

**National Highways**

# **Benchmark Apps**

## **Estimate Initiation Request Forms User Guide**

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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.

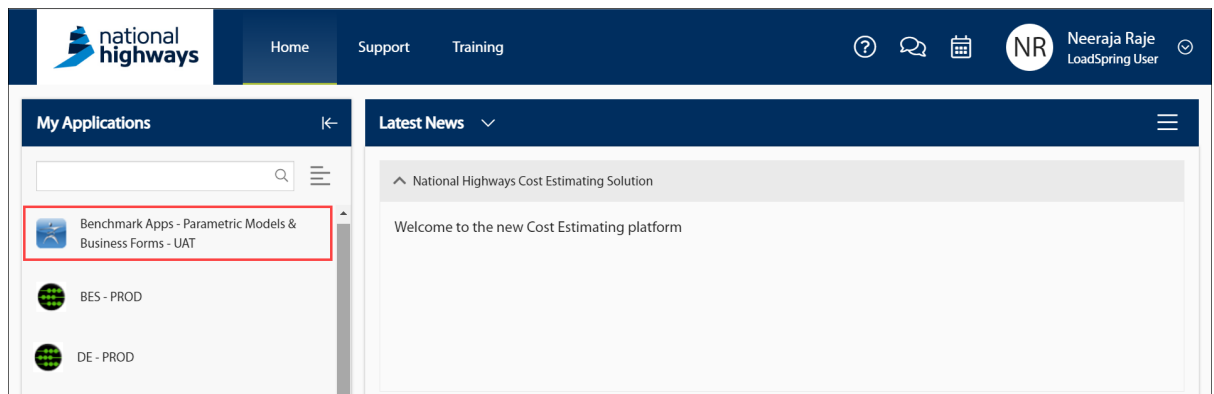
## Accessing the Application



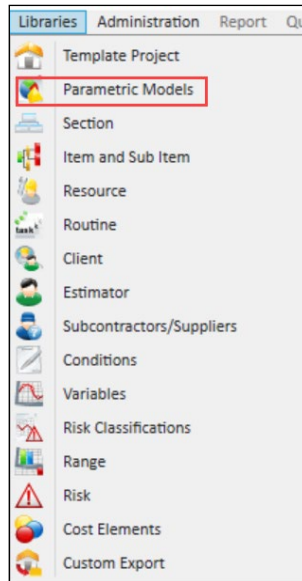
This topic references the UAT application. Information about the Production application will be published in this guide, once available.


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

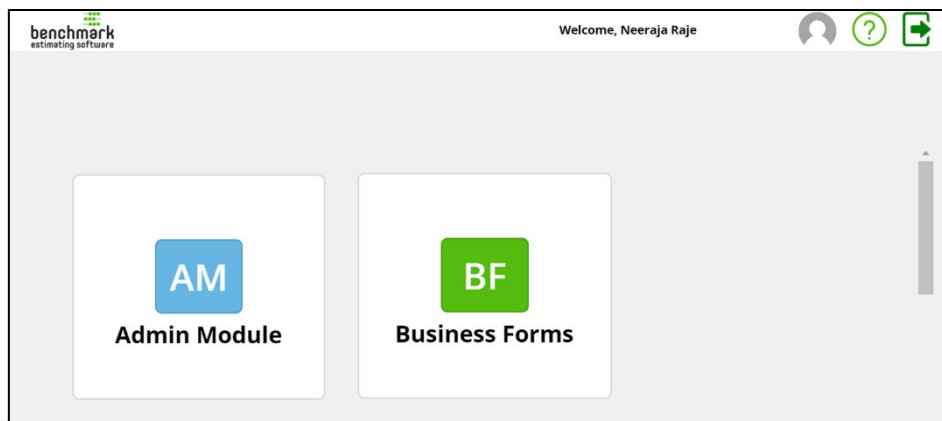
### Landing Page

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

**benchmark** estimating software

**EI-Estimate Initiation**

Welcome, Neeraja Raje

Saved Submitted Approved Rejected Archived

Search

Create New Form

Form	Portfolio Name	Programme Name	Scheme Name	Created By	Date Created	Action
New Request A1256	Strategy	Design	Scheme 02	Neeraja Raje	11/10/2022	<a href="#">View</a>
New Estimate Request	Strategy	Design	Scheme 01	Neeraja Raje	11/10/2022	<a href="#">View</a>
Form 1008			Scheme 01	Vinodh KP	10/08/2022	<a href="#">View</a>

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.

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.
- 10 - View this Help document.

## 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	<ul style="list-style-type: none"><li>➤ <b>Can only access their own Estimate Initiation Requests</b></li><li>➤ Create and submit new requests</li><li>➤ Save requests</li><li>➤ Modify requests</li><li>➤ Archive requests</li><li>➤ Retrieve their rejected requests, modify and re-submit</li><li>➤ Copy the requests they created (regardless of the status or assignee)</li></ul>
Estimating Manager	<ul style="list-style-type: none"><li>➤ Create and submit new Estimate Initiation Requests</li><li>➤ View all submitted requests for their Portfolio / Programme</li><li>➤ Accept / reject requests</li><li>➤ Edit requests (regardless of the status or assignee)</li><li>➤ Archive requests (regardless of the status or assignee)</li></ul>

Role	Permissions
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.

Home / Add New Access

Model: Business Forms (2) Submodel: Estimate Initiation (3) Role: Project User (4)

Username: Search (1) Neeraja Rajee

Model	Submodel	Validity From	Validity Till
<input checked="" type="checkbox"/>	Business Forms (5)	Estimate Initiation	09/08/2022 (6) 09/08/2023 (6) <input type="checkbox"/> No Expiry (6)

Save (7) Clear

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* or *Template Configuration*.
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.

Home / Add New Access

Model: Business Forms Submodel: Estimate Initiation Role: Estimating Manager

Portfolio: Strategy Programme: Design

Model	Submodel	Validity From	Validity Till
<input checked="" type="checkbox"/>	Business Forms	Estimate Initiation	09/08/2022 09/08/2023 <input type="checkbox"/> No Expiry

*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* <sup>6</sup>
10. Select Save <sup>7</sup>

## 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 <sup>1</sup> the relevant user.
2. Select the Edit <sup>2</sup> icon.
3. In the pop-up screen, modify the validity of the user's access or select *No Expiry* <sup>3</sup>
4. Select Update Access <sup>4</sup>

The screenshot shows the 'Access Control' tab in the software. At the top, there are tabs for 'Access Control' and 'History'. Below them is a search bar with a magnifying glass icon and a 'Search' button, labeled with a red circle 1. To the right of the search bar is a 'New Access +' button. Below the search bar is a table with columns: 'Model', 'Submodel', 'User', 'Assigned By', and 'Action'. The table lists several users, including 'Neeraja Rajee' and 'Vinodh KP'. A red circle 2 highlights the edit icon (pencil) in the 'Action' column for 'Neeraja Rajee'. A modal window is open for editing the user's access. It contains fields for 'Valid From' (8/9/2022), 'Valid Till' (8/9/2023), and a 'No Expiry' checkbox, labeled with a red circle 3. There are also fields for 'Role' (Estimating Manager), 'Portfolio' (Strategy), and 'Programme' (Design). At the bottom of the modal are 'Update Access' and 'Cancel' buttons, with 'Update Access' labeled with a red circle 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.



You can delete user access if:


- They are the only user assigned to a Portfolio/Programme as the Estimating Manager.
- They have forms in the *Submitted* status.

## Viewing Access History

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

<div> <div>Access Control</div> <div>History</div> </div> <div> <input type="text"/> <div>New Access +</div> </div>							
Past Models	Submodel	User Name	Role	Email ID	Admin	Action Performed	Action Date
Business Forms	Estimate Initiation	Shashanka C	Estimator	Shashankac@benchmarkestimating.com	Shashanka C	Created	24/09/2022
Business Forms	Estimate Initiation	Shashanka C		Shashankac@benchmarkestimating.com	Shashanka C	Deleted	24/09/2022
Business Forms	Estimate Initiation	Shashanka C	Estimator	Shashankac@benchmarkestimating.com	Shashanka C	Created	24/09/2022
Business Forms	Estimate Initiation	Shashanka C		Shashankac@benchmarkestimating.com	Shashanka C	Deleted	24/09/2022
Business Forms	Estimate Initiation	Vinodh KP		vinodhkp@benchmarkestimating.com	Shashanka C	Deleted	24/09/2022
Business Forms	Estimate Initiation	Vinodh KP	Estimator	vinodhkp@benchmarkestimating.com	Shashanka C	Created	23/09/2022



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

## Configuring Estimate Templates

Administrators can determine the Template on which new Estimates will be based when created from approved requests.

1. Open the app.
2. Select Business Forms.
3. Select Template Configuration.
4. Enter the relevant *Template Id*.
5. Select Update.

## 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.


Saved

Submitted

Approved

Rejected

Archived



Create New Form

Form	Portfolio Name	Programme Name	Scheme Name	Created By	Submitted To	Date Created	Action
Estimate F145	Strategy	Design	Scheme 04	Neeraja Raje	Neeraja Raje	03/11/2022	<a href="#">View</a>
New Request A11	Strategy	Design	Scheme 01	Neeraja Raje	Neeraja Raje	09/08/2022	<a href="#">View</a>

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:

- Select Approve **B**
- Select the relevant Estimator **C**
- Select Approve **D**

An email notification will be sent to the assigned Estimator.

The approved form creates an Estimate in Benchmark, with the relevant information populated in the Project Custom Fields.

11. If you wish to reject this request:

- In the For completion by Estimating Manager panel, enter the *Reason for rejection*.
- Select Reject.

The following confirmation prompt displays:

“Are you sure you want to reject <Form Name> Form?”

- 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.

- Select Save As Draft to save the entered details.



**Estimate F145** Save As Draft Modify

**Request For Estimate**

1.Scheme Details  
2.Estimate Details  
3.Project Manager Details

4.Requested timescales for issue of estimate(s)  
5.For completion by Estimating Manager

**Requested timescales for issues of estimate(s)**

Estimate Due Date \* 26/01/2023   Estimate delivery requested by \* User Name:Neeraja Raje  
Email:neeraja.raje@benchmarkestimating.com




Other high level information (eg. scoping) considered relevant for cost engineer

Please Submit Request A Min. Of 12 Weeks Before Estimate Delivery Date

For completion by Estimating Manager

Back Submit

2. These drafts display within the Saved tab.

<span>Saved</span> <span>Submitted</span> <span>Approved</span> <span>Rejected</span> <span>Archived</span> <span> Search</span> <span>Create New Form</span>						
Form	Portfolio Name	Programme Name	Scheme Name	Created By	Date Created	Action
Estimate F145	Strategy	Design	Scheme 04	Neeraja Raje	03/11/2022	<a href="#">View</a> 
New Estimate Request	Strategy	Design	Scheme 01	Neeraja Raje	11/10/2022	<a href="#">View</a> 

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.

<span>Saved</span> <span>Submitted</span> <span>Approved</span> <span>Rejected</span> <span>Archived</span> <span> Search</span> <span>Create New Form</span>						
Form	Portfolio Name	Programme Name	Scheme Name	Created By	Date Created	Action
New Request A1256	Strategy	Design	Scheme 02	Neeraja Raje	11/10/2022	<a href="#">View</a> 
New Estimate Request	Strategy	Design	Scheme 01	Neeraja Raje	11/10/2022	<a href="#">View</a> 

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**.

**New Request A13**  
Last Modified Date : 10/08/2022 Last Modified By : Neeraja Raju

**Request For Estimate**

1.Scheme Details  
2.Estimate Details  
3.Project Manager Details

4.Requested timescales for issue of estimate(s)  
5.For completion by Estimating Manager

**Scheme Credentials**

Portfolio Name \* Strategy Programme Name \* Design Scheme Name \* Scheme 03

Scheme Type Options Phase PIN 5455 Development Phase PIN 456

Construction Phase PIN 53 Other Phase PIN 5455 Region

Current PCF Stage \* Strategy, Shaping &

**Next**


This creates a copy of the form.

3. 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**.

Our mission is to help organisations improve their estimating, and the integration of estimating with related business processes; for private enterprise this helps improve your profit and market share; public authorities can deliver more accurate budgets and streamline project delivery.

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