Home

Congratulations on buying Trimble Modelogix™, a fast, accurate and easy-to-use software package for modeling preliminary project cost projects. Modelogix enables companies, large and small, to capture and store historical cost projects and *as built* project costs efficiently in a standard Microsoft SQL database. Modelogix uses these selected historical project costs, which can be normalized by time and location, to generate a conceptual building cost model.

The Home page has links to video clips that help you learn about how to import projects, how to search projects and how to create a new model.

Across the upper part of the screen are several buttons:

- Import WinEst Project - Browse to and select a WinEst project to import into Modelogix. You will need to set up at least one WBS Table before you can import an project.
- Import Excel Project - Browse to and select an Excel project to import into Modelogix. Prior to importing you need to setup a template that defines the data in the Excel file. And you will need to setup at least one WBS Table before you can import an project.
- Create Model - Takes you to the Models topic where you setup the details and spreadsheet for a new model.
- Search Projects - Takes you to the Search topic where you setup queries, or searches, that are used to identify the projects you wish to include in a model.
- Build Report - Takes you to the Reports topic where you define the views and other options to be included in a report.

About

The About screen displays information about Modelogix, about WinEstimator and includes a diagram of WinEst software. The box in the upper left displays the Modelogix version, the user and role and license details. In the lower left is information about our company, WinEstimator. To the right is a diagram of the role of each piece of WinEstimator software and how each interfaces as a part of the complete solution for your estimating needs.

Licensing: If you have been issued a new license, click 'Change Activation' and paste the new activation code.

Social Media: Follow us on social media. Simply click on one of the links and follow us!

Setup

Setup is the first step in using Modelogix. This is where you setup Modelogix to suit your company needs best. Custom units, metrics definitions, WBS tables, Cost Indices, Smart Categories, Options and Users are all managed here. Click a link below to see more on each topic.

Cost Indices

Cost Indices in Modelogix are used to adjust estimates for time, location, or both. Modelogix can handle as many Cost Indices as needed to update a project or parts of a project to today's costs and the proposed model project location. In addition to being able to index estimates for date and time differences, Modelogix can further break down these changes by cost type. This can only be done for contributing cost metrics.

Date indices are used to change project dollars from the project date to the date specified as of today, or at a future date as specified on the project or Model. Location indices are used to change project costs from the project's execution location to the location specified for the project or Model. Date and location indices are used to change a project's costs for both time and location simultaneously.

To set up a Cost Index:

1. On the navigation pane, click **Setup** > **Cost Indices**.
2. Enter a name at the bottom of the Cost Index list.
3. Press Enter or click to add to the list.
4. Select whether you want to have date-based and/or location-based cost indices.
5. Click **OK**.

   A grid appears to the right of the cost index.

6. To enter values in each of the cells of the grid:
   - Date: Type the date using the *m/d/yyyy* date format. Otherwise, double-click on the cell, click on the calendar icon and select the date from the calendar.
   - Location: Type the name of the location or click the drop-down arrow to select a previously entered location.
   - Total: Enter the cost index that will be applied to cost metrics within that row that do not have a populated cost index. For example, if a cost index of 1.1 was manually entered for Labor, entering an index of 0.9 to the Total field will skip the Labor metric and will only apply to the other cost metrics in the same row.
7. Optionally use the following buttons on the toolbar:
   - Fill Down - Select the cells that you wish to fill in with the top value and then click this button.
   - Import from External Source Files - Opens a window where you can select an Excel file to import data. Supported File Types include Excel files (*.xls, *.xlsx), CSV (*.csv), Tab Delimited (*.txt). The import file needs to have the factor columns in the same order as seen on your screen.
8. If you are editing a cost index that has already been used in a model, click to refresh the new values in your models. Depending on the number of models that are being updated, this process may take some time.

Note If you do not wish to have an index on each cost type, there is no need to include a value in the import.

To delete a Cost Index

1. Select the cost index to delete.
2. If values have been assigned to the cost index, delete them.

   Tip: If a location is defined for this cost index, you must first delete all the other defined values before deleting the location.

3. Click next to the cost index to delete.
4. Click **Yes** when prompted to confirm.

Markups

Using Markups to apply a fixed amount to a model is an efficient way to determine overheads, profits, and other contract prices. Modelogix enables you to add Markups to your model budgets. For your convenience, System Markups can be created by your administrator so that they are available to all models. Alternatively, you can create unique Markups that are only available to your model.

To add a system markup

1. On the Navigation Pane, click **Setup** > **Markups** menu.
2. At the bottom of the Markups table, enter a unique name for the markup.This will help users to easily identify the markup when choosing from a list of system markups to add to a model.
3. Click or press Enter.
    - **Name**: Optionally change the name of the markup. This field is required and cannot be empty.
    - **Type**: Select the basis for the markup: lump sum or percent.
    - **Value:** Enter the value for the markup. You can enter it as a percentage or dollar value.
    - **Range Only:** Optionally apply a range to the markup basis. The range can be based on any of the available WBS tables and their codes.

      If you select a range by 'code', it searches for all the WBS tables between the selected codes.

      If you select a range by 'name', it will search for all the WBS tables between the selected names. Example: Selecting 'General Conditions', which starts with the letter "G", and selecting 'Project Office Expenses', which starts with the letter "P", will search for all tables that start with letters between "G" and "P".

    - **Apply to Metrics**: Optionally limit the markup to any of the metric amounts.

To delete a system markup

1. Select the system markup to delete.
2. Click .
3. Click **OK** when prompted to confirm.

   Any system markup that was added to a model will not be affected.

Metrics

Modelogix lets you define metrics used for modeling. You can define up to 22 metrics. Unless listed as "locked" , all the existing metrics can be customized.

To add a metric

1. On the navigation pane, click **Setup > Metrics** menu.
2. Enter the name at the bottom of the Metric list and click to add to the list.
3. Select one of the following options. Note that these three check boxes are mutually exclusive.

- **Cost**: Select this if you wish to include this metric in the Total Cost. Clear this check box if this metric is for displaying information only. Examples of this are labor, material, equipment, etc.
- **Weighted**: Select this if you want your metric to use a weighted average based on Project Size. This option is available to your metric if it is not reserved. It is not calculated from other metrics, and it does not contribute to the Total Cost. This setting is set as default for the Labor Hours metric.
- **Calculation**: Select this if you want your metric to be calculated from other metrics. When selected, the Expression drop-down lists become available and you can develop a simple expression. This is not available for all metrics because certain metrics, such as labor or material costs, come directly from the project and are not calculated fields. However, a metric like labor unit cost is calculated by dividing labor by quantity.

4. Select the **Format** in which the metric will be displayed.
5. Select the number of **Digits** to display after a decimal point.

Options

In the Options page, you can set the following project-wide settings:

Company

Once Modelogix has been installed and a database has been created, there are some options you may want to set. For example, you can add a logo for your company or you can change the terminology used for "Project".

Company options

1. On the navigation pane, click **Setup**.
2. On the menu, click Options > **Company**.
3. Optionally do the following:
    - Logo: Click the logo box and select the picture to be used as your company logo.

      Nomenclature

    - Project Name: Enter the name that your company uses for projects. For example, if your company refers to projects as an 'Estimate', enter it in the Value column. Make sure that it is capitalized as the system will automatically change it to lowercase where applicable. All instances of 'Project' in Modelogix will then be replaced with 'Estimate'.
    - Project Plural: Enter the plural for the Project Name, such as *Estimates*. Ensure that it is capitalized as the system will automatically change it to lowercase where applicable.

Prolog

Modelogix enables you to import the Budget Code Structure of closed projects in Prolog and link them to your WBS tables. Additionally, the project's size, unit of measurement, and finished date are also imported.

To establish a link with Prolog's database, you need access to Prolog Connect 9.61 or later. (Note: In Prolog 9.8, Prolog Connect has been renamed to Prolog Web Services and was added to the Prolog Converge installation wizard.) To purchase a copy of Prolog, please contact Meridian Systems.

Tip: Before linking to a Prolog database, ensure that your WBS tables are set up to map the Budget Code Structure used in the Prolog projects. For information on how to create WBS tables, see WBS Tables. Note that only Administrators have permission to import Prolog's Budget Code Structure.

To import Prolog budget codes

1. On the navigation pane, click **Setup.**
2. Click the **Options** menu > **Prolog**.
3. Under Connection Details, enter the following information to establish a connection:
   - URL: Enter the Prolog Connect address. Example: *http[s]://<host-name>/prolog* <host-name> is where Prolog Connect is installed
   - User Name / Password: Enter valid Prolog credentials.
4. Click **Connect** to establish the connection.

   A list of portfolios is listed.
5. Select the check box next to the portfolios that contain the projects you wish to import.

   The system loads Prolog's budget group.
6. Select the portfolio that you wish to create the mapping.
7. Map the Modelogix WBS table to Prolog's budget group.
8. Click **Select Folder** and choose where newly imported Prolog projects will be placed.
9. Click **Save**.

   The system is now set up to automatically import only Closed projects from Prolog once every hour. However, you can also click **Refresh Projects** to import the projects immediately. (To 'Close' a project in Prolog, open Portfolio Manager and select the 'Closed' check box for that project.)
10. To stop the automatic import, click **Disconnect**. This will not affect any previously imported projects.

These projects can now be published and used for cost modeling. You can also export the project back to Prolog as a budget. For more information, see Model.

Vico

Projects created with Vico Office can be exported into Modelogix and added to the historical database. With these Vico projects in your database, you can then create a model that can be used as the basis for a new project in Vico.

A link between Vico Office and Modelogix is established from Vico Office. Projects are exported to Modelogix from Vico Office. In Modelogix, you simply indicate which folder these projects should be in as well as how the Vico hierarchy should map to the associated WBS tables.

Before creating this Vico mapping, ensure that WBS tables have been created in Modelogix.

To map imported Vico projects

1. On the navigation pane, click **Setup**.
2. Click the **Options** menu > Vico.
3. Under **Vico Import Mappings,** enter the following information:
   - **Select Folder**: Click to select the folder where all Vico projects will be placed.
   - **Vico Level / WBS Table**: Vico supports the concept of hierarchical levels. Each active level is part of the hierarchy.

     In Modelogix, active levels can be mapped to each Modelogix WBS table. Not all levels must be mapped, but levels between mapped levels cannot be skipped. (e.g., if Level 2 and Level 4 are mapped, Level 3 must also be mapped.)
     You can determine the level of detail in which you want to map your Vico levels to the WBS tables. If you don't map a lower level (e.g., Level 4) and this level has cost items, they will be rolled into the next level up (e.g., Level 3).

     Tip: Level 1 is the project name; hence, Level 1 is not available on the drop-down list.
   - **Total Source**: Select the column from which to pull the total value. This value is from Level 1, which is a total of all the child levels.
   - **Default Metric**: Any unmapped cost will be mapped to this default metric.

- **Tagging Category/Tag**: In Vico, tags are used for sorting and filtering purposes. Tag categories are used to organize these tags in your project. If tags have been defined in Vico, map them to the associated metric.

4. Click **Save.**

Note: The **Reset** button will change your mappings to the last saved settings.

Smart Categories

Smart Categories are used to define projects in such a way that they can be easily found during the search process. Each Smart Category must be given a type and a name and depending upon the type selected, valid choices might also need to be entered.

Only published projects are available for modeling. The act of publishing tells the system that the project has sufficient historical value to be used when modeling future work. It also forces the user to define project-level Smart Categories that have been flagged as 'required'.

An example of a Smart Category would be *Project Type*. Setting this up allows you to query different types of projects to select the projects most appropriate for generating a model. Entering CSI or Uniformat codes in Smart Categories is not recommended as this becomes unwieldy and is best handled in WBS Tables.

To create a smart category:

1. On the Navigation Pane, click **Setup** > **Smart Categories** menu.
2. At the bottom of the Smart Categories table, enter a unique name for the smart category.
3. Press Enter or click .
4. Select the type of smart category you wish to create and click **OK**.
5. Optionally enter the following details if available for your selected smart category type:
   - **Description**: Each Smart Category may be given an optional description that will help guide the user during entry.
   - **Required**: A Smart Category can be required; thus, requiring the publisher of a project to enter information before giving them access to the project for modeling. When a Smart Category is marked as required, it must have a value before the system will allow publishing.

     Tip: If the smart category is required, then input to it cannot be calculated.
   - **Calculated**: The Calculated box allows you to define an expression that will be used to calculate the value of the answer for the Smart Category. You can select project properties and/or other Smart Categories as variables and use math expressions, constants and operators to create a calculation. These values are then used to search for projects that match this criteria.

     This setting offers you the flexibility to manipulate your project data. For example, if you need to add a currency conversion rate of 12% to all of your project Totals, you would create the following expressions: 'Estimate.Total*1.12'. All your projects will have this smart category automatically calculated.

     Tip: If this smart category is calculated, then input to this smart category cannot be required.
   - **Choices**: Multiple-choice type of smart categories will include a box where you can enter the options that they can choose from. If more than one option is allowed, select the 'Allow multiple selection of values'.
   - **Unit**: Number type of smart categories will enable you to define the unit for the number. Select it from the Unit drop-down list.

- **Import Field:** Each Smart Category can be assigned a value for Import Field. This can be a time-saver in populating Smart Category answers when importing Excel and WinEst projects.

  By populating a Smart Category's Import Field with the name of an Excel Range Name, you are telling Modelogix to import the value from that Excel Range Name as the answer to this Smart Category when importing any Excel project. Similarly, by populating a Smart Category's Import Field with the name of a WinEst Keyword Definition, you are telling Modelogix to import the value from that WinEst field as the answer to this Smart Category when importing any WinEst project. If, in either scenario, Modelogix encounters an error obtaining the value from those fields, such as, they are not the correct type, or they are blank, it will silently bypass them and leave that Smart Category unanswered.

  If you import both Excel and WinEst projects regularly and you wish to use this feature, it is recommended that you standardize on the WinEst Keyword Definition names as the Import Field names. Then by also defining your Excel Range Names using the WinEst Keyword Definition names, you will be able to import Smart Category answers from both sources. For more information on WinEst Keyword Definitions, search for Keyword Definition in WinEst Help. For more information on Excel Range Names, do a search on 'How to Create Range Names in Excel' within Microsoft Excel's help system.

Example of how Smart Categories might be set up:

Units

Units of Measure can be assigned to any level of WBS within a project. Each Unit of Measure within Modelogix can have an unlimited number of abbreviations resolving to the specific unit. This enables Modelogix to recognize Units of Measure as defined by various cost estimating systems as a single same unit. SF, sf, & sqft can all be defined as 'Square Foot' in Modelogix. Units already assigned in a project by another estimating program will be kept and brought in during the import to Modelogix.

To Add a Unit

1. On the navigation pane, click **Setup** > **Units** menu.
2. At the bottom of the screen, enter the new unit.
3. Click to add to the list.
4. Enter an optional abbreviation.
5. Click to add to the list.
6. Repeat steps 3-6 for any additional units and abbreviations.

Sample Unit Types

- Count - each, box, case, dozen
    - Length - inch, foot, yard, meter
- Weight - ounce, pound, kilogram
- Volume - quart, gallon, cubic yard, liter
- Area - square foot, acre, square meter
- Time - minute, hour, day, month, year

Users

All users who want to access Modelogix must have an account and one of the following security **roles**:

- **Administrator** - Has unlimited access to Modelogix including all the models created by users. This includes those not marked as editable by everyone (Model > Details > 'Mark can be editable by everyone').
- **User** - Limited to creating Models and building Report Templates.

To create a user account

1. On the navigation pane, click **Setup > Users** menu.
2. At the bottom of the window, enter the user's name, which will be used as the username.
3. Press Enter or click to add to the list.
4. Optionally change the Display Name.
5. Optionally enter an Email address.
6. Select the appropriate role for this user.
7. Double-clicking the logo box opens a window where you can browse to and select a profile picture.
8. To add or change the user's password, enter the new password and click **Submit**.

   The password will take effect the next the user logs in to Modelogix.

WBS Tables

Work Breakdown Structures are vital to the way Modelogix sorts and summarizes information for the analysis of actual cost projects when creating a Model.

As projects are loaded into Modelogix, WBS structures contained within the project point to WBS structures contained within the Modelogix database. This is mapped prior to importing. Individual estimators as well as different project authoring systems may generate and store WBS information within their specific project files differently.

Important There *must* be a minimum of one common WBS across all projects. This allows you to compare similar data between projects. The mapping feature contained in the Modelogix import function allows for the standardization of work breakdown structures across project files and systems.

In addition, Modelogix allows the system administrator to set up standard work breakdown structures to be imported into the system. For example, the administrator or publisher may set up Modelogix to use CSI, Uniformat, or Job Cost information.

Tip: If you are integrating with Prolog, set up your WBS table to match Prolog's budget code structure.

To set up WBS Tables

1. On the navigation pane, click **Setup** > **WBS Tables**.
2. At the bottom of the Table column, enter the name of the table.
3. Click to add to the list.

   The codes and names will display **after** you import projects that have tables with this information.

Note Each level requires its own table. For example, a 3-level CSI structure would require a division table, a major table and a minor table.

Editing Control Units

If you did not import Control Units with your projects, they can be added later.

Control Units and Quantities are used for modeling alternate Units of Measure, and are optional. For example, a project may be based on the square feet of the building. However you may need to view the sitework for this project in acres, or the steel framing in linear feet. You can do this by assigning Control Units.

To assign Control Units:

1. If your project was imported from WinEst, the quantities and units in the WBS tables are automatically imported.
2. To manually assign Control Units after importing projects, double-click on a table's Control Unit field and select the Control Unit from the drop-down list.

Search

The Search feature helps you locate similar projects contained within the Modelogix database. Projects can exist across a wide range of sizes, dates, and project types. The Search feature helps narrow down the list to a manageable set of projects for the purpose of modeling new proposed projects.

When a search is created, each of the project fields and Smart Category assignments are displayed in columns. You can then select which values to allow in the search results. As each selection is made, the list will be narrowed to reflect the set of filtered columns.

A search reduces the set of projects to a list of similar projects which can then be used to create a Model. Since Models are a projection of future costs based on past performance, it is important that the projects contained in the search are of similar scope as the proposed new Model. This is accomplished by the value assignments made to Smart Categories during the project publishing process. For example, if the Model is to reflect a medium sized commercial building, projects in the search should be of this same general size, and type. Smart Category tags define the project type in order to assist finding the project when needed.

Tip: If you create a new project, you must first log out / log in before this project is included in the Search filters.

Searching for Projects

Use the Filters (right column of the Search screen) to search for projects to be used in a model. Once the projects are filtered, you can create a model with the click of a single button.

The following buttons are available on the Search screen:

- - Exports data to an Excel file.
- - Creates a new model from the search results.
- - Opens a window where you can select the columns to display.
- - Hides or show the results grid.
- - Hides or shows the map.
- - Centers the map on the selected estimates in the grid view.

To search for projects using filters

1. On the right side of the Search screen, expand the Project Information and/or the Smart Categories headings.
2. Check the various properties to filter your view. Click to show the filters or click to hide the filters.

The bottom of the screen displays the grid view (if the grid is set to be displayed - see the Search buttons). Click the column headers to sort by that column.

Note Once you have the estimates selected for a model, click ,

Folder Content

Modelogix provides you with a folder structure that enables you to organize in hierarchical format all of your projects, models, reports, and supporting documents. Within these folders, you can open, move, and delete files and folders.

Any folder, project, model or document that you add to a folder will appear as a subfolder.

以上内容仅为本文档的试下载部分，为可阅读页数的一半内容。如要下载或阅读全文，请访问：https://d.book118.com/357102000134006026