

# RSMeans Online Quick Tip: Creating an Estimate

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Now a standard feature for all subscribers, creating estimates with RSMeans Online is quick and easy! Whether you're creating a unit or an assembly estimate, RSMeans Online gives you all the tools you need to create, save and export your construction cost estimates.

Use the steps in this month's Quick Tip to get started creating estimates fast!

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## Getting started

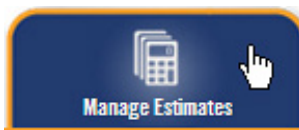
Before you get started, it's helpful to know that creating an assembly or unit estimate consists of the following steps:

- Setting the estimate basics, such as estimate name, project address, and folder location.
- Selecting the cost data and format to use, whether the default data selections or a temporary selection.
- Adding cost lines to your estimate, including those you have customized.

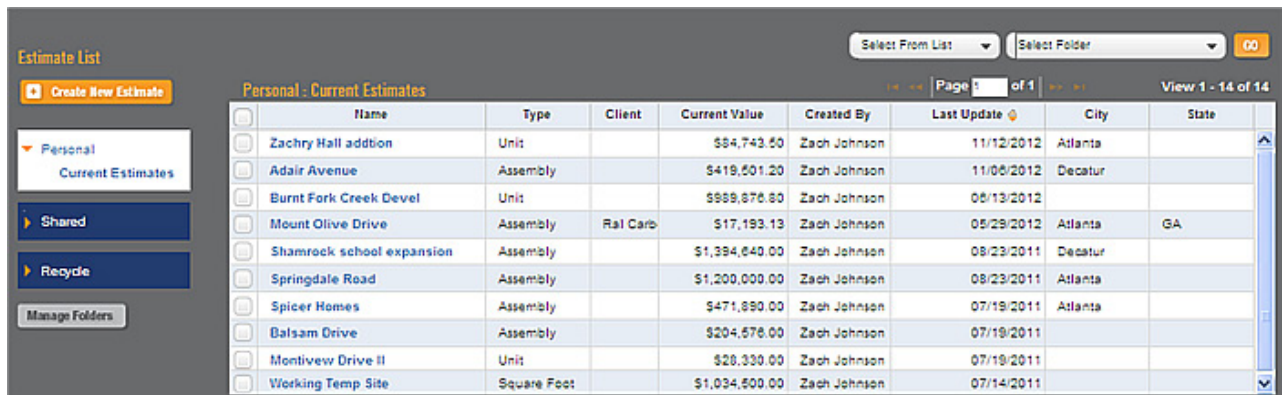
## Let's get started!

### Setting the estimate basics

1. Once you are logged in to your account, click the **Manage Estimates** tab:



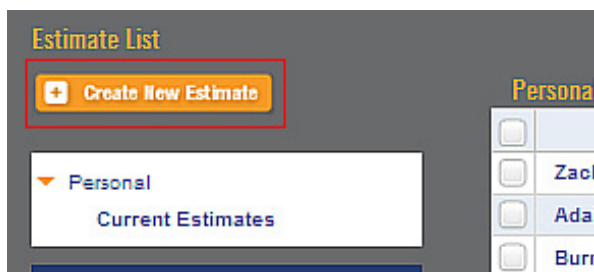
This opens the window where you access your estimates and estimate functions:



The screenshot shows the "Estimate List" interface. On the left, there is a sidebar with a "Create New Estimate" button and a folder tree showing "Personal" > "Current Estimates". The main area displays a table of estimates under the heading "Personal: Current Estimates". The table has columns for Name, Type, Client, Current Value, Created By, Last Update, City, and State. There are 10 rows of data.

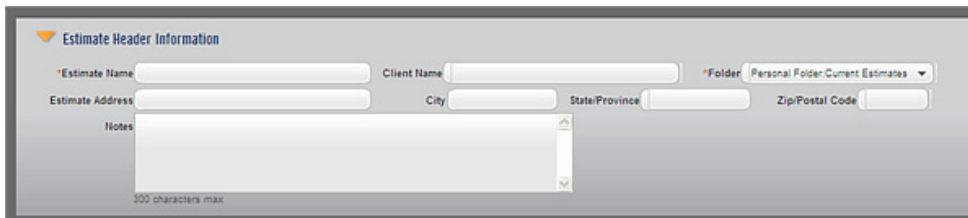
Name	Type	Client	Current Value	Created By	Last Update	City	State
Zachry Hall addition	Unit		\$54,743.50	Zach Johnson	11/12/2012	Atlanta	
Adair Avenue	Assembly		\$419,501.20	Zach Johnson	11/06/2012	Decatur	
Burnt Fork Creek Devel	Unit		\$959,676.80	Zach Johnson	05/13/2012		
Mount Olive Drive	Assembly	Ral Carb	\$17,193.13	Zach Johnson	05/29/2012	Atlanta	GA
Shamrock school expansion	Assembly		\$1,394,640.00	Zach Johnson	09/23/2011	Decatur	
Springdale Road	Assembly		\$1,200,000.00	Zach Johnson	09/23/2011	Atlanta	
Spicer Homes	Assembly		\$471,890.00	Zach Johnson	07/19/2011	Atlanta	
Balsam Drive	Assembly		\$204,576.00	Zach Johnson	07/19/2011		
Montview Drive II	Unit		\$28,330.00	Zach Johnson	07/19/2011		
Working Temp Site	Square Foot		\$1,034,500.00	Zach Johnson	07/14/2011		

2. Click **Create New Estimate**:



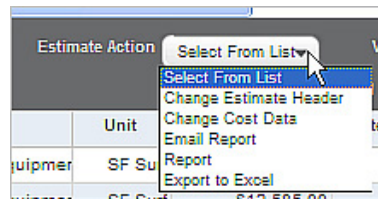
This opens the window where you complete the estimate header and select the Cost Data Preferences for the estimate.

3. First, complete the information in the Estimate Header Information section:

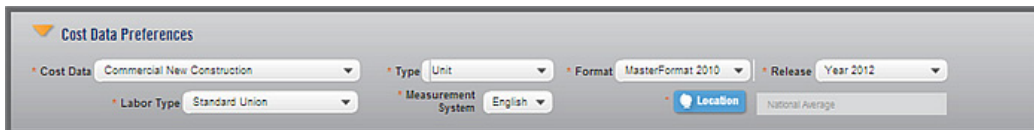


The screenshot shows the 'Estimate Header Information' section of a software interface. It contains several input fields: 'Estimate Name' (with an asterisk indicating it is required), 'Client Name', 'Estimate Address', 'City', 'State/Province', and 'Zip/Postal Code'. There is also a 'Folder' dropdown menu currently set to 'Personal Folder:Current Estimates'. A 'Notes' text area is located below the address fields, with a '500 characters max' limit. A small blue arrow icon is visible in the top left corner of the section.

**Note** that the Estimate Name and the Folder sections are required. However, you can always change any of the header information once your estimate is complete by using the Estimate Action menu:



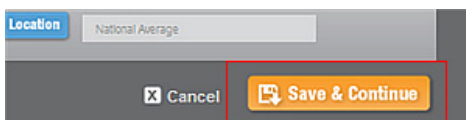
4. Next, verify that the correct cost data is selected in the Cost Data Preferences section:



The screenshot shows the 'Cost Data Preferences' section. It features several dropdown menus: 'Cost Data' (set to 'Commercial New Construction'), 'Type' (set to 'Unit'), 'Format' (set to 'MasterFormat 2010'), and 'Release' (set to 'Year 2012'). There are also 'Labor Type' (set to 'Standard Union') and 'Measurement System' (set to 'English') dropdowns. A 'Location' button is present, with 'National Average' displayed next to it.

**Note** that the Cost Data Preferences menu is automatically populated with your default cost data selections. You can use this cost data or select a different cost data set. Remember that your subscription determines the cost data available for your estimate.

5. Once you are finished making your selections, click **Save & Continue**:



The screenshot shows a close-up of the bottom of the form. It features a 'Location' dropdown set to 'National Average'. Below this are two buttons: a 'Cancel' button with a close icon and a 'Save & Continue' button with a floppy disk icon. The 'Save & Continue' button is highlighted with a red rectangular box.

Now that your basics are set, you're ready to start building your estimate. Continue to the following section to begin adding cost lines to your estimate!

## Adding cost lines to your estimate

The menu for adding cost lines to your estimate is divided into four sections:

The screenshot shows a software interface for adding cost lines to an estimate. It is divided into four sections labeled A, B, C, and D.

- Section A:** A vertical tree on the left side of the window, titled "MasterFormat 2010", listing various construction categories like "General Requirements", "Concrete", "Masonry", etc.
- Section B:** The top header area containing dropdown menus for "Cost Data" (Commercial New Construction), "Type" (Unit), "Labor Type" (Standard Union), "Location" (National Average), and "Release" (Year 2012). It also includes a search bar and a "Search" button.
- Section C:** A table displaying a list of cost lines. The table has columns for "Line Number", "Description", "Unit", "Crew", "Daily Output", and "Labor Hours". The "General Requirements" category is expanded, showing lines for "Summary of Work", "Models & Renderings", "Professional Consultants", "ARCHITECTURAL FEES", and "For new construction" with sub-entries for "Minimum" and "Maximum".
- Section D:** The bottom area, currently showing an empty table for the estimate. The table header includes "Qty", "Line Number", "Description", "Unit", "Extended Total", "Extended Total G&P", "Labor Type", and "Notes". The estimate name "Jackson Lodge" is visible at the top left of this section.

Use the following table to help you understand the different sections in the window:

Section	Description
A	This is the data selection tree. Use this section to locate the cost lines for the selected data category.
B	This is the header menu where you can view and change the cost data used for the estimate. You can also use the search options to locate specific cost lines to add to your estimate.
C	This pane displays the cost lines selected in the data selection tree. Use this menu to add cost lines to your estimate.
D	This is your estimate. The estimate name is at the top left of the section. The buttons at the top of the section let you perform tasks with your estimate.

1. From the data selection tree, click on your selected data category to open the cost lines in the middle pane:

The screenshot shows a portion of the data selection tree. It is expanded to show the following path:

- 8 Openings
  - 0801 Operation And Maintenance Of Openings
    - 080153 Operation And Maintenance Of Plastic Windows
      - 080153.81 SOLID VINYL REPLACEMENT WINDOWS
    - 0805 Common Work Results For Openings

## Adding cost lines to your estimate

The middle pane displays the available cost lines for the selected data category:

Line Number	Description	Unit	Crew	Daily Output	Labor Hours
080153810010	SOLID VINYL REPLACEMENT WINDOWS				
080153810020	Double hung, insulated glass, up to 83 united inches	Ea.	2 Carp	8.00	2.000
080153810040	84 to 93	Ea.	2 Carp	8.00	2.000
080153810060	94 to 101	Ea.	2 Carp	8.00	2.000
080153810080	102 to 111	Ea.	2 Carp	8.00	2.000
080153810100	112 to 120	Ea.	2 Carp	8.00	2.000
080153810120	For each united inch over 120, add	Inch	2 Carp	800.00	0.020
080153810140	Caseement windows, one operating sash, 42 to 60 united inches	Ea.	2 Carp	8.00	2.000

**Tip:** You can also use the header menu to locate cost lines:

- In the search field, you can enter a full or partial name (doors or wood doors) or line number (0501).
- Click to open the Advanced Search menu for more search options.

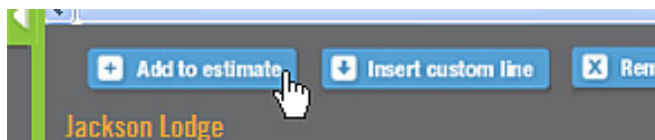
2. Check the cost line that you want to add to your estimate:

<input type="checkbox"/>	080153810020	Double hung, insulated glass,
<input checked="" type="checkbox"/>	080153810040	84 to 93
<input type="checkbox"/>	080153810060	94 to 101

**Tip:** Click on the cost line number to view the details for the selected line:

<input type="checkbox"/>	080153810020	
<input checked="" type="checkbox"/>	080153810040	<b>Line Number:</b> 080153810040 <b>Description:</b> Windows, solid vinyl replacement, double hung, insulated glass, 84 to 93 united inches <b>Crew:</b> 2 Carp <b>Graphic:</b> <a href="#">G.pdf</a> <b>Link:</b> <a href="#">085313 20 Replacement Windows</a>
<input type="checkbox"/>	080153810060	
<input type="checkbox"/>	080153810080	
<input type="checkbox"/>	080153810100	
<input type="checkbox"/>	080153810120	

3. Click **Add to estimate**:



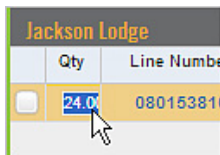
## Adding cost lines to your estimate

The line is added to your estimate with a quantity of zero:



Qty	Line Number	Description	Unit	Extended Total	Extended Total O&P
0	080153810040	Windows, solid vinyl replacement, double hung, insu	Ea.		

4. Enter the quantity for the line:



Qty	Line Number
24.0	080153810040

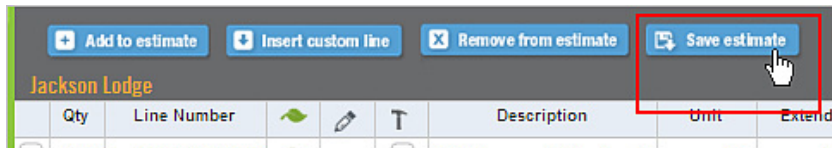
5. Press **Enter**.

The value for the cost line is computed and the value is added to your estimate total:



Qty	Line Number	Description	Unit	Extended Total	Extended Total O&P	Labor Type	Notes
24.0	080153810040	Windows, solid vinyl replat	Ea.	\$10,536.00	\$12,504.00	Open Shop	

6. Remember to click **Save** as you build your estimate to make sure all of your information is saved:



Qty	Line Number	Description	Unit	Extended Total
24.0	080153810040	Windows, solid vinyl replat	Ea.	\$10,536.00

That's it! You can add as many cost lines as you need to create an accurate estimate for your project, customized to your specific location. And once you are ready, you can create reports, email the estimate, create an Excel spreadsheet of the estimate, and copy the estimate to a shared folder for collaboration with other members of your team.

For a full description of all the features and functions of RSMMeans Online, please refer to the Online Help:

[Welcome](#) | [Quick Tour](#) | [Help](#) | [Product Overview](#)

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