

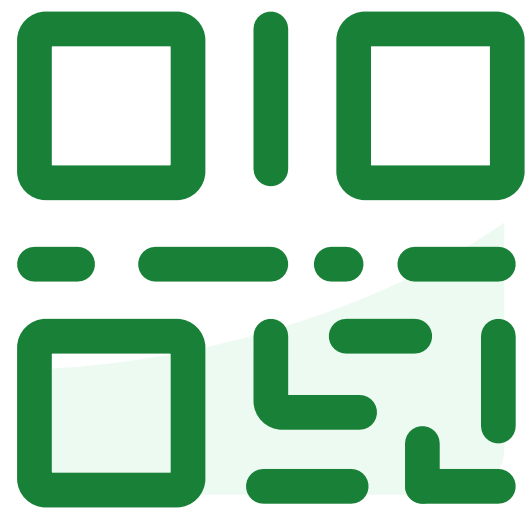
Creating & Managing Custom Templates for Standardization

Doug Maiden



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slido.com
#4135 1801

Do not edit
How to change the design



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i The Slido app must be installed on every computer you're presenting from

slido

Rules of Engagement

Demonstration Bases NOT Lead/Follow

- You May Follow Along and Complete Similar Actions
- Explore and Ask Questions Regarding the Area of Focus
- Consider Following Up with Your Customer Success Specialist
- Talk with Us at the Genius Bar



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Introduction

Views/Dialogs that Contain Constructs

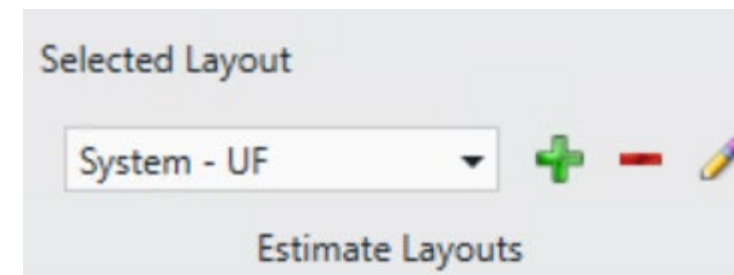
- Estimate View
- Filter View
- Fee Editor
- Highlight Rules
- WBS Properties
- Project View
- Dashboard
- 2D Takeoff Palette

Let's Go!!!



Estimate View

- Estimate Layout
 - Grouping
 - Visible Columns
 - Freeze Columns
 - Sum Footer of Numeric Value
- Alternates
 - Settings
 - Custom Column 1 - 3



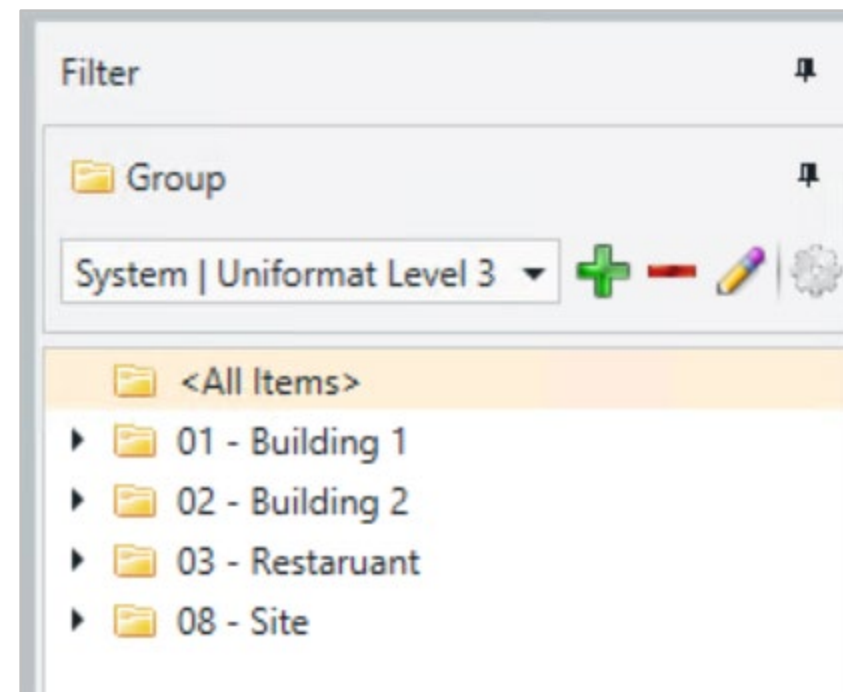
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Audience Q&A

Filter View

- Origin - Alternate
- Is Mapped - 2D/3D
- Component Name - 2D/3D
- Created By
- Estimator
- Has Conversion Factor
- Assembly



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What other favorites do you have?



Construct

Fee Editor

- Base Estimate Fees
- Custom (per Alternate)



Create ALL Anticipated Fees and Use On/Off Toggle

On	Name	Type	Cost Basis	Amount	Fee Total	Distribute
☒	General Liability	Percent	Distributed Direct	1.250%	\$464,745.84	☐ ...
☒	GC	Percent	Distributed Direct	10.000%	\$3,717,966.68	☐ ...
☒	Insurance	Percent	Distributed Direct	2.500%	\$929,491.67	☐ ...
	Subtotal	Running Total			\$42,191,773.92	?
☒	OH&P	Percent	Subtotal	3.500%	\$1,476,712.09	☐ ...
☒	Subcontractor Default Insurance (SDI)	Percent	Custom	1.200%	\$444,954.84	☐ ...
	Subtotal Direct Work	Running Total			\$44,113,440.84	?
☒	Escalation Contingency	Percent	Custom	5.000%	\$1,853,978.49	☐ ...
☒	Construction Contingency	Percent	Custom	2.000%	\$741,591.39	☐ ...
	Subtotal Contingency	Running Total			\$46,709,010.73	?
☒	Builder's Risk (0.77% Annually)	Percent	Total	2.310%	\$1,124,227.36	☐ ...
☒	Contractor-Controlled Insurance Policy...	Percent	Total	1.350%	\$657,015.99	☐ ...
	Subtotal Insurances	Running Total			\$48,490,254.08	?
☐	Adjustment to 1.00% Fee for Buildings...	Percent	Custom	-2.000%	\$0.00	☐ ...
	Subtotal Indirects	Running Total			\$48,490,254.08	?
☒	Targeted Buyout Savings	Lump Sum	Lump Sum	\$50,000.00	\$50,000.00	☒ ...
	Total Project	Running Total			\$48,540,254.08	?
☒	Bond	Bond	Bond	0.210%	\$77,500.00	
☒	Material Sales Tax	Percent	Custom	8.250%	\$50,097.10	☒ ...



Audience Q&A

Highlight Rules

- Zero Quantity
- Zero Cost

Edit Highlight Rules

Name: Zero Quantity

Color:

Criteria

Property Name	Comparison	Value
Quantity	Equals	0

OK Cancel



Audience Q&A



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WBS Properties

- Set System as Sticky Value

Others?

WBS Properties

WBS Properties

Source	Name	Type	Takeoff Value	Set as Sticky Value
	CSI Level 1	TEXT		☐
	CSI Level 2	TEXT		☐
	CSI Level 3	TEXT		☐
	ENR Commodity	TEXT		☐
	Masterformat Level...	TEXT		☐
	Masterformat Level...	TEXT		☐
	Masterformat Level...	TEXT		☐
	Masterformat Level...	TEXT		☐
	System	TEXT	...	☒
	Uniformat Level 1	TEXT		☐
	Uniformat Level 2	TEXT		☐
	Uniformat Level 3	TEXT		☐

Edit WBS Property Values

WBS Properties

WBS Property Values

WBS Property Value	Takeoff Value
	☒
01 - Building 1	☐
02 - Building 2	☐
03 - Restaurant	☐
08 - Site	☐

OK Cancel

Cost Information

WBS

QTO Prop

Asm Items

Automatic Pricing ON

WBS Property Name	Value
System	01 - Building 1
Assembly Item	
Bid Package	03.00 Turnkey Concrete
BNI Item Number	
CSI Level 1	03 CONCRETE
CSI Level 2	03300 Cast-in-Place Concrete
CSI Level 3	
ENR Commodity	
Masterformat Level...	03 00 00 CONCRETE
Masterformat Level...	03 30 00 Cast-in-Place Concrete



Audience Q&A



Project View

- System | Numeric Code Prefix
Ascending Sort
- Area Study
Copy/Paste Declared Values to
System WBS Property

Project					
A1					
	A	B	C	D	E
1		BECK TECH			
2					
3		Area Study			
4					
5		Unit Reference	Breakout Name	System (Copy/Paste to WBS Property Value)	Area (Reference/Metric) UoM
6	01	System 01 Area	Building 1	01 - Building 1	125,000 sf
7	02	System 02 Area	Building 2	02 - Building 2	75,000 sf
8	03	System 03 Area	Restaruant	03 - Restaruant	8,500 sf
9	04	System 04 Area			-
10	05	System 05 Area			-
11	06	System 06 Area			-
12	07	System 07 Area			-
13	08	System 08 Area	Site	08 - Site	8.20 acre
14					
15		Total Building Area			200,000 sf



Audience Q&A

Dashboard

Dashboard | Calculation Mode | Manual

Maintains Application Performance

Calculation Mode: Manual

Calculate Now

Calculation

30			
31			
32			
33			
34			

Exec Summary / Summary / System Breakdown / Estimate Comp

Calculate

Project

Estimate

Rates & Resources

Dashboard

Comparison

Takeoff



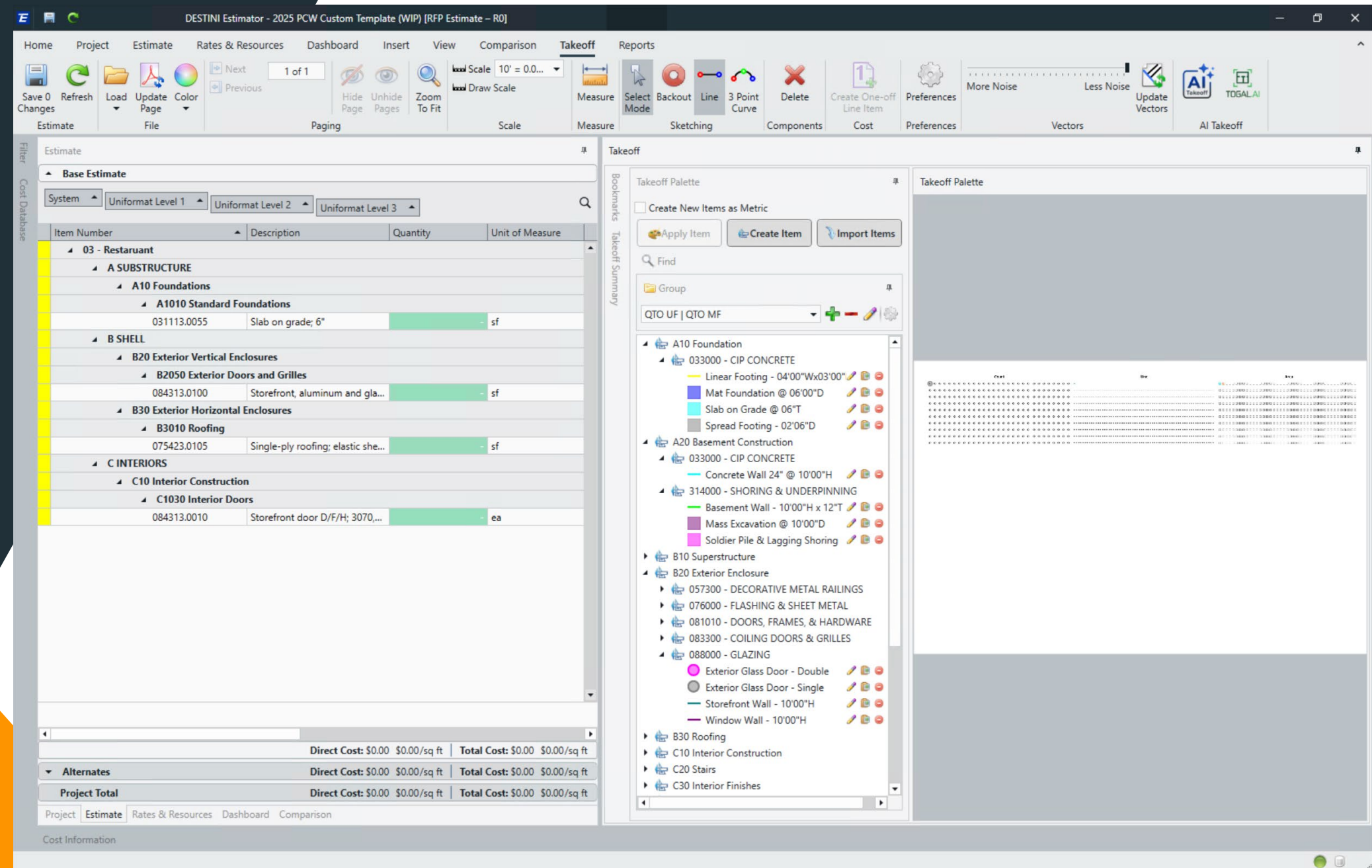
Audience Q&A

2D Takeoff

Takeoff | Manage Takeoff Templates

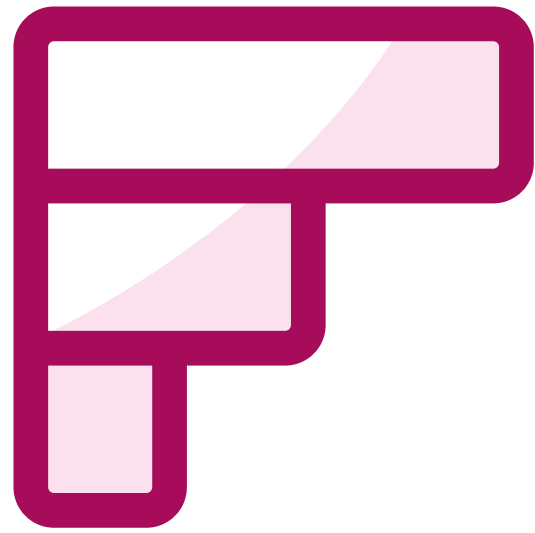


Implement Takeoff Palette.pdf for Mapping Takeoff Conditions to Line Items





Audience Q&A



What is Your Top Key Takeaway From This Session?

THANK YOU