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Benchmark Apps – Estimate Initiation Request Forms

benchmark
estimating software

Benchmark Apps – Estimate Initiation Request Forms User Manual

This manual is designed to assist users in the day-to-day use of the Estimate Initiation application

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Benchmark Apps – Estimate Initiation Request Forms

Benchmark apps, built using Microsoft Power Apps, offer an intuitive, cloud-hosted solution for Estimate Initiation Request Forms (Business Forms). This application allows:

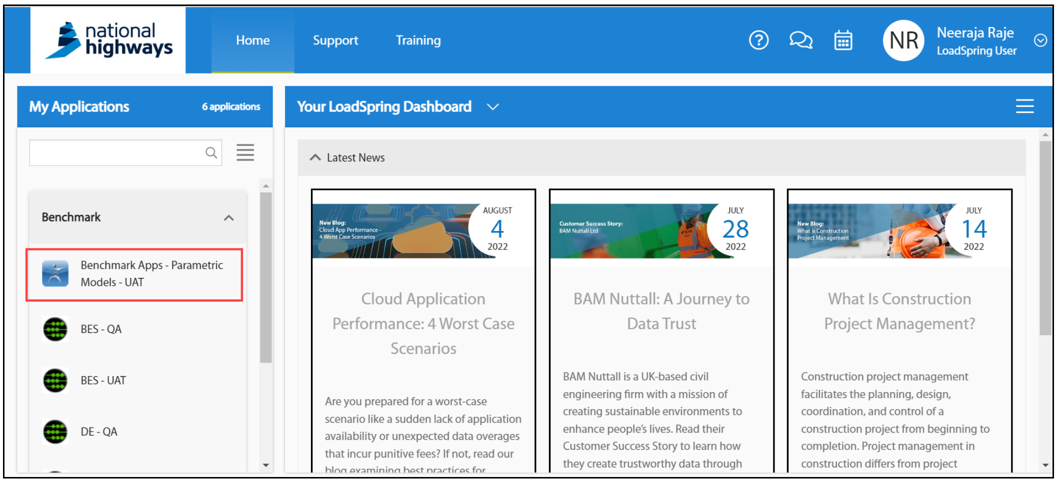
- Third-party users / Project team members to create and submit Estimate Initiation Requests using Business Forms.
- Estimating Managers to review the submitted requests and decide – approve or reject the requests.
- Assign approved requests to the relevant Estimators.
- Approved requests to create Projects (Estimates) in Benchmark and actioned from the Benchmark application thereon.

Accessing the Application

This topic references the UAT application. Information about the Production application will be published in this guide, once available.

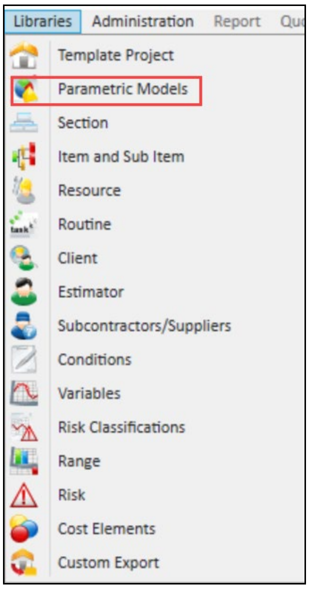
You can access the app:

- From the LoadSpring Homepage



- Using the direct application URL - https://apps.powerapps.com/play/e/76f50b6f-c0f1-41ef-ad44-ccb24a93ac03/a/14b00568-9699-48fa-bbad-659c1f00a6f7?tenantId=be127120-9dbe-46ff-90ea-f32f6e40b0c6

- From within the Benchmark application:
    - Libraries > Parametric Models



    - Project Section or Composite Total > Parametric Model  icon in the toolbar. Alternatively, use the right-click menu option.

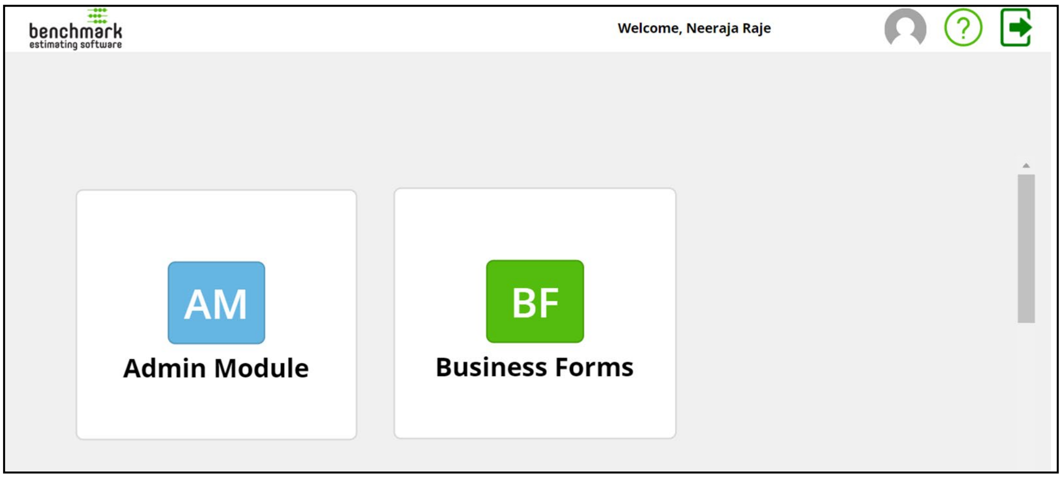
Navigating the App

Landing Page

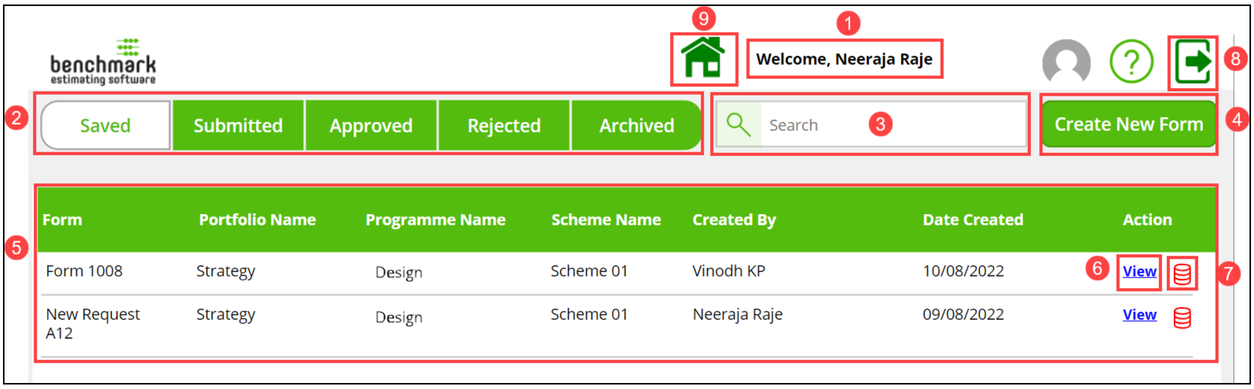
The app landing page contains:

- Admin Module – Where Administrators can set up user access to Estimate Initiation Request Forms.
- Business Forms – Where users with the relevant access can access Estimate Request Initiation Forms.

Only users with an Administrator role for this application in Power Apps will have access to the Admin Module.



Summary Page



1 - Displays the name of the logged in user.

2 - Use this toggle to view the list of Saved, Submitted, Approved, Rejected and Archived Estimate Initiation Requests.

This toggle is not available to Estimators. Estimators can only view the approved requests assigned to them. See Roles for more information.

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3 - Search for requests.

4 - Create new requests.

5 - Displays key information for each of the request:

- Form Name
- Portfolio Name
- Programme Name
- Scheme Name
- Name of the user who created the request
- Estimating Manager who approved/rejected a request (this column is only available in the Approved and Rejected toggles)
- All the Estimating Managers the request is submitted to (this column is only available in the Submitted toggle)
- Date the request was created

6 - View all the details for the selected request.

7 - Archive the request.

8 - Log out of the application.

9 - Go back to the Home (previous) screen.

Managing User Access

Administrators must grant users the relevant Roles and access to Business Forms. This access can be granted for a set duration, if required.

Roles

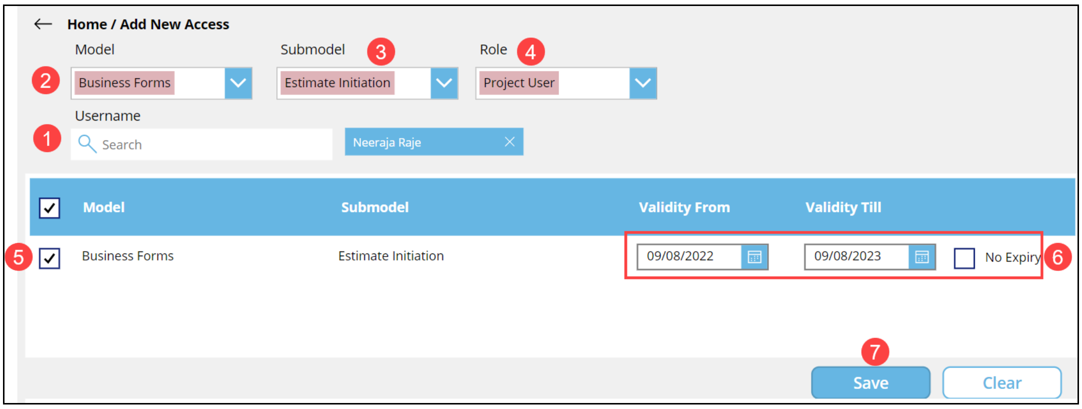
A user's Role determines the operations they are permitted to perform in the application. The available Roles are:

- Project User
- Estimating Manager
- Estimator

Role	Permissions
Project User	➢ **Can only access their own Estimate Initiation Requests** ➢ Create and submit new requests ➢ Save requests ➢ Modify requests ➢ Archive requests ➢ Retrieve their rejected requests, modify and re-submit ➢ Copy the requests they created (regardless of the status or assignee)
Estimating Manager	➢ Create and submit new Estimate Initiation Requests ➢ View all submitted requests for their Portfolio / Programme ➢ Accept / reject requests ➢ Edit requests (regardless of the status or assignee) ➢ Archive requests (regardless of the status or assignee)
Estimator	➢ Can view all the requests assigned to them

Setting Up New Access

1. Open the Estimate Initiation Request Forms app.
2. Select Admin Module.
3. Select the New Access + button.

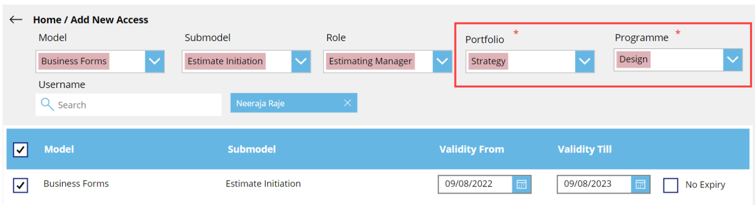


4. From the *Username* 1 dropdown, search and select the relevant user(s).

   To remove a selected user, select x in their username tab.

5. From the *Model* 2 dropdown, select *Business Forms*.
6. From the *Submodel* 3 dropdown, select *Estimate Initiation*.
7. Select the Role 4 you wish to assign to this user.

For the *Estimating Manager* Role, you must also select the relevant *Portfolio* and *Programme*. These are mandatory selections that determine which Estimate initiation Requests this user is permitted to approve/reject.



Business Forms will be added to the grid, with a default validity of one year.

8. Select the relevant row 5

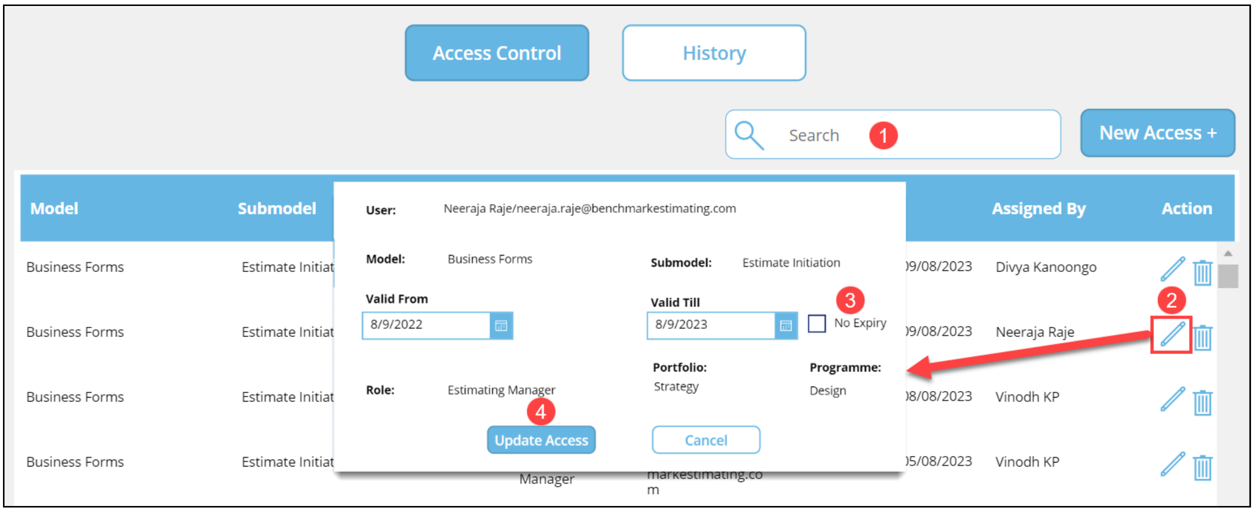
   Alternatively, use the checkbox in the header to select all the rows.

9. To modify the default access duration, use the *Validity From* and *Validity To* calendar tools or check *No Expiry* 6
10. Select Save 7

Modifying User Access

The Access Control tab lists all the users and their access within the application. Administrators can modify the duration for which users can access the Estimate Initiation Request Forms.

1. In the Access Control tab, search 1 the relevant user.
2. Select the Edit 2 icon.
3. In the pop-up screen, modify the validity of the user's access or select *No Expiry* 3
4. Select Update Access 4



Deleting User Access

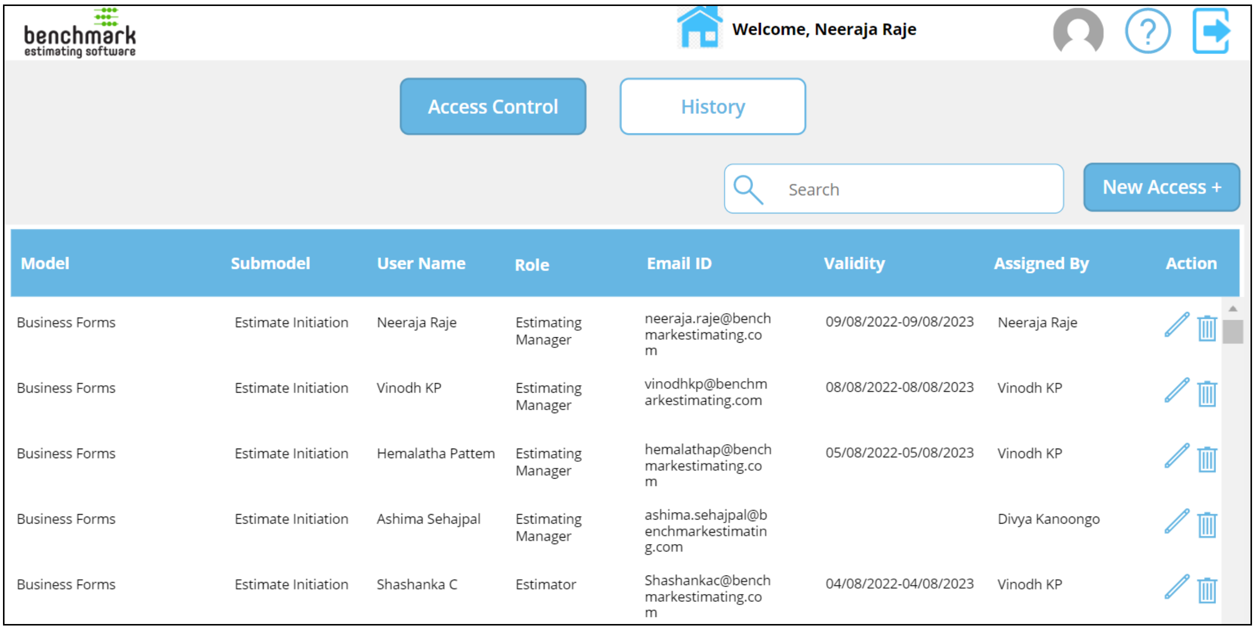
Administrators can revoke a user's access to the Estimate Initiation Request Forms.

1. In the Access Control tab, search the relevant user.
2. Select the Delete icon
3. Enter comments in the text area within the prompt, if required.
4. Select Yes.

If only one user is assigned to a Portfolio/Programme as the Estimating Manager, you cannot delete this access.

Viewing Access History

The History tab of the Admin Module shows all the access created, updated and deleted by Administrators.

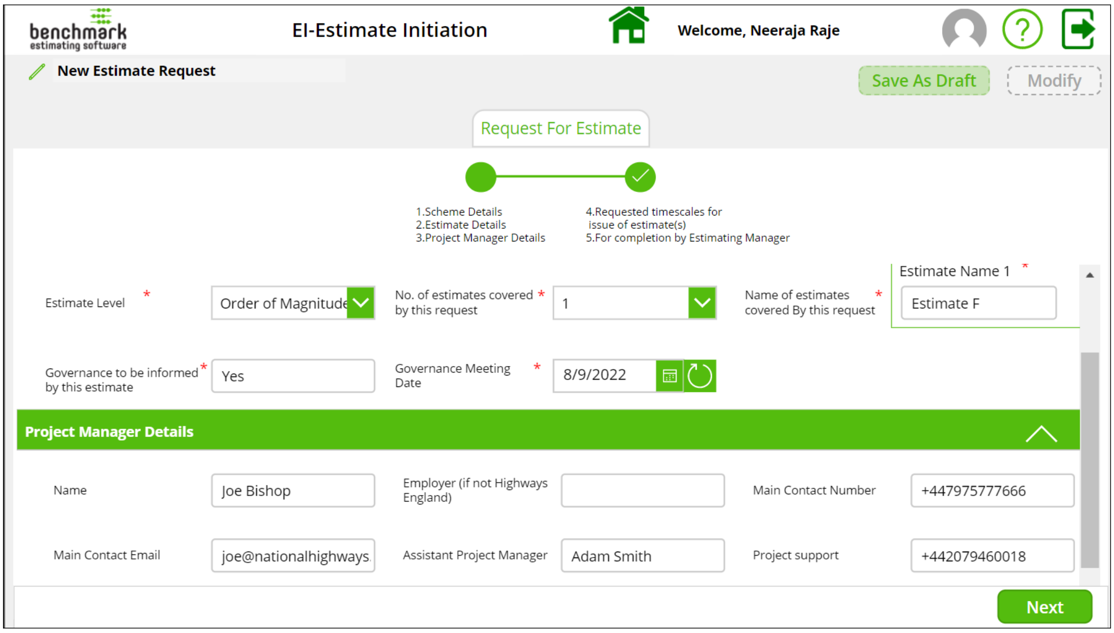


An information icon displays if a comment was added when deleting an access. Select the icon to view the comment.

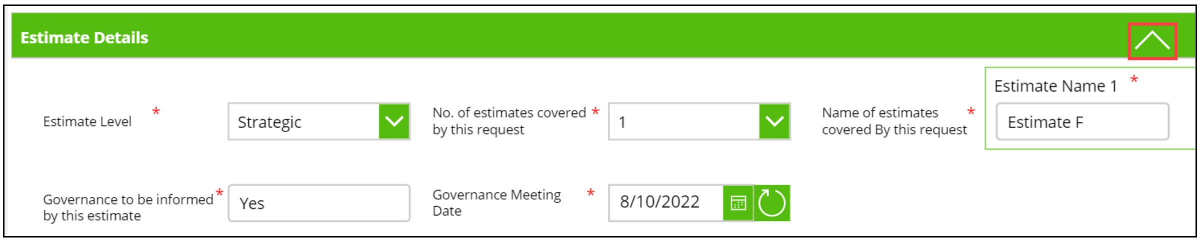
Creating and Submitting New Estimate Initiation Requests

Typically, Project Users will create new Estimate Initiation Requests.

1. Open the app.
2. Select Business Forms.
3. Select Estimate Initiation.
4. Select Create New Form.



5. Use the up and down arrows on the accordions to expand or collapse panels in the screen.



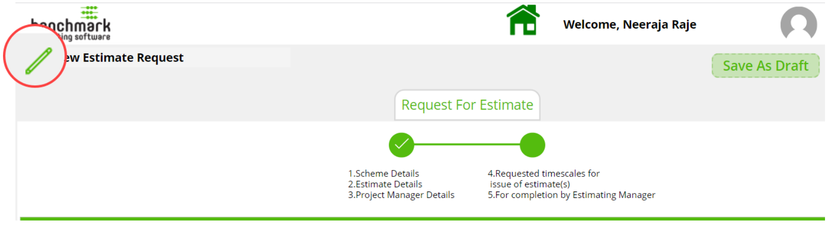
6. Enter / select details for all the relevant fields in each of the panels in the screen.
7. Select Next to proceed to the next screen.

   When you proceed from the first screen, you will be prompted to enter the form name.

8. Enter a unique name and select Continue.

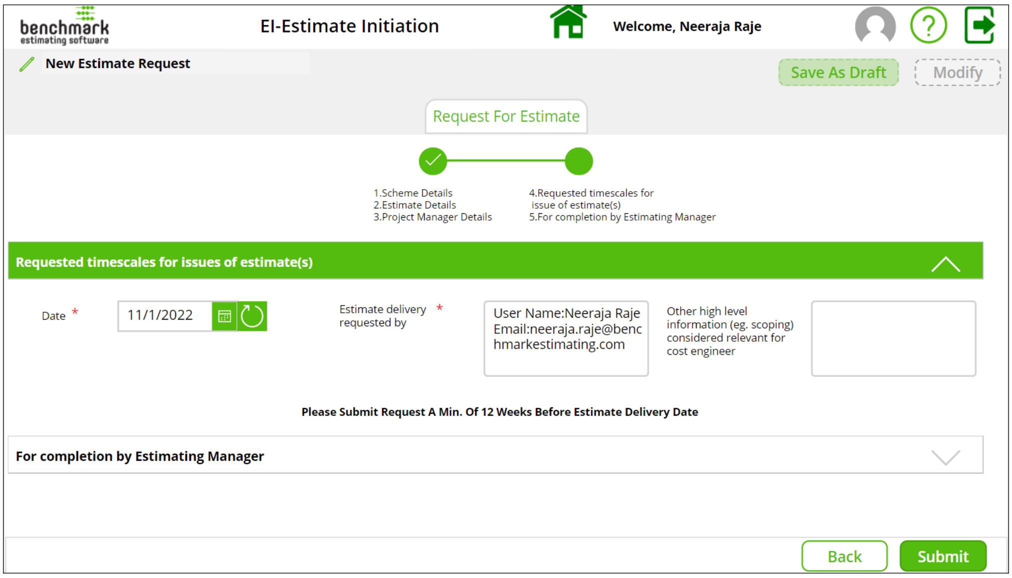
If required, you can edit this name in any of the screens using the Edit icon.

Then, Save the new name.



- Each completed screen is denoted by a tick within a green circle in the progress line.
- Active screens are denoted by a green circle
- Screens pending completion are denoted by grey circles

9. Enter / select details for all the relevant fields in each of the panels in the next screen.



Fields in the For completion by Estimating Manager will only be available to Estimating Managers, and will be disabled for Projects Users and Estimators.

10. Select Submit.

The following confirmation prompt displays:

"Are you sure you want to submit <Form Name> Form?"

11. Select Yes.

The request will be added to the Submitted tab in the app landing page, awaiting review and decision from all the users with the Estimating Manager role responsible for the Portfolio / Programme for which the Estimate Initiation Request is submitted.

An email notification will be sent to all these Estimating Managers.

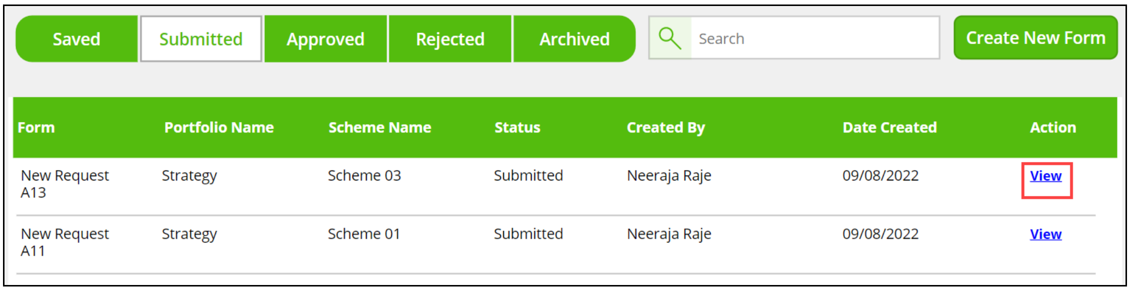
Approving / Rejecting Requests

Once submitted, the Estimating Manager must:

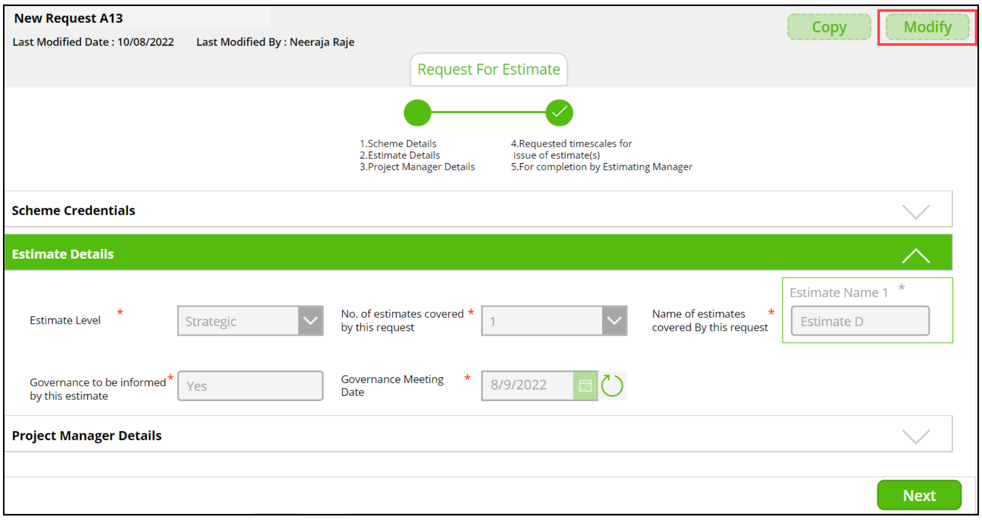
- Review the Estimate Initiation Request (belonging to the Portfolio/Programme the Estimating Manager is responsible for).
- Edit the form, if required.
- Assign the request to an Estimator, if approved or
- Reject the request.

To approve / reject a request:

1. Open the app.
2. Select Business Forms.
3. Select Estimate Initiation.
4. Go to the Submitted tab.
5. For the request you wish you to review, select View.



6. Review the details entered in all the panels of the form.
7. If you wish to edit any details, select Modify and make the required changes.



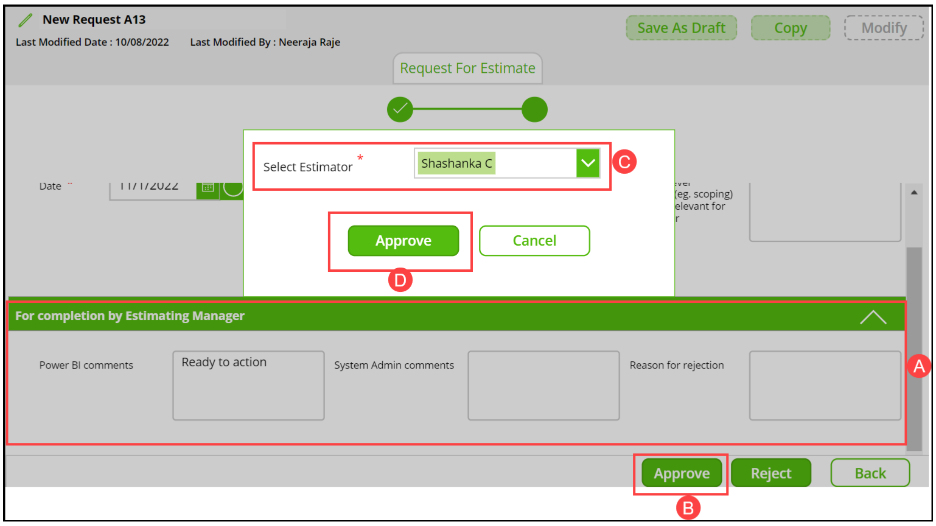
8. Select Next to proceed to the next screen.
9. In the For completion by Estimating Manager panel A, enter the relevant details.

10. If you wish to approve this request:

    a. Select Approve B

    b. Select the relevant Estimator C

    c. Select Approve D



An email notification will be sent to the assigned Estimator.

11. If you wish to reject this request:

    a. In the For completion by Estimating Manager panel, enter the *Reason for rejection*.

    b. Select Reject.

    The following confirmation prompt displays:

    "Are you sure you want to reject <Form Name> Form?

    c. Select Yes.

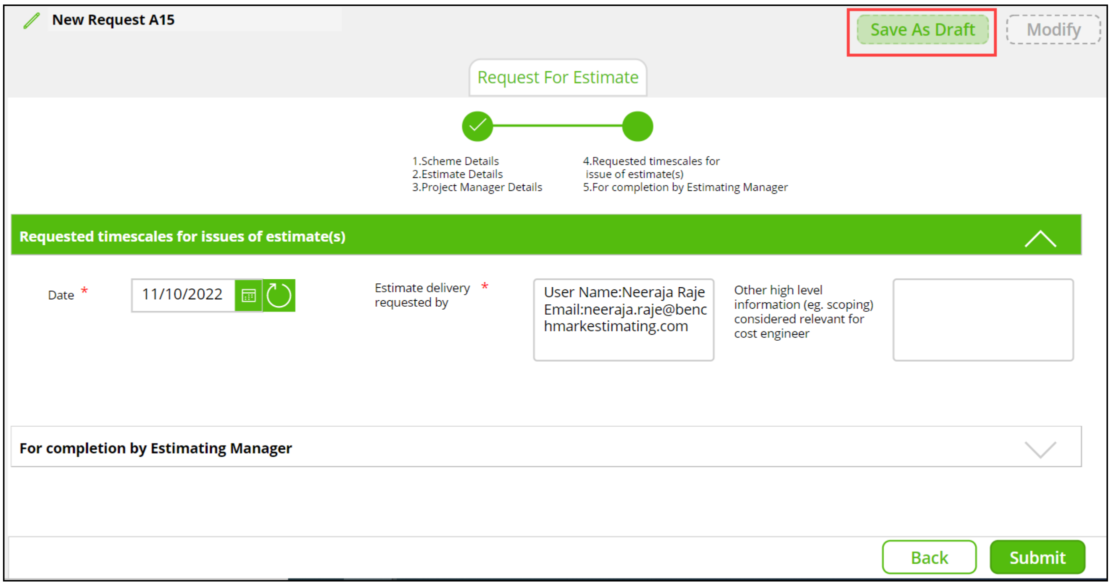
An email will be sent to the Project User who created the request, notifying them of the rejection. The user can then modify the request and re-submit it for approval.

Other Functions

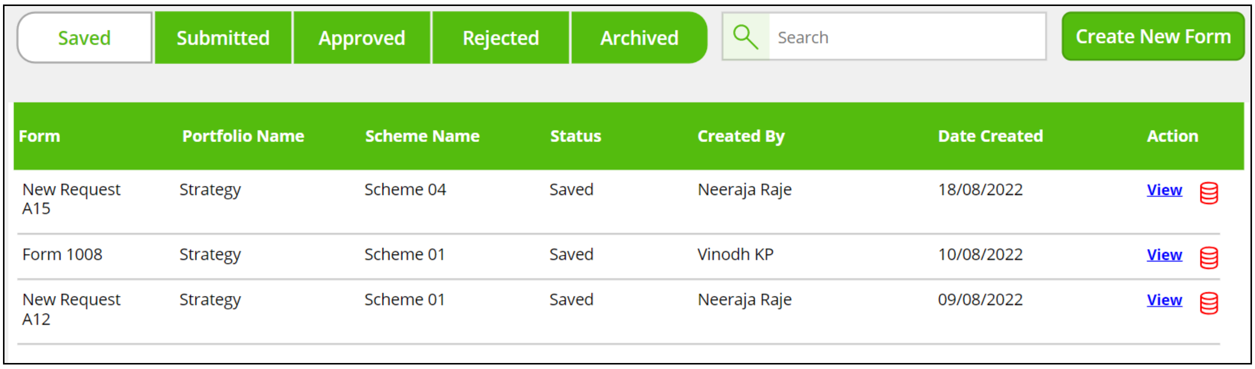
Saving Requests

When working on a form, you can choose to save the details and submit it later.

1. Select Save As Draft to save the entered details.



2. Within the Saved tab, these drafts display with a status of **Saved**.



3. Select **View** to open the draft.

4. Select **Modify** to continue working on the form.

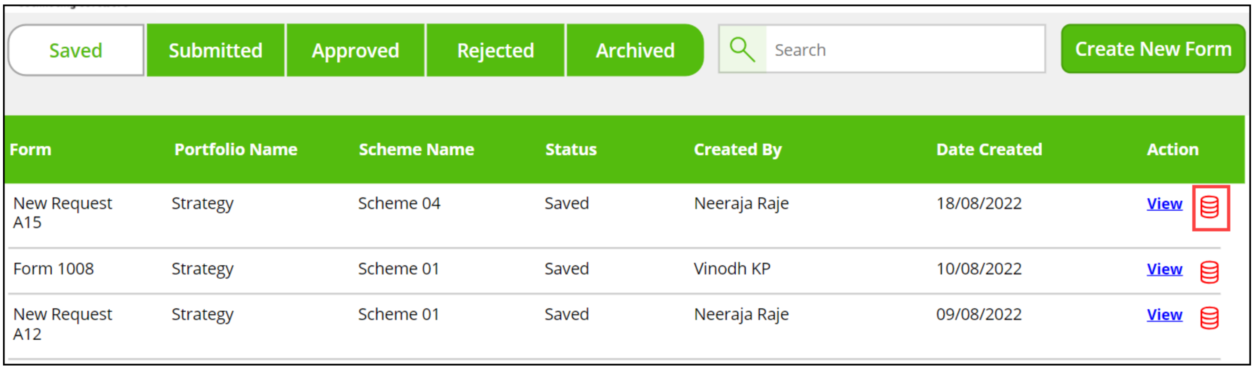
Archiving Requests

If you no longer need a form, you can archive it. This can be particularly useful when you need to manage a large list of forms in the application.

See Roles for information on which roles can archive requests (forms).

To archive:

1. Select the Archive icon for the relevant form.



   The following confirmation prompt displays:

   “Are you sure you want to archive <form name> form?”

2. Add a comment within the text area in the prompt, if required.
3. Select Yes.

   The form will be removed from its current tab, and added to the Archived tab.

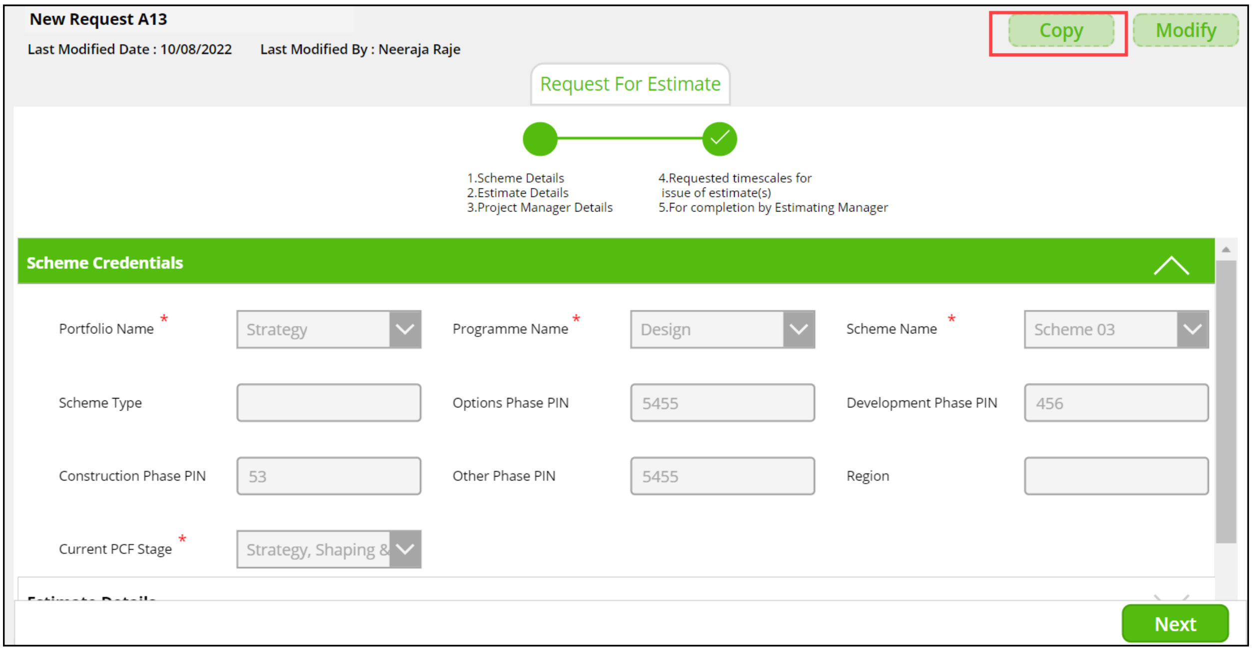
   You can view or copy these archived forms, but not submit them.

Duplicating Requests

This functionality is particularly useful when you want to use a submitted / approved form as a template to create a new Estimate Initiation Request.

To duplicate a form:

1. From the list of saved/submitted/approved/rejected/archived forms, select View to open the form you want to duplicate.
2. Select Copy.

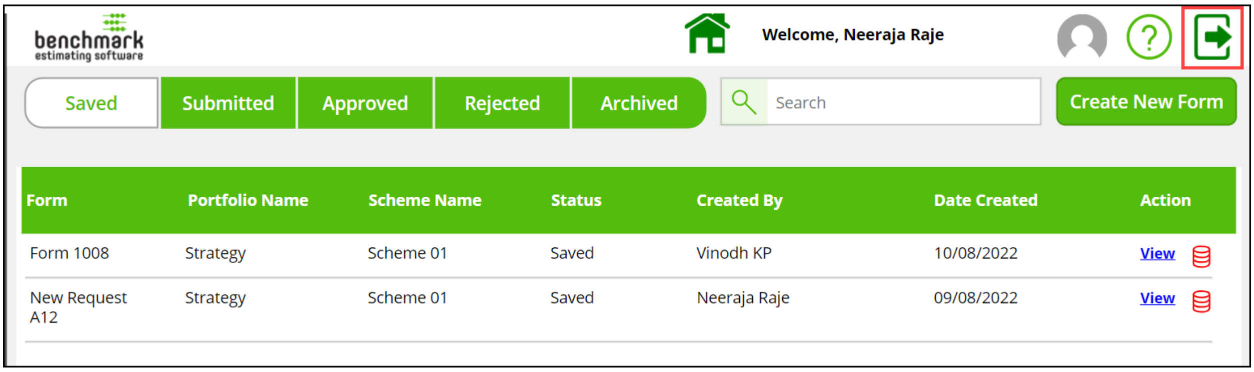


3. This creates a copy of the form.
4. Enter / select details for the new form using standard functionality.

Logging Out

To log out of this application:

1. From any page within the application, select the Logout icon.



   The following confirmation prompt displays:

   "Are you sure you want to Logout?"

2. Select Yes.

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