



Getting Started Manual



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introduction

Expert Project is a real time tool that gives you full control of all the financial functions of your project. Expert Project gives you instant access to your project's information when and where you need it. Expert Project also makes sure that you are getting paid what you should be and helps to ensure that what you do is costing as little as possible. Expert Project was created by project managers and is supported by Pronamics' 24 hour, 7 day global technical assistance.

Expert Project's comprehensive list of features allows it to be used for projects of all levels of complexity. Expert Project is fully customisable and enables you to compare your project's estimated budget against actual costs and to forecast your estimate to complete. Expert Project also offers the ability to produce progress claims, estimate variations, record extensions of time and has tools for resource, inventory and standing order management. You can perform full earned value (C/SPI) analysis, cash flow and detailed cost analysis. Expert Project also contains alert functions for vital actions and performance indicator tools showing as much detail as you demand.

Expert Project will become an invaluable project management tool and is easily integrated throughout your organisation. Expert Project contains multi-user network capabilities, the ability to split a project (allowing it to be worked on in different locations), plus the ability to copy and paste data both to and from other standard Windows® applications.

Expert Project contains outstanding reporting functions including: print preview on all reports, 3-dimensional interactive graphs and company name and logo fields to add a personal touch. Expert Project generates reports that are clear, concise, accurate and professional.

Expert Project is easy to use and navigate. Our developers have incorporated thoughtful design with intuitive functions and a comprehensive interactive help system. This ensures that new users can become familiar with the program quickly and easily. Pronamics also runs regular introductory training courses using professional computer training facilities. Pronamics provides 24 hour, 7 day product support and regular application updates to our users.

Expert Project does not require you to purchase any add-on modules. Your purchase includes the complete suite of features as standard. All product updates (including new releases) and support for the first 12 months are included in your purchase and our ongoing maintenance subscriptions deliver great value.

Pronamics is proud of the relationship that we share with our customers. These relationships mean that we are continually working to upgrade Expert Project in response to feedback from our clients.

We look forward to working with you.



expert project benefits

Pronamics has been listening to our clients, which means Expert Project contains not only the features that you need, but also what you want. Pronamics has developed one of the most comprehensive and easy to use project management packages available.

Below are some of the benefits of Expert Project. On the next page is a summary of the key features of Expert Project. Please take some time to review the benefits and features on offer and compare them with your current system.

- Real time project management. You have instant access to all of your project's actual cost information for comparison with your budget and forecasts.
- Increased efficiency and accuracy by automating regular tasks and calculations.
- Consistency for recording information and reporting across your organisation.
- Flexibility. Expert Project is suitable for any industry that needs to manage project costs.
- Multiple user access. Users can work on the same project at the same time.
- A standard Windows look and feel.
- Thoughtful design, intuitive layout and functionality.
- Easy transfer of data to and from other standard Windows applications, such as Microsoft Excel®.
- Powerful calculation methods for analysing your project's performance from an individual cost record level, through to analysis of a group of projects.
- No expensive optional add-on modules to purchase. Expert Project comes with the complete suite of features as standard; applicable for all projects from the quick and simple, to the most complex.
- 24 hour product support provided by professional staff with a direct involvement in the development of the product.
- Introductory training is included in the purchase price.
- All product updates (even major releases) are included with the continuation of product support.



main feature areas

Below is a list of the main features and their availability to users of Expert Project.

feature	cost to complete	expert project express	expert project
project items and navigation			
Workflow	●	●	●
Contract Items		●	●
Overhead Items		●	●
Variations		●	●
Sundries			●
project progress and cost recording			
Progress Over Time			●
Progress Claim		●	●
Non Client Progress Claim			●
Time Sheet		●	●
Cost Explorer		●	●
Resource Explorer	●	●	●
Cost Codes	●	●	●
Extensions of Time		●	●
project analysis and reporting			
Project Status		●	●
Budget Performance	●	●	●
Detail Cost Comparison		○	●
Accrued-Committed Costs		○	●
Earned Value	●	●	●
Other Analysis Tools		○	●
Reports	●	●	●
advanced analysis			
Subcontractor Management			●
Inventory			●
Standing Orders			●
Quality Assurance			●
Tracking			●
Information Management/Contacts			●

○ Basic ● Advanced



general overview

Expert Project is a real time project financial management system. This Getting Started guide is designed to give you an overview of the main features of Expert Project.

Expert Project allows project managers to manage their project costs from the job site rather than having to wait for cost information to be relayed from head office. By having access to this information in real time, you are able to make required adjustments far more quickly than is often possible by using traditional accounting systems.

Expert Project enables you to record daily or periodic resource usage which gives you an instant estimate of the costs incurred on the project for that day. By logging the progress for each item, variation and sundry item, the project's actual costs may be compared with the project's budget for analysis of the project's performance.

Expert Project has been designed so that it can work in conjunction with Pronamics' Expert Estimation software. When you first set up a project with Expert Project, all of your tender estimate and budget information can be imported directly from Expert Estimation or from standard Windows-based software via the clipboard. You can also directly enter estimate and budget data.



Once the tender estimate and budget data have been entered, a wide variety of options are available. These options include:

Option	Description
Resource Timesheet	The Resource Timesheet allows you to record the actual costs incurred for that day (or any other specified period) based on the resources actually used in that period.
Cost Explorer	The Cost Explorer allows you to enter any costs that are additional to those entered into the Resource Timesheet (for example, Overhead (indirect) Costs for telephone or office rental). The Cost Explorer also allows you to enter a value of costs to date for a cost code and reconcile your invoices to confirm your cost records.
Progress	Item, Variation and Sundry Progress is entered periodically so that a comparison can be made between your actual and budget costs. This progress may also be used as the basis for the quantities to claim in progress claims.
Variations	Variations can be quickly and easily created and estimated by using the Variation Explorer window. Expert Project uses the same Cost Estimate window for estimating variations as Expert Estimation.
Progress Claims	Expert Project can generate your Progress Claims automatically based on the quantity of each contract item actually performed. You can also alter the quantities to be claimed (without affecting your progress data) as and when you require.
Cost to Complete	The Cost to Complete for each cost code can be calculated automatically by using one of the in-built calculation routines or can be estimated from first principals by using the same Cost Estimate window and functionality found in Expert Estimation.
Budget Performance	The Budget Performance window allows users to view project-wide performance. This includes Budgeted and Actual costs as well as forecasting information for each cost code.
Analysis tools	<p>Expert Project provides a wealth of analysis tools to assist the project manager's knowledge of how the project is performing at any point in time. Analysis Tools range from the Project Status window, which provides an overview of your project's Key Performance Indicators (KPIs), to the Detailed Cost Comparison for analysing how each Cost Code is performing.</p> <p>The Earned Value Analysis calculation provides Cost/Schedule Performance Index information for comparing your project's Budgeted Cost of Work Scheduled (BCWS), Budgeted Cost of Work Performed (BCWP) and Actual Cost of Work Performed (ACWP).</p>
Extensions of Time	Extensions of Time can be quickly and easily created for recording the status of any events that affect the project finish date.
Project Action List	The Project Action List helps to ensure that you never miss an important submission date by reminding you of impending events.



costs process

The following diagrams show how the various parts of Expert Project interact. Note these are simplified diagrams, as most processes within Expert Project interact with each other.

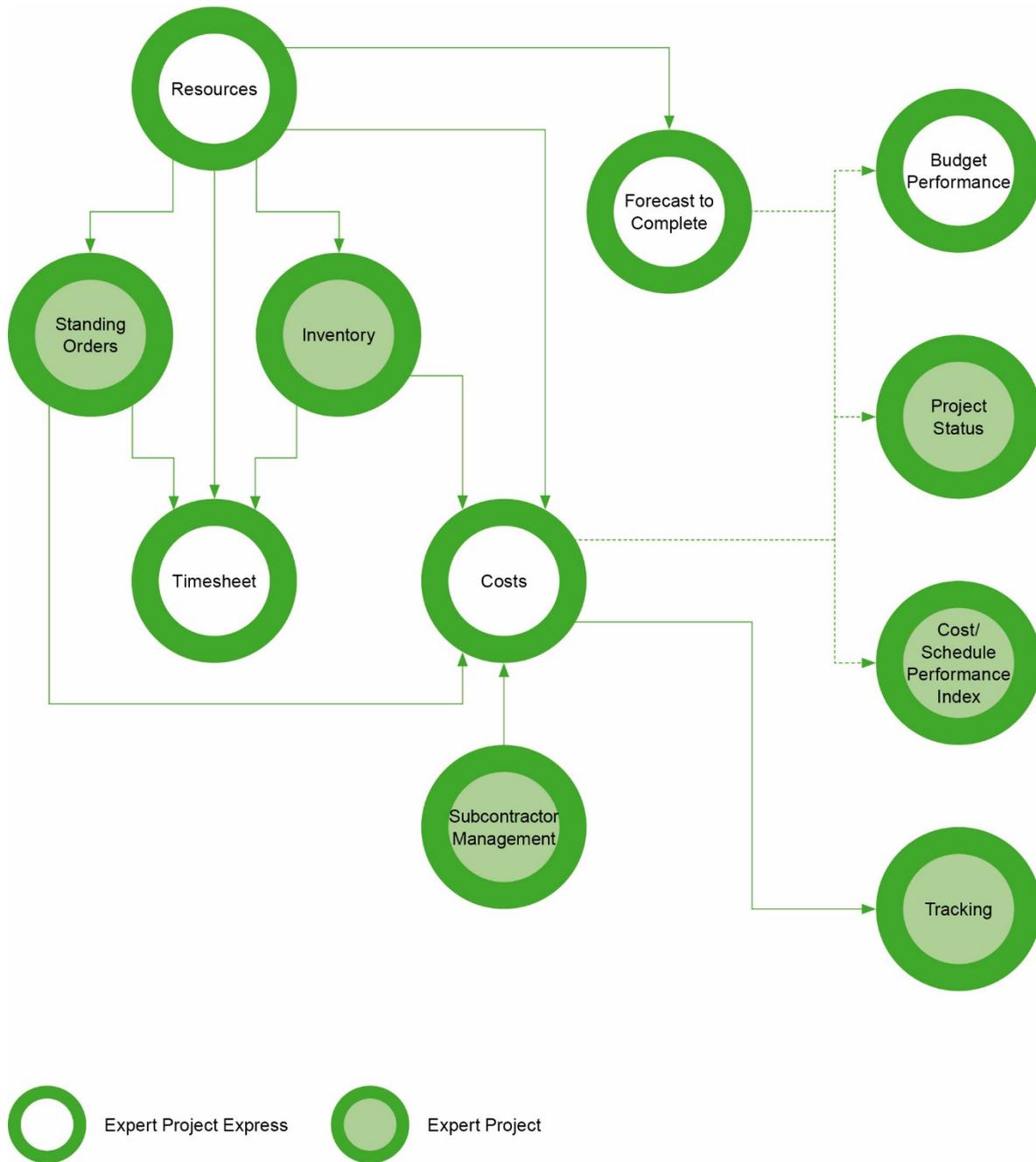


Image 1 – Cost Process Flow



actual progress process

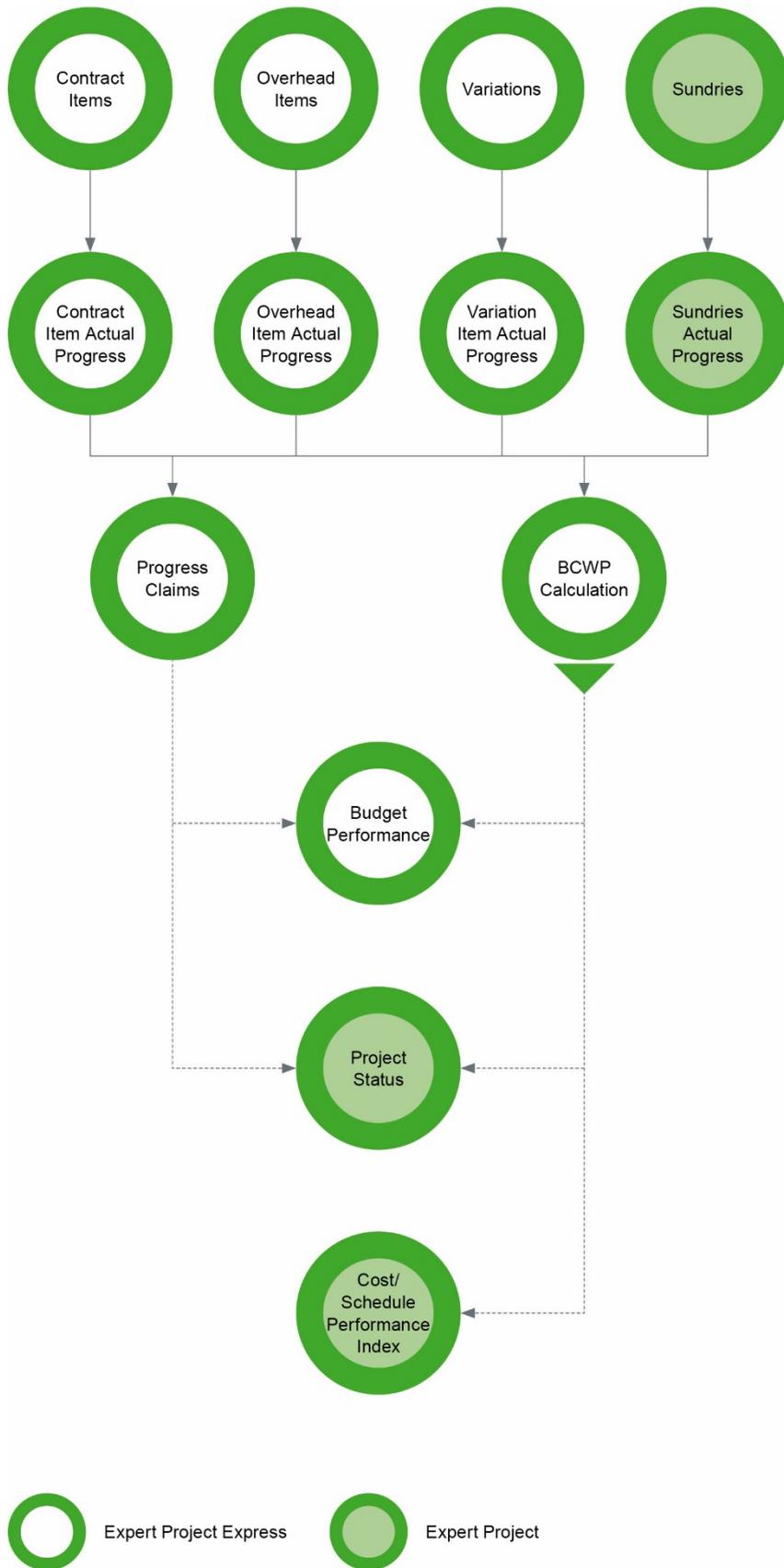


Image 2 – Actual Progress Process Flow



project action list process

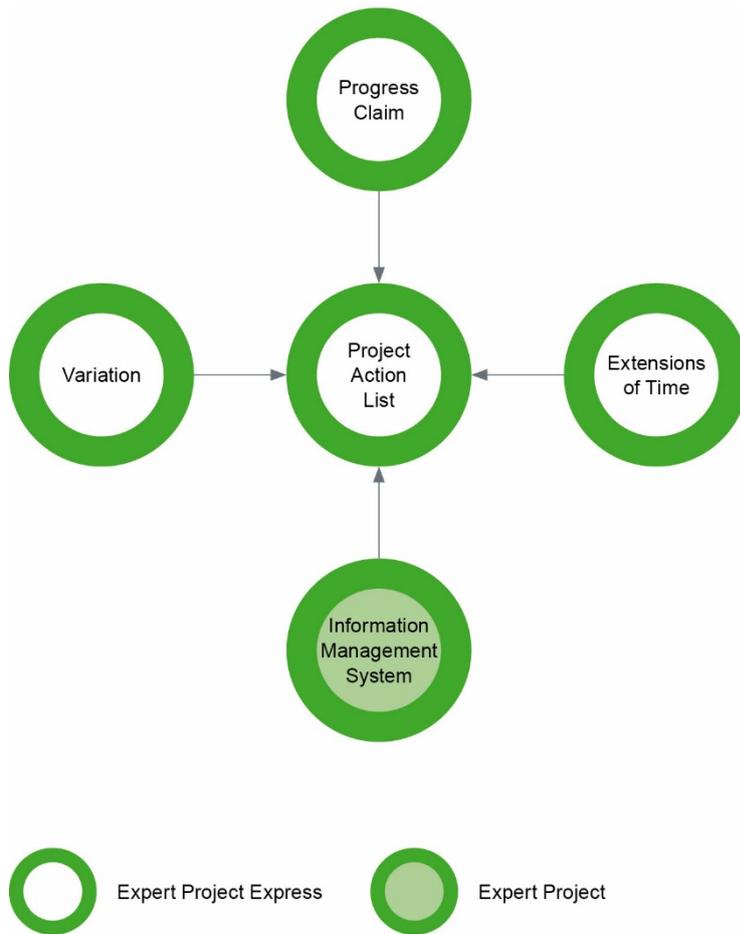


Image 3 – Project Action List Process Flow



before you install

System Requirements

To function effectively, Expert Project requires a computer with the following specifications:

	Minimum	Recommended
CPU	1.5 GHz Processor	2.80 GHz Processor or higher
Memory	2Gb RAM	4Gb RAM
Supported Operating Systems	Windows 7 Windows 8 Windows 8.1 Windows 10 Server 2008 R2 Server 2012 Server 2016	
Screen Resolution	1024x768	1920x1080 or higher
Hard Disk Space	Installation requires 200Mb	Hard Disk Space
Additional Software	Microsoft Excel (for linking of Rates and Defines to Excel and exporting reports to Excel format)	



Note: Calculations in Expert Project are completed in a single thread. As such, multicore processors will not increase performance within the program. However, additional cores may improve overall system performance while using Expert Project.



installation

Installation Instructions

- 1 Click on the Installation icon
- 2 Save the file to your computer
- 3 Once downloaded, run the installer application (Expert Project.msi)



Note: If you would like some extra help installing Expert Project, do not hesitate to call Pronamics at any time on: 07 3481 9626 (+61 7 3481 9626 international) or send an email to support@pronamics.com.au.

Setup

The setup for Expert Project will open.

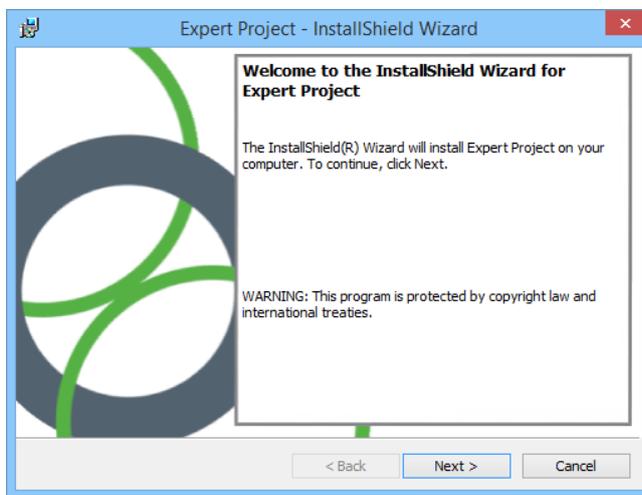


Image 4 – The Expert Project installation window

- 1 Click the Next button
- 2 Please read the **License Agreement** carefully as it contains some very important legal and user information
- 3 To indicate that you agree with the information that you have read in the License Agreement, select I accept the terms in the license agreement, and click the Next button



Image 5 – The Expert Project End User Licence Agreement window



- Click **Next** to accept the default folder, or click the **Change** button to select a different folder

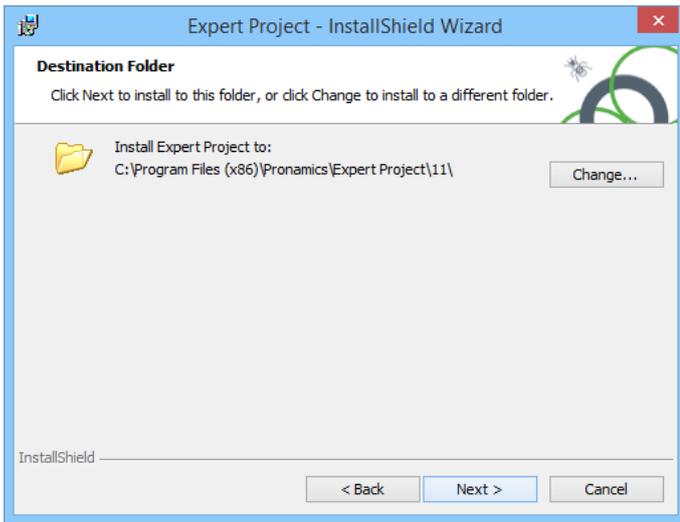


Image 6 – The Destination Folder allows users to specify where the program files are saved

- Click the **Install** button to start copying files

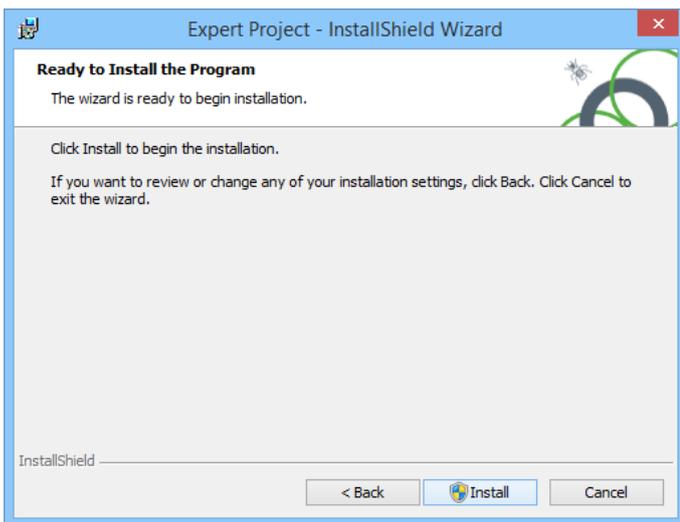


Image 7 – The Ready to install window will start the installation of the program files

Once the setup is finished you are then able to start Expert Project.



starting expert project

Launching Program

The application can be opened from your Windows Desktop by double-clicking on the Expert Project icon.



Expert Project may also be opened from the **Start** menu.

By default, no projects will be open at this stage. To commence work, you will need to either open an existing project or create a new project.

A labelled diagram of the main areas of the Expert Project screen is shown below.

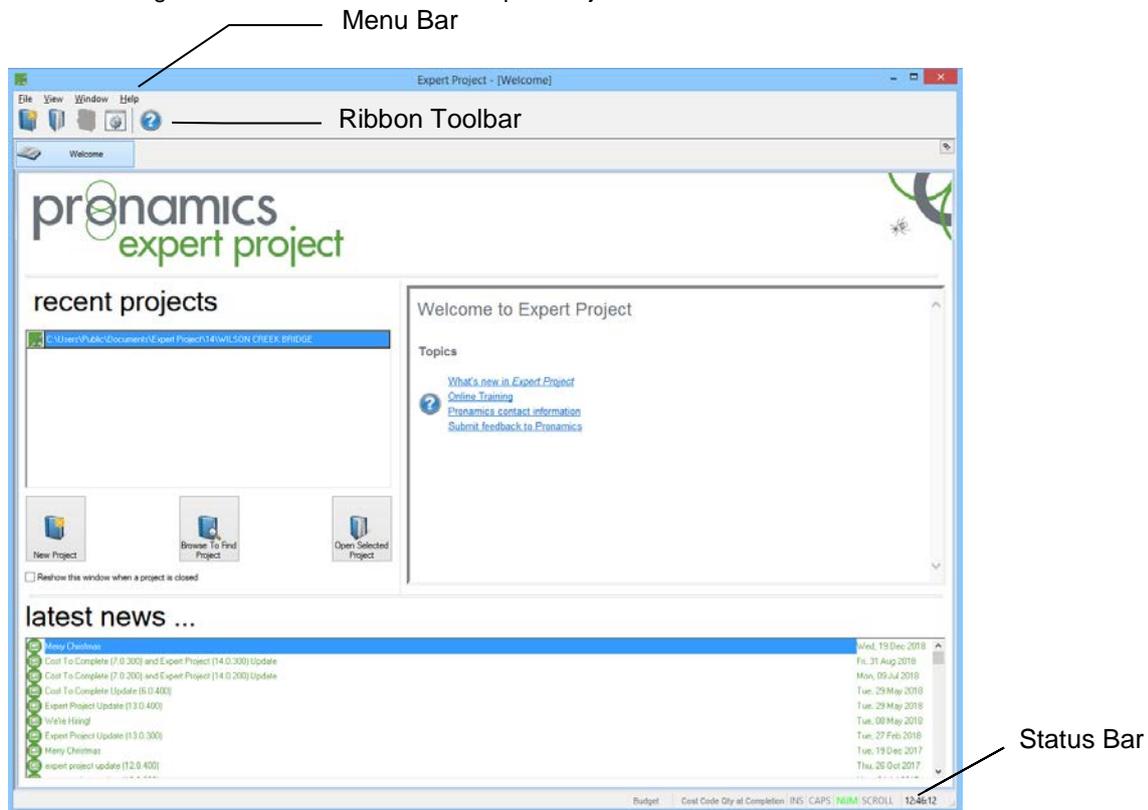


Image 8 – The Welcome window is shown in front of the basic Expert Project screen.

Column Title	Description
Menu Bar	Most commands in Expert Project can be accessed from the menu bar. If a command is not in the menu, it could possibly be available from the context menu.
Toolbar	Buttons will appear on the toolbar for the user to gain quick access to some of the common windows and operations.



Column Title	Description
Taskbar	A button will be created for all open windows (apart from popup dialog windows). Switching from window to window is as easy as clicking on the appropriate button. Note that the Taskbar is an option. The Taskbar can be turned on and off by using the Use Taskbar to manage windows option in the General section of the Options window.
Status Bar	The status bar shows a brief description of menu commands when the mouse hovers over them. Other copy and paste status messages may also appear.
Context Menu (not shown)	The context menu is accessed by right-mouse clicking on a particular area of the screen. The menu that appears is dependent on which part of the screen was clicked. The context menus are very powerful and contain a number of commands which are not available anywhere else.

Setup for First Time Use

After Expert Project starts, you will be asked to enter a License Holder name (this is the name that will appear at the footer of your reports).

Press the **OK** button once you are satisfied with the settings on this window.

Image 9 –The Setup for First Time Use window allows you to set a username that will be recorded.



Note: Help is available for this and any other window in Expert Project by pressing the F1 key.



expert project help

Expert Project's Help system is extremely comprehensive and is designed to take the place of a user manual. The Help system is automatically updated with your regular program updates. You should refer to the Help system as a first step for any assistance that you require.

Starting Help

To open the Savvy help system, select **Help** and **Context Help**. Alternatively click the  button on the toolbar or use the keyboard shortcut F1.

The Expert Project Help window shown in Image is displayed.



Image 10 –The Savvy Help Window

You can get help for any menu command or directly within the feature you are using.

The Help system operates as an unrestricted popup window within Expert Project and you can move it to another display if you require. The help window will remember the last location that it was opened, allowing you to have a set location that the help file will sit while you work within Expert Project.

Navigating Savvy help within Expert Project is very simple as the window will refresh and display the relevant information for the window that you have opened.

Context Sensitive Help

Clicking the  Help icon in a window of Expert Project will take you to Help specifically about the area of the program you are currently viewing. Pressing F1 from any location will also open context sensitive help.

While the Savvy Help window is open changing windows within Expert Project will update the Savvy Help window and display the information relevant to that window.

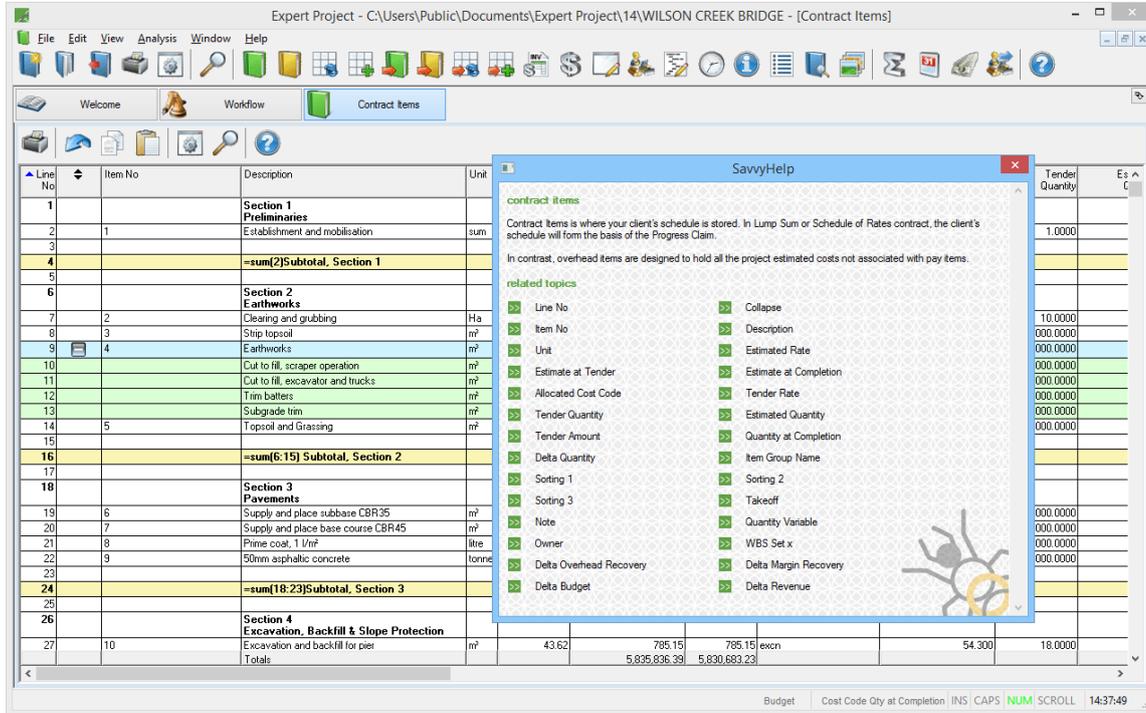


Image 11 –The Savvy Help Window Showing Context Sensitive information.



setting options

There are numerous ways to fine-tune Expert Project to suit your own preferences and requirements.

1 From the **File** menu, select **Options**

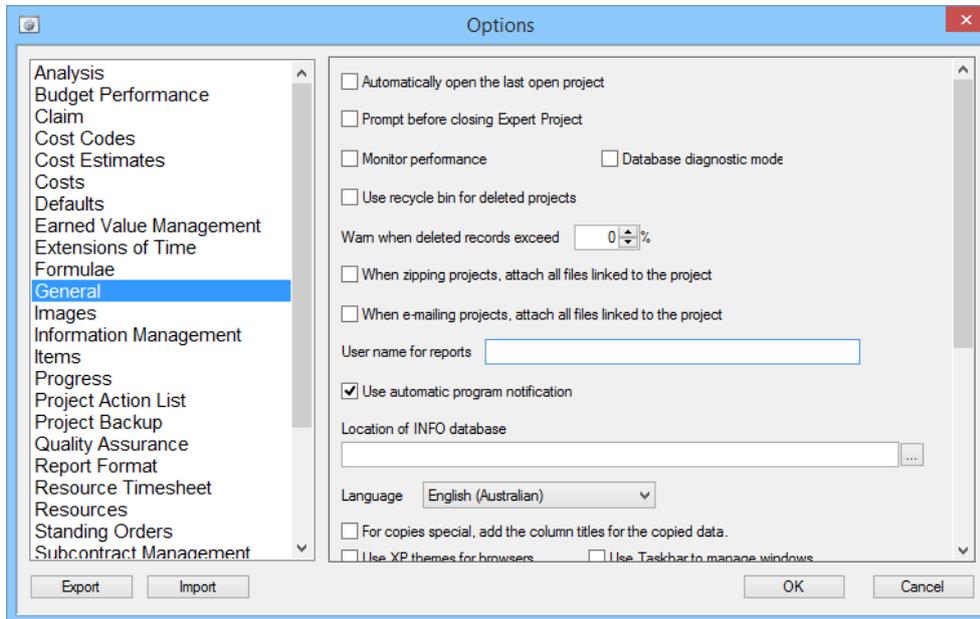


Image 12 – The Options window, showing the General Options

2 For **Help** or detailed information about configuring Expert Project, press the F1 key after opening the **Options** window



Note: You will be able to use Expert Project with the default settings. This should suit most users.



working with projects

Opening an Existing Project

1 From the File menu, select **Open Project** or press the  icon on the toolbar

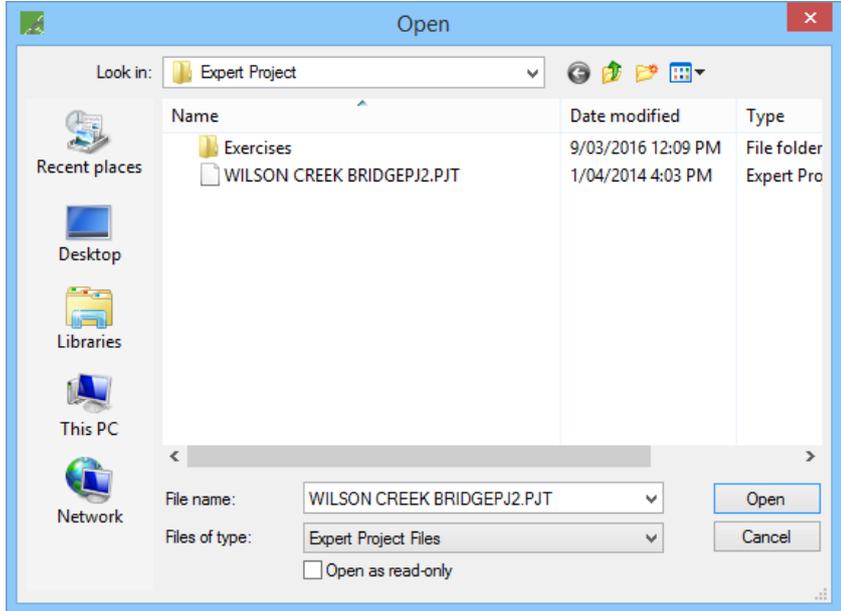


Image 13 – Open an Existing Project



Note: Each Expert Project project consists of a magnitude of files. Only the header (PJ2.PJT) file for each project is displayed in the Open window.

Renaming, moving, copying or deleting files from this window will make the project unusable. Only rename, move, copy or delete projects using the functions in the File menu under the Project Utilities option.

- 2 Select the project file you want to open
- 3 Click the **Open** button

When a project is opened, the title bar of Expert Project will display the file name and the buttons on the toolbar will change. The diagram on the following page is indicative of the updated screen.

If enabled, the **Project Action List** will also open (to check if this option is enabled see **File, Options, Project Action List**).

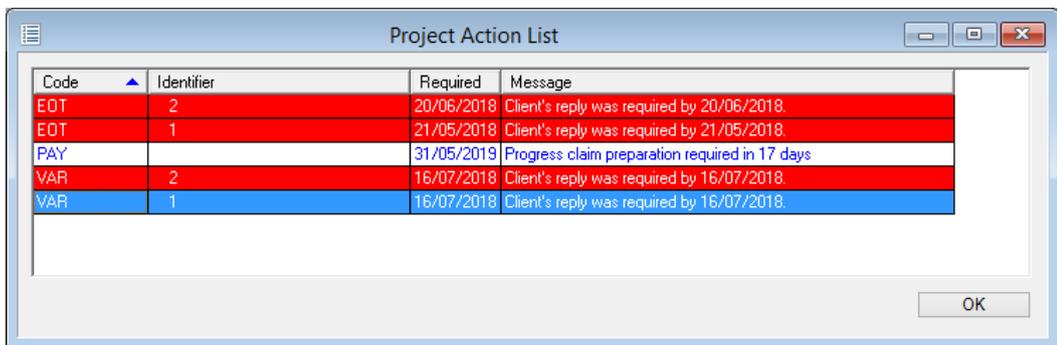


Image 14 – The Project Action List



Creating a New Project

- 1 From the **File** menu, select **New** or press the  icon on the toolbar

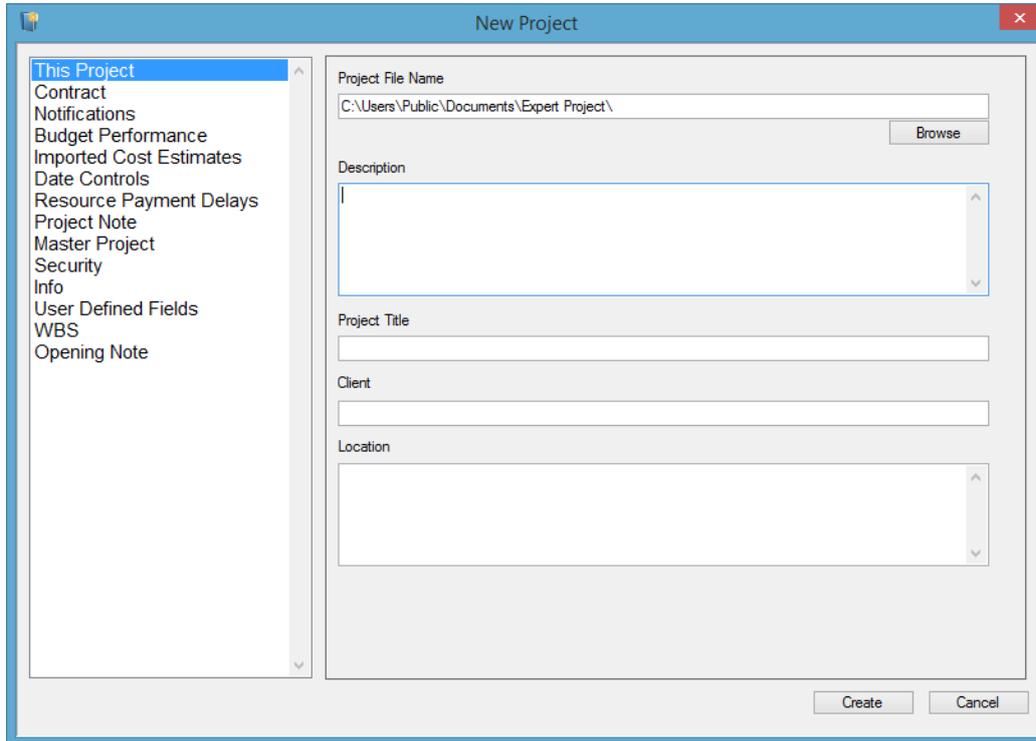


Image 15 – New Project: The Project Tab

- 2 Click the **Browse** button to locate the folder in which you want to save your new project
- 3 Type in the file name and click the **Save** button. The full path will be transferred to the Project file name field



Note: Do not select an existing project file from this window. Selecting an existing project could overwrite the project.

Enter a new project name in the File name field.

Project Details

You can set a variety of details for a new project. You can alter these details at any time after the project has been created, with the exception of the Master project, which cannot be changed after the project has been created. For more information on Master projects see page 27.



Contract tab

The **Contract** tab allows you to set a Lump Sum, Schedule of Rates or Alliance/Cost Plus contract type. You can also enter project durations as well as start and finish dates.

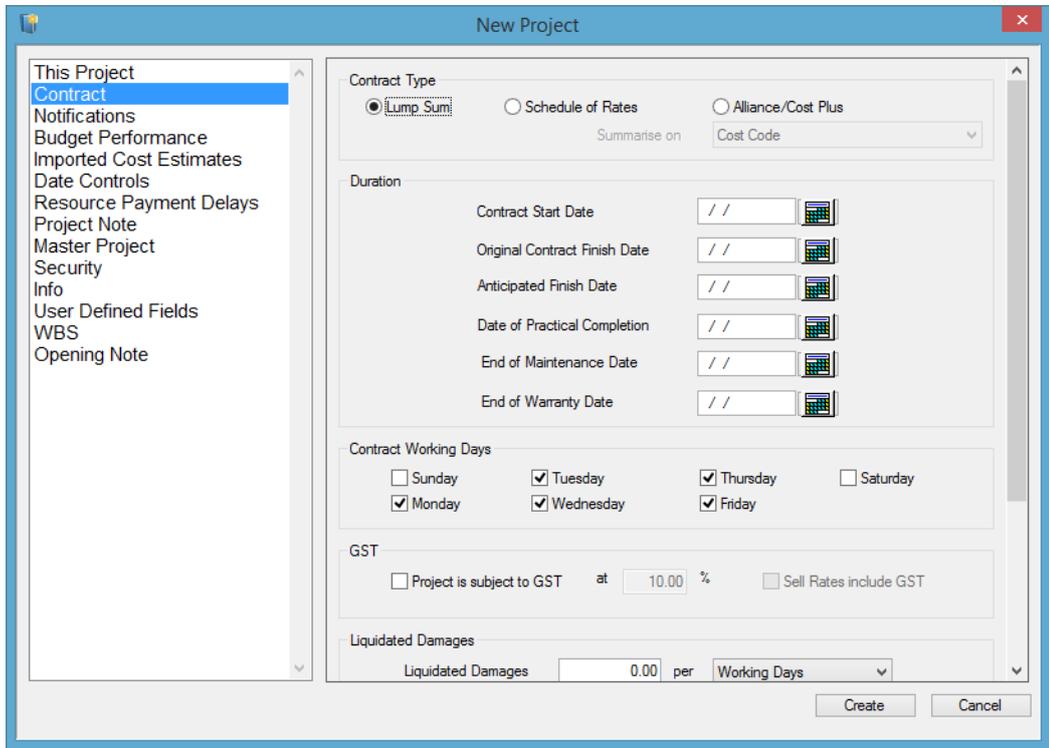


Image 16 – New Project: Contract Tab

You must set the Contract Start, Finish and Anticipated Finish dates. The Original Contract Finish Date is the date by which you must finish the contract. The Anticipated Finish Date is your expected finish date, which could be earlier or later than your Original Contract Finish Date.



Notifications tab

The values shown on the **Notifications** tab represent the maximum number of calendar days between when an event occurs and when an action is required. The default values for these options can be set in the **File, Options** window.

The screenshot shows the 'New Project' dialog box with the 'Notifications' tab selected. The left sidebar lists various project settings, with 'Notifications' highlighted. The main area contains the following settings:

- Notification period for Extensions of Time: 14 calendar days
- Client's period for reply to Extensions of Time claims: 14 calendar days
- Notification period for identification of Variations: 14 calendar days
- Client's reply period for Variations: 14 calendar days
- Time for approval of Progress Claim: 14 calendar days
- Time for payment of Progress Claim: 14 calendar days

The 'Progress Claims' section is expanded, showing two radio button options:

- Progress Claims are made on specific calendar days
- Progress Claims are made on specific dates

Below these options, there is a text box with the label 'Progress claims prepared on calendar day (negative numbers signify calendar days prior to the end of the month)' and a value of 0.

At the bottom right of the dialog, there are 'Create' and 'Cancel' buttons.

Image 17 – New Project: Notifications Tab



Note: If the 'Progress claims prepared on day' option is 0, progress claims will always be submitted on the last day of the month. If a number between 1 and 28 is entered, the date entered will be used for progress claims. A negative number represents the number of days prior to the end of the month.



Master Projects tab

A Master project is a template used for creating a new project. During the project creation process, a copy of the template information is copied into this project. The Master project is unaffected by this process. Use Master projects if you are working on projects which are quite similar. Any existing project can be used as a Master.

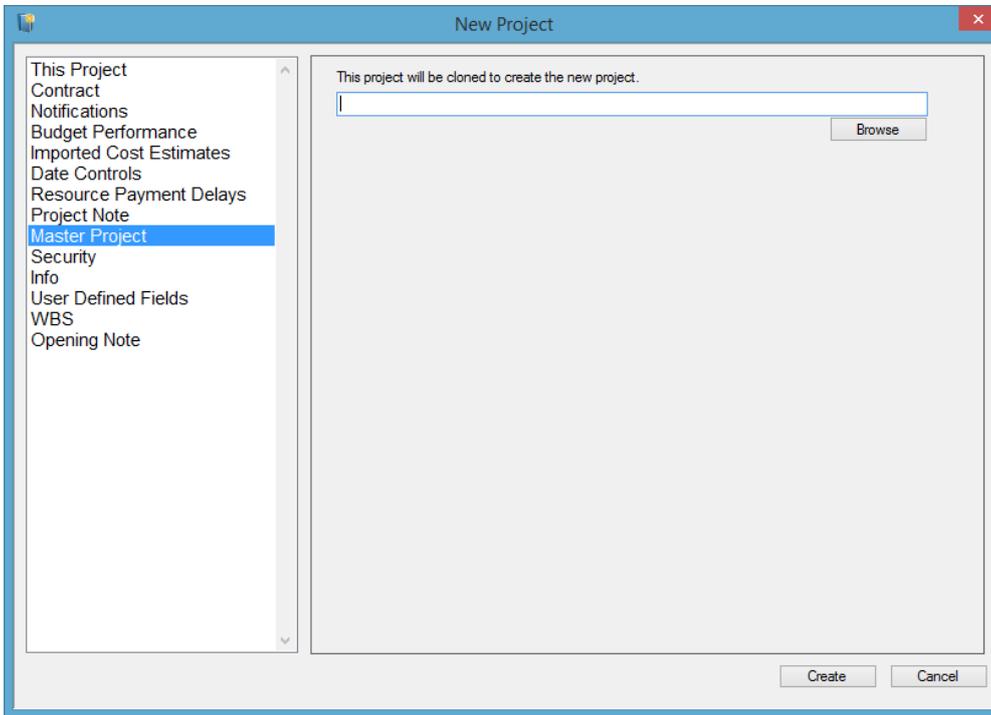


Image 18 – New Project: Master Projects Tab



Note: As the new project will be created based on the Master project, the Master project cannot be changed once the project has been created.



Info tab

The **Info** tab contains user defined fields. The labels for these can be defined in the **Options** window.

On the **Terminology** tab, enter the labels for the fields you wish to retain. These fields will apply for all projects.

The values entered in these fields on the **Info** tab are stored within each project.

- 1 When you have entered all valid information, click the **Create** button to create the project.
- 2 Click the **Yes** button to open the project.
- 3 The project opens with the **Project Action List** displayed.
- 4 Click the **OK** button to close these notices for now.

Closing a Project

- 1 From the **File** menu, select **Close Project** or press the  icon on the toolbar.

The project is closed and you are returned to the default Expert Project window.



Note: If unsaved information exists, you will be prompted to save before the project is closed.

Exiting Expert Project

- 1 To close the current project and exit the application, select Exit from the File menu.

If the **Prompt before closing Expert Project option** in the **General** tab of the **Options** window is checked, you may be prompted to confirm that you want to quit Expert Project.

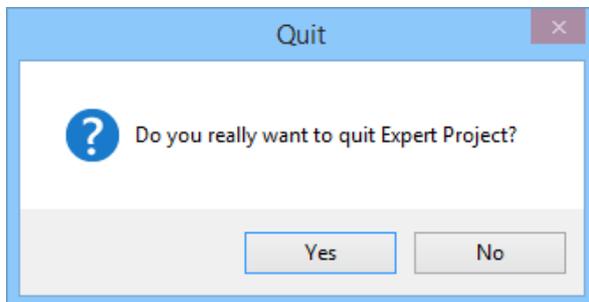


Image 19 – Prompt that will appear when closing Expert Project

- 2 Click **Yes** to exit.

navigating expert project

The information in Expert Project is divided up into a number of main areas. These areas are also called Windows. The most important windows are found on the Toolbar and in the **View** menu. Open a project with the  **Open Project** icon.

The project has opened when the title bar states the name of the project, and the toolbar now displays the full set of buttons, as shown in the diagram below.

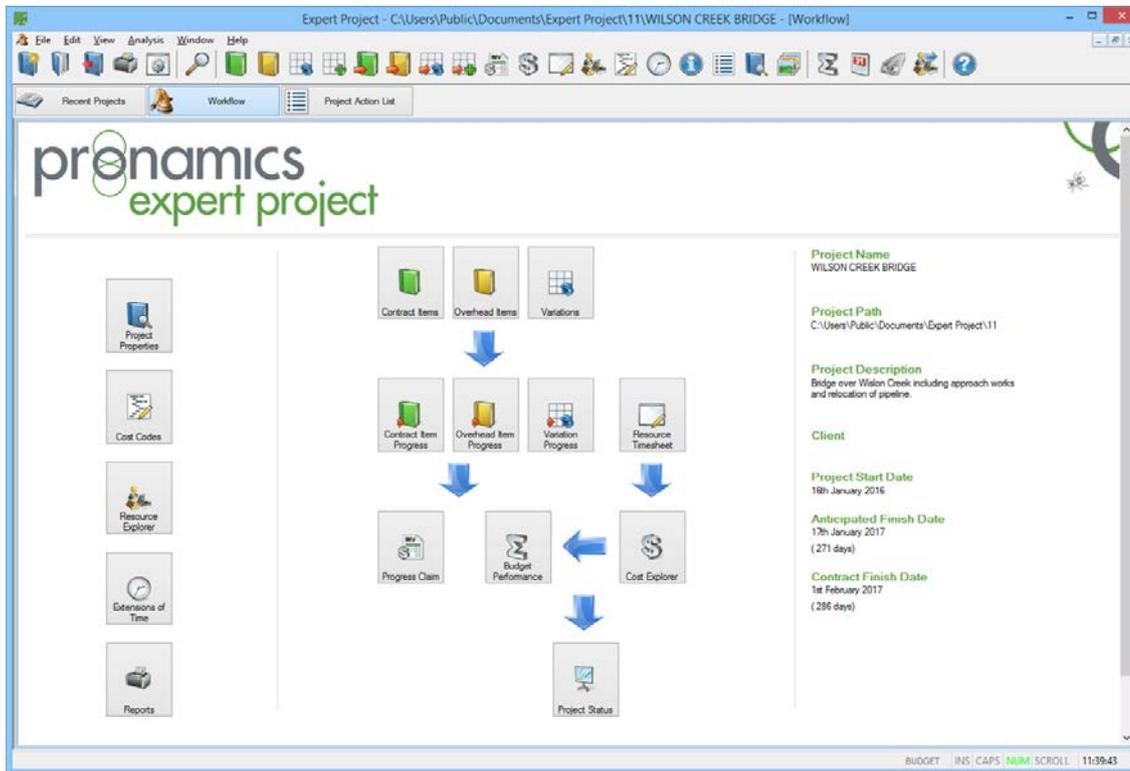


Image 20 – The workflow window



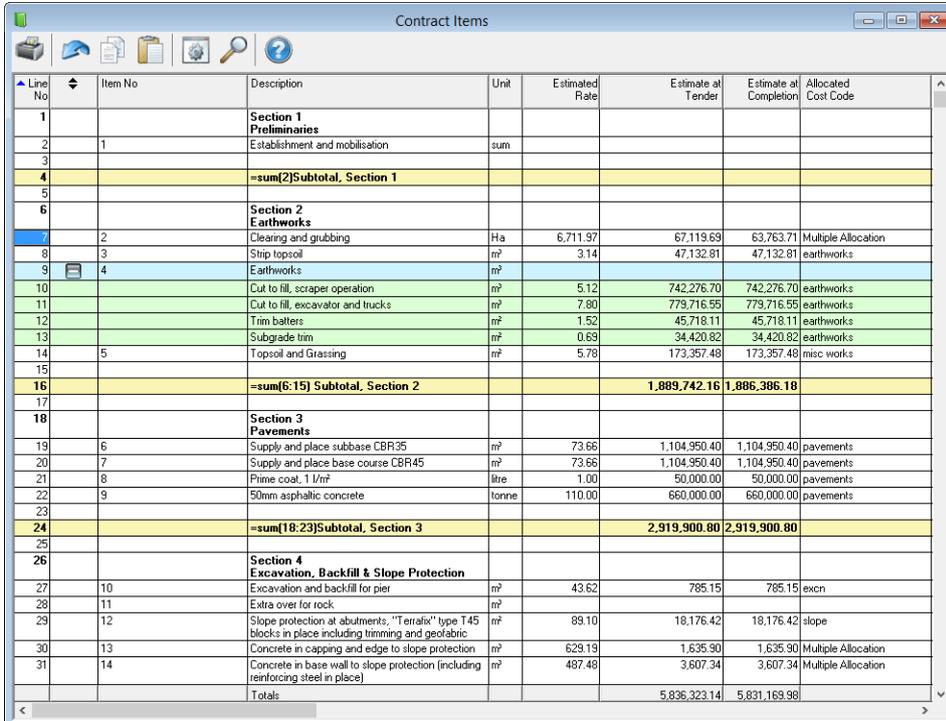
Note: Expert Project allows you to have multiple windows open within the project.



Open Contract Items

- 1 Select the  Contract Items icon.

The **Contract Items** window will open, as shown in the following diagram.



Line No	Item No	Description	Unit	Estimated Rate	Estimate at Tender	Estimate at Completion	Allocated Cost Code
1		Section 1 Preliminaries					
2	1	Establishment and mobilisation	sum				
3							
4		=sum(2)Subtotal, Section 1					
5							
6		Section 2 Earthworks					
7	2	Clearing and grubbing	Ha	6,711.97	67,119.69	63,763.71	Multiple Allocation
8	3	Strip topsoil	m ²	3.14	47,132.81	47,132.81	earthworks
9	4	Earthworks	m ²				
10		Cut to fill, scraper operation	m ²	5.12	742,276.70	742,276.70	earthworks
11		Cut to fill, excavator and trucks	m ²	7.80	779,716.55	779,716.55	earthworks
12		Trim ballers	m ²	1.52	45,718.11	45,718.11	earthworks
13		Subgrade trim	m ²	0.69	34,420.82	34,420.82	earthworks
14	5	Topsoil and Grassing	m ²	5.78	173,357.48	173,357.48	misc works
15							
16		=sum(6:15) Subtotal, Section 2			1,889,742.16	1,886,386.18	
17							
18		Section 3 Pavements					
19	6	Supply and place subbase CBR35	m ²	73.66	1,104,950.40	1,104,950.40	pavements
20	7	Supply and place base course CBR45	m ²	73.66	1,104,950.40	1,104,950.40	pavements
21	8	Prime coat, 1 l/m ²	litre	1.00	50,000.00	50,000.00	pavements
22	9	50mm asphaltic concrete	tonne	110.00	660,000.00	660,000.00	pavements
23							
24		=sum(18:23)Subtotal, Section 3			2,919,900.80	2,919,900.80	
25							
26		Section 4 Excavation, Backfill & Slope Protection					
27	10	Excavation and backfill for pier	m ²	43.62	785.15	785.15	excn
28	11	Extra over for rock	m ²				
29	12	Slope protection at abutments, "Terralis" type T45 blocks in place including trimming and geofabric	m ²	89.10	18,176.42	18,176.42	slope
30	13	Concrete in capping and edge to slope protection	m ²	629.19	1,635.90	1,635.90	Multiple Allocation
31	14	Concrete in base wall to slope protection (including reinforcing steel in place)	m ²	487.48	3,607.34	3,607.34	Multiple Allocation
		Totals			5,836,323.14	5,831,163.98	

Image 21 – The Contract Items window

- 2 Select the  Resource Explorer icon.

The **Resource Explorer** window will open on top of the **Contract Items** window.

To get back to the **Contract Items** window, do not press the button again. Each time you press a button, a new copy of that window will open. Go to the **Window** menu and select the window you want to return to.



Note: Double-clicking a button from the toolbar will open two copies of the window, one of which will be 'locked' disallowing any edits. To prevent this occurring, refrain from double-clicking on any button.



Toolbar Buttons

Common commands can be found on buttons on the toolbar at the top of the Expert Project window. The buttons which will appear on the main toolbar include:

	Creates a new project		Progress Claim
	Opens an existing project		Cost Explorer
	Closes the current project		Resource Timesheet
	Prints reports		Resources
	Options window		Cost Codes
	Finds text in the project		Extension of Time
	Contract Items		Information Management System
	Overhead Items		Project Action List
	Variation Explorer		Project Properties
	Sundry Item Explorer		Images
	Contract Items Progress		Project Budget Performance
	Overhead Items Progress		Calendar
	Variation Items Progress		Cash Flow
	Sundry Items Progress		Resource Flow
			Help

Buttons which are dimmed (greyed out) are unavailable at that time. Most windows have their own buttons at the top of each window. These are only available when that window has focus. Buttons on individual windows function specifically for that window. For example, clicking on the  **Print** icon in a window will print the report specific to that window.

Context Menus

Many commands in Expert Project are found in Context menus. Context menus are accessed by pointing the mouse cursor over the line or column of text you want to work with and clicking once on the right mouse button.

The commands that appear are valid for the particular area you are working in. By using Context menus, you do not have to remember where a command is on a menu, as it is right at your fingertips.

- 1 Select **View**, **Contract Items** or click the  **Contract Items** icon.
- 2 Right-click on an item in the **Description** column.

The Context menu for this column appears, as shown at right.

The commands shown here are only valid for this column. If you right-click on another column, you will see different menu options.

To select a command from a Context menu:

- 1 Move the mouse over the command.
- 2 Click the left mouse button once to select the command.

To deselect (turn off) the menu:

- 1 To avoid activating any commands, left-click the mouse somewhere away from the menu. The menu will disappear.

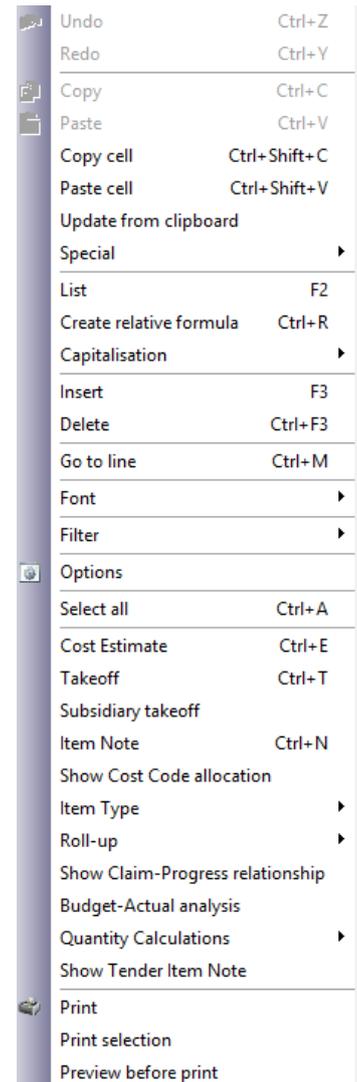


Image 22 – Context Menu of Contract Items



Note: Many common commands accessed from the right-click menu also have keyboard shortcuts associated with them. These shortcuts are shown to the right of the command on the menu.

For example, from the Resource Timesheet window, pressing **Ctrl** and **C** will copy the current line.

F2 lists from the currently selected cell.



Double Clicking

Double-clicking on any cell of information in any window will allow you to either:

Edit data

Line No	Item No	Description	Unit	Estimated Rate	Estimate of Tender	Estimate of Completion	Allocated Cost Code
1		Section 1					
2	1	Establishment and mobilisation	sum				
4		Subtotal, Section 1					
5							
6		Section 2					
7	2	Clearing and grubbing	Ha	6,711.97	67,119.69	63,763.71	earthwork
8	3	Topsoil	m ³	3.14	47,132.81	47,132.81	earthwork
9	4	Earthworks	m ²				
10		Cut to 18. excavator operation	m ²	5.12	742,276.70	742,276.70	earthwork
11		Cut to 18. excavator and trucks	m ²	7.90	779,716.95	779,716.95	earthwork
12		Fill/bank	m ²	1.52	69,718.11	69,718.11	earthwork
13		Subgrade fill	m ²	0.69	34,420.82	34,420.82	earthwork
14	5	Topsoil and Grassing	m ²	5.78	173,957.48	173,957.48	misc work
15							
16		Subtotal, Section 2		1,889,742.16	1,888,386.19		
17							
18		Section 3					
19	6	Supply and place subbase CBRS	m ²	73.60	1,104,950.40	1,104,950.40	payments
20	7	Supply and place base course CBRS	m ²	73.60	1,104,950.40	1,104,950.40	payments
21	8	Prime coat, 1.5%*	litre	1.00	50,000.00	50,000.00	payments
22	9	Open surface, concrete	tonne	110.00	660,000.00	660,000.00	payments
23							
24		Totals		5,564,758.86	5,989,699.70		

Image 23 – Contract Items window

Or open a child window, such as a Cost Estimate window.

Line No	Item No	Description	Unit	Estimated Rate	Estimate of Tender	Estimate of Completion	Allocated Cost Code
38	17	Supply on site	m	158.00	43,056.00	43,056.00	precast
39	18	Setting up	m	300.00	300.00	300.00	
40	19	Preboring	m				
41	20	Drilling	m				
42	21	Drilling	m				
43	22	Stripping	m				
44	23	Extensions	m				
45	24	Setting up	m				
46							
47		Subtotal					
48							
49		Section 4					
50	25	Concrete	m ³				
51	26	Concrete	m ³				
52	27	Concrete	m ³				
53	28	Concrete	m ³				
54	29	Concrete	m ³				
55	30	Concrete	m ³				
56		Reinforcing	m ²				
57		Parapet	m ²				
58	31	Reinforcing	m ²				
59	32	Deck, cast	m ²				
60	33	Erection of	m ²				
61		Totals					

Line no	Item no	Comment	Resource	Unit	Quantity	Resource Rate	Total
1		Formwork					
2		Make forms to full height and construct columns on 1 lit			277.0000		
3		Make forms to full height and construct columns on 1 lit	buik	m ²	48.4750	40.650	1,971
4		Make forms to full height and construct columns on 1 lit	solider	use	162.6667	5.000	813
5		Make forms to full height and construct columns on 1 lit	carp	m ²	37.0000	36.000	1,332
6		Make forms to full height and construct columns on 1 lit	lab	m ²	37.0000	32.394	1,199
7		Make forms to full height and construct columns on 1 lit	carp	m ²	162.6667	36.000	5,886
8		Make forms to full height and construct columns on 1 lit	lab	m ²	162.6667	32.394	5,269
9		Make forms to full height and construct columns on 1 lit	matvsk	m ²	277.0000	2.500	693
10		Make forms to full height and construct columns on 1 lit	40ccrane	hr	50.8333	175.000	8,886
11		Make forms to full height and construct columns on 1 lit					
12		Make forms to full height and construct columns on 1 lit					
13		Make forms to full height and construct columns on 1 lit					
14		Make forms to full height and construct columns on 1 lit					
15		Make forms to full height and construct columns on 1 lit					
16		Concrete					
17		Supply concrete	con35/20	m ³		105.000	
18		Waste					
19		Waste	lab	m ²		32.394	
20		Other materials	miscconc	m ²		6.500	
21		Crane to pour	40ccrane	hr	20.3333	175.000	3,558

Mode	Quantity	Labour	Material	Plant	Subcontract	Rate (Sch Qty)	Rate (Est Qty)	Total
Quantity	57.6000	11.144	2.738	9.988	0	412.326	0.000	23,750

Image 24 – Contract Items with Cost Estimates



Note: If double-clicking has no effect, you are either unable to edit data from that area or no child windows exist.



importing an expert estimation project

If the tender for your project was prepared in Expert Estimation, the relevant data required by Expert Project can be imported from the Expert Estimation project files.

If you did not prepare the tender in Expert Estimation, then the relevant data can either be copied from another Windows application or entered manually.

To import data from Expert Estimation

- 1 From the File menu, select Import Project, From Expert Estimation.

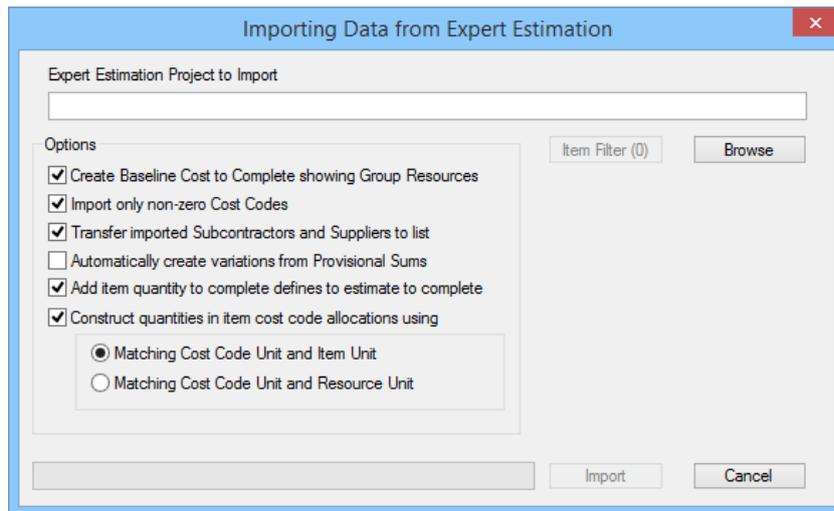


Image 25 – Importing Data from Expert Estimation

- 2 Click the **Browse** button to locate the Expert Estimation project to import.
- 3 Click the **Import** button to begin importing.



Note: For more information on importing a project into Expert Project or for information on the elements that have been imported, refer to Expert Project's Help system.



contract items

The **Contract Items** window is a starting point for listing items which directly contribute to the project.

The actual estimate for each item is available through the **Cost Estimate** window.



Note: Once the project is imported into Expert Project the Cost Estimates can no longer be edited.

From the **View** menu, select **Items, Contract Items** or press the  icon on the toolbar.

Line No	Item No	Description	Unit	Estimated Rate	Estimate at Tender	Estimate at Completion	Allocated Cost Code
1		Section 1 Preliminaries					
2	1	Establishment and mobilisation	sum				
3							
4		=sum(2) Subtotal, Section 1					
5							
6		Section 2 Earthworks					
7	2	Clearing and grubbing	Ha	6,711.97	67,119.69	63,763.71	earthworks
8	3	Strip topsoil	m ²	3.14	47,132.81	47,132.81	earthworks
9	4	Earthworks	m ²				
10		Cut to fill, scraper operation	m ²	5.12	742,276.70	742,276.70	earthworks
11		Cut to fill, excavator and trucks	m ²	7.80	779,716.55	779,716.55	earthworks
12		Trim batters	m ²	1.52	45,718.11	45,718.11	earthworks
13		Subgrade trim	m ²	0.69	34,420.82	34,420.82	earthworks
14	5	Topsoil and Grassing	m ²	5.78	173,357.48	173,357.48	misc works
15							
16		=sum(6:15) Subtotal, Section 2			1,889,742.16	1,886,386.18	
17							
18		Section 3 Pavements					
19	6	Supply and place subbase CBR35	m ²	73.66	1,104,950.40	1,104,950.40	pavements
20	7	Supply and place base course CBR45	m ²	73.66	1,104,950.40	1,104,950.40	pavements
21	8	Prime coat, 1 l/m ²	litre	1.00	50,000.00	50,000.00	pavements
22	9	50mm asphaltic concrete	tonne	110.00	660,000.00	660,000.00	pavements
23							
		Totals			5,564,758.86	5,559,605.70	

Image 26 – Contract Items Window



Adding a New Contract Item

You can import items into the **Contract Items** window, or type them all as new.

Select the line into which you want to enter text. Alternatively, press the Down Arrow key to add a line or **F3** to insert a line.

While entering the information for a new Contract item, several warnings could be raised.

After typing a **Tender Quantity** and pressing **Enter**, a warning box will appear.

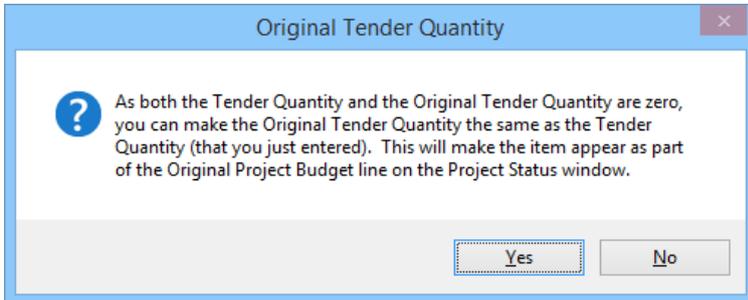


Image 27 –Tender Quantity Warning

After entering the **Tender Rate**, a warning box will appear.

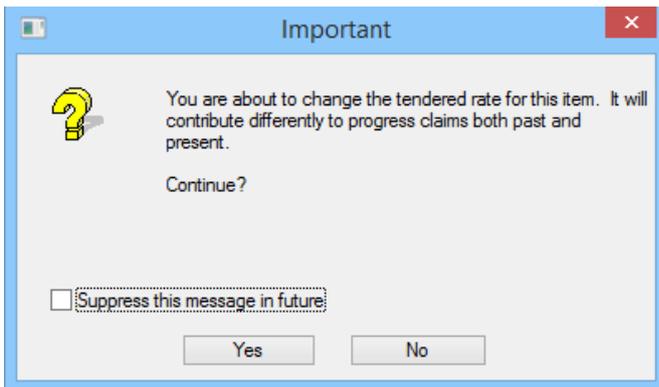


Image 28 – Tender Rate Warning

Importing Items from a Spreadsheet

You are able to import your Contract items from a spreadsheet. This will save you valuable data entry time and will help minimise errors.



Note: The columns in your spreadsheet do not have to match exactly to those in Expert Project.

- 1 Open the spreadsheet containing the Contract items.
- 2 In your spreadsheet application, highlight the text to copy and select **Copy**.
- 3 With the **Contract Items** window open, right-click on the line you want to paste to and select **Special, Paste**.

The **Paste Special** window will appear similar to the image below.

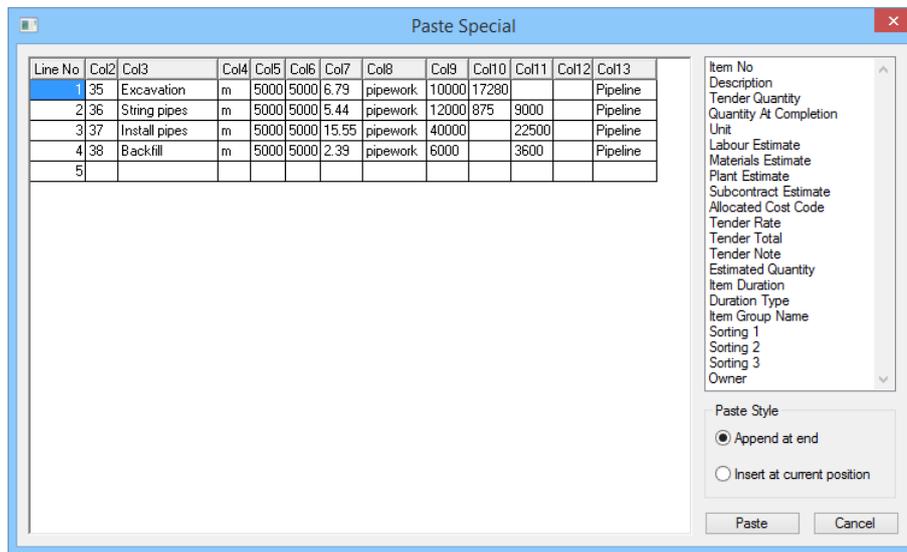


Image 29 – Paste Special Window

Before pasting, you need to tell Expert Project which columns to paste the data into.

- 4 Click in the second column (**Col2**).
- 5 Select the heading of the column by double-clicking on the appropriate item from the list on the right (in this example, the data represents the **Item Number** column). Alternatively, the data type can be dragged and dropped into the appropriate column.

The column heading for the second column will change to Item Number.

- 6 Continue labelling each column to be imported by clicking on the next column and double-clicking on the appropriate item type.



Note: Columns that are not labelled will not be imported.

- 7 Click on **Append at end** to paste the spreadsheet lines at the end of the schedule, or **Insert at current position** to start the paste at the line the **Paste Special** window was accessed from.
- 8 Click **Paste**.



resource explorer

Overview

The resources listed in the **Resource Explorer** window include all Group (G), Labour (L), Material (M), Plant (P) and Subcontract (S) resources that are available for the project. Resources are used to enter actual costs and to calculate the Cost to Complete, as well as to estimate Variations and Sundry items.

The **Resource Explorer** is a window that allows you to enter and manage the resources that you have available. The data in the **Resource Explorer** can also be imported from Expert Estimation. You are also able to add new resources and make changes to the imported data.

Viewing Imported Resources

Expert Project's **Resource Explorer** operates in a similar manner to Expert Estimation's **Resource Explorer**. However, unlike Expert Estimation, in Expert Project the rates can be modified with each use of the resource.

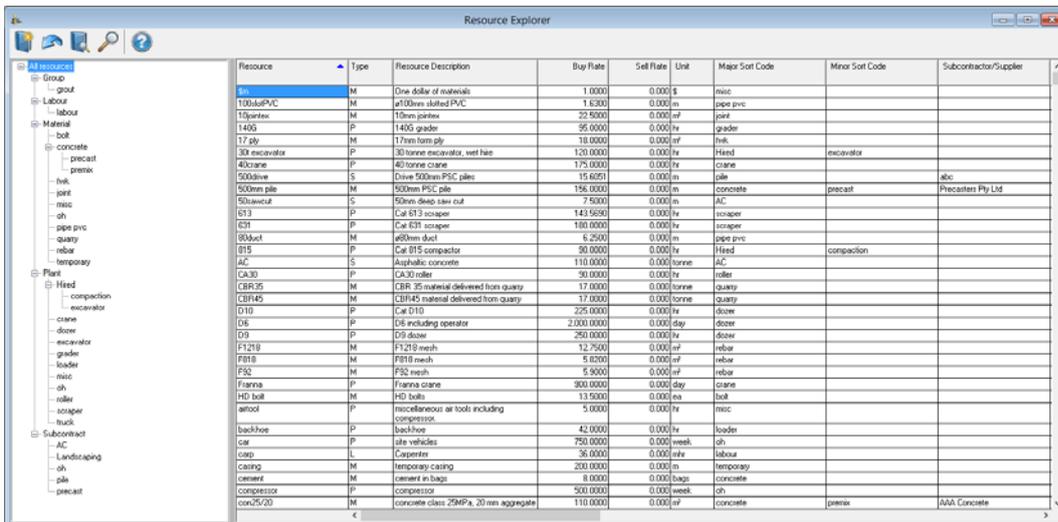
For example, a plant item costs \$100.00 per hour for a weekday and \$150.00 per hour on weekends. When the resource is used, the data entry can show the relevant rate just for that particular usage. The figure is not changed in the **Resource Explorer** as it is a default rate.

If you have used Expert Estimation you will be familiar with Base and Group resources. Group resources created in Expert Project do not have a Cost Estimate attached. By default, the Labour, Material, Plant and Subcontract components of the Group resource will be one quarter of the Group resource rate entered but these can be altered by the user. For imported Group resources, the Group's individual Base components are calculated and imported, thus providing the proper break up of Labour, Material, Plant and Subcontract. The Cost Estimates for Group resources are not imported from Expert Estimation.

Imported Resource Information

- 1 From the **View** menu, select **Resources** or click the  icon on the toolbar.

The **Resource Explorer** window appears (see following diagram), showing all resources, including Sort Codes imported from the Expert Estimation file.



Resource	Type	Resource Description	Buy Rate	Sell Rate	Unit	Major Sort Code	Minor Sort Code	Subcontractor/Supplier
One dollar of materials	M		1.0000	0.0000	\$	misc		
100mmPVC	M	#100mm ducted PVC	1.5300	0.0000	m	pipe pvc		
10pannee	M	10mm jointee	22.5000	0.0000	mf	joint		
140G	P	140G grader	95.0000	0.0000	hr	grader		
17ply	M	17mm form ply	18.0000	0.0000	mf	frsk		
30 excavator	P	30 tonne excavator, wet hire	120.0000	0.0000	hr	excavator	excavator	
40crane	P	40 tonne crane	175.0000	0.0000	hr	crane		
500drive	S	Drive 500mm PSC piles	15.6051	0.0000	m	pile		abc
500mm pile	M	500mm PSC pile	156.0000	0.0000	m	concrete	precast	Precasters Pty Ltd
50mmcut	S	50mm deep saw cut	7.5000	0.0000	m	JAC		
513	P	Cat 513 scrapper	142.5650	0.0000	hr	scraper		
621	P	Cat 621 scrapper	160.0000	0.0000	hr	scraper		
80duct	M	#80mm duct	6.2500	0.0000	m	pipe pvc		
815	P	Cat 815 compactor	80.0000	0.0000	hr	flend	compaction	
JAC	S	Asphaltic concrete	110.0000	0.0000	tonne	JAC		
CA30	P	CA30 roller	90.0000	0.0000	hr	roller		
CBR35	M	CBR 35 material delivered from quarry	17.0000	0.0000	tonne	quarry		
CBH45	M	CBH45 material delivered from quarry	17.0000	0.0000	tonne	quarry		
D10	P	Cat D10	225.0000	0.0000	hr	dozer		
D6	P	D6 including operator	2.000.0000	0.0000	day	dozer		
D9	P	D9 dozer	250.0000	0.0000	hr	dozer		
F1219	M	F1219 mesh	12.7500	0.0000	mf	rebar		
F1818	M	F1818 mesh	5.5000	0.0000	mf	rebar		
F32	M	F32 mesh	5.9000	0.0000	mf	rebar		
Franna	P	Franna crane	300.0000	0.0000	day	crane		
HD ball	M	HD balls	13.5000	0.0000	ea	ball		
misc	P	miscellaneous air tools including compressor	5.0000	0.0000	hr	misc		
backhoe	P	backhoe	42.0000	0.0000	hr	loader		
car	P	site vehicles	750.0000	0.0000	week	oh		
carp	L	Carpenter	36.0000	0.0000	hr	labour		
casing	M	temporary casing	200.0000	0.0000	m	Temporary		
ceament	M	ceament in bags	8.0000	0.0000	bags	concrete		
compressor	P	compressor	500.0000	0.0000	week	oh		
conc25/20	M	concrete class 25MPa, 20 mm aggregate	110.0000	0.0000	mf	concrete	premix	AAA Concrete

Image 30 – The Resource Explorer Window

The Buy rate is imported from the Calculated rate in Expert Estimation. The Sell rate needs to be entered by the user.



Creating New Resources

To add a new resource to the Resource Explorer:

- 1 If the **Resource Explorer** window is not open, select **Resources** from the **View** menu.
- 2 Right-click in the **Resource Explorer** window and select **New Resource**.

The **New Resource** window is displayed.

The screenshot shows the 'New Resource' dialog box with the 'Detail' tab selected. The fields are as follows:

- Resource Name: [Text Input]
- Resource Group: [Dropdown]
- Resource Type: [Dropdown]
- Production Unit: [Dropdown]
- Description: [Text Area]
- Production Multiplier: [Text Input, value: 1.00000]
- Buy rate: [Text Input, value: 0.0000]
- Resource Unit: [Dropdown]
- Date: [Date Picker, value: 01/04/2016]
- Sell rate: [Text Input, value: 0.000]
- Time between use and payment: [Spin Box, value: 0]
- Major sort code: [Dropdown]
- Minor sort code: [Dropdown]
- Cost code: [Dropdown]
- Supplier / Subcontractor: [Dropdown]
- General Ledger Account: [Dropdown, value: No general ledger account]
- WBS (): [Text Input]

Buttons on the right side: Preview, OK, Cancel.

Image 31 – New Resource: Detail Tab



variation items

Variations can (and do) occur during a project's lifetime. Variations usually involve changes to the original quantity and/or scope of project works – possibly more or less work, resources, cost and time. Standard project management involves a procedure of submissions to the client, with timeframes explicitly defined in the contract. At times, the rate for work to be done under the Variation is an unknown value at the time of identification.

Expert Project allows you to track all stages of the variation process, from first identifying the variation, through submission, to acceptance (or rejection) and claiming. The Variation Explorer displays all variations as well as their current status.

Variations must have one of the following statuses:

Identified	Items identified but not yet submitted to the principal.
Submitted	Items either submitted or submitted and claimed to the client but have not yet been approved.
Submitted and claimed	
Approved	Items that the client has approved.
Disputed	Items that have been submitted but are being disputed between the parties.
Not pursued	Items that are no longer being pursued with the client.

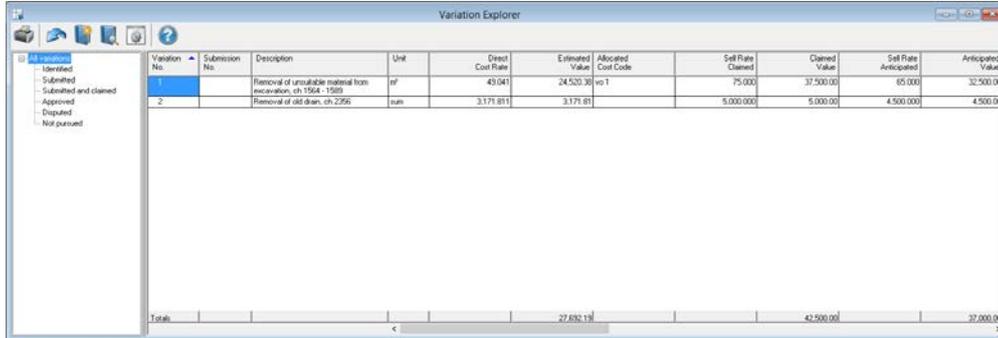


Creating a New Variation

When a Variation is identified it should be entered into Expert Project immediately.

- 1 From the **View** menu, select **Items, Variations** or press the  icon from the toolbar.

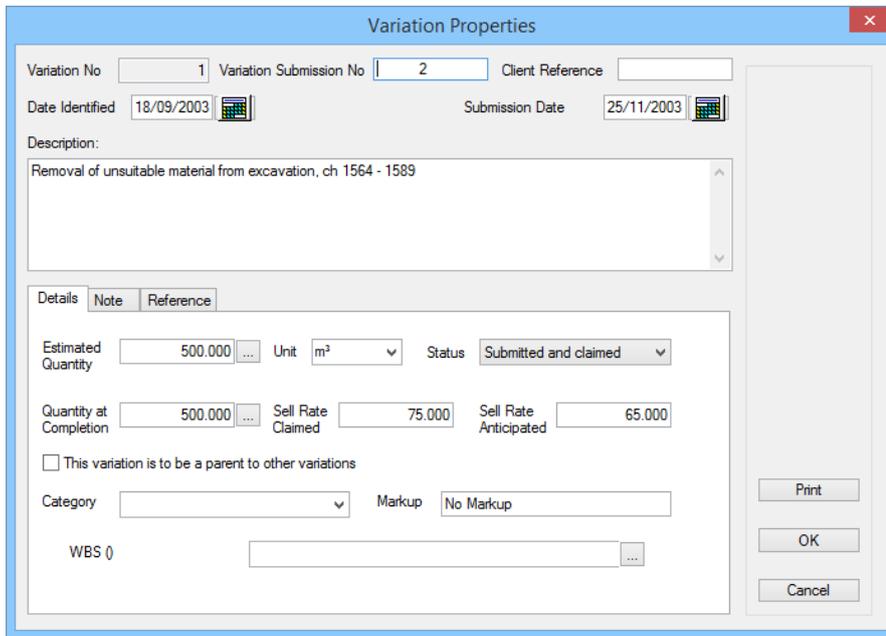
The **Variation Explorer** window is displayed.



Variation No.	Submission No.	Description	Unit	Direct Cost Rate	Estimated Value	Allocated Cost Code	Sell Rate Claimed	Claimed Value	Sell Rate Anticipated	Anticipated Value
		Removal of unsuitable material from excavation, ch 1564 - 1589	m ³	48.041	24,520.38	wo 1	75,000	37,500.00	65,000	32,500.00
2		Removal of old drain, ch 2356	sum	3,171.81	3,171.81		5,000,000	5,000.00	4,500,000	4,500.00
Totals					27,692.19			42,500.00		37,000.00

Image 32 – The Variation Explorer Window

- 2 To create a Variation, right-click inside the window and select **New Variation**.



Variation Properties

Variation No: Variation Submission No: Client Reference:

Date Identified: Submission Date:

Description:
Removal of unsuitable material from excavation, ch 1564 - 1589

Details | Note | Reference

Estimated Quantity: Unit: Status:

Quantity at Completion: Sell Rate Claimed: Sell Rate Anticipated:

This variation is to be a parent to other variations

Category: Markup:

WBS:

Buttons: Print, OK, Cancel

Image 33 – Variation Properties: Details Tab

- 3 Enter the required information into the window.
- 4 From the **Status** drop down menu, select **Identified**.
- 5 Click **OK** to save the Variation.

The item now appears in **Variation Explorer** under the identified branch. Identified Variations appear in blue.



Note: Variation Submission Number and Submission Date will only become applicable when the status is set to Submitted.



Preparing a Variation Cost Estimate

To assist in development of the costs of a Variation, a Cost Estimate for the Variation needs to be completed.

- 1 Right-click on the Variation that was just created.
- 2 Select Prepare Cost Estimate.

An empty **Cost Estimate** window is displayed.

Line No	Comment	Resource	Unit	Quantity	Resource Rate	Total
1	+(500/50) 30 tonne excavator to remove	30 excavator	hr	10.0000	150.0000	1.500
2	labourers to attend	lab	mhr	20.0000	35.0000	700
3	trucks	truck	hr	30.0000	60.0000	1.800
4						
5	+(500 m ³ * 2.4 tonne per m ³) Purchase backfill material	fill	tonne	1.200.0000	10.0000	12.000
6	+(500/15) backhoe to place	backhoe	hr	33.3333	42.0000	1.400
7	labourers	lab	mhr	67.0000	32.394	2.170
8	roller	CA30	hr	33.0000	90.0000	2.970
9	watertruck	watertruck	hr	33.0000	60.0000	1.980

Mode	Quantity	Labour	Material	Plant	Subcontract	Rate (Sch. Qty.)	Total
Quantity	500.0000	2.970	12.000	9.650	0	49.041	24.520

Image 34 – Cost Estimate for a variation

- 3 Right-click in the **Resource** column and select **List** to add resources from the **Resource Explorer** and enter quantities against them for this Variation.
- 4 Click the to close the **Cost Estimate** window.
- 5 Click **Yes** to save the changes.

You have now developed the budgeted cost of your Variation item. A Direct Cost rate will now appear against this Variation.



cost codes

Cost Codes are initially imported from Expert Estimation with corresponding values against them for the works in the original tender. These then become the Tender Values with Contract Values being determined as the project progresses. **Cost Codes** window can be accessed from the **View** menu.

Cost Code	Cost Code Description	Quantity Qty at Compln	Unit	Type	Labour	Material	Plant	Subcontract
Disestablish	Disestablishment			Tender	4,840	1,296		1,800
				Contract	4,840	1,296		1,800
Establish	Establishment			Tender	12,000			1,800
				Contract	12,000			1,800
Fees	Fees and Insurances			Tender				12,500
				Contract				12,500
Overhead plant	Overhead Plant			Tender	15,000			
				Contract	15,000			
Site Costs	Site Costs			Tender	31,200		20,800	
				Contract	31,200		20,800	
Staff	Staff costs			Tender	138,000	496,400		
				Contract	138,000	496,400		
crane hire	Crane hire			Tender	-10,495	7,995	3,899	
				Contract	-10,495	7,995	3,899	
earthworks	Earthworks to subgrade			Tender	1,515,211	151,173		50,000
				Contract	1,514,436	151,092		47,500
erect precast	Erect Precast concrete			Tender	10,950	24,423	21,006	
				Contract	10,950	24,423	21,006	
	Totals for tender values				2,484,819	1,034,491	1,866,498	924,102
	Totals for contract values				2,486,914	1,046,410	1,866,148	920,298
	Delta (contract - tender)				2,095	11,919	-3,350	-3,812

Image 35 – The Cost Codes Window



Note: The imported data is from Expert Estimation. If you are not importing from Expert Estimation, you will need to enter your Cost Codes manually.

Adding New Cost Codes

- 1 Right-click within the **Cost Code** window and select **Insert** (or press the **F3** key).
- 2 Enter the details for the new Cost Code.
- 3 Click **Save** to add the Cost Code.



Note: The unit and quantity fields are not mandatory and are only applicable if the Cost Code is distinctly measurable.

Allocating Cost Codes

You will need to allocate your new Cost Code to an item to populate values in the **Tender** and **Contract** fields for this Cost Code.

- 1 Open the Contract Items.



Note: Cost Codes can be allocated to any type of item (Overhead Costs, Variations and Sundry Items) in the same way.

- 2 Right-click on a line and select **Show Cost Code Allocation**.
- 3 Right-click over the Cost Code section of the window and select **List**.
- 4 Select the relevant Cost Code in the list and click the **Select** button.

The Cost Code is added to the **Cost Code** window.

- 5 Right-click on the Cost Code and select **Balance** to add the remainder of the budget to this Cost Code.
- 6 Click **OK** to finalise the allocation.



resource timesheet

The **Resource Timesheet** allows entry of your project's periodic resource usage. Timesheets can be prepared daily, weekly or for any other period. The cost record entries created from the Timesheet generates your project's Actual Cost of Work Performed (ACWP).

- 1 From the **View** menu, select **Costs, Resource Timesheet** or press the  icon on the toolbar.

Image 36 – The Resource Timesheets Window

- 2 Enter the **Date**, **Foreman** and **Shift** details. The combination of these three fields must be unique for each Timesheet.



Note: Not all columns are visible. Use the scroll bar at the bottom of the window to view unseen columns. The columns in this view can also be rearranged. These settings will be saved for your next session.

Entering Resources

- 1 To add resources that are consumed in this time period select the **Resources** tab.
- 2 Right-click in the **Resource Name** field, select **List** and select the resource that was used.
- 3 Enter the quantity of the resource that was consumed into the **Resource Quantity** column (Use the scroll bar if the column is not visible).
- 4 Enter a Cost Code for the resource (A Cost Code will appear automatically if the resource already has a Cost Code allocated to it).
- 5 Enter the remaining details of usage for this resource.
- 6 Click **OK** to save the Timesheet.

cost explorer

The **Cost Explorer** shows all cost records entered via the **Resource Timesheet** or directly entered into the **Cost Explorer**. By the conclusion of the project, this window can contain thousands of entries per project. There are many ways to sort and filter these records.

From the **View** menu, select **Costs, Cost Explorer** or press the **\$** icon on the toolbar.



Image 37 – The Cost Explorer Window

The left pane can be configured to display Cost Codes, Suppliers, Voucher numbers, Adjustment, Resources, Dates or Work Area references.

The right pane displays all cost records related to the selected category or type, from the left pane.

Changing the Tree View in the Cost Explorer

- 1 Right-click in the left pane of the **Cost Explorer**.
- 2 From the menu, select **Show branches as**.

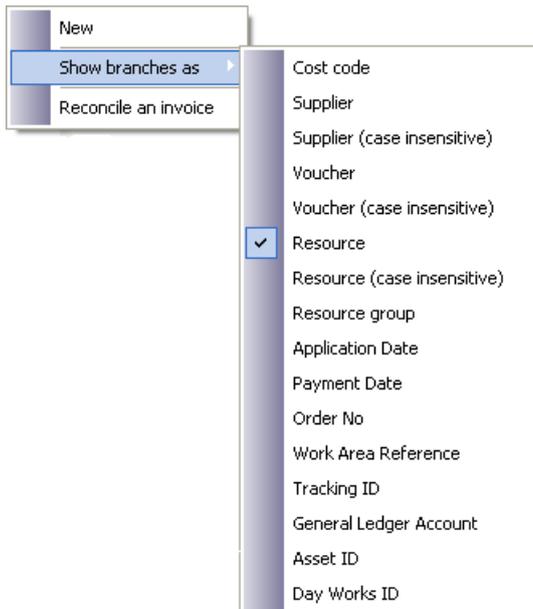


Image 38 – The Context menu in the tree view of the Cost Explorer allows you to sort the branches in various ways

The branches change according to your selection. This allows faster sorting of cost records.

New Cost Record

You can create a new cost record if you have a cost that is not directly related to a work activity, such as a phone bill that has arrived and needs to be paid.

- 1 Right-click in the **Cost Explorer**.
- 2 Select New Cost Record.
- 3 An empty **Cost Record Properties** window appears.

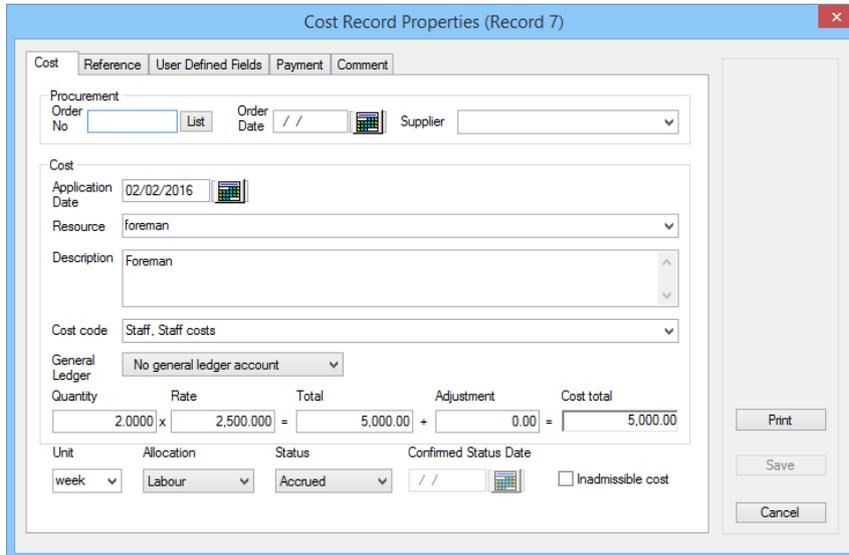


Image 39 – New Cost Records: Costs Tab

- 4 Enter the details and click **Save**.

Existing Cost Records can be edited individually or modified as a group. They can also be cloned. The records in the explorer can be sorted (by clicking on a column heading) or filtered (by choosing **Select Cost Record Subset** from the right click menu), to easily identify and edit individual entries.



recorded progress

The **Recorded Progress** area of Expert Project allows you to enter the quantity of work performed for each item. This enables calculation of the Budgeted Cost of Work Performed (BCWP).

When you record progress against an item, it multiplies the Quantity entered by the Estimated Cost Rate for the item to calculate your BCWP. The budgeted cost of work performed is compared with your actual costs in Expert Project's analysis windows.

The quantities that you enter into progress can also be used as a starting point for the quantities that you wish to claim in Progress Claims.

Actual progress is entered against Contract, Overhead, Variation or Sundry Items.

Recording Actual Progress – Contract Items

- From the **View** menu, select **Progress, Contract Items** or press the  icon on the toolbar.

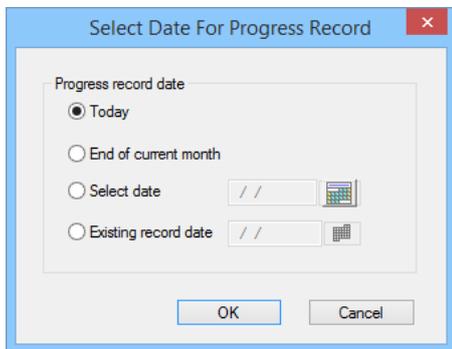


Image 40 – Date Selection for Progress Record

You will be progressing up to and including the date that you specify. It will record progress from the last progress date recorded.

- Choose **Select Date** and enter the date to record progress.
- Click **OK**.

The **Contract Items Progress Period Ending** window appears as shown in the diagram on the following page.

Line No	Item No	Description	Unit	Tender Rate	Tender Quantity	Quantity At Completion	Quantity Previous Periods	Quantity This Period	Quantity To Date	Allocated Cost Code
1		Section 1 Preliminaries								
2	1	Establishment and mobilisation	sum	12,800,000	1,000	1,000	1,000		1,000	
4		--sum(2)Subtotal, Section 1								
6		Section 2 Earthworks								
7	2	Clearing and grubbing	Ha	8,349,600	10,000	9,500	9,500		9,500	earthworks
8	3	Strip topsoil	m ²	3,910	15,000,000	15,000,000	15,000,000		15,000,000	earthworks
9	4	Earthworks	m ²	8,140	245,000,000	245,000,000	236,595,000		236,595,000	earthworks
10		Car to fill, scraper operation	m ²	145,000,000	145,000,000	138,595,000			138,595,000	earthworks
11		Cut to fill, excavator and trucks	m ²	100,000,000	100,000,000	100,000,000			100,000,000	earthworks
12		Tin batter	m ²	30,000,000	30,000,000	24,145,000			24,145,000	earthworks
13		Subgrade fill	m ²	50,000,000	50,000,000	17,500,000			17,500,000	earthworks
14	5	Topsoil and Grassing	m ²	7,190	30,000,000	30,000,000	14,000,000		14,000,000	misc works
15										
16		--sum(6-15) Subtotal, Section 2								
18		Section 3 Pavements								
19	6	Supply and place subbase CBR25	m ²	91,630	15,000,000	15,000,000				pavements
20	7	Supply and place base course CBR45	m ²	91,630	15,000,000	15,000,000				pavements
21	8	Prime coat, 1.1% ¹	tonne	1,240	50,000,000	50,000,000				pavements
22	9	50mm asphaltic concrete	tonne	136,830	6,000,000	6,000,000				pavements
23										
24		--sum(18-23)Subtotal, Section 3								

Image 41 – Contract Item Progress Period Ending Window



Note: Only the Item Number, Description, Unit, Quantity at Completion, Quantity this Period and Quantity to Date columns can be modified from this window.



Entering Progress for a Selected Date

- 1 Enter the quantity to progress for this period into the **Quantity this Period** column.
- 2 Press **Enter**.

Alternatively you can enter the **Quantity to Date**.

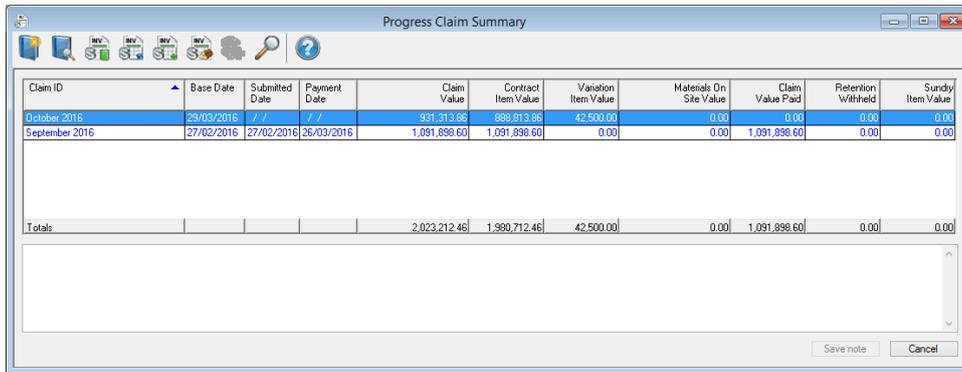


progress claims

The Progress Claim feature of Expert Project allows you to create claims to the client for your project. You should prepare a claim when progress has been recorded and you need to be paid by the client.

Quantities to claim may be entered either automatically (based on your recorded progress) or manually. Progress claims are created from the **Progress Claim Summary** window.

From the **View** menu, select **Income, Claim** or press the  icon on the toolbar.



Claim ID	Base Date	Submitted Date	Payment Date	Claim Value	Contract Item Value	Variation Item Value	Materials On Site Value	Claim Value Paid	Retention Withheld	Sundry Item Value
October 2016	23/03/2016	/ /	/ /	321,313.88	888,812.88	42,500.00	0.00	0.00	0.00	0.00
September 2016	27/02/2016	27/02/2016	26/03/2016	1,091,898.60	1,091,898.60	0.00	0.00	1,091,898.60	0.00	0.00
Totals				2,023,212.46	1,980,712.46	42,500.00	0.00	1,091,898.60	0.00	0.00

Image 42 – Progress Claim Summary

The **Progress Claim Summary** window shows previous claim details and any attached notes. Previous claims can be modified, however if they have already been submitted, warnings will be displayed.



To Create a New Claim:

- 1 Right-click in the top pane of the **Progress Claim Summary** window and select **New Claim**.

The **New Claim** window will be displayed.

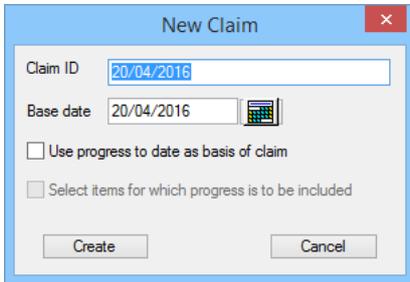


Image 43 – New Claim Window

On the **New Claim** window:

Claim ID	The ID may be any text, number or date to identify the claim.
Base date	The date up to which you want to claim progress.
Use progress to date as basis of claim	When checked, generates the claim using the quantities of each item entered in the actual progress since the last claim.
Select items for which progress is to be included	If the Use progress to date box is checked, you will also be able to select individual items that will appear in this claim.

- 2 Enter a name in the **Claim ID** to identify this claim.
- 3 Select the **Base Date**.



Note: Dates cannot be entered earlier than previous claim dates.

- 4 Check **Use progress to date as basis of claim**.
- 5 Press **Create** to generate the claim.
- 6 The **Contract Item Progress Claim** window will appear.
- 7 Quantities will be populated with the quantities progressed since the last claim if the **Use progress to date as basis for claim box**, was ticked.

Line No	Item No	Description	Unit	Tender Rate	Tender Quantity	Quantity At Completion	Quantity Previous Period	Quantity This Period	Quantity To Date	Allocated Cost Code
Section 1 Pavements										
1	1	Establishment and mobilisation	sum	13,000.000	1,000.000	1,000.000	1,000.000		1,000.000	
Section 2 Earthworks										
7	1	Cleaning and grubbing	ha	8,340.000	10.0000	9,500.000	9,500.000		9,500.000	earthworks
8	1	Chip heave	sq	3,910.000	15,000.0000	14,800.0000	15,000.0000		14,800.0000	earthworks
9	1	Earthworks	sq	9,360.000	245,000.0000	245,000.0000	236,595.0000		236,595.0000	earthworks
10	1	Cut to fill, scrape operation	sq	145,000.0000	145,000.0000	138,508.0000			138,508.0000	earthworks
11	1	Cut to fill, motorator and trucks	sq	100,000.0000	100,000.0000	100,000.0000			100,000.0000	earthworks
12	1	Fill batters	sq	30,000.0000	30,000.0000	28,145.0000			28,145.0000	earthworks
13	1	Subgrade fill	sq	50,000.0000	50,000.0000	17,500.0000			17,500.0000	earthworks
14	5	Topsoil and Grassing	sq	7,500.0000	30,000.0000	30,000.0000	14,000.0000		14,000.0000	misc works
Section 3 Pavements										
19	1	Supply and place subbase CR145	sq	91,630.0000	15,000.0000	15,000.0000				pavements
20	1	Supply and place base course CR145	sq	91,630.0000	15,000.0000	15,000.0000				pavements
21	1	Prime coat, 1 Unit	ha	1,240.0000	50,000.0000	50,000.0000				pavements
22	1	50mm asphaltic concrete	tonne	136,630.0000	6,000.0000	6,000.0000				pavements

Image 44 – Contract Item Progress Period Ending Window



analysis tools

The **Analysis** menu contains windows displaying analytical data which can be viewed or printed at any stage of the project. Some Analysis windows can be customised and graphed.

The **Budget Performance** window is used for analysing your project's Cost Code performance and calculating the Cost to Complete. This can be done at any time during the project.

The **Budget Performance** window will display your historic Cost Code performance which can be used as the basis for predicting your future performance. Alternatively, a Cost to Complete may be produced using first principles estimates.

- 1 From the Analysis menu, select Budget Performance.
- 2 When first opened, the window will display **Non Record Date**.
- 3 Choose **Baseline estimate** from the drop down box to view the budget from your Tender estimate.

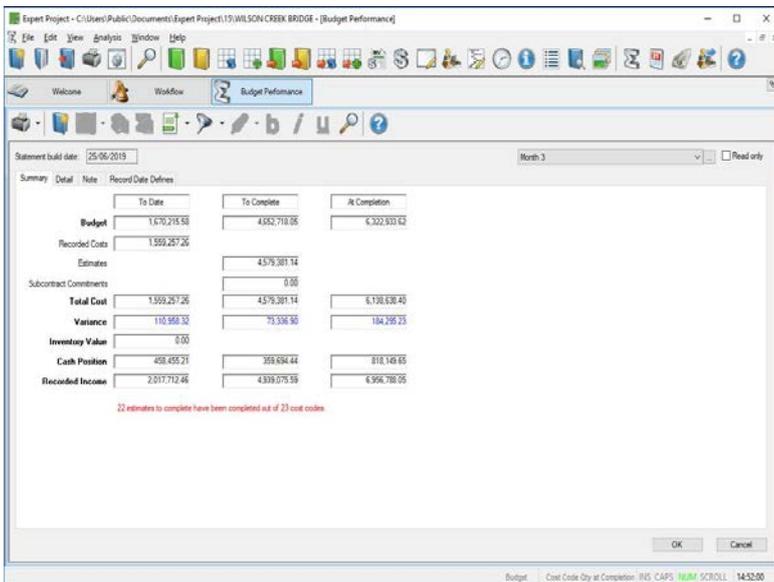


Image 45 – Budget Performance: Summary Tab

The Baseline estimate is your budget performance at the start of the project. The Statement build date for the Baseline estimate is the first date of your project.



Creating a New Record Date

- 1 Right-click on the drop-down box in the top right corner of the **Budget Performance** window (the **Record date** field) and select **Create new record date**.

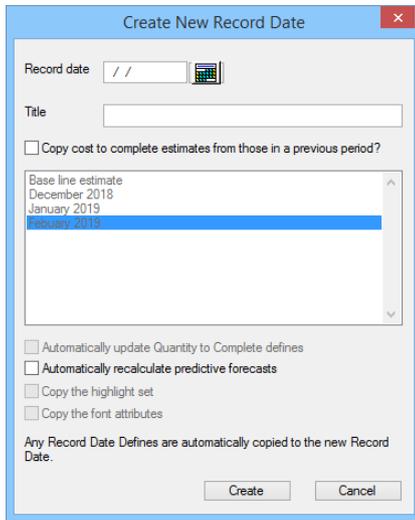


Image 47 – The Create New Record Date Window

- 2 Enter the date and a title for the record date.
- 3 If you wish to create your current forecast based on a previous record date (or the Base Line estimate), tick the **Copy cost to complete estimates from those in previous periods** box and select the record date.
- 4 Press **Create**.
- 5 Right-click on the Cost Code to forecast the cost to complete and select **Forecasting**.



Note: For more information on the forecasting formula consult the Expert Project Help system by pressing F1 from the Detail tab of the Project Budget Performance window.

See page 36 for more information on using the Expert Project Cost Estimate window.



printing and reporting

You can preview or print any window in Expert Project. Before you start, configure your printer through the **File** menu, **Printer Setup** command.

Printing from any Window

Depending on the window you wish to print from, there are two main ways to print reports from windows in Expert Project.

If the window is a grid (spreadsheet) style window:

This will include windows such as the Contract Items, Variation Items, Resource Explorer and Cost Explorer windows.

- 1 Right-click in the window and select **Print** (to print the report directly to the printer).

To preview the report first:

- 1 Right-click in the window and select **Preview Before Print**.
- 2 Right-click again and select **Print**.

A preview of the report will appear.

Statistic	Base line estimate 1/4/2018	October 2018 26/10/2018	Period Data
CONTRACTUALITY			
Original contract value	6,526,504	6,526,504	
Contract value adjusted for quantity changes	6,526,504	6,519,718	-6,786
Approved variations, extras and deductions	0	0	0
Revised approved contract value	6,526,504	6,519,718	-6,786
Unapproved variations (claimed value)	0	42,500	42,500
Unapproved variations (projected value)	0	37,000	37,000
Work in progress (act value)	0	0	0
Work in progress (projected value)	0	0	0
Just completed items (contract value (CV))	6,526,504	6,516,718	-9,786
Partial final contract value	6,526,504	6,562,238	35,734
Delta contract value (Contracted - Anticipated)	0	3,530	3,530
CURRENT			
Work in progress claim to date	0	2,023,212	2,023,212
Work in progress to date	0	0	0
Work in progress to date (act)	0	40,840	40,840
Work completed subsequent to progress claim	0	0	0
Revised value of work completed	0	2,023,212	2,023,212
Budgeted cost of work performed (Contract items)	0	1,684,050	1,684,050
Budgeted cost of work performed (Overhead items)	0	19,950	19,950
Budgeted cost of work performed (Variation)	0	27,802	27,802
Budgeted cost of work performed (Subs)	0	0	0
Budgeted cost of work performed (Overhead)	0	0	0
Budgeted cost of work performed (BCWP)	0	1,678,214	1,678,214
Actual cost to date (contracted)	0	0	0
Actual cost to date (actual)	0	1,529,242	1,529,242
Actual cost of work performed (ACWP)	0	1,529,242	1,529,242
Cost of resources	0	0	0
Remaining value of standing orders	0	0	0
Final project cost	0	1,529,242	1,529,242
Budget Actual cost difference (BACWP - ACWP)	0	110,971	110,971
Cost performance index (CPI = BCWP/ACWP)	0.00	0.87	0.87
Actual margin (Contract value - ACWP)/ACWP)	0.00%	-11.67%	-11.67%
Actual margin (Contract value - ACWP)	0	108,020	108,020
Budgeted cost of work scheduled (BCWS)	0	1,678,214	1,678,214
Schedule performance index (SPI = BCWP/BCWS)	0.00	0.83	0.83
SCHEDULE PERFORMANCE			
Original project index	0.00	0.83	0.83

Image 48 – The Project Status Report

- 3 Click the **Print** icon to print the report or the to close the preview.

To print a form style window:

This could include windows such as the Resource Details, Cost Record Properties or Resource Properties windows.

- 1 Press the **Print** button (to print the report directly to the printer).

OR

Right-click on the **Print** button and select **Preview before Print**.

The button will change to **Preview**.

- 2 Press the **Preview** button.

- 3 Click the **Print** icon to print the report or the to close the preview.



Printing Reports

Reports can also be printed from the **Print Reports** window.

The window below shows the reports available. Refer to the Expert Project Help system (Press **F1**) for more information about each report.

- 1 Click on the File menu and select Print Reports or select from the toolbar.

The Print Reports window is displayed.

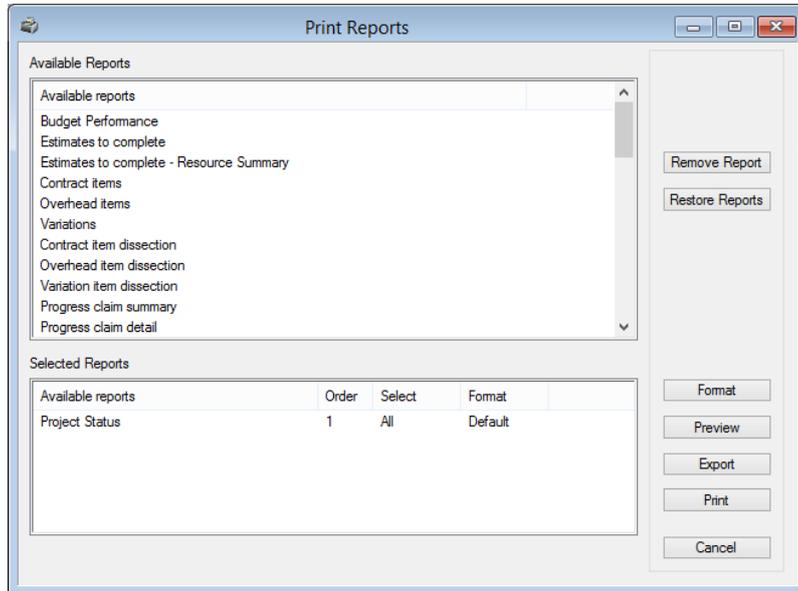


Image 49 – The Print Reports Window

- 2 Double-click on the name of each report you want to print.

The selected reports appear in the lower pane. Double-clicking a report in the lower pane removes the report from the **Selected reports** list.

- 3 Right-click on the selected reports to **Format** or **Preview** the report if required.
- 4 To complete the final print of the selected reports, click the **Print** button on the right of the **Print Reports** window.



other tools

Standing Orders

The **Standing Orders** window is used to record orders for resources where a quantity of resources is ordered but will not be supplied in one lot. For example, you may have a standing order for 500m³ of concrete to be supplied over the duration of the project.

Inventory

The **Inventory** window is used for recording and viewing inventory resource purchases and withdrawals.

Sundry Items

Sundry items (sometimes called Works Orders) are items of work that are not included in the project's Contract items. Sundry items may be generated by the client (and claimed using the normal **Progress Claim** window) or may be non-client generated (and claimed using the **Non-client Sundry Progress Claim** window).

The **Sundry Items Explorer** has two view modes: **Sundry Item Summary** mode and **Sundry Item Element** mode.

Calendar

The Calendar window allows you to easily navigate to particular events or entries on a particular date. The calendar also allows you to define non-work days.

Tracking

The **Tracking** window allows you to track key performance indicators for the actual value of costs and production for a portion of work and compare them with target budget costs and production.

Information Management System (IMS)

The **Information Management Explorer** window is used to record and view all information flow for the project. Both incoming and outgoing information may be recorded.

Contact Explorer

The **Contact Explorer** window is used to view, edit and create contacts for use within the **Information Management Explorer** (IMS) window or as a stand-alone contact manager.



Note: For information on these functions or any other area of Expert Project, please consult the Expert Project Help file or contact the support staff at Pronamics.



registration

For Expert Project to function fully (without system limitations), the program must be registered.

To assist your evaluation, **Pronamics** offers a free trial registration allowing Expert Project to be used without limitations on actual projects for a period of 30 days. Please contact **Pronamics** if you would like to obtain a temporary registration.

After purchasing Expert Project, your copy can be permanently registered using the procedure outlined below.

To access the Expert Project **Registration** window, select **File, Registration, Register Expert Project**. The following window is displayed:

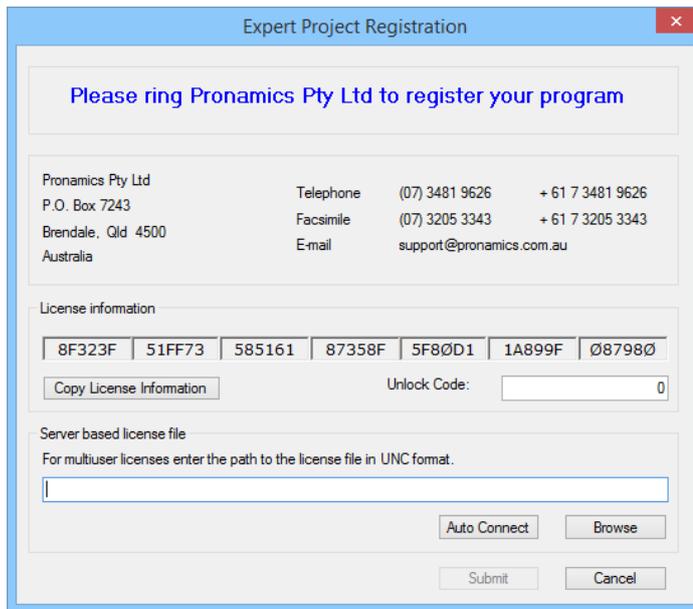


Image 50 – The Expert Project Registration Screen

The **License information** number is unique to your computer. We will ask for this information when you call and in return, provide you with an Unlock code to register the product. The **Server based license file** is used if this is a concurrent user registration.

To register Expert Project, please have the program open at the above window and telephone Pronamics on (07) 3481 9626 or +61 7 3481 9626.

Registration via facsimile and e-mail can be processed if required. Please contact **Pronamics** technical support for details.

Concurrent User Licenses

Where a server based licence is required, a suitable folder is created on the server and all users are given read and write permissions to the folder. It will be used to hold the licence file. The software is installed on the local computers as described in the Installation section of this manual. The computers will be connected to the server based licence file during the registration process.



glossary

Accrued	A cost record for which the actual cost to the project is not known.
Backup	The process of saving a copy of the project information to guard against errors that could make the current project unusable.
Base resource	An identifiable, physical item that has a cost and can be assigned to a work item. Expert Project has four groups of Base resources: Plant, Labour, Material and Subcontract.
Cash Flow	A representation of the incoming and outgoing monies derived from the project.
Claim	A type of invoice to the client for work completed.
Confirmed	A cost record for which the actual cost to the project is known.
Contract items	The list of work items provided by the client or created by the tenderer.
Cost Estimate	A method of systematically creating an estimate for a variation, cost to complete or sundry item.
Cost Code	A budget group used to prepare a budget for construction after a project is won and awarded.
Cost record	An individual cost to the project.
Cost to Date	The total for all costs for a cost code or project.
Current project	The project that is currently open in Expert Project.
Direct Cost schedule	The schedule which makes up the direct project work elements.
Extensions of Time	Changes to the contract completion date due to events associated with the project.
Group resource	An identifiable, physical work process that can be costed and assigned to a work item as a process. Group resources are of limited use in Expert Project.
Holiday	A day defined in the program as a non-workday.
Information Management system	Also known as IMS - a module designed to manage all information flows on the project.
Item note	A document used by Expert Project to display notes made by the Estimator concerning the item to which the Item note is attached.
Margin	The amount of money added for profit or contingencies to a project's estimated cost.
Master project	A project especially created for the purpose of being used as a template for a specific work type.
Open project	The project which is being managed at this time.
Overhead items	The schedule which makes up the indirect project work elements.



Payment lag	The duration between the use of a resource and the payment for the resource.
Profit	See Margin.
Progress	Recording the actual amount of work completed. This is used to generate the budgets to compare to actual costs.
Project Action list	A list of actions required for the project. Submitting of variations and extensions of time, progress claim approval and payment and information management system document actions as detailed in the Project Action List.
Project notes	A document used by Expert Project to display notes made by the Estimator concerning the project as a whole.
Rate Only	An item that requires a rate to be submitted as part of the project submission.
Resource	A physical item which has a cost for consumption and can be assigned to a cost item. See also, Base resource.
Resource Flow	The representation of the use of a resource over the duration of the project.
Resource Timesheet	A form to record costs recorded against a project in a given period.
Resource Usage	The total number of units of a resource used in a project.
Sundries	An area to enter works performed for other parties during the course of the project. Also known as Works Orders.
Tracking	A module to allow the tracking and reporting of costs and budget on specific work activities.
Variations	Changes to the defined works.
Work item	A Direct or Overhead Cost item, which represents a section of the project that has definable scope.
Works Orders	See Sundries.
Unit	The means by which the resource is measured.



expert project training courses

Pronamics offers a self-paced introductory online training course providing foundation skills to ensure users get the most out of their software. Each purchased Expert Project licence includes one seat for online introductory training.

In addition Pronamics also offers in-house training solutions, allowing users to participate in face-to-face training, customise course content and utilise their own projects as course case studies.

Please contact Pronamics for any further information on +61 7 3481 9686 or at training@pronamics.com.au

Introductory Expert Project Face-to-Face Training – Course Outline

Lesson 1 Introduction

- A general overview of Expert Project
- Starting Expert Project
- Locating the software build number
- Opening an existing project
- Exiting Expert Project
- Expert Project file management

Lesson 2 Navigating Expert Project

- Working with windows
- Other windows
- Context menus
- Common functionality

Lesson 3 Using Expert Project Help

- Starting help
- Using help contents
- Browsing the help system
- Context sensitive help
- Using the help index
- Using the help search
- Adding a help topic to favourites
- Other help facility buttons

Lesson 4 Starting a New Project

- Naming and locating the project files
 - Completing the new project details
 - Importing details from an Expert Estimation project
 - Changing project properties
 - What is imported from the Expert Estimation project
-



Introductory Expert Project Face-to-Face Training – Course Outline

- Lesson 5** Contract Items
- Overview
 - Imported data
 - Entering new item details (for an item that is not imported)
 - Importing details from a spreadsheet
 - Filtering
 - Working with formulae
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- Lesson 6** Overhead Items
- Overview
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- Lesson 7** Resource Explorer
- Overview
 - Viewing imported resources
 - Import resource information
 - Creating new resources
-

- Lesson 8** Variation Explorer
- Overview
 - Creating a new variation
 - Cost estimates
 - Preparing a variation cost estimate
 - Selling rates and markup
 - Printing variation cost estimate details
 - Changing status
-

- Lesson 9** Cost Codes
- View imported cost codes
 - Adding new cost codes
 - Allocating cost codes
 - Recalculating cost code values
-

- Lesson 10** Resource Timesheet
- Overview
 - Timesheet options (defaults)
 - New timesheets
 - Viewing a previously saved timesheet
 - Cloning a timesheet
 - Timesheet templates
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Introductory Expert Project Face-to-Face Training – Course Outline

- Lesson 11** Cost Explorer
- Overview
 - Opening the cost explorer
 - Changing the tree view in the cost explorer
 - Show timesheet data as cost records
 - Creating new cost records
 - Editing existing cost records
 - Cloning cost records
 - Sorting records in the cost explorer
 - Filtering cost records
 - Modifying a group of cost records
 - Cost statistics
-

- Lesson 12** Recorded Progress
- Overview
 - Recording actual progress: contract items
 - Recording actual progress: overhead items
 - Recording actual progress: variations and sundries
 - Selecting other periods of recorded progress
 - Filtering
 - Show progress over time
 - Budget-actual analysis
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- Lesson 13** Progress Claims
- Overview
 - Progress claim summary
 - Claim properties
 - Claiming variations
 - Display claim-progress relationship
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- Lesson 14** Extension Of Time
- Overview
 - Creating extensions of time when identified
-

- Lesson 15** Project Action List
- Overview
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Introductory Expert Project Face-to-Face Training – Course Outline

- Lesson 16** Budget Performance
- Overview
 - Forecasting methods
 - Forecasting using a formula
 - Forecasting using a cost estimate
 - Cost estimate formulae
 - Selecting forecasting methods
 - Cost-to-date details
 - Budget details
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- Lesson 17** Analysis Windows
- Project status
 - Detailed cost comparison
 - Cash flow
 - Accrued-committed costs
 - Cost/schedule performance index
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- Lesson 18** Printing and Reporting
- Changing printer setup
 - Printing from any window
 - Printer button
 - Printing reports
 - Formatting reports
 - Exporting reports
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