accounting system. Provides reliable source data estimators can use to substantiate their cost estimates. Estimators can apply a complexity factor once they pull the data into their project.
Create or import bills of material (BOM) using source data from another system	Establish a library of common BOMs proposal teams can use as a basis for a new proposal. This increases accuracy and consistency in approach. BOMs in BOEMax are hierarchical structures that make it easy for estimators to enter BOM quantities for a top assembly, automatically flow the quantity to the sub-assemblies, and price out the cost of materials. Add user defined fields to the BOM to fit business needs. The library of BOMs can be used with the process templates.
Establish a library of templates for repeatable work processes	Use these estimating process templates to capture a list of related tasks, labor resource requirements such as the type of resources and number of hours, and materials required to produce a component such as an assembly or subassembly. Estimators can change the relationship data such as the number of hours or material cost once they pull the template data into their project. These help to establish a consistent basis

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	proposal teams can use to create their cost estimates. They have a common set of source data that has been validated and used for similar proposals, another time saver for the team.
Establish a standard base project configuration	Create and maintain a new project template proposal teams can use to quickly set up a new proposal project. Establishing a base configuration can help to ensure projects include required codes to produce reports across projects. Provides a foundation to increase consistency and create repeatable processes.
Create document templates	Create rich text templates for common documentation proposal teams can include with the cost estimate data such as basis of estimate rationale, risks, and assumptions. These templates help to establish a repeatable process for the proposal teams.
Project level security	Users are set up and configured, and then associated with security roles. This determines which projects users can access and what they can do within those projects.

## Planning

Feature	Notes
Build WBS structures	Create it manually, import it from an Excel file, or import it from common scheduling tools such as Oracle Primavera P6 and Microsoft Project. BOEMax uses the structure to automatically create the hierarchical estimate grid view ready for estimators to enter their cost data.
Produce WBS dictionary documents	Include rich text documentation with the WBS data structure to easily produce common reports government customers expect.
Import, parse, and map statement of work (SOW) requirements	Provided the SOW is a structured document, BOEMax can parse the SOW paragraphs into a code structure the proposal team can use to map the SOW to the WBS elements. Eliminates time spent copying and pasting the SOW paragraphs.

## Integrated Estimating and Pricing

Feature	Notes
Central database for proposal teams to collaborate and share cost estimate data	BOEMax provides a single database for the entire proposal team to create their cost estimate data and enter rich text documentation all in one place. The team can view the complete set of cost estimate data and documentation – the single authoritative source for the data. No need to copy and paste or reassemble content, a huge time saver for the proposal team. It also makes it easier for the proposal team to create quality cost estimates with data driven basis of estimate rationale.
Estimate locking	Lock the estimate at specific levels to work exclusively on a specific WBS element or the entire estimate. Other users can still view data while estimates are locked.

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Easy to use grid view similar to Excel to enter data with built-in hierarchical structure to view the data at summary, intermediate, and detail levels	Estimators can quickly enter their data or view their data using a familiar user interface. They can collapse or expand the WBS hierarchy as needed, change the order of the columns, hide or show columns, or sort and filter the data in the grid view just like they do in Excel.
Enter estimates in hours, full time equivalents (FTEs), or direct cost	Estimate in hours and BOEMax calculates the FTE numbers and direct cost. Estimate in FTE and BOEMax calculates hours and direct costs. The assigned rate structure automatically calculates the applicable indirect costs to determine total costs.
Full pricing capability	Build simple or complex rate structures to match proposal needs. Use the rate structures to build cost rules into labor categories or resources to determine the calculated results from user entered values such as labor hours, bill of material quantities, or material cost.
Cost and price modeling, create an unlimited number of rate structures	Model costs with direct costs, indirect costs, and fees. Use resource codes for cost pool reporting and add effective dates with escalation. Create alternate rate structures to model different pricing scenarios.
Bi-directional integration with Oracle Primavera P6 or Microsoft Project	Estimate the duration of tasks and resource requirements in BOEMax, write the data out to the schedule tool, have schedulers build the network schedule task relationships to determine the proper time phasing, and pull the data back in to establish pricing in alignment with the schedule task dates.
Rich text documentation and reporting, content management and document management	Create documents with or without templates. This can include information such as the SOW, basis of estimate rationale, risks, and assumptions. BOEMax includes the documentation with the cost estimate data. The estimators determine the level of detail where they want to enter their rich text documentation.
Document versioning	Enable document versioning as needed. This leverages capability similar to MS Word to turn on change management and red lining. Also tracks the author who made the changes.
Broad range of estimate methodologies including bottom up, expert judgment, travel, material, analogous, multiplier, and parametric	BOEMax includes a standard travel form for BOE details as well as material type methodology for BOM quantities and unit pricing. Estimators can use the BOEMax search function to locate historical estimates or actual costs to create analogous estimates. They can also build their own equations with the multiplier method or build historical data to generate cost estimating relationships (CERs).
Easily incorporate subcontractor or supplier cost estimate data with user access controls	Proposal teams can create a data import template for subcontractors or suppliers to provide data they need for the proposal. A common format eliminates time wasted on translating or transforming the data from a supplier. Or, create WBS specific data views in BOEMax for the subcontractor to enter their data. Each subcontractor can access and view just the WBS elements they are responsible for.

Feature	Notes
Use the cost estimate data as the basis for the performance measurement baseline (PMB) budget data after contract award	Quickly import the time phased cost estimate data into EVMax, the companion software tool to BOEMax, to manage project execution. BOEMax and EVMax share the built-in workflow process to manage changes.

### Scenario Analysis

Feature	Notes
Complete versioning capability, create an unlimited number of versions	Create a “snapshot” of the proposal at any time and create as many versions as needed. Proposal teams can easily compare versions or restore a version to be the live version. Versions can also be locked.
Perform global updates using filters and similar Excel type functions	Create shortcuts to quickly make batch data updates and analyze the results. For example, replace all in-house mechanical engineers with outsourced mechanical engineers to evaluate the price impact, or reduce budgeted hours by 10% in WBS 1.1.
Project version reporting	Compare versions at any level of the proposal data structures. For example, compare labor category by hours and total cost at the project level, as well as at a different WBS levels.

### Reporting

Feature	Notes
Pivot table and ad hoc reports, easy to use report wizard	Create reports at will to address business or analysis needs. These reports are easy to configure and once they are created, they can be saved as a reusable template.
Built-in standard cost summary and cost volume reports to comply with FAR 15.408, Table 15-2 requirements with full top down and bottom up traceability to support internal and customer audits	<p>BOEMax produces a number of different reports out of the box to meet the FAR/DFARS requirements. This includes the:</p> <ol style="list-style-type: none"> <li>1. High level element of cost report showing labor cost by cost pool, subcontractor cost, material cost, travel cost, and other direct costs (ODC).</li> <li>2. Similar report to number 1 broken out by labor category with hours and rates by year or period of performance.</li> <li>3. Travel detail report.</li> <li>4. Consolidated bill of material report.</li> <li>5. Supplier analysis report.</li> <li>6. Report showing subcontractor costs in descending order.</li> </ol> <p>All of these reports have “in cell” formulas and are fully traceable so proposal team members, the customer, and auditors can verify the cost estimate details.</p>
Built-in subcontractor or supplier basis of estimate reports	This report is included in the cost summary report and can be produced as a separate report. Helps the proposal team to

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	keep track of supplier material quotes, the basis for the pricing such as a catalog, sole source, competitive, or GSA schedule, as well as the status of supplier evaluation and estimated completion date.
Rate reports by element of cost categories	Create labor category and subcontractor rate reports by period and show indirect rates as necessary.
Combine time phased data and documentation in one report	Produce a variety of reports using the estimate data structures such as the WBS as the framework for the time phased cost data and include the desired rich text documentation. For example, an estimator could produce a report with WBS header detail, estimate data by labor category and period along with basis of estimate rationale, risks, and assumptions rich text documentation. Proposal teams can format these reports to match project specific, internal management, or customer needs.
Single project, multi-project, or enterprise level portfolio analysis reporting	Define project groups to produce a variety of reports for additional analysis. For example, group projects by product line, business unit, customers, or the entire company. Use the report wizard to create reporting templates for corporate and financial users to perform project or program portfolio analysis and manage staffing needs across projects.

### Workflow, Proposal Management

Feature	Notes
Proposal management	With the built-in workflow process, the proposal manager can create a framework to organize the proposal team, define roles, establish standard basis of estimate forms for the data, route specific work elements to the person responsible for developing or approving the cost estimate, and track progress. The entire proposal team has complete visibility into where things are in the proposal development process.
Establish standard workflow forms	Implement standard forms to ensure proposal teams include the expected basis of estimate content. These forms include a summary page for approval signatures along with the detail time phased data automatically populated from the BOEMax database.
Define workflow user roles	Proposal managers can use the workflow process to help them define the proposal team roles and responsibilities. They can then assign the roles to specific team members.
Establish workflow routing rules and workflow queues with electronic signature signoff	Proposal managers can set up the routing rules or handoffs between team members. They can route specific work elements to a team member to develop the cost estimate and then route the cost estimate through various approval levels. This reduces processing time because each person

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	knows what is in their work queue and who is responsible for what.
Transaction audit trail and versioning	The detail level changes are automatically captured in the database. The entire proposal team has a complete audit trail of how the cost estimate was developed and can trace who did what to the data for full transparency.