

International Comparison Program

[02.03]

ICP 2011: MACHINERY AND EQUIPMENT SURVEY

**DATA TOOL
USER MANUAL**

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1 Preliminary Remarks

For the Machinery and Equipment Survey (World Bank, International Comparison Program 2011), an Excel tool – the Data Tool – will be used to make item specifications and record pricing information on Equipment Goods. The major goal of this tool is to provide an easy and reliable method for recording the data. This user manual is intended to show how to use the Data Tool.

2 Installation

2.1 Technical Requirements

The Data Tool requires MS Office 97 or newer, installed on a PC running Windows NT/2000/XP or newer.

Depending on the national version of the operating system and of the MS Office version, some messages may differ from the ones in this manual. This manual was created on a PC with Office 2000.

In order to use the Data Tool, it is absolutely mandatory that VBA macros are enabled. You may need to change the safety level in your Excel version to allow for enabling macros.

2.2 First Start and Setup

Please copy the Excel file data_tool.xls you have received and the subdirectories containing the item images to a separate folder, then open the file data_tool.xls there by double-clicking on it.

Depending on your safety settings in Excel, a dialog may be displayed which asks whether or not to enable macros. Please always enable macros for the Data Tool, otherwise it will not run properly. In case you do not get a dialog and macros are disabled automatically, please change the Excel safety level appropriately (see 2.1).

After the first program start, the setup dialog of the Data Tool will automatically open up:

Setup

Reporting country (XX=other country)

Standard technical specifications
☐ Imperial ☒ Metric

Item deletion password (leave empty to avoid password query)

Which basic headings shall be useable in this Excel file?

- ☒ BH 1 (150111): Fabr. metal products, except mach. and equipm.
- ☒ BH 2 (150112): General purpose machinery
- ☒ BH 3 (150113): Special purpose machinery
- ☒ BH 4 (150114): Electrical and optical equipment
- ☒ BH 5 (150115): Other manufactured goods n.e.c.
- ☒ BH 6 (150121): Other road transport
- ☒ BH 7 (150311): Other products

Text for the "Yes" button Text for the "No" button

The first thing to do is to select the appropriate country. Please select the appropriate country from the pull-down list that appears when you click on the down arrow next to the "Reporting country" input box. At present, this list contains the following entries:

- CM (Cameroon)
- KE (Kenya)
- ZA (South Africa)
- AR (Argentina)
- BZ (Brazil)
- CO (Colombia)
- AU (Australia)
- CN (China)
- IN (India)
- XX (other countries)

The screenshot shows the 'Setup' dialog box. The 'Reporting country' dropdown is set to 'CM'. The 'Standard technical specifications' section has the 'Imperial' radio button selected. The 'Item deletion password' field is empty. The 'Which basic headings shall be useable in this Excel file?' section shows a list of headings (H 1 to H 5) and checkboxes for BH 6 and BH 7, both of which are checked. The 'Text for the "Yes" button' field contains 'YES' and the 'Text for the "No" button' field contains 'NO'. The 'Test' button is visible next to the 'No' text field. The 'Save and exit' and 'Exit without saving' buttons are at the bottom.

For this user manual, CM (Cameroon) is used. In case your country is not included in the list, please select XX (other countries).

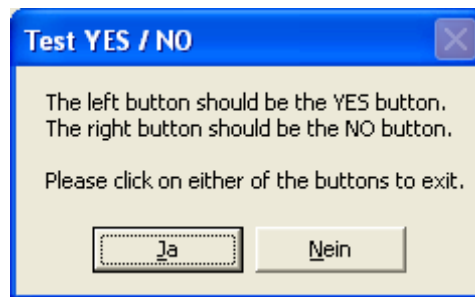
Next, the standard for the technical specifications has to be selected (either "Imperial" or "Metric"). To do this, please just click on "Imperial" or "Metric".

In case you want to protect items against deletion, you may specify an item deletion password. If this is left empty, you will just be asked if you really want to delete an item when you select "Delete item" in the main input area; otherwise, you will be prompted for the password. We propose to leave the item deletion password empty.

In the top right part of the dialog, you find seven checkboxes (one for each basic heading (BH)). By default, all these checkboxes are "checked", indicating that you can save data for all BH. In case you want to divide the input work among several persons, you can just copy the (still empty) Data Tool Excel file several times (under different names) and then activate each BH in exactly one of the files. Please note: Merging the files can not be done by the data tool user; it will be done later during the analysis of the Data Tool files.

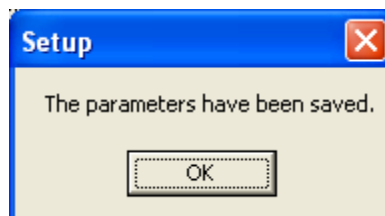
In the input fields "Text for the YES button" and "Text for the NO button", please enter the text appearing on those buttons in the operating system installed on your PC. If you are not sure about the texts,

just click on the “Test” button. A “Test YES / NO”-dialog will then appear. In a German Windows version, this may e.g. appear as follows:



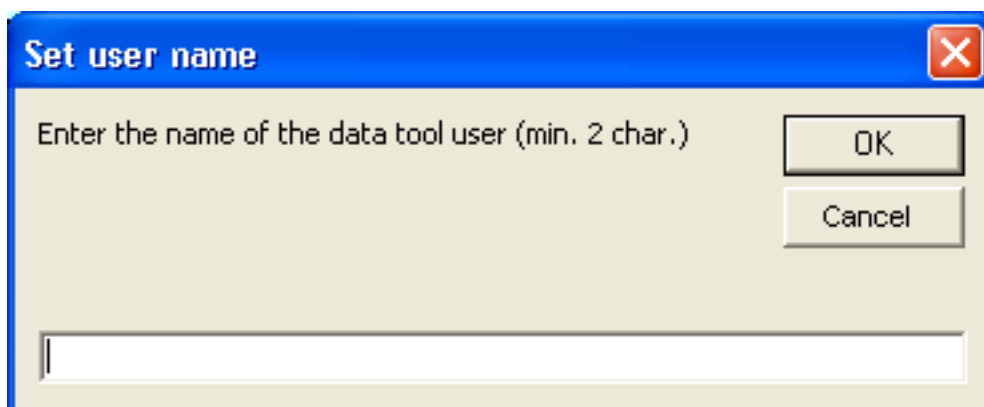
Thus the texts to be entered in the setup dialog for the German version should be JA and NEIN.

In order to save the settings made, please click on the “Save and exit” button. Clicking on the “Exit without saving” button results in discarding the changes made in the setup dialog. After clicking on the “Save and exit” button, you will receive the following message:



2.3 User identification

After completing the first setup dialog (see above) and whenever the Data Tool is started, a dialog will ask for the name of the Data Tool user:



This name will be used for recording item history (see below). The name entered will be saved and suggested as the default value for the next Data Tool start.

After completion of the first setup and the user identification, the data input screen is displayed and normal data input can start.

3 Data Input

3.1 Data Input Screen

The data input screen is designed to fit on two “pages”, the first covering “Specifications” and “Terms and conditions” and the second “Representativity and comparability”, “Options/additional specifications”, and “Notes”. The top part of the screen (rows one to six) is fixed and will be visible on both pages. In order to reference the various parts of the screen more easily, they are labelled with red boxes and white text in the following figure.

A	B	C	D	E	F
1	150111.01: Single skinned horiz. cyl. storage tank / Unspecified / 100 cu. m.			Delete item	History
2				Setup	
3	Item +	Item -	Item Status	Save	Check
4	Item	Item	Item Status	Print	Exit
5	MACHINERY AND EQUIPMENT SURVEY			Country	
6	150111.01: Single skinned horiz. cyl. storage tank			CM	
7	Product			Specified	
8	Make (and nationality):			no picture!	
9	Model:			Show pict.	
10	Specifications			8	
11	Metric Copy ->			9	
12	Imperial Copy ->			Show diff.	
13	Capacity			100 m³	
14	Number of compartments			one	
15	Length x diameter			14 x 3 m	
16	Thickness of steel: shell			8.00 mm	
17	Thickness of steel: dished ends			8.00 mm	
18	Tensile strength of steel			430-580 N/mm²	
19	Tested pressure: inner/outer			0.3/0.4 bar	
20	Design pressure			0.7 bar	
21	Working temp. range			-20 C + 50 C	
22	Uncoated internally (standard finish)			yes	
23	Black bitumen finish			yes	
24	Weight, empty			14,700 kgs	
25	Terms and conditions				
26	a Order quantity			one	
27	b Currency			specify	
28	c Unit price			one	
29	d Installation costs			no	
30	e Delivery costs			yes	
31	f Discount			yes (%)	
32	g Non-deductible taxes			yes	
33	Total unit price net of deductible taxes and discount			Compute price ->	
34	Representativity and comparability				

- 1: Pull-down list containing all items
- 2: Navigation buttons next/previous item/BH
- 3: “Filter” settings (eight checkboxes)
- 4: Item status
- 5: Command buttons
- 6: Input area “Make and Model”
- 7: Input area “Specifications”
- 8: Command buttons for copying make, model, and/or specifications
- 9: Command button for displaying differences in specifications
- 10: Command button “Show pict.” and info “no picture” or “picture av.” (for “picture available”)
- 11: Input area “Terms and conditions”

The second (bottom) part of the input screen covers “Representativity and comparability”, “Options/additional specifications”, and “Notes”:

A	B	C	D	E	F
1	150111.01: Single skinned horiz. cyl. storage tank / Unspecified / 100 cu. m.			Delete item	History
2				Setup	
3	Item +	Item -	BH +	BH -	
4	☒ Priced	☒ Unspec.	☒ Repr.	☒ ID	Item Status UNSPECIFIED
	☒ Incomp.	☒ Deleted	☒ Not repr.	☒ EQ	
5	MACHINERY AND EQUIPMENT SURVEY			Save	Check
6	150111.01: Single skinned horiz. cyl. storage tank			Print	Exit
32	Representativity and comparability			Country	
33	Is the product/item priced representative (yes) or unrepresentative (no)?			CM	
34	Are the product/item priced and the product/item specified identical (1) or equivalent (2)?			no picture!	
36	Options / additional specifications				
37	13				
38					
39					
40					
41					
42					
43					
44	Notes				
45	14				
46					
47					
48					
49					
50					
51					
52					
53					
54					
55	FOR THE STORAGE OF FUEL OIL. THESE TANKS CAN BE USED FOR THE STORAGE OF FUEL OIL ABOVE GROUND. BY LAW THEY ARE NOW				
56	REQUIRED TO STAND IN A PROTECTIVE TRAY IN CASE OF LEAKAGE. THIS TRAY CAN BE MADE OF STEEL (AND SUPPLIED BY THE				
57	TANK MANUFACTURER) OR OF BRICK, CONCRETE ETC. IT IS NOT KNOWN AS BUNDING AND SHOULD NOT BE INCLUDED.				
58	TANK TO BE SUPPLIED WITH LEAK DETECTION SYSTEM, COMPLETE WITH CONNECTION KIT, DIPSTICK AND				
59	A CERTIFICATE OF CONFORMITY TO STANDARD CEN 12285				
60					

Input_Sheet / Spec_Sheets / History / Summary_products / Summary / Summary_resul

There are three input areas:

12: Representativity and comparability

13: Options/additional specifications

14: Notes

In the following chapters, the areas labelled 1 to 14 in the two parts of the input screen are described in more detail.

3.1.1 Pull-down List containing all Items

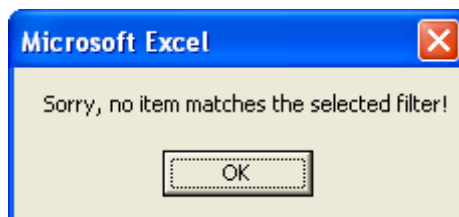
From this list – which is displayed when you click on the down arrow on the right hand side of it - you can directly select an item (even when it is in a BH not activated in the setup dialog). The entry displayed in the box corresponds to the currently selected item. The items appearing in the list are sorted by BH, product and item.

A	B	C	D	E	F
1	150111.03: Double skinned horiz. cyl. storage tank / Unspecified / 50 cu. m.			Delete item History Setup	
2	150111.03: Double skinned horiz. cyl. storage tank / Unspecified / 50 cu. m.			Save Check Print Exit	
3	150111.04: Stainless steel beer keg / Unspecified / 50 litre standard			Country	
4	150111.05: Packaged steam boiler / Viessmann (Germany) / Vitomax 200 HS, model 237			CM	no picture!
5	150111.06: Packaged steam boiler / Viessmann (Germany) / Vitomax 200 HS, model 237			Specified	Show pict.
6	150111.07: Packaged steam boiler / Viessmann (Germany) / Vitoplex 200 SX2 1950 kV				<- Copy
7	150111.08: Packaged steam boiler / Viessmann (Germany) / Vitoplex 200 SX2 1950 kV				<- Copy
8	150111.09: Hack saw / Stanley (USA) / Multiposition hacksaw 15-120				<- Copy
9	150111.10: Hack saw / Stanley (USA) / High-Tension Hack saw				<- Copy
10	150111.11: Hack saw / USAG (Italy) / 200 S				<- Copy
11	150111.12: Automotive tool set / Facon (France) / Tool set BT.11A				<- Copy
12	150112.01: Portable screw compressor / Unspecified /				<- Copy
13	150112.02: Portable screw compressor / Atlas Copco (USA) / XAS 67 Dd Series 7				<- Copy
14	150112.03: Portable screw compressor / Atlas Copco (USA) / XAS 77 Dd Series 7				<- Copy
15	150112.04: Diesel engine (general purpose) / Unspecified /				<- Copy
16	150112.05: Diesel engine (general purpose) / Yanmar / 3TNV88-DSA				<- Copy
17	150112.06: Industrial petrol engine / Honda (Japan) / GX 270 SWC 4				<- Copy
18	150112.07: Industrial petrol engine / Honda (Japan) / GX 160 SX 4				<- Copy
19	150112.08: Water pump (stationary) / Unspecified /				<- Copy
20	150112.09: Water pump (stationary) / Grundfos (Denmark) / TP 32-320/2				<- Copy
21	150112.10: Water pump (stationary) / Grundfos (Denmark) / TP 32-380/2				<- Copy
22	6 Thickness of steel, dished ends (inner and outer)	6.00 mm	0.24 in		<- Copy
23	7 Classification of steel (European norm)	EN 1025 S 275	EN 1025 S 275		<- Copy
24	8 Tested pressure: inner/outer	0.3/0.4 bar	0.3.0.4 bar		<- Copy
25	9 Design pressure	0.7 bar	0.7 bar		<- Copy
26	10 Working temp. range	-20 C + 50 C	-2 F + 120 F		<- Copy
27	11 Uncoated internally (standard finish)	yes	yes		<- Copy
28	12 Weight, empty	approx. 8297 kgs	18253 lbs		<- Copy
29	Terms and conditions				
30	a Order quantity	one	one		
31	b Currency	specify	specify	XAF	
32	c Unit price	one	one		
33	d Installation costs	no	no		
34	e Delivery costs	yes	yes		
35	f Discount	yes (%)	yes (%)		
36	g Non-deductible taxes	yes	yes		
37	Total unit price net of deductible taxes and discount			Compute price ->	
38	Representativity and comparability				

In order to select an item, move the cursor to it (the cursor is followed by the dark blue highlighting line) and click on it. The Data Tool then copies the appropriate texts etc. from the database to the input screen. In case you selected an item in a BH which was not activated in the setup dialog, you will get a corresponding warning.

3.1.2 Navigation Buttons next/previous Item/BH

Using the long pull-down list involves a lot of scrolling to select the appropriate item. As an alternative, the additional navigation buttons for selecting the next/previous item/BH may be used. Clicking on one of them lets the Data Tool move forward or backward in the list of items until an appropriate item is found. During this search, the settings made in the “filter” area (see next paragraph) are respected. In case no item matching the filter is found, you will get the following message:



As a consequence, the last selected item will be displayed.

3.1.3 “Filter” Settings

In order to allow for easier navigation, “filter” checkboxes have been included:

☒ Priced	☒ Unspec.	☒ Repr.	☒ ID
☒ Incomp.	☒ Deleted	☒ Not repr.	☒ EQ

By default, all eight checkboxes are “checked”. This filter is used during item navigation as well as for printouts. Filtering is available for the following:

- Item status: priced / unspecified / incomplete / deleted
- Importance: important / not important
- Comparability: identical / equivalent

To change the filter, just click on corresponding text or checkbox. Please note that the “hot spot” of the cursor hand used is not the “tip of the index finger”, but a little bit below it. If you click with the tip of the cursor hand index finger on the bottom line of the “Priced” checkbox, the status of the “Incomplete” checkbox will change (sorry, we can’t do anything about this).

3.1.4 Item Status

The item status is displayed in the yellow area. There are four options as follows:

Priced

The item is (formally) correctly priced and saved.

Unspecified

These are items for which no information has been saved or which have been priced, but deleted afterwards (with throwing away the entered information).

Deleted

This indicates an item, for which information has been saved and which has been deleted afterwards. During the deletion process, the user decided to just mark the item as “deleted”, but keep all entered information.

Incomplete

The item has been saved with some information being (formally) wrong or incomplete. The advantage of having the option to save incomplete or wrong information is that you may have started entering data for an item and then notice some missing information. Instead of erasing the already entered information and re-entering it later, you can just save the available information and come back to the item later. Here using the filter comes in: In order to find such an item later, de-select all checkboxes except “Incomplete” and then click on the “Next item” button. The Data Tool will then find the next item with status “Incomplete”.

Each possible status is additionally signalled by the appropriate colour:

PRICED, **UNSPECIFIED**, **DELETED**, **INCOMPLETE**.

3.1.5 Command Buttons for Saving, Checking, Printing etc.

The command buttons in this area are intended for

- Saving the information entered for the currently selected item
- Checking the information entered for the currently selected item
- Starting the printing dialog
- Exiting the Data Tool
- Deleting the currently selected item
- Displaying the “history” of the currently selected item
- Starting the setup dialog

3.1.6 Input Area “Make and Model”

After having selected the appropriate item, data input normally starts in the input area for make and model. In case the proposed make and model are ok, you may click on the  button on the right hand side of the input field instead of entering the text yourself. Please note that the make and model have to be entered for all priced items (as well as the technical specifications).

3.1.7 Input Area “Specifications”

In this area, the specifications of the priced have to be entered. Please note that if data are given in the “Metric” or “Imperial” columns, the corresponding specification input field (column E) has to be filled in, too.

3.1.8 Command Buttons for Copying Make, Model, and/or Specifications

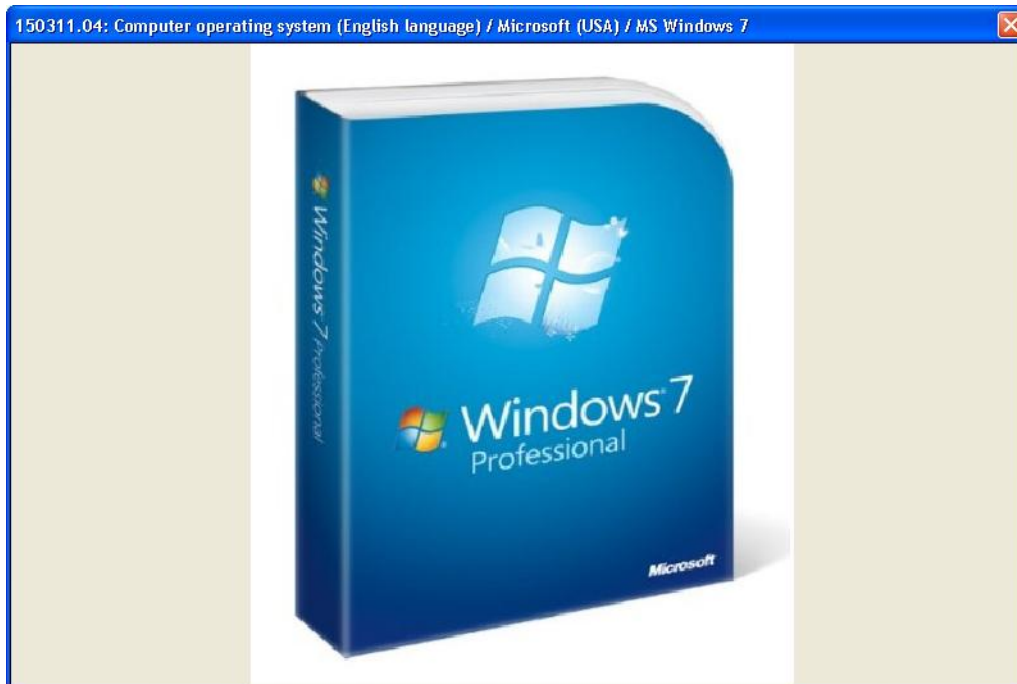
In cases where the priced product/item is identical or nearly identical to the proposed one, all or at least most of the technical parameters as well as the make and model should be identical to the entries in the “Metric” or “Imperial” column or in the range C8:C9 (proposed make and model). To facilitate input, there are  buttons in the “Imperial” and “Metric” columns. In order to copy all parameters from the “Imperial” or “Metric” column, click on the appropriate one. Please note: This also causes the item to be marked as 1 (for “Identical”) in the “Representativity and comparability” input area. To just copy single parameters, click on the  button on the right hand side of the input field. Please note: Depending on what you specified in the setup dialog, either the metric or the imperial parameters will be copied.

3.1.9 Highlighting of Technical Parameters which are different

Upon display of an item in the input sheet, the technical specifications of that item which are different to both texts/values given in the “Imperial” and “Metric” columns will be highlighted by a yellow cell background. This can not be done continuously, but can be asked for by clicking on the “Show diff.” button to the right of the “National” column.

3.1.10 Displaying Item Pictures

In case the content of field F6 is **picture av.**, a picture for the currently selected item is available, otherwise the content of field F6 is **no picture!** (f.e. for all generic items with make “unspecified”). In case there is a picture available, a click on the button **Show pict.** causes the display of the picture in a separate window, like in the example shown below.



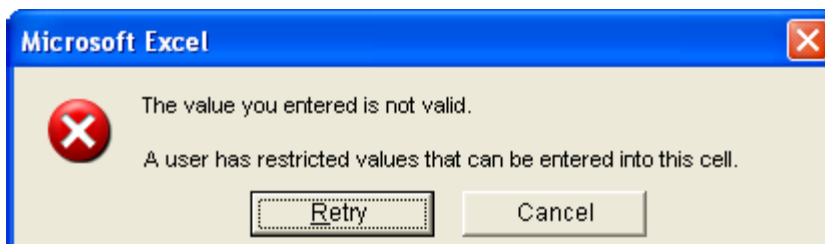
The picture window may be closed by clicking on the  in the top right corner of the image window.

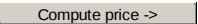
3.1.11 Terms and Conditions

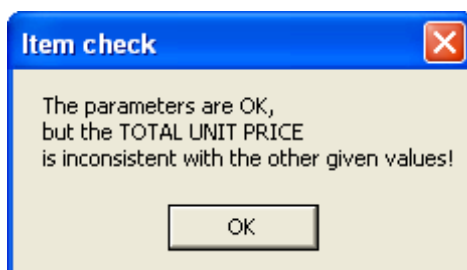
In this area, the information determining the “Total unit price net of deductible taxes and discount” have to be entered. The following rules apply:

Order quantity	any text or number, no checks are applied
Currency	Only the local currency is valid, all other values may be entered, but result in an error message when trying to save the item (and the item will be flagged as “incomplete”)
Unit price	any positive number
Installation costs	any non-negative number (please specify 0 instead of none)
Delivery costs	any non-negative number (please specify 0 instead of none)
Discount	either a non-negative number (giving the discount percentage) or a negative number (indicating the discount in units of local currency, e.g. –1300000 for a discount of 1300000 XAF (in our example)).
Non-deductible taxes	any non-negative number (please specify 0 instead of none)
Total unit price net of deductible taxes and discount	any positive number

In case a value is entered that is not valid for the input field (e.g. a negative number in the “Total unit price” field, a corresponding error message is given. As the message is a standard Excel message, it varies depending on the national version of your MS Excel software.



The total unit price may be calculated and entered in the input field by clicking on the  button. If you modify this value later or manually enter a value that does not match the calculated one (with a tolerance of one unit of the local currency), a message like



will be displayed when you try to save the item or when you click on the  button. In addition, in the Summary Results List (described in a later chapter), such an item will be flagged correspondingly.

3.1.12 Representativity and Comparability

In the “Representativity” field, only “Y” or “N” may be entered (either in capital letter or in lower case). All other values result in an error message.

In the comparability field, only 1 or 2 may be entered. (1 for “identical”, 2 for “equivalent”). All other values result in an error message.

3.1.13 Options

The input made in this area (A37:E43) is not checked in the Data Tool.

3.1.14 Notes

The input made in this area (A45:E54) is not checked in the Data Tool.

For most of the “specific” items, a website address of the manufacturer is provided in the “Notes” section. In the example displayed below (item 150111.10, a high tension hacksaw manufactured by Stanley (USA)), the website address is

www.stanleytools.com

You may jump to that website by clicking on the link.

3.2 Input of a Sample Item

Let us assume we want to specify item 150121.03, a Ford Transit 260 SWB Medium Roof van. We found the exactly identical product, and it is an important item in the market. The price we found for the van is 13 million XAF, the discount is 10% (=1.3 million XAF), there are neither installation costs nor or delivery costs or non-deductible taxes.

These are just assumptions for the sample input; for more detailed information on pricing items please refer to the briefing notes.

There are different ways of selecting the item, but knowing it is in BH 6 of 7 and assuming we are in BH 1, clicking two times on the “Prev. BH” button takes us to the beginning of BH 6 (BH 7+“Next” = BH 1, BH 1+“Previous” = BH 7). Then click on the down arrow on the right hand side of the pull-down list to get the following:

A	B	C	D	E	F
1	150121.01: Van / Unspecified / -			Delete item History Setup	
2				Save Check Print Exit	
3	150121.01: Van / Unspecified / -				
4	150121.02: Van / Mercedes Benz (Germany) / Sprinter 313 CDI				
5	150121.03: Van / Ford (USA) / Transit 260 SWB Medium Roof				
6	150121.04: Van / V / (Germany) / T 30			Country	
7	150121.05: Double cab pick-up / Toyota (Japan) / Hilux HL 2 Double Cab 4WD			CM	no picture!
8	150121.06: Delivery scooter / Yamaha (Japan) / Yity			Specified	Show pict.
9	150121.07: Delivery scooter / Honda (Japan) / ANF 125i Innova				<- Copy
10	150121.08: Delivery scooter / TGB (Taiwan) / Delivery				<- Copy
11	150121.09: Diesel minibus / Unspecified / -			National	Show diff.
12	150121.10: Diesel minibus / Mercedes Benz (Germany) / Yiko Traveliner				<- Copy
13	150121.11: Diesel minibus / V / (Germany) / Caravelle				<- Copy
14	150121.12: Lorry chassis cab / Mercedes Benz (Germany) / Sprinter 516 CDI				<- Copy
15	150121.13: Lorry chassis cab / Volvo (Sweden) / FL 240 HP 4x2 Rigid				<- Copy
16	150121.14: Lorry chassis cab / Ford (USA) / Transit 350 LWB DRW RWD				<- Copy
17	150121.15: Lorry chassis cab / V / (Germany) / Crafter CR 35				<- Copy
18	150121.16: Tractor unit / Unspecified / -				<- Copy
19	150121.17: Tractor unit / Mercedes Benz (Germany) / Actros 2644 S 6x4 LS				<- Copy
20	150121.18: Tractor unit / Mercedes Benz (Germany) / Actros 1844 LS 4x2				<- Copy
21	150121.19: Tractor unit / Scania (Sweden) / R 400 LA 4x2 MNA				<- Copy
22	150311.01: Computer operating system / Unspecified / -				<- Copy
23	Engine Euro 4 compliant	yes	yes		<- Copy
24	With 5-speed gearbox	yes	yes		<- Copy
25	Wheelbase	4325 mm	170 ins		<- Copy
26	Load length	4300 mm	169.3 ins		<- Copy
27	Interior height	1940 mm	76.4 ins		<- Copy
28	Side door	1 sliding	1 sliding		<- Copy
29	Rear doors	2 swing	2 swing		<- Copy
30	Terms and conditions				
31	a Order quantity	one	one		
32	b Currency	specify	specify	XAF	
33	c Unit price	one	one		
34	d Installation costs	no	no		
35	e Delivery costs	yes	yes		
36	f Discount	yes (%)	yes (%)		
37	g Non-deductible taxes	yes	yes		
38	Total unit price net of deductible taxes and discount		Compute price ->		
39	Representativity and comparability				
40	Input_Sheet / Spec_Sheets / History / Summary_products / Summary / Summary_resul				

Now move the cursor to the entry for the Ford Transit 260 van and click:

A	B	C	D	E	F
1	150121.03: Van / Ford (USA) / Transit 260 SWB Medium Roof				Delete item History Setup
2					
3	Item +	Item -	BH +	BH -	✓ Priced ✓ Unspec. ✓ Repr. ✓ ID
4					✓ Incomp. ✓ Deleted ✓ Not repr. ✓ EQ
5	MACHINERY AND EQUIPMENT SURVEY			Item Status	UNSPECIFIED
6	150121.03: Van			Save Check Print Exit	
7	Product	Proposed		Country	
8	Make (and nationality):	Ford (USA)		CM	picture av.
9	Model:	Transit 260 SWB Medium Roof		Specified	<- Copy
10	Specifications	Metric Copy ->	Imperial Copy ->	National	Show diff.
11	1 Payload	966 kg	2125 lbs		<- Copy
12	2 Gross vehicle weight	2800 kg	5720 lbs		<- Copy
13	3 Type of engine	Duratorq TCDi Diesel	Duratorq TCDi Diesel		<- Copy
14	4 Engine capacity	2.2 l	134 cu.in		<- Copy
15	5 Engine power output	75 kw	110 bhp		<- Copy
16	6 Front wheel drive	yes	yes		<- Copy
17	7 Brakes	All disc	All disc		<- Copy
18	8 Axle ratio	4.23:1	4.23:1		<- Copy
19	9 Wheelbase	2933 mm	115.5 in		<- Copy
20	10 Load volume	6.81 m3	240 cu ft		<- Copy
21	11 Side door	1 sliding	1 sliding		<- Copy
22	12 Rear doors	2 swing	2 swing		<- Copy
23	Terms and conditions				
24	a Order quantity	one	one		
25	b Currency	specify	specify	XAF	
26	c Unit price	one	one		
27	d Installation costs	no	no		
28	e Delivery costs	yes	yes		
29	f Discount	yes (%)	yes (%)		
30	g Non-deductible taxes	yes	yes		
31	Total unit price net of deductible taxes and discount			Compute price ->	
32	Representativity and comparability				
33	Is the product/item priced representative (yes) or unrepresentative (no)?				
34	Are the product/item priced and the product/item specified identical (1) or equivalent (2)?				
35	Options / additional specifications				
36					
37					
38					
39					
40					
41					
42					
43					
44	Notes				
45					
46					
47					
48					

As we found an identical item, we click on the two <- Copy buttons for make and model as well as on the Copy -> button in the "Metric" column. As mentioned before, this causes a "1" to be entered in the comparability input field.

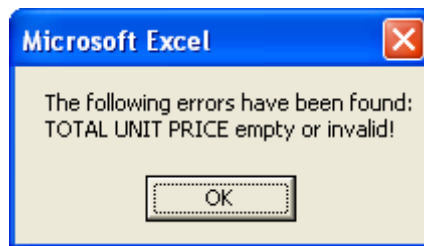
A	B	C	D	E	F
1	150121.03: Van / Ford (USA) / Transit 260 SWB Medium Roof				Delete item History Setup
2					
3	Item +	Item -	BH +	BH -	✓ Priced ✓ Unspec. ✓ Repr. ✓ ID
4					✓ Incomp. ✓ Deleted ✓ Not repr. ✓ EQ
5	MACHINERY AND EQUIPMENT SURVEY			Item Status	UNSPECIFIED
6	150121.03: Van			Save Check Print Exit	
7	Product	Proposed		Country	
8	Make (and nationality):	Ford (USA)		CM	picture av.
9	Model:	Transit 260 SWB Medium Roof		Specified	<- Copy
10	Specifications	Metric Copy ->	Imperial Copy ->	National	Show diff.
11	1 Payload	966 kg	2125 lbs		<- Copy
12	2 Gross vehicle weight	2800 kg	5720 lbs		<- Copy
13	3 Type of engine	Duratorq TCDi Diesel	Duratorq TCDi Diesel		<- Copy
14	4 Engine capacity	2.2 l	134 cu.in		<- Copy
15	5 Engine power output	75 kw	110 bhp		<- Copy
16	6 Front wheel drive	yes	yes		<- Copy
17	7 Brakes	All disc	All disc		<- Copy
18	8 Axle ratio	4.23:1	4.23:1		<- Copy
19	9 Wheelbase	2933 mm	115.5 in		<- Copy
20	10 Load volume	6.81 m3	240 cu ft		<- Copy
21	11 Side door	1 sliding	1 sliding		<- Copy
22	12 Rear doors	2 swing	2 swing		<- Copy
23	Terms and conditions				
24	a Order quantity	one	one		
25	b Currency	specify	specify	XAF	
26	c Unit price	one	one		
27	d Installation costs	no	no		
28	e Delivery costs	yes	yes		
29	f Discount	yes (%)	yes (%)		
30	g Non-deductible taxes	yes	yes		
31	Total unit price net of deductible taxes and discount			Compute price ->	
32	Representativity and comparability				
33	Is the product/item priced representative (yes) or unrepresentative (no)?				
34	Are the product/item priced and the product/item specified identical (1) or equivalent (2)?				
35	Options / additional specifications				
36					
37					
38					
39					
40					
41					
42					
43					
44	Notes				
45					
46					
47					
48					

After having entered a "Y" in the representativity field, we continue by entering the pricing information in the "Terms and conditions" input area. Note: For entering the discount, we may either enter -1300000 (absolute value) or 10 (for 10%). Here the value 10 (for 10%) has been entered in the discount input field:

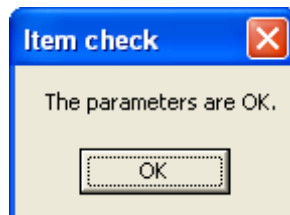
A	B	C	D	E	F
150121.03: Van / Ford (USA) / Transit 260 SWB Medium Roof				Delete item	History
☒ Priced ☒ Unspec. ☒ Repr. ☒ ID ☒ Incomp. ☒ Deleted ☒ Not repr. ☒ EQ				Item Status UNSPECIFIED	Save Check Print Exit
MACHINERY AND EQUIPMENT SURVEY				SPECIFIC	Country
150121.03: Van				CM	picture av.
12	Rear doors	2 swing	2 swing	2 swing	<- Copy
Terms and conditions					
a	Order quantity	one	one	1	
b	Currency	specify	specify	XAF	
c	Unit price	one	one	13,000,000.00	
d	Installation costs	no	no	0.00	
e	Delivery costs	yes	yes	0.00	
f	Discount	yes (%)	yes (%)	10.00	
g	Non-deductible taxes	yes	yes	0.00	
31 Total unit price net of deductible taxes and discount				Compute price ->	
Representativity and comparability					
Is the product/item priced representative (yes) or unrepresentative (no)?				Y	
Are the product/item priced and the product/item specified identical (1) or equivalent (2)?				1	
Options / additional specifications					
Notes					

Input_Sheet / Spec_Sheets / History / Summary_products / Summary / Summary_resul

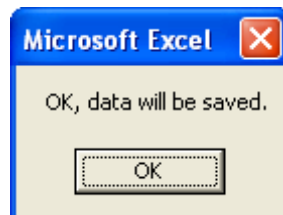
We check whether everything is ok by clicking on the “Check” button. We get the following response:



After closing the message box by a click on the “OK” button, we click on the **Compute price ->** button to let the Data Tool calculate the “Total unit price net of deductible taxes and discounts”. The calculated value (11700000 XAF) is automatically entered in the appropriate input field. Another click on the “Check” button produces the following message:



Now we can save the entered information by clicking on the “Save” button.



In addition, the following dialog is displayed:



The dialog box has a blue title bar with the text "Create item history entry" and a red close button. The main area is light beige and contains the following text: "Item: 150121.03: Van / Ford (USA) / Transit 260 SWB", "Medium Roof", "Date and time: 23.03.2011 15:05", "User: Peter Tabor", "Action : Item priced", and "Standard comment: -". To the right of this text are two buttons: "OK" and "Abbrechen". Below the text is a label "Please add your comment" and a text input field containing the text "Sample input".

The text you enter here, as well as date and time of this action (saving) will be stored in the “history” of the priced item and can be retrieved afterwards by clicking on the “History” button in the data input screen. You do not need to enter a comment here, but it may be useful to do it.

Please note: Saving item information will also save the Data Tool file to disk, in order to ensure that the database is immediately saved to disk and avoid any possible data loss.

After saving has been completed, the item is indicated as being “priced” in the “item status” area:

Item Status PRICED

3.3 Special Situations

3.3.1 Moving to next Item without prior “Save”

Now we assume that we have selected a new item (e.g. the next item after the van from the example above). After having entered some information for this item, we “forget” to check and save the item and click on “next item”. In such a situation, the Data Tool notes that the last saved information for the item and what is present in the input sheet differ. The tool then reduces the zoom factor (to be able to display the complete specification sheet for the item), highlights all changed cells with yellow colour, and asks the user whether or not to save the data:

Item #	Item	BH	BH	Print	Share	Import	Export	Item Status	Country
1	150121.04: Van / VW (Germany) / T 30							UNSPECIFIED	CM
2	Product	Proposed						Specified	
3	Make (and nationality):	VW (Germany)						VW (Germany)	
4	Model:	T 30						T 30	
5	Specifications	Metric	Imperial					National	
6	1 Payload	1200 kg	2640 lb					1200 kg	
7	2 Gross vehicle weight	3000 kg	6600 lbs					3000 kg	
8	3 Type of engine	diesel TDI	diesel Tdi					diesel TDI	
9	4 Engine capacity	2.5 L	107 cu in					2.5 L	
10	5 Engine power output	96 kW	130 PS					96 kW	
11	6 Wheelbase	3000 mm	118 ins					3000 mm	
12	7 Load area	4.3 m²	46 sq ft					4.3 m²	
13	8 Interior height	1410 mm	55.5 ins					1410 mm	
14	9 Side door	1 sliding	1 sliding					1 sliding	
15	10 Rear doors	yes	yes					yes	
16	11								
17	12								
18	13								
19	14								
20	15								
21	16								
22	17								
23	18								
24	19								
25	20								
26	21								
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90	85								
91	86								
92	87								
93	88								
94	89								
95	90								
96	91								
97	92								
98	93								
99	94								
100	95								

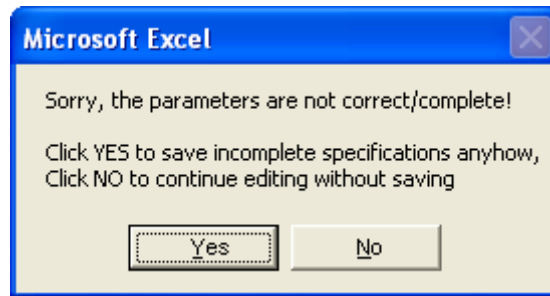
In the example shown, not all parameters have been entered properly. Thus, after clicking on the “Yes” button (to save the entered information), we get an error message listing what is missing or invalid:

Microsoft Excel

The following errors have been found:
ORDER QUANTITY empty or invalid!
UNIT PRICE empty or invalid!
INSTALLATION COSTS empty or invalid!
DELIVERY COSTS empty or invalid!
DISCOUNT empty or invalid!
NON-DEDUCTIBLE TAXES empty or invalid!
TOTAL UNIT PRICE empty or invalid!
REPRESENTATIVITY empty or invalid!

OK

After clicking on the OK button, we have two choices:



Clicking “Yes” results in saving the information and marking the item as “incomplete”, “No” moves on to the item we wanted to go to without saving the information.

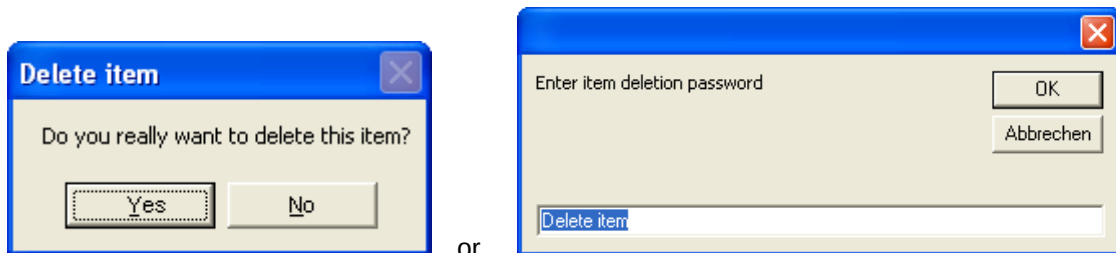
3.3.2 Bottom Line Prices

Let us use the data from the sample input – the Ford van – again. Assumed we phoned the dealer again, asking for a better bottom line price, and he comes up with a bottom line price of 10 million XAF. Instead of calculating an odd discount percentage, we can either just enter this price in the “Total unit price” field and save the item or enter the correct discount. The first alternative would result in a warning, as the price calculated from the different price component does not match the price entered, whereas entering –3000000 in the discount field and then clicking on the “Compute price” button results in the correct bottom line price to be calculated and entered.

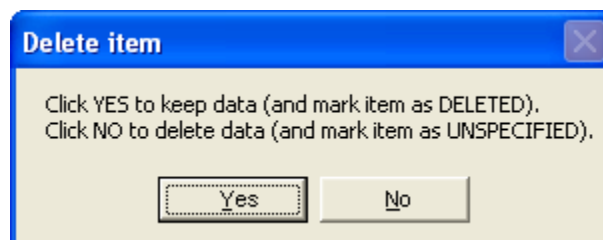
3.4 Delete Item

Deleting items can be used for two different purposes: First, having specified the correct parameters, but for the wrong item, second to (maybe temporarily) mark an item as incomplete, as we want to modify something later (because we are not sure about all the parameters). In both situations, we start with selecting the item and clicking on the “Delete item” button.

Depending on whether or not we specified an item deletion password in the setup dialog, we get one of the two following dialogs:



After clicking on the “Yes” button (first case) or entering the correct item deletion password and clicking on the “OK” button, the Data Tool offers two choices:



Clicking on the “Yes” button results in just marking the item as “Deleted”, but keeps the data – this is what should be done in the second situation described.

Clicking on “No” really deletes the data entered for this item and marks the item as “Unspecified” – the correct action in the first situation.

3.5 Item History

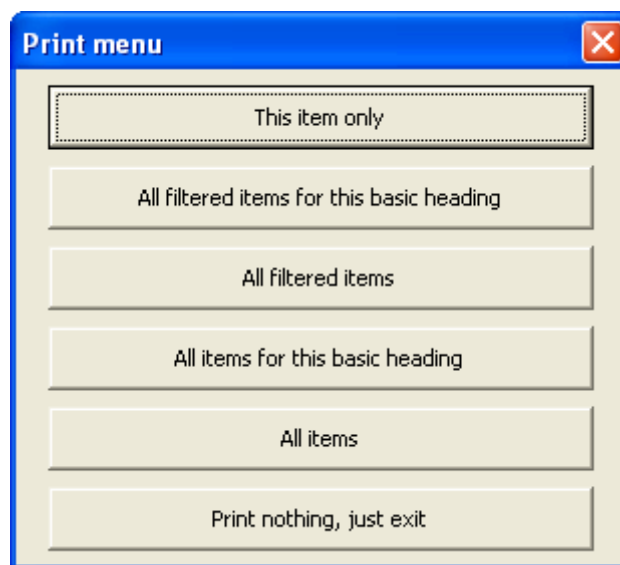
When saving or deleting an item, the user will be prompted for an additional comment. In the message box displayed, additional information (item name, data and time, user name, action) will be given. This information, as well as the comment entered by the user, will be recorded in the “History” worksheet.

In order to list the history of an item, please select the appropriate item and click on the “History” button. The history for the corresponding item will be filtered, you will get a display like the following:

Item	Date and time	User	Action	Comment
150121.03	21.03.11 14:00		Initialised	(Data tool creation)
150121.03	23.03.11 15:05	Peter Tabor	Item priced	Sample input

3.6 Printing

A click on the “Print” button causes the following menu to open:

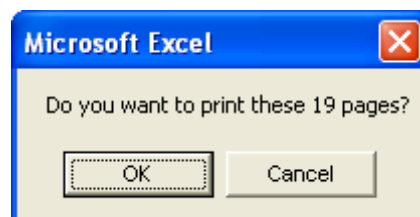


The user may now select to print

- this item (the currently selected one) only
- all filtered items for the currently selected BH
- all filtered items
- all items for the currently selected BH
- all items.

In addition, the user may select to print nothing and just exit the print menu.

To avoid printing too many pages by mistake, the Data Tool gives an extra message when printing more than one page:



Please note: The Data Tool always prints to the default printer, so please make sure to select the proper printer in advance!

In case an error occurs during printing, the Data Tool issues an appropriate warning.

The printout is done with one item per page, additional information is given in the page footer.

MACHINERY AND EQUIPMENT SURVEY		SPECIFIC		Country
150121.03: Van				CM
Product		Proposed		Specified
Make (and nationality):		Ford (USA)		Ford (USA)
Model:		Transit 260 SWB Medium Roof		Transit 260 SWB Medium Roof
Specifications		Metric	Imperial	National
1	Payload	966 kg	2125 lbs	966 kg
2	Gross vehicle weight	2800 kg	5720 lbs	2800 kg
3	Type of engine	Duratorq TCDi Diesel	Duratorq TCDi Diesel	Duratorq TCDi Diesel
4	Engine capacity	2.2 l	134 cu.in	2.2 l
5	Engine power output	75 kw	110 bhp	75 kw
6	Front wheel drive	yes	yes	yes
7	Brakes	All disc	All disc	All disc
8	Axle ratio	4.23:1	4.23:1	4.23:1
9	Wheelbase	2933 mm	115.5 in	2933 mm
10	Load volume	6.81 m3	240 cu ft	6.81 m3
11	Side door	1 sliding	1 sliding	1 sliding
12	Rear doors	2 swing	2 swing	2 swing
Terms and conditions				
a	Order quantity	one	one	1
b	Currency	specify	specify	XAF
c	Unit price	one	one	13,000,000.00
d	Installation costs	no	no	0.00
e	Delivery costs	yes	yes	0.00
f	Discount	yes (%)	yes (%)	10.00
g	Non-deductible taxes	yes	yes	0.00
Total unit price net of deductible taxes and discount				11,700,000.00
Representativity and comparability				
Is the product/item priced representative (yes) or unrepresentative (no)?			Y	
Are the product/item priced and the product/item specified identical (1) or equivalent (2)?			1	
Options / additional specifications				
Notes				
Website address: www.ford.com				

3.7 Additional Hints: Enhanced Filtering and Printing

Special printing tasks can be performed by appropriate settings of the filters in the input sheet and selecting the correct buttons in the “Print” dialog. In order to print priced only, please check all boxes in the filter area as shown below:

☒ Priced	☐ Unspec.	☒ Repr.	☒ ID
☐ Incomp.	☐ Deleted	☒ Not repr.	☒ EQ

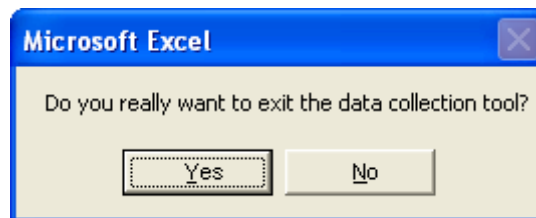
Then click on the “Print” button and select “All filtered items” in the “Print” dialog.

3.8 Setup

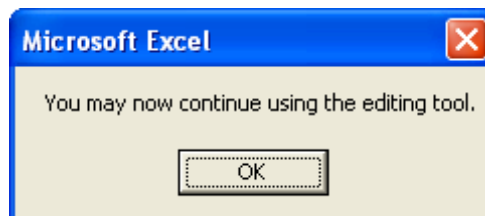
The setup dialog has already been described in the “First start and setup” chapter.

3.9 Exit

Clicking on exit closes the Data Tool. For safety reasons, the Data Tool first asks whether the user really wants to exit:



Then the Data Tool checks for unsaved information specified for the currently selected item (see chapter “Special situations”). When clicking on the “Cancel” button, the exit process is stopped and the following message is displayed:



4 Summaries

The Data Tool provides three summaries of the information entered.

- “Summary_results”: item-by-item information
- “Summary”: summary by Basic Heading and item status
- “Summary_products”: product specification summary by Basic Heading

In order to access these summaries, just select the appropriate Excel sheet.

4.1 Item-by-Item Information

“Summary_results” provides a list of all items with information which of them were priced, whether they are priced as identical or equivalent, and whether the Data Tool user specified the item to be important. In cases where the “Total unit price net of deductible taxes and discounts” entered does not match the price which would be calculated from the pricing details, the item is marked accordingly in the “price inconsistent” column.

“Summary_results” is not updated automatically. In order to update this summary, please select the “Summary_results” sheet, go to the top left corner and click on the “CREATE SUMMARY” button. The Data Tool will then create the following list:

	A	B	C	D	E	F	G	H	I	J
1	CREATE SUMMARY		MACHINERY AND EQUIPMENT SURVEY - ICP 2011: SUMMARY RESULTS LIST							
2										
3	Item	Code	Description and make	Model	Ident.	Equiv.	Representative	Not priced	Price inconsistent	Parameters for generic items
265			BH 6. (150121): Other road transport							
266			Van							
267	158	150121.01	Unspecified	-				X		150121.02
268			Van							
269	159	150121.02	Mercedes Benz (Germany)	Sprinter 313 CDI				X		
270	160	150121.03	Ford (USA)	Transit 260 SWB Medium Roof	X		Y			
271	161	150121.04	V W (Germany)	T 30				X		
272			Double cab pick-up							
273	162	150121.05	Toyota (Japan)	Hilux HL 2 Double Cab 4WD				X		
274			Delivery scooter							
275	163	150121.06	Yamaha (Japan)	Vity				X		
276	164	150121.07	Honda (Japan)	ANF 125i Innova				X		
277	165	150121.08	TGB (Taiwan)	Delivery				X		
278			Diesel minibus							
279	166	150121.09	Unspecified	-				X		150121.10
280			Diesel minibus							
281	167	150121.10	Mercedes Benz (Germany)	Vito Traveliner				X		
282	168	150121.11	V W (Germany)	Caravelle				X		
283			Lorry chassis cab							
284	169	150121.12	Mercedes Benz (Germany)	Sprinter 516 CDI				X		
285	170	150121.13	Volvo (Sweden)	FLL 240 HP 4x2 Rigid				X		
286	171	150121.14	Ford (USA)	Transit 360 LWB DRW RWD				X		
287	172	150121.15	V W (Germany)	Crafter CR 35				X		
288			Tractor unit							
289	173	150121.16	Unspecified	-				X		150121.17
290			Tractor unit							
291	174	150121.17	Mercedes Benz (Germany)	Actros 2644 S 6x4 LS				X		
292	175	150121.18	Mercedes Benz (Germany)	Actros 1844 LS 4x2				X		
293	176	150121.19	Scania (Sweden)	R 400 LA 4x2 MNA				X		
294			BH 7. (150311): Other products							

... continued

4.2 Summary by Basic Heading and Item Status

“Summary” gives the total number of items priced per BH (distinguishing between the various combinations of representativity and comparability) as well as the number of unspecified, incomplete and deleted items. In addition to this information, the number of products (not items!) priced per BH as well as the number of priced products per BH that were both important and identical is given.

Country: CM	Number of priced items per basic heading							Unspecified, incomplete and deleted items				PRODUCTS priced	
	Representative			Not representative			Total	Unspecified	Incomplete	Deleted	Total	Total	Representative + identical
	BH	Total	Ident.	Equiv.	Total	Ident.	Equiv.						
1	0	0	0	0	0	0	0	12	0	0	12	0	0
2	0	0	0	0	0	0	0	21	0	0	21	0	0
3	0	0	0	0	0	0	0	56	0	0	56	0	0
4	0	0	0	0	0	0	0	60	0	0	60	0	0
5	0	0	0	0	0	0	0	8	0	0	8	0	0
6	1	1	0	0	0	0	1	18	0	0	18	1	1
7	0	0	0	0	0	0	0	15	0	0	15	0	0
Total	1	1	0	0	0	0	1	190	0	0	190	1	1

4.3 Product Specification Summary by Basic Heading

“Summary_Products” is an extract from “Summary” plus a comparison with the “Recommended minimum number” of products which are to be priced as both important and identical. At the time of writing this manual the “Recommended minimum number” was set to “1” for all countries and Basic Headings.

Country: CM	Code of BH	Name of basic heading	PRODUCTS priced		Rec. Min. No.	Difference
			Total	Representative + identical		
1	150111	Fabricated metal products, except machinery and equipment	0	0	1	-1
2	150112	General purpose machinery	0	0	1	-1
3	150113	Special purpose machinery	0	0	1	-1
4	150114	Electrical and optical equipment	0	0	1	-1
5	150115	Other manufactured goods n.e.c.	0	0	1	-1
6	150121	Other road transport	1	1	1	0
7	150311	Other products	0	0	1	-1
Total survey			1	1	7	-6

5 Sending Data to the Region

After having finished the input work, please send the completed data_tool.xls file(s) to the Regional coordination team for validation.