Washington State
Department of Transportation

Unifier

Design Estimate/Sub-Estimate

(EST/SBEST)

User Guide

September 2025

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EST - Business Process (BP) Overview

The Design Estimate Business Process (BP) allows users to create and manage detailed design estimates within Unifier. It integrates with related Design Estimating BPs, such as Fund and Fund/Participant Matching, Groups, and Columns, to help the project team accurately track and manage estimated costs.

The Sub-Estimate BP in Unifier allows users to create and manage detailed design estimates within Unifier. It works alongside the Design Estimate BP but is simpler, as it does not involve a workflow or the Advertisement and Award process. The Sub-Estimate BP enables estimators to build their own estimates, which can then be incorporated into the main Design Estimate BP via consolidate line items feature in Unifier.

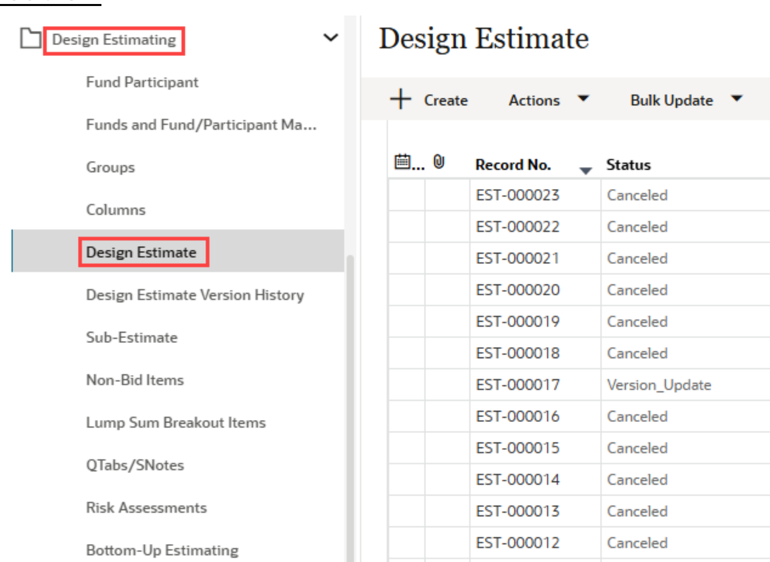
The Sub-Estimate BP is primarily used by the Specialty Estimator group, which includes divisions like the Bridge Department, Traffic, or other specialized WSDOT teams. These groups can add specific bid items to a Sub-Estimate, which can then be pulled into the main Design Estimate by the project estimator. Other WSDOT estimators may also use this BP when contributing to project estimates.

Note: This guide covers both the Sub-Estimate and Design Estimate BPs, as they share the same detail forms. However, workflow instructions apply only to the Design Estimate BP.

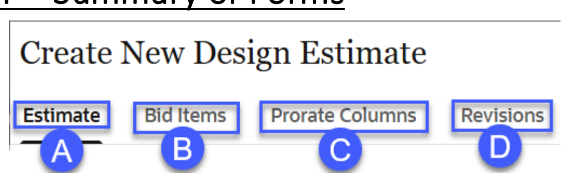
EST - User Mode Navigator Location

The **Design Estimate** BP Node is located under:

Design Estimating
> Design Estimate



EST – Summary of Forms



A. Estimate (Upper/Main Form)

- Holds general project information, review comments, and details specific to the Design Estimate record.

B. Bid Items (Detail Form/Tab)

- Lists all bid items and their associated data tied to the Design Estimate.

C. Prorate Columns (Detail Form/Tab)

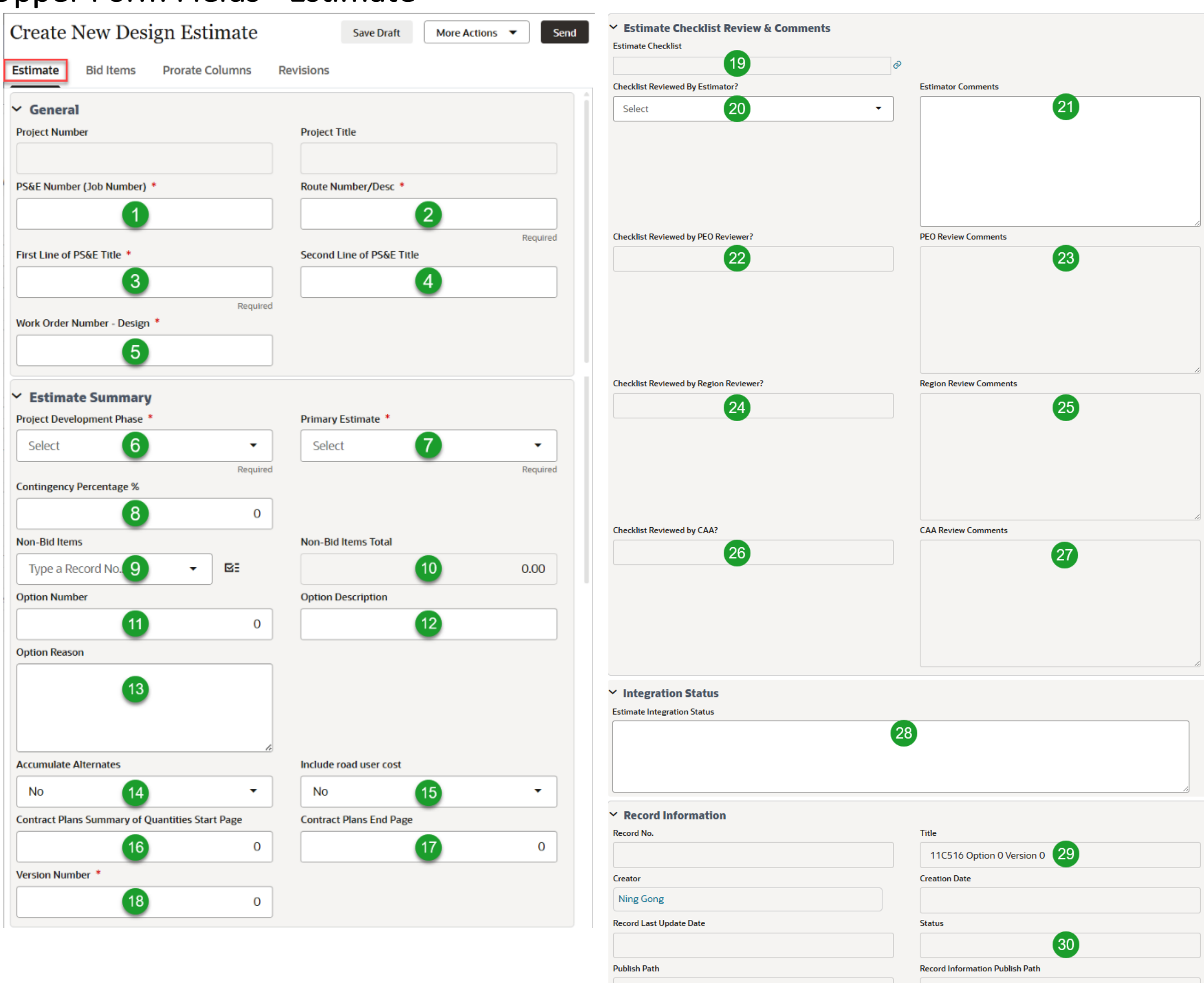
- If Prorate is used, this detail form contains all the columns that the Prorate applies to.

D. Revisions (Detail Form/Tab)

- Tracks all prior revisions to the Design Estimate record. This data appears in the Summary of Quantities Report.

EST – Fields Descriptions

Upper Form Fields - Estimate



(1)-(5) General Project Information

These fields are auto-populated from the Estimate Information[1] BP, but can be modified within the Design Estimate to suit the specific needs of the current record. Changes made here do not affect the original Estimate Information and vice versa, allowing you to maintain a phase-specific snapshot even as the source Estimate Information data evolves throughout the project lifecycle.

(6) Project Development Phase

Select the applicable phase. Note: While this tool is tailored for Design estimates, it can also be used to prepare estimates during other phases if desired.

(7) Primary Estimate

Use this field to indicate the primary estimate for each phase.

(8) Contingency Percentage %

Enter the Contingency Percentage that will be applied to the estimate. This value should be entered as a percentage. For example: enter 10 for 10%.

💡 Contingency percentages cover project changes during construction, such as unforeseen conditions or quantity overruns. The default is 4%; Design-Build projects require at least 5%. Should special conditions require additional contingency dollars, contact Region Program Management for approval.

(9)-(10) Non-Bid Items & Non-Bid Items Total

Associate Non-Bid Item record. Note: If a Non-Bid Item record is not selected here, it will not be included in any of the reports. Once a Non-Bid Item record is selected, the Non-Bid Items Total will be automatically populated.

(11)-(13) Option Number, Option Description, and Option Reason

Use these fields to define different Estimate Options (if applicable). The "Option" fields allow estimators to create and compare different Estimate Scenarios or Options of an estimate for the same project.
For example, an estimator might have one estimate for building a roundabout using Hot Mix Asphalt (as Option 1) and another using concrete (as Option 2). The option fields allow you to differentiate between the two estimates. This way, you can work on multiple estimate options side-by-side, helping you evaluate different approaches or materials for the same project.
Note: The Option fields show up on most of the Estimate reports in the header.

(14) Accumulate Alternates (Default Value: No)

Occasionally, you may want to award a contract based on funds available. In other words, you may want to construct as much as possible, depending on the bids within the funds available.

⚠️ **Important:**

When adding Accumulative Alternates to your Base contract, be sure that the work included in the alternate is truly “optional” if it must be eliminated.

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[1] 💡 Tip: Click here to access the foundational and supporting BP User Guides.

(15) Include Road User Cost (Default Value: No)

Road User Cost (RUC), also known as A+B bidding, measures the impact of a transportation facility on the public and the benefits of proposed improvements. It allows contractors to be rewarded for early completion by factoring in the cost of each working day, construction expenses, and user delays.

(16)-(17) Contract Plans Summary of Quantities Start Page & Contract Plans End Page

Use these fields to place sheet numbers on each SQ sheet and fill in the sheet reference numbers.

- Contract Plans Summary of Quantities Start Page: Enter the plan sheet number where the SQ will be inserted into the plans set.
- Contract Plans End Page: Enter the total number of sheets in the plans set

(18) Version Number

The Version Number field is only editable when the Design Estimate record is in the 'Build_Estimate' status. Reviewers are not able to modify it.

- Before submitting the estimate to Ads, Estimators can create a new version by copying the existing Design Estimate record and manually updating the version number during the *Build Estimate* step. Please start with Version 1 as the initial entry.
- Once the estimate is submitted to Ad, it is linked with the Bids process. At that point, the version number can only be updated through revisions, and the system will automatically increment it via the "Estimate Version Update" step.

(19) Estimate Checklist

If applicable, click the icon to add the link to the Estimate Checklist provided by your Region.

(20)-(27) Estimate Review and Comments fields

Use these comment fields to document review notes or explain review decisions, such as why you're returning a record for clarification. These comments are tied to specific workflow actions and can only be edited by the assigned users at that step.
This is different from the *Comments* tab, which is meant for general notes only. Comments in that tab can be added or edited anytime by anyone with access.

(28) Estimate Integration Status

This field is populated through the integration to indicate whether any errors occurred during the assignment of Bid Item Numbers.

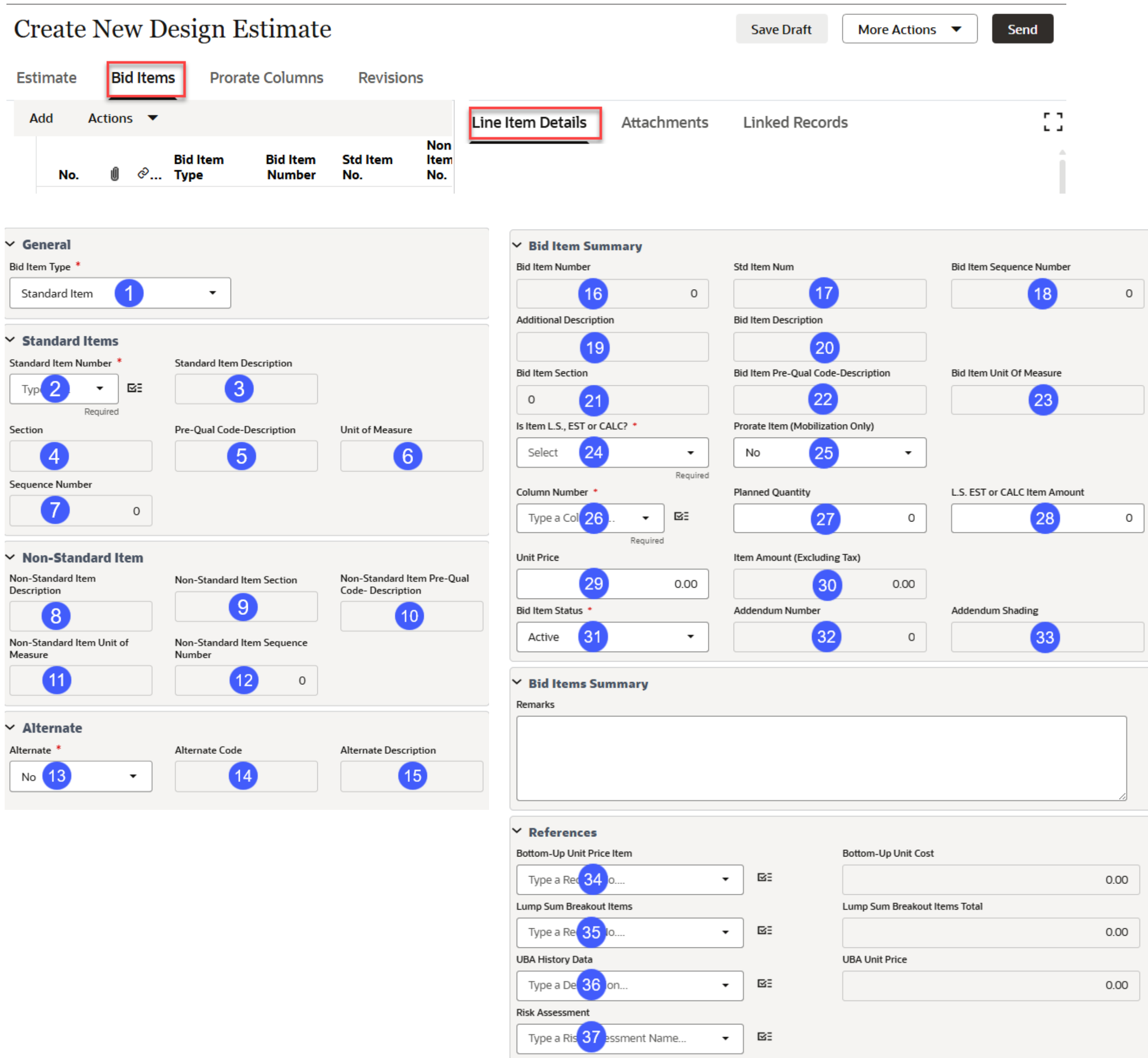
(29) Title

The Title field is a read only field, and is populated by the system with the Job Number, Option Number, and Version Number.

(30) Status

As a workflow BP, the Design Estimate BP record status is managed by the workflow steps.

Detail Form Fields – Bid Items



(1) Bid Item Type

Choose between 'Standard Item' and 'Non-Standard Item.' The default selection is 'Standard Item.' This field controls which set of fields will become available- *Standard Item* or *Non-Standard Item*. A selection is required to proceed.

(2) Standard Item Number

This field becomes available when "Standard Item" is selected as the *Bid Item Type*. Click the picker ( ) to open the Standard Item table, then use the Search ( ) or Find on Page ( ) to find and pick the standard item.

(3)-(7) Standard Item Details

Once a standard item is selected, its details are auto populated into the relevant fields. These fields are read-only, as the data comes directly from the Standard Item table and is maintained by the HQ Development team.

(8)-(11) Non-Standard Item Description & Details

The Non-Standard Item fields become available when 'Non-Standard Item' is selected as the *Bid Item Type*. Enter the information manually or select values from the dropdown menus.

(12) Non-Standard Item Sequence Number

The system uses both Standard and Non-Standard Item Sequence Numbers to sort Bid Items and assign Bid Item Numbers. Standard Item Sequence Numbers come from the Standard Item table, while Non-Standard Item Sequence Numbers can be entered manually as decimals to position them between Standard Items.

Example:

- To insert a Non-Standard Item between Standard Item 0030 (Sequence Number 4 – CLEARING AND GRUBBING–SITE) and Standard Item 0035 (Sequence Number 5 – CLEARING AND GRUBBING), you can assign a Sequence Number of 4.5 to the Non-Standard Item.

(13)-(15) Alternate

Use the fields in the “Alternate” block to designate Alternate Bid Items. This section is collapsed by default. Click the arrow to expand it and enter your data. A separate group and column are required for alternate bid item quantities.

⚠ **Important:**

- The alternate code is made up of an alphabetic character from A to E in the first position and a numeric character from 1 to 9 in the second position. Examples: A1, A2, A3, E1, E2, E3
- All bid items within an alternate **MUST** carry the same **Alternate Code** and **Alternate Description**.
- Alternate Description **MUST** include the word “**ALTERNATE**” and is used as the Alternate Section Header for Estimate Reports.

(16) Bid Item Number

This field is read-only and assigned by the system through the “*Assign Bid Item Numbers” or “Assign Addenda Bid Item Numbers”* workflow step.

The logic for how the system assigns Bid Item Numbers varies based on the different use cases:

a. **Estimate with only Base items:** Bid Item Numbers are assigned based on the sort order of Standard and Non-Standard Item Sequence Numbers. Refer to bullet (12) for guidance on assigning Non-Standard Item Sequence Numbers.
b. **Estimate with Base and Alternate items:** The system first assigns Bid Item Numbers to Base items, then to Alternate items. Alternate items are first grouped and sorted by Alternate Code, and within each Alternate Code group, sorted by their sequence number.
c. **Items added by addenda**: Items added via addenda are always placed at the end of their respective groups, either Base or Alternate, and then sorted by their sequence number.

⚠ **Important:**

- Make sure the Bid Item Numbers are assigned before generating any reports.

(17)-(23) Bid Item Details

These read-only fields originate from the “Standard Item” or “Non-Standard Item” block and appear in the line-item log for quick reference.

(24) Is Item L.S., EST or CALC?

This field controls the behavior of the following fields: “L.S. EST or CALC Item Amount,” “Planned Quantity,” and “Unit Price.” A selection is required to proceed.

Is Item L.S, EST or CALC	L.S. EST or CALC Item Amount	Planned Quantity	Unit Price
Yes	Enabled and required	Disabled	Disabled
No	Disabled	Enabled and required	Enabled and required

(25) Prorate Item (Mobilization Only)

This field controls the behavior of the “Column Number” field. The default value is “No.”

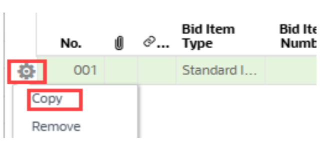
Prorate Item	Column Number
Yes	Disabled Prorate Columns must be entered in the “Prorate Columns” detail form.
No	Enabled and required

(26)-(28) Column Number, Planned Quantity & L.S., EST or CALC Item Amount

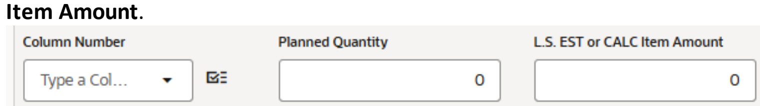
Click the “Column Number” picker ( ) to open the “Columns (BP)” selection window. From there, select a Column record you’ve created in Column BP. Then, enter the associated “Planned Quantity” or “L.S. EST or CALC Item Amount.”

⚠ **Important:**

- You can distribute a bid item’s quantity by assigning it to different columns that represent the location of work. The “Planned Quantity” is tied to the selected Column.
- To add more columns to a bid item, click the gear icon next to the line item, select Copy, then update the “Column Number” and either “Planned Quantity” or “L.S. EST or CALC Item Amount.”



Update only the **Column Number** and **Planned Quantity/L.S. EST or CALC Item Amount**.



(29) Unit Price

Enter the Bid Item’s Unit Price if applicable.

⚠ **Important:**

- All line items for the same bid item **MUST** carry the same **Unit Price**.

(30) Item Amount (Excluding Tax)

This is a system-calculated field.

- For L.S. EST. or CALC items, it equals the value entered in the “L.S. EST or CALC Item Amount” field.
- For all other items, it is calculated as Planned Quantity * Unit Price.
- Note: This field reflects the item amount for the selected Column only.

(31) Bid Item Status

- **Active**: This is the default Bid Item Status. You should change it only during the revision process (e.g., when adding, editing, or deleting items via an addendum).
- **Added by Addendum**: Use this status to indicate new items added through an addendum. After updating the status, send the BP record to the "Assign Addenda Bid Item Numbers" step to assign Bid Item Numbers.
- **Deleted by Addendum**: Use this status to delete a Bid Item via addendum. Remove all columns associated with the Bid Item, leaving only Column 1. Then update the Bid Item Status in Column 1 to "Deleted by Addendum." Set both the Planned Quantity and Unit Price to 0.01.
- **Edited by Addendum**: Apply this status when item details are modified during the revision process. The system will retain the original Bid Item Number when this status is used.

⚠️ **Important:**

- To add a bid item by addendum, ensure that all associated line items are assigned to the same Bid Item Status "Added by Addendum."

(32)-(33) Addendum Number & Addendum Shading

These two fields become available when the Bid Item Status is set to anything other than Active. Use them to specify the Addendum Number and indicate whether Addendum Shading should be applied in the Summary of Quantities report.

(34)-(37) Estimating Tool References

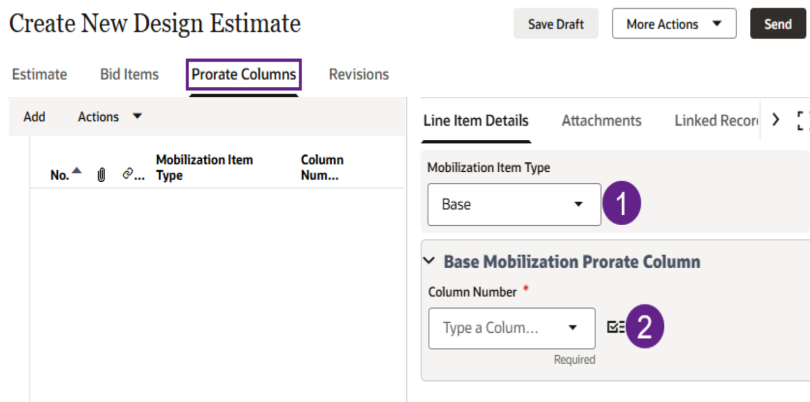
Use the following fields to link relevant Estimating Tool BP records to your Design Estimate:

- **Bottom-Up Unit Price Item:**
  Select the Bottom-Up BP record you've created. The Bottom-Up Unit Cost will populate automatically.
- **Lump Sum Breakout Items:**
  Select the Lump Sum Breakout Item BP record you've created. The Lump Sum Breakout Items Total will populate automatically.
  - Note: The selected Lump Sum Breakout Item BP record is tied to the specific line item (column) of the Bid Item. If you want the Lump Sum Breakout item to apply to the entire Bid Item, make sure to select it for **EACH** line item associated with that Bid Item.
- **UBA History Data:**
  Use this field to search for and select UBA data. The picker is filtered by *the Standard Item Number*, and the UBA Unit Price will populate automatically.
- **Risk Assessment:**
  Select and reference the Risk Assessment BP record you have created

Detail Form Fields – Prorate Columns

(1) Mobilization Item Type
This field only contains one option, Base, serving as a reminder that only Base Mobilization can be prorated.

(2) Column Number
Use this field to select the prorate column for Base Mobilization. Click the "Column Number" picker (☑) to open the Columns (BP) selection window, and choose a Column record you've created in the Columns BP.

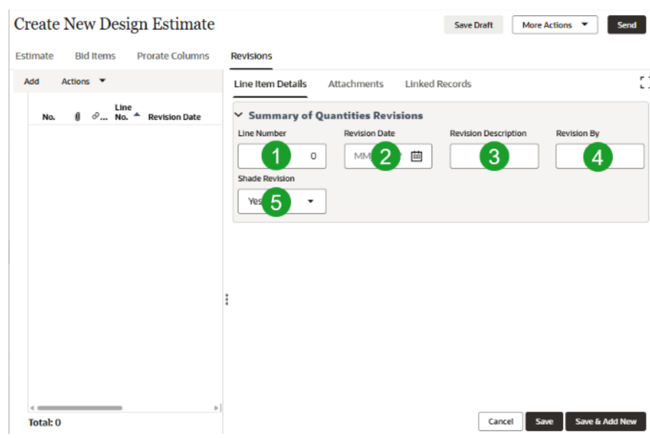


Detail Form Fields – Revisions

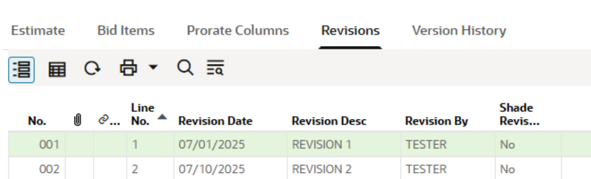
(1) Line Number
Use this field to set the display order of revision history on the Summary of Quantities Report. **Note**, only lines 1-6 will appear on the report.

(2)-(4) Revision Details
Enter the revision information to be displayed on the Summary of Quantities report.

(5) Shade Revision
Select Yes if you want the revision history to be shaded on the Summary of Quantities report for visual emphasis.

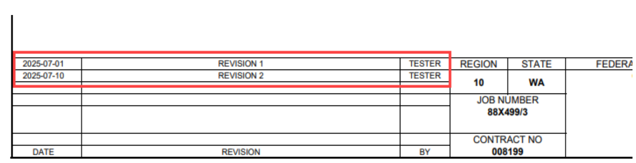


Revisions detail form log

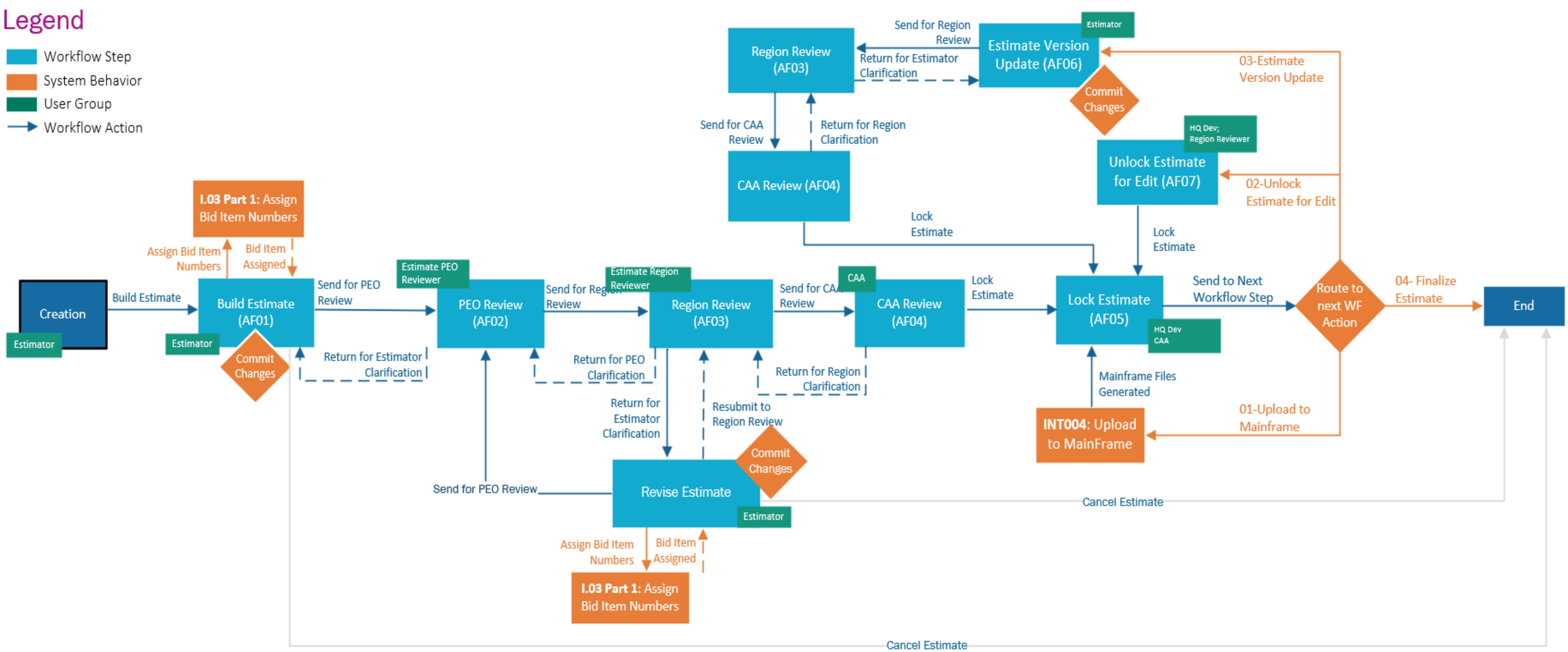


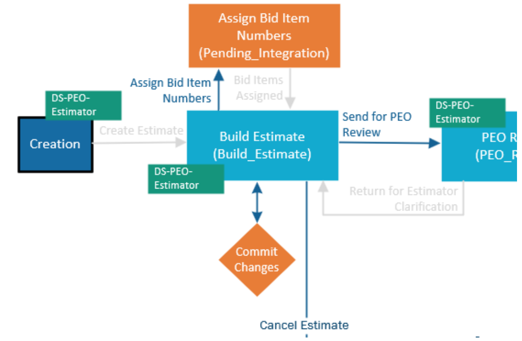
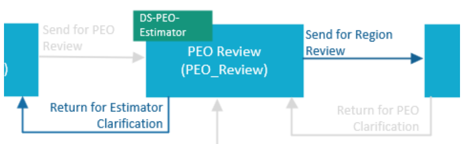
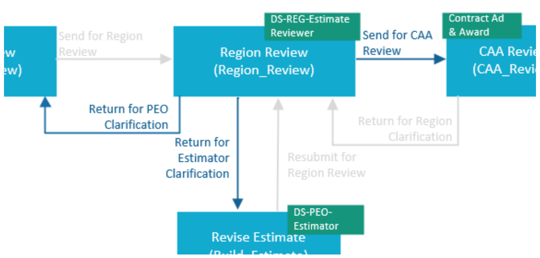
No.	Line No.	Revision Date	Revision Desc	Revision By	Shade Revis...
001	1	07/01/2025	REVISION 1	TESTER	No
002	2	07/10/2025	REVISION 2	TESTER	No

Summary of Quantities report revision history

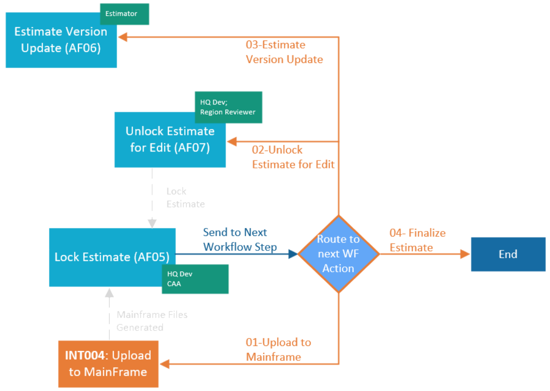


EST – Workflow



Step/Record Status	Assignee	Available Workflow Actions
(1) Build Estimate 	DS-PEO-Estimator Group	Build Estimate is the first step in creating a Design Estimate. Be sure to send the record to “Assign Bid Item Numbers” before generating the Estimating Reports or moving it to the next review step. ➡ **Actions:** • **Assign Bid Item Numbers**: Assigns Bid Item Numbers through system integration. These numbers are critical to ensure accuracy across all Estimating Reports. • **Commit Changes**: Commits the changes to the cloud database; this way, all updates and changes made to the estimate can be seen in the reports. • **Send for PEO Review**: Advances the workflow to the PEO Review step (User-selected assignee). • **Cancel Estimate**
(2) PEO Review 	Selected User from DS-PEO-Estimator Group	➡ **Actions:** • **Return for Estimator Clarification**: Sends the Design Estimate back to the DS-PEO-Estimator group for editing or revisions. • **Send for Region Review**: Advances the workflow to the Region Review step
(3) Region Review 	DS-REG-Estimate Reviewer Group	The upper form (Estimate tab) is editable during the Region Review step. However, the detail forms will be restricted to the DS-PEO-Estimator Group only. ➡ **Actions:** • **Return for PEO Clarification**: Sends the Design Estimate back to the PEO Reviewer (Single Assignee). • **Return for Estimator Clarification**: Sends the Design Estimate back to the estimator for corrections/ revisions. • **Send for CAA Review**: Advances the workflow to the CAA Review step

Step/Record Status	Assignee	Available Workflow Actions
(4) Revise Estimate	DS-PEO-Estimator Group	User access and workflow actions in this step are the same as in Build Estimate, except the Estimator can re-submit the Design Estimate to the Region Reviewer Group directly, by passing the PEO review step.
(5) CAA Review  	Contract Ad & Award Group	Navigate to Home > Tasks to find the Design Estimate record ready for review. 1. From the Tasks log, click the gear icon next to a record to run any of the Estimate Reports. 2. Double-click a record to open the Design Estimate, then go to the Bid Items tab to review bid item details. ➡ **Actions:** • **Return for Region Clarification**: Sends the Design Estimate back to the Region Reviewer. • **Lock Estimate:** After all reviews are complete, advance the Design Estimate to the Lock Estimate step to initiate the Bids process. ⚠ **Important:** • Once the Design Estimate record is locked, it cannot be returned to the CAA Review step. Any emergency edits or revisions must be carried out through the Unlock Estimate for Edit and Estimate Version Update Steps.

<table>
<tr><th>Step/Record Status</th><th>Assignee</th><th>Available Workflow Actions</th></tr>
<tr>
<td>(6) Lock Estimate

</td>
<td>Contract Ad & Award Groups
(HQ Development)</td>
<td>In this step, the system determines the next workflow action based on the option selected in the 'What is your next workflow action?' field.

➡ Actions:

01-Upload to Mainframe: Use this workflow action to generate the mainframe files
02-Unlock Estimate for Edit: Use this workflow action to unlock the Design Estimate for the DS-REG-Estimate Reviewer Group in cases of emergency edits.
03-Estimate Version Update: Use this workflow action to initiate the revision process (via addendum) for the DS-PEO-Estimator Group. (See important note.)
04-Finalize Estimate: Once V99 is created, use this workflow action to finalize the Engineer's Estimate.

⚠ Important:

Before advancing the workflow to the Estimate Version Update step, make sure the "Duplicate/New Version" field is set to "Pending Creation." And if a Version History is already linked, remove it and reset the field to "Pending Creation."
DO NOT click "Duplicate/New Version" if the next workflow action is NOT "Estimate Version Update."
In the scenario where all Bids are rejected, the current locked Design Estimate record can be terminated by clicking the gear icon next to the BP record in the BP log and selecting "Terminate Record." This action ends the Design Estimate at the Lock Estimate step, after which a new record can be created to restart the process.
</td>
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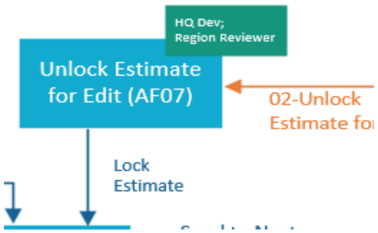
</table>

<table>
<tr><th>Step/Record Status</th><th>Assignee</th><th>Available Workflow Actions</th></tr>
<tr><td>

(7) Unlock Estimate for Edit



</td><td>DS-REG-Estimate Reviewer Group (HQ Development)</td><td>

During the Bids process, emergency edits to the Design Estimate record can be made through this workflow step. The step is assigned to the DS-REG-Estimate Reviewer Group; however, only the Contract Ad & Award and HQ DEV groups have access to unlock the record and assign it to this step.

➡ **Action:**

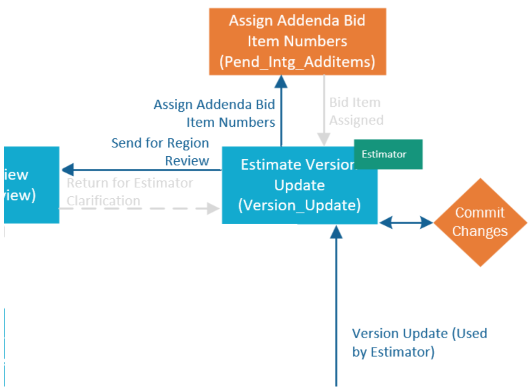
- **Lock Estimate:** After completing the edits, send the record back to the Lock Estimate step.

⚠ **Important:**

- New Bid items cannot be added during this step.
- The Bid Item Number cannot be changed.

</td></tr>
<tr><td>

(8) Estimate Version Update



</td><td>DS-PEO-Estimator Group</td><td>

During the Bids process, revisions through addenda are managed in this workflow step. The step is assigned to the DS-PEO-Estimator Group; however, only the Contract Ad & Award and HQ DEV groups have the authority to unlock the record and assign it to this step.

➡ **Action:**

- **Assign Addenda Bid Item Numbers:** Bid items added by addendum are placed at the end of their group (Base or Alternate). Existing Base Bid Item Numbers remain unchanged.
- **Commit Changes.**
- **Send for Region Review**

Design Estimate Version Update Process

- Before Submitting to Ad: Cancel the current record, create a new one, and manually enter the version number during the Build Estimate step.
- After Submitting to Ad: Use the Estimate Version Update step. The system auto-increments the Version Number.

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EST-REPORTS

(1) Available Design Estimate Reports

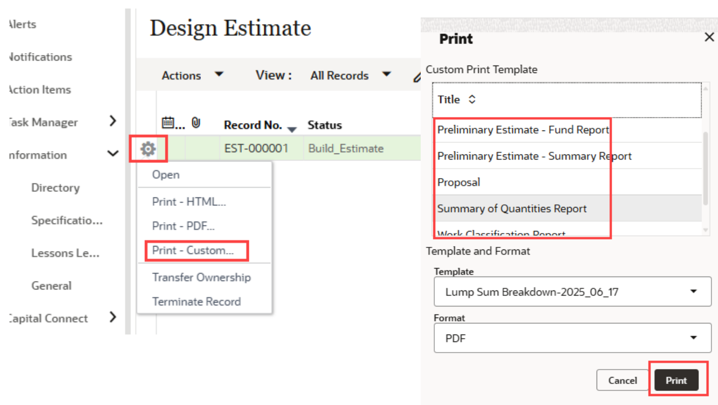
- Lump Sum Breakdown Report
- Preliminary Estimate - By Group Report
- Preliminary Estimate - By Item Report
- Preliminary Estimate - Fund Report
- Preliminary Estimate - Summary Report
- Proposal
- Summary of Quantities Report
- Work Classification Report
- Work Order Worksheet

(2) Viewing and Printing Reports

Any user assigned to the project would have access to generate any Design Estimate report throughout the project life cycle.

To generate a Design Estimate Report:

1. Click the gear icon next to the desired Design Estimate record, then select “Print – Custom.”
2. In the Print window, select the desired report and click Print.

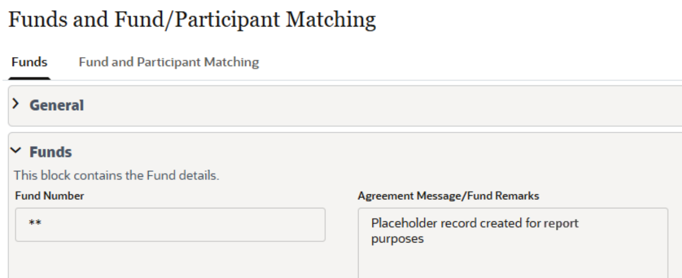


Important:

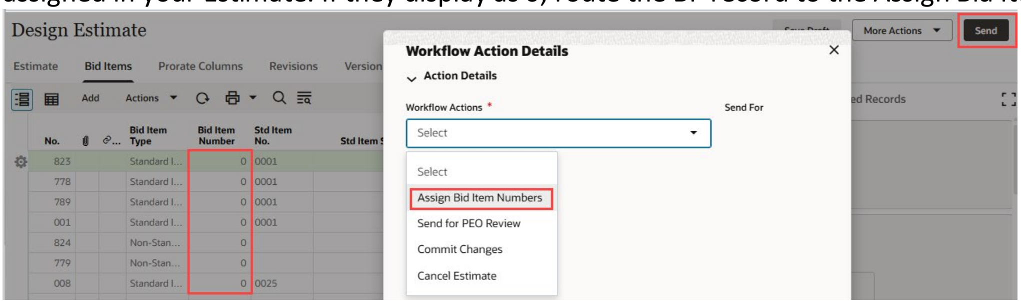
1. To ensure the reports are generated successfully, all required data must be entered and associated. If certain data is not yet available, please create placeholder records to allow for interim report generation.
2. Make sure the Bid Item Numbers are assigned before generating any reports.
3. To ensure updates appear in the Estimate Reports, the Design Estimate record must be submitted to a Workflow step rather than left in edit mode.
4. Use workflow action [Commit Changes](#) to save the data to the database, ensuring it is reflected in the Estimating reports.

Example:

1. If the Fund information is not yet finalized, you can:
   - Create A placeholder **Fund Participant** and **Fund and Fund/Participant Matching** BP records.
   - Associate them with the Groups BP record.
   - Generate the report for interim use.

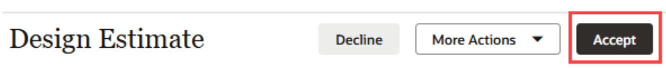


2. Please verify that Bid Item Numbers are assigned in your Estimate. If they display as 0, route the BP record to the Assign Bid Item Numbers step.



3. To confirm your Design Estimate is NOT in Edit mode, double-click to open the record. If the available button shows "**Accept**" instead of "**Send**," the record is in View (not Edit) mode.

View Mode *(data change will be reflected in the reports):*



Edit Mode *(data change will not be reflected in the reports):*