

## Process Phase: Planning

### Setting Up Project Architecture

Feature	Notes
Set up as many user defined fields as necessary to customize project codes and reports	If your business specific code or field does not exist in our system, create it! Custom or user defined fields automatically show up as parameters in reporting.
Create or import Bill of Material Detail	Bill of Material can be created manually or imported into our system. If there is a need to create a custom field, again simply create it. An example from a recent customer is Spare Quantities.
Import from MS Excel	Companies often import from Excel to create rate and resource files during system configuration and setup
Security by Project	Users are set up and configured, and then associated with security roles. This determines which projects they have access to and what they can do within those projects.
Build WBS	Build WBS manually within the system, import from Excel or import from common scheduling tools like Primavera or MS Project
Import, Parse and Map Statement of Work Requirements	BOEMax has the capability to parse a statement of work document into a code structure provided the document is smartly structured. Once these codes are parsed, they can then be mapped to the WBS to create proper estimating guidance.
Set up Workflow Forms and Routing Rules	ProjStream can assist you in creating your process framework, enabling electronic approvals and a data trail associated with workflow signoff.
Create document templates	Create rich text templates to enable repeatable documentation structure for items like basis of estimate, risks and assumptions.
Cost and Price Modeling	Model Costs with direct costs, indirects and fees, add resource codes for cost pool reporting, add effective dates with escalation as necessary

## Process Phase: Estimating

Feature	Notes
Grid View Entry Allows Ease of Use	Allows Estimators to View the Entire Project and enter estimates into any WBS from the same screen
Estimate in Hours, Manpower or Dollars	Estimating in Hours will calculate the manpower or FTE numbers and dollars, Estimating in Manpower or FTE will calculate hours and dollars, etc.
Estimate Methodologies include Bottom's Up or SME (Subject Matter Expert) Judgment, Travel, Material, Analogous, Multiplier and Parametric	Standard Travel Form included for BOE Detail, Material Type Methodology to include BOM quantities and unit pricing, BOE search allows pulling from other estimates and actuals to create analogous estimates, build your own equations with the Multiplier method, and build historical data to generate CER's
Estimating Process Libraries	Build a repeatable estimating library – the process is like a container or folder of work that builds estimate templates

	according to your process and relationships of labor and nonlabor resources. Quantities and Bill of Material information can be established as part of these relationships. The relationships (number of hours and dollars) can be changed as a one-off after the template is assigned to the project.
Bi-Directional Integration with MS Project and Primavera	Estimate the Duration of estimates within BOEMax, write the data out to the schedule, have schedulers build schedule relationships that establish proper time-phasing and pull that data back in to establish pricing according to new schedule dates
Rich Text Documentation and Reporting, Content Management and Document Management	Create Documents with or without rich text templates for repeatable use. This could include information such as basis of estimate, risk, assumptions, statement of work, etc.
Document Versioning	The superuser has the ability to turn on document versioning, this leverages the MS Word like capability to turn on change management and redlining, along with the author that made the changes
Workflow Queues and Management	Use workflow to manage the estimating process, work items show up in the users queue until they take the required action, then the item moves to the next responsible person
Estimate Locking	Lock the estimate at specific levels to work exclusively on a portion or the entire estimate. Other users can still view data while estimates are locked.
Full Pricing Capability	Build Cost Rules into your labor categories or resources so if you enter labor hours the output can be full labor cost and if you put in bill of material quantities or material dollars, the output is material or nonlabor cost.

### Process Phase: What-if Analysis / Iteration / Options

Feature	Notes
Complete Versioning Capability	Create a "snapshot" of the proposal at any point in time. Create an infinite number of versions. Compare any version to any other version. Restore versions to be live version as necessary.
Global Updates	Logical Update Capabilities using filters and update statements that create shortcuts to batch data updates, assisting in quicker what-if analysis. An example of this might be replace all in house mechanical engineers with outsourced mechanical engineers, what is the price impact, or reduce budgeted hours by 10% in WBS 1.1.
Project Version Reporting	Compare versions of the project proposal at any level of the proposal. For example compare labor category by hours and total cost at the project level, as well as at a WBS level.

## Process Phase: Reporting

Feature	Notes
Cost Summary or “Cost Volume” Reporting	Produces a number of different reports out of the box to meet the FAR/DFARS requirements: 1) High Level Element of Cost Report showing Labor Cost by Cost Pool, Subcontractor Cost, Material Cost, Travel Cost, ODC’s etc. 2) Similar Report to number 1 but broken out by labor category with hours and rates by year or period of performance 3) Travel Detail Report 4) Consolidated Bill of Material Report 5) Supplier Analysis Report 6) Report Showing Subcontractor Costs in Descending Order. All of these reports have “in Cell” Formulas and are fully traceable by auditors and your customer.
Pivot Reporting (Ad Hoc)	Set up any report necessary to answer whatever question you need answered. These reports are easy to configure by the end user and once they are created they can be saved as templates so they are completely reusable.
Bill of Material Assignment “Export” Reports and Import Templates	Export Bill of Material Data and where it is assigned in the Project, update the information and reimport using templates. This is a big time saver.
Rate Reports	Create Labor category and subcontractor rate reports by period and show indirect rates as necessary
Project Data and Documentation Reports (Project Management Information System)	Show WBS Header Detail, Estimate data by labor category and period, documentation data to include basis of estimates, assumptions, statement of work, risks, etc. Format these reports exactly as you and your stakeholders need them.