

MODIFYING & CUSTOMIZING REPORTS

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#6455 101



Hi 🖐️ I'm Stephanie

- Joined Beck Technology in 2011
- 2011-2022: Led the Quality Assurance team
- 2023+: Business Intelligence Analyst, helping preconstruction teams understand their data through dashboards and reports



Topics

1

Getting Started

2

Meet the Report
Designer

3

Brand It Like
Marketing

4

Make It Yours



PRECON
WORLD
2025

1

Getting Started

- A. Why Adopt Standards?
- B. Download the latest
- C. Save to Z drive
- D. Run

1

A. Why Adopt Standards?

- Faster transition to DESTINI Cloud
- Includes Alternates
- Includes Overlines
- Fee calculations match DESTINI Estimator

	Owners	LMSEO	Self Perform	Alternates Summary
Base Estimate	✓	✓	✓	
Accepted Alternates	✓	✓	✓	✓
Pending Alternates				✓
Rejected Alternates				✓
Overlines	✓	✓	✓	✓

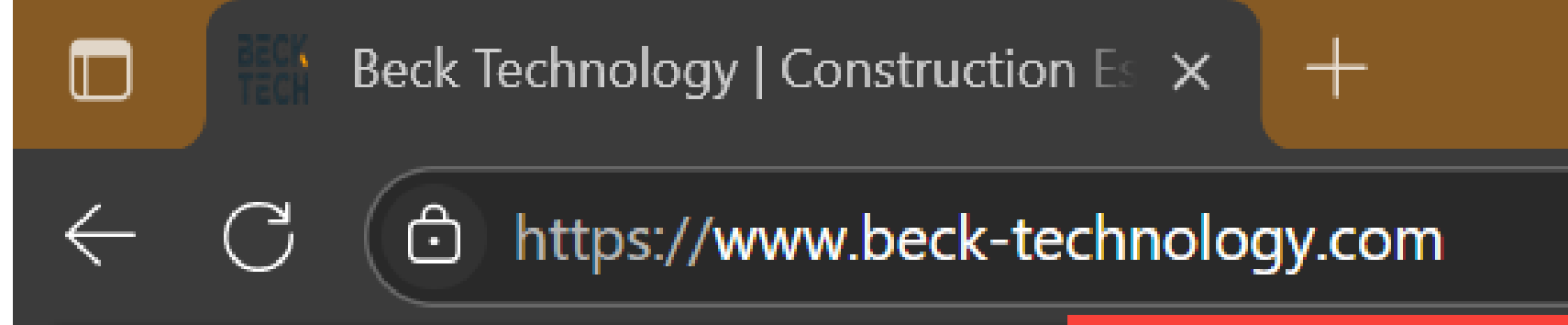


Which Standard Reports do you use?

1

B. Download the latest

1. www.Beck-Technology.com
2. Resources | Help Center
3. Reporting & Analytics
4. Running Standard Reports | Downloads:
Standard Report File Templates
5. Download from SharePoint



Resources ▾

Help Center

ROI Calculator

Blog



REPORTING & ANALYTICS

Articles related to end user cost reports and Power Bi historical costing

Running Standard Reports

[Downloads: Standard Report File Templates](#)

[How To Make the Reports Button Show Your Report Files for All Users](#)

[How To Populate Your Custom Report in Estimator](#)

[How To Generate CSV Files From a Report in Destini Estimator](#)

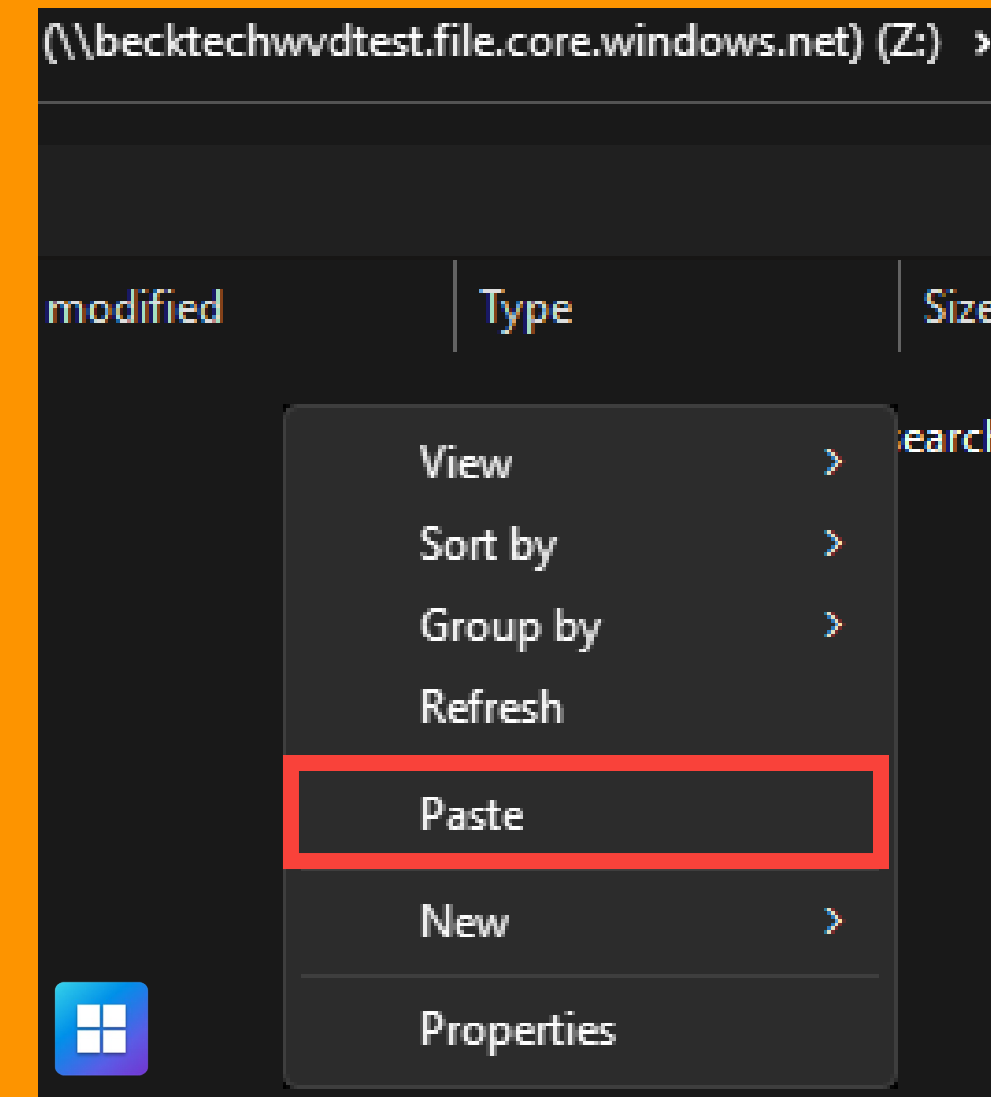
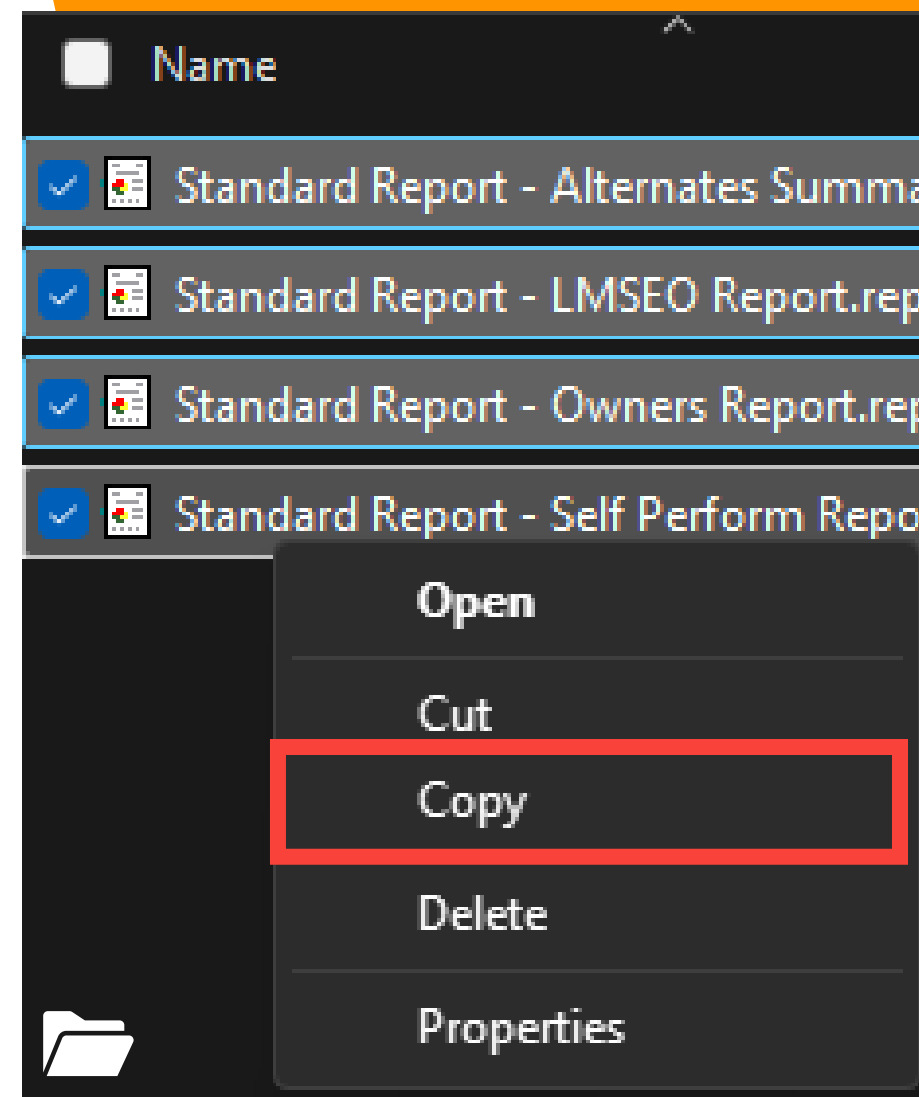
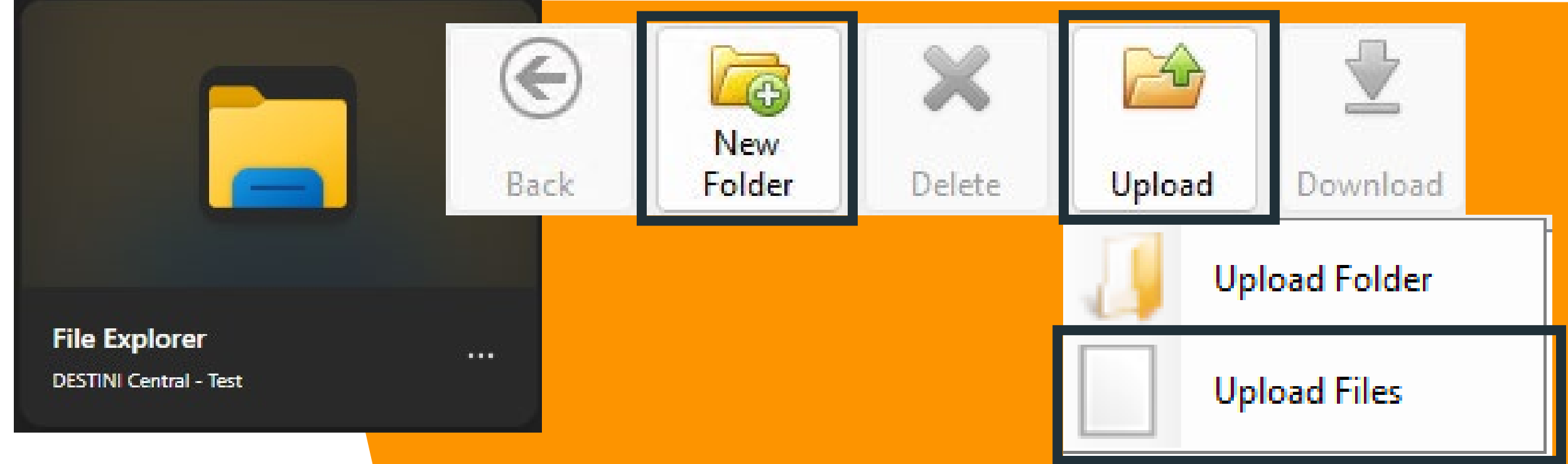
[How To Print Your Takeoff](#)

See more ▾

1

C. Save to Z drive

1.  Open File Explorer
2.  Create a new folder called “Precon World”
3.  Inside this folder, click Upload | Upload Files
4.  Right-click the Standard Reports, Copy
5.  Right-click, Paste



1

D. Run





Audience Q&A



Meet the Report Designer

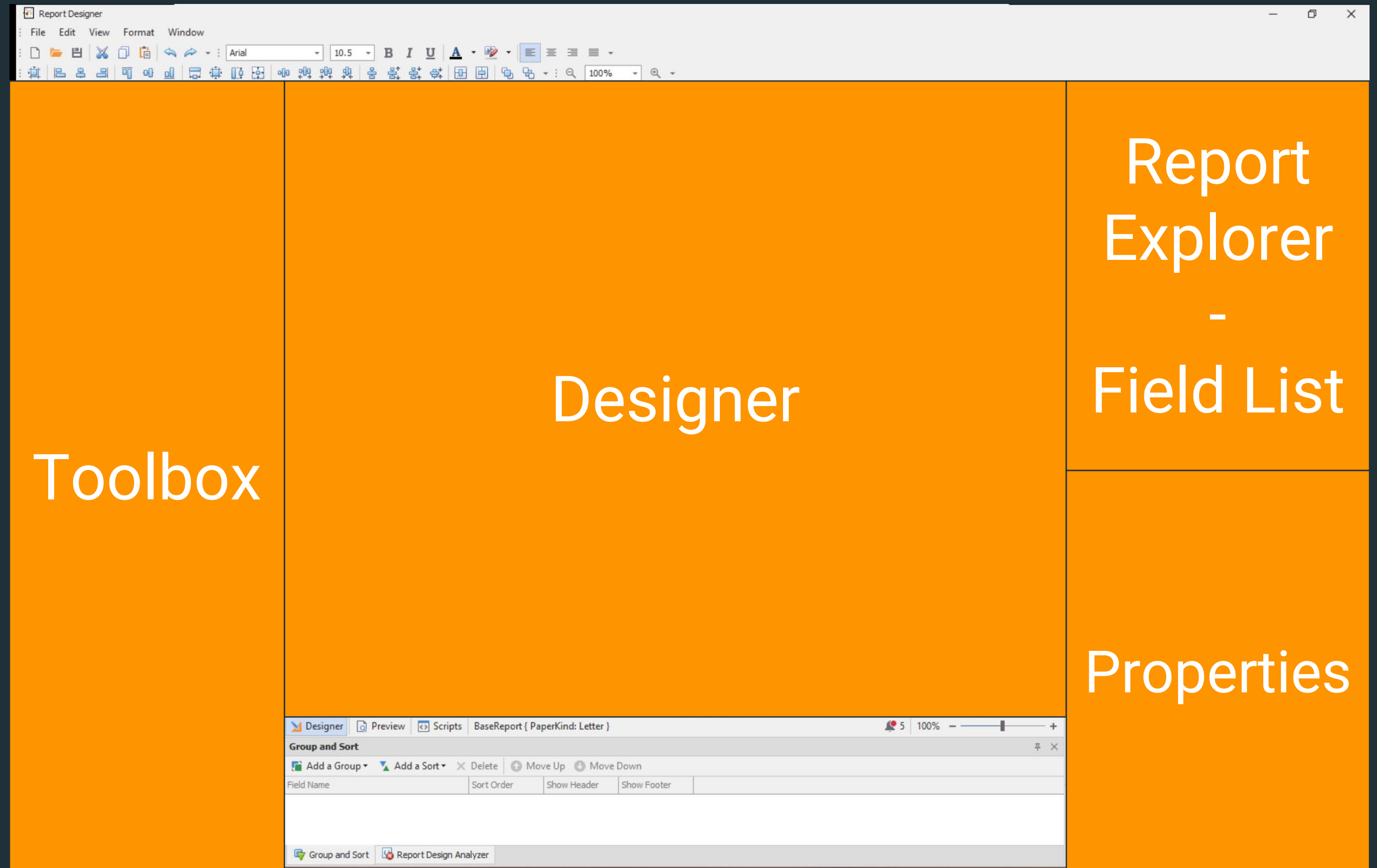
- A. Layout
- B. Bands
- C. Summaries



How well do you know the Report Designer?

2

A. Layout



2

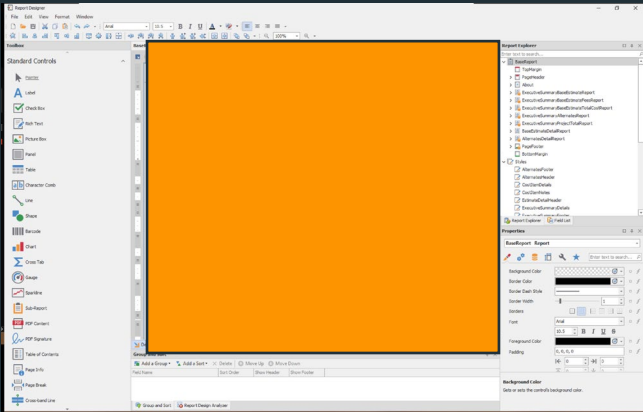
B. Bands

1. Intro

ExecutiveSummaryBaseEstimateReport - "ProjectCostDataDetails"

ReportHeader

DESCRIPTION	QUANTITY	UNIT	TOTAL
GroupHeader7 (Level 0)			
[WBSProperty1]	[ProjectCos	[Proje	lif([ProjectCos] sumSum([Repor
Detail2			
ReportFooter			
Base Estimate Direct Cost	[ProjectCo	SF	lif([ProjectCo sumSum([Repc



2

B. Bands

2. Types

ExecutiveSummaryBaseEstimateReport
ReportHeader
DESCRIPTION
GroupHeader7 (Level 0)
[WBSProperty1]
Detail2
ReportFooter
Base Estimate Direct Cost

2

B. Bands

3. Group Headers

1. Group Fields

DESCRIPTION

▼ GroupHeader7 (Level 0)

[WBSPProperty1]

▶ Detail2

TOTAL

Sum([Repor

⚙

f

Group Header Tasks

Edit and Reorder Bands...

Group Fields

(Collection)

...

Group Union

None

▼

Level

0

⬆⬇⬆

Sorting Summary

(Group Sorting Summary)

...

Group Field Collection Editor

GroupField - WBSPProperty1

Behavior

Field Name

WBSPProperty1

Sort Order

Ascending

Add

Remove

↑

↓

OK

Cancel



2

C. Summaries

DESCRIPTION	UNIT	TOTAL
▼ GroupHeader7 (Level 0)		
[WBSProperty1]	Cost	sumSum([ReportableLineItemTotalCost])
▶ Detail2		
▼ ReportFooter		

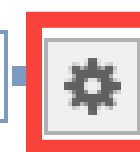


Table Cell Tasks

Text	tableCellSummaryTotalCost
Expression	sumSum([ReportableLineItemTotalCost])
Format String	{0:c0}
Summary	Group

☒ Can Grow

Summary Editor

Summary running:	Group
Summary function:	Sum
Argument expression:	[ReportableLineItemTotalCost]

☐ Ignore null values

☒ Treat strings as numerics

OK

Cancel



Audience Q&A



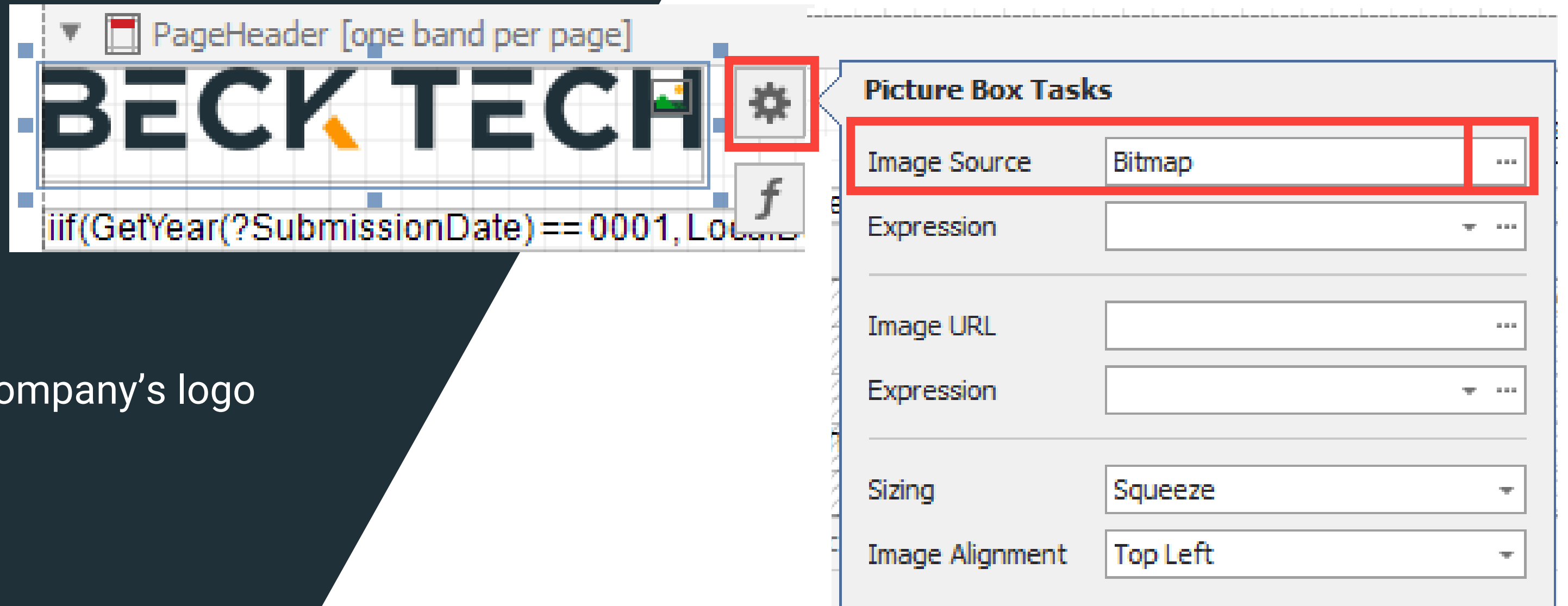
Brand It Like Marketing

- A. Logo
- B. Styles
- C. Numerical Formatting

3

A. Logo

1. Upload your company's logo



The screenshot shows a software interface for editing a page header. The header area contains the text "BECK TECH" and a small graphic. Below the header, there is a code snippet: `iif(GetYear(?SubmissionDate) == 0001, Log...`. A settings gear icon is highlighted with a red box. To the right, the "Picture Box Tasks" panel is open, showing options for Image Source (Bitmap), Image URL, Expression, Sizing (Squeeze), and Image Alignment (Top Left). The "Image Source" field is also highlighted with a red box.

3

A. Logo

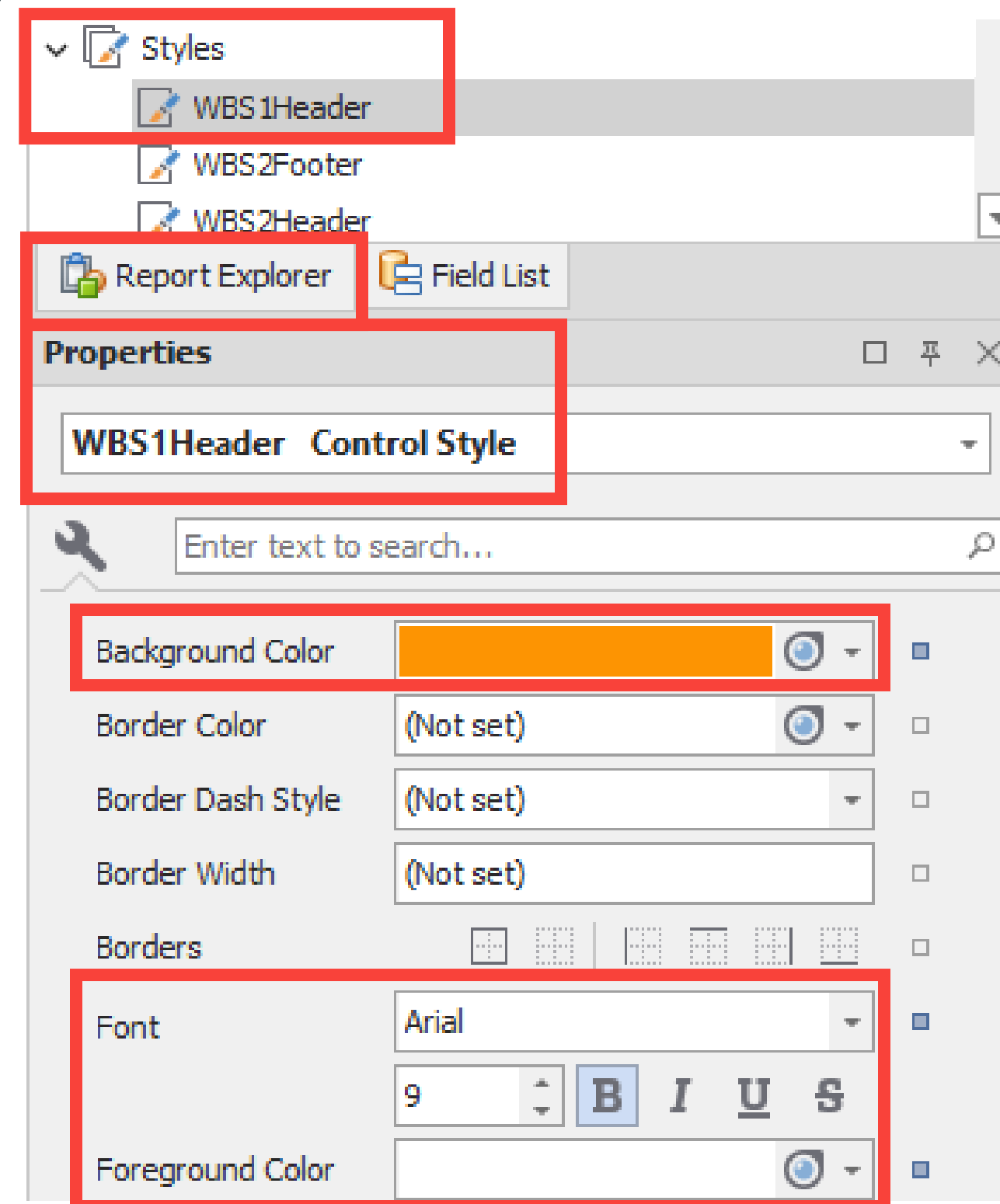
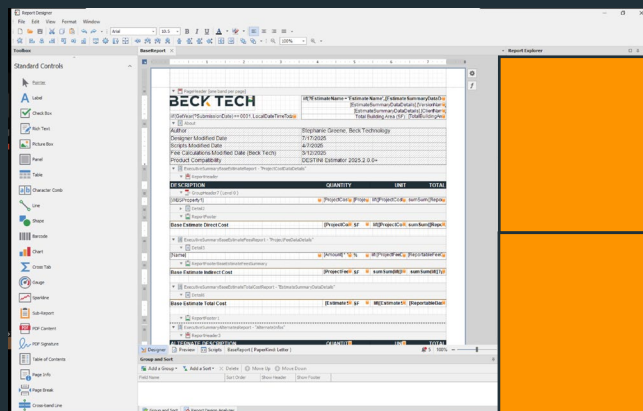
2. Formatting



3

B. Styles

1. Background Color
2. Font Type, Size
3. Foreground (Font) Color



3

B. Styles

4. Applied to Bands

▼ GroupHeader6 (Level 5)			
DESCRIPTION	QUANTITY	UNIT	TOTAL
▼ GroupHeader5 (Level 4)			
[WBSProperty1]	[ProjectCos	[Proje	lif([ProjectCos sumSum([Repor
▼ GroupHeader4 (Level 3)			
[WBSProperty2]	[ProjectCos	[Proje	lif([ProjectCos sumSum([Repor

Properties

GroupHeader5 Group Header



Enter text to search...

> Style Priority

(Style Priority)

▼ Styles

(Collection)

▼ Style

WBS 1Header

(Name)

WBS 1Header

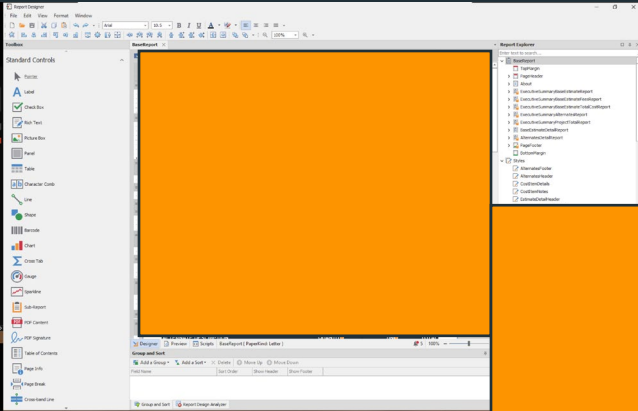
Background Color

Border Color

(Not set)

Border Dash Style

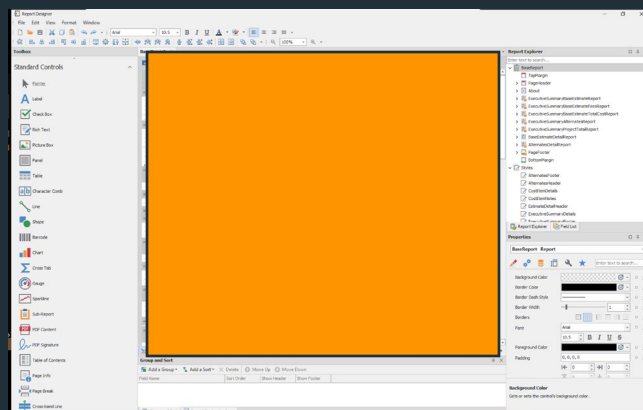
(Not set)



3

C. Numerical Formatting

1. {0:c0} = \$1,234
2. {0:c2} = \$1,234.56
3. {0:n0} = 1,234
4. {0:n2} = 1,234.56



DESCRIPTION	UNIT	TOTAL
▼ GroupHeader7 (Level 0)		
[WBSProperty1]	Cost	sumSum([Repor
▶ Detail2		
▼ ReportFooter		

Table Cell Tasks

Text: tableCellSummaryTotalCost

Expression: sumSum([ReportableLineIte ...

Format String: {0:c0} ...

Summary: Group

Format String Editor

Category: Currency

Standard Types: Custom

C0
C1
C2
c
c0
c1
c2

\$100

OK Cancel



Audience Q&A

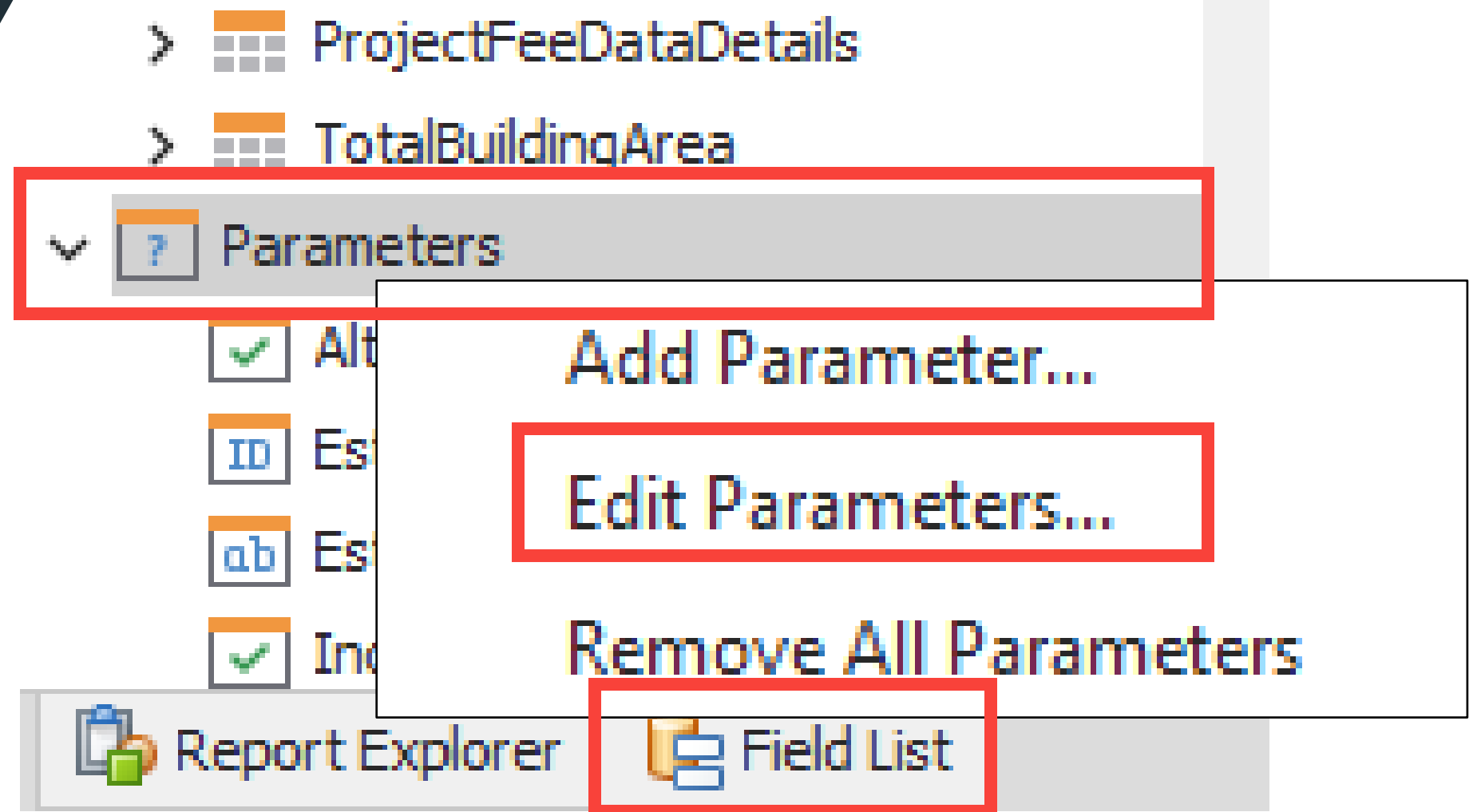
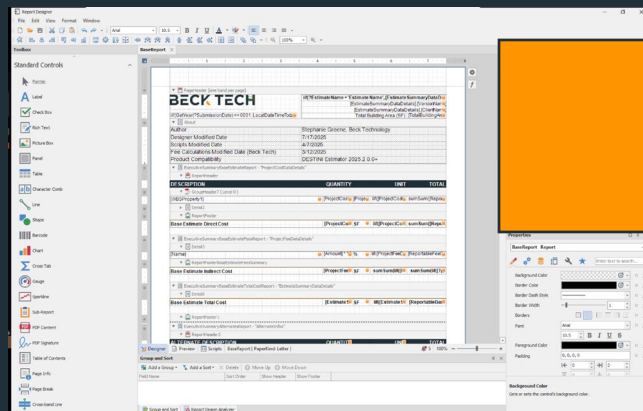
4

Make It Yours

- A. Default Parameter Values
- B. Conditionally Show Line Item Pricing
- C. Print Project Properties

4

A. Parameters



4

A. Parameters

1. Order
2. Description
3. Visible
4. Default Value
5. Dynamic List

Report Parameters Editor

+ Add

OverallFilterProperty

OverallFilterValues

Level1Group

Level1Filter

Level1RollUp

Level2Group

Level2Filter

Level2RollUp

Level3Group

Level3Filter

Name: Level1Group

Description: Level One Group

Visible: Yes *f*

Enabled: Yes *f*

Type: String

Default Value: (none) *f*

☒ Allow null value
☐ Allow multiple values
☐ Select all values

Value Source: Dynamic List

Data Source: DESTINIData

Data Member: EstimateWBSPROPERTYValues

Value Member: WBSPROPERTYName

Display Member: WBSPROPERTYName

Filter String: ...

Sort Member: WBSPROPERTYName

Sort Order: Ascending

OK
Cancel

4

B. Conditionally Show Line Item Pricing

1. Add a new Boolean (Yes/No) parameter

Report Parameters Editor

+ Add

Level4Filter

Level4RollUp

IncludeAllLineItemDetails

IncludeOLineItemDetails

IncludeLineItemNotes

IncludeAlternateDetails

AlternateFeesRollUp

IncludePageNumber

parameter 1

Name:

parameter1

Description:

Parameter 1

Visible:

Yes

Enabled:

Yes

Type:

Number (32 bit integer)

Default Value:

0

☐ Allow null value

☐ Allow multiple values

☐ Select all values

4

B. Conditionally Show Line Item Pricing

1. Add a new Boolean (Yes/No) parameter

Report Parameters Editor

+ Add

Level4Filter

Level4RollUp

IncludeAllLineItemDetails

IncludeOLineItemDetails

IncludeLineItemNotes

IncludeAlternateDetails

AlternateFeesRollUp

IncludePageNumber

IncludeLineItemPricing

Name: IncludeLineItemPricing

Description: Include Line Item Pricing

Visible: Yes *f*

Enabled: Yes *f*

Type: Boolean

Default Value: No *f*

☐ Allow null value

☐ Allow multiple values

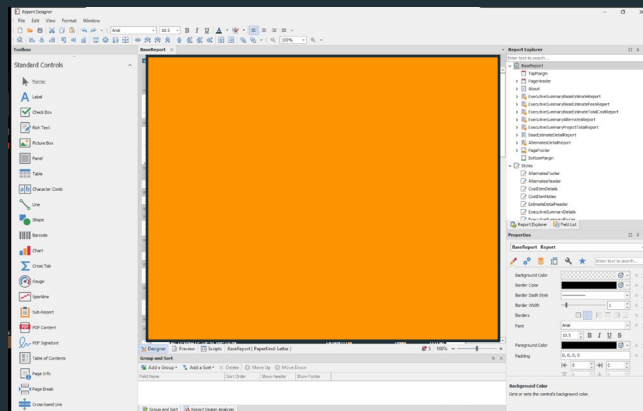
☐ Select all values

4

B. Conditionally Show Line Item Pricing

2. Locate the fields

DESCRIPTION		QUANTITY		LABOR		
				UNIT	TOTAL	
▼ GroupHeader5 (Level 4)						
[WBSPProperty1]		☐	lif([WBSPProperty1])	☐	lif([WBSPProperty1])	☐
▼ GroupHeader4 (Level 3)						
[WBSPProperty2]		☐	lif([WBSPProperty2])	☐	lif([WBSPProperty2])	☐
▼ GroupHeader3 (Level 2)						
[WBSPProperty3]		☐	iif([WBSPProperty3])	☐	lif([WBSPProperty3])	☐
▼ GroupHeader2 (Level 1)						
[WBSPProperty4]		☐	lif([WBSPProperty4])	☐	lif([WBSPProperty4])	☐
▼ GroupHeader1 (Level 0)						
[Name]	☐ [Description]	☐	sumSum([C])	☐ [Unit]	☐ lif([Reportable])	☐ sumSum(lif([F])
Notes: [ReportableNotes]				☐		
▶ Detail1						



4

B. Conditionally Show Line Item Pricing

3. Apply to Text Expression

The screenshot displays the software interface for configuring a table cell. The 'Table Cell Tasks' panel is visible, showing the 'Expression' field with the text `sumSum(Iif([ReportableLaborCost] = 0, '', [ReportableLaborCost] * [Quantity]))`. The 'Expression Editor' panel shows the same expression in a text area. The 'Text' option in the 'Table Cell Tasks' panel is highlighted with a red box. The 'Fields' panel shows a tree view with 'ProjectCostDataDetails' expanded.

4

B. Conditionally Show Line Item Pricing

3. Apply to Text Expression

```
sumSum(  
  Iif(  
    [ReportableLaborCost] = 0,  
    '' ,  
    [ReportableLaborCost] * [Quantity])  
  )  
)
```

4

B. Conditionally Show Line Item Pricing

3. Apply to Text Expression

```
Iif(  
    ?IncludeLineItemPricing,  
    sumSum(  
        Iif([ReportableLaborCost] = 0,  
            "",  
            [ReportableLaborCost] * [Quantity])  
        )  
    , ""  
)
```

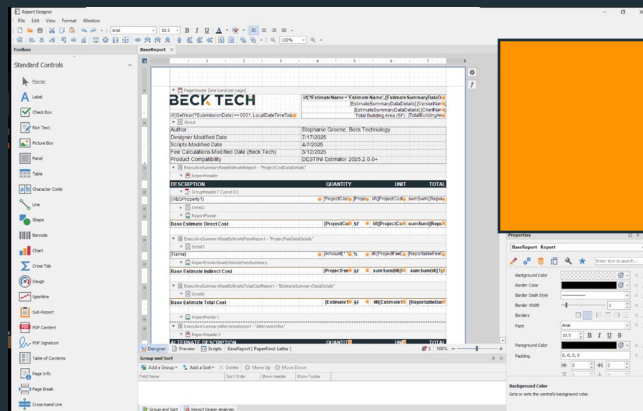


Audience Q&A

4

C. Print Project Properties

1. Add a new String (Text) parameter



Report Parameters Editor

+ Add ↑ ↓

- Level4 RollUp
- Include AllLineItemDetails
- Include OLineItemDetails
- Include LineItemNotes
- Include AlternateDetails
- Alternate Fees RollUp
- Include PageNumber
- Include LineItemPricing
- parameter 1

Name: parameter 1

Description: Parameter 1

Visible: Yes ☐ f

Enabled: Yes ☐ f

Type: Number (32 bit integer)

Default Value: 0 ☐ f

☐ Allow null value

☐ Allow multiple values

☐ Select all values

4

C. Print Project Properties

1. Add a new String (Text) parameter

Report Parameters Editor

+ Add

Level4RollUp

IncludeAllLineItemDetails

Include0LineItemDetails

IncludeLineItemNotes

IncludeAlternateDetails

AlternateFeesRollUp

IncludePageNumber

IncludeLineItemPricing

ProjectProperties

Name: ProjectProperties

Description: Project Properties

Visible: Yes *f*

Enabled: Yes *f*

Type: String

Default Value: Client,Project Duration,Total *f*

☒ Allow null value

☒ Allow multiple values

☐ Select all values

4

C. Print Project Properties

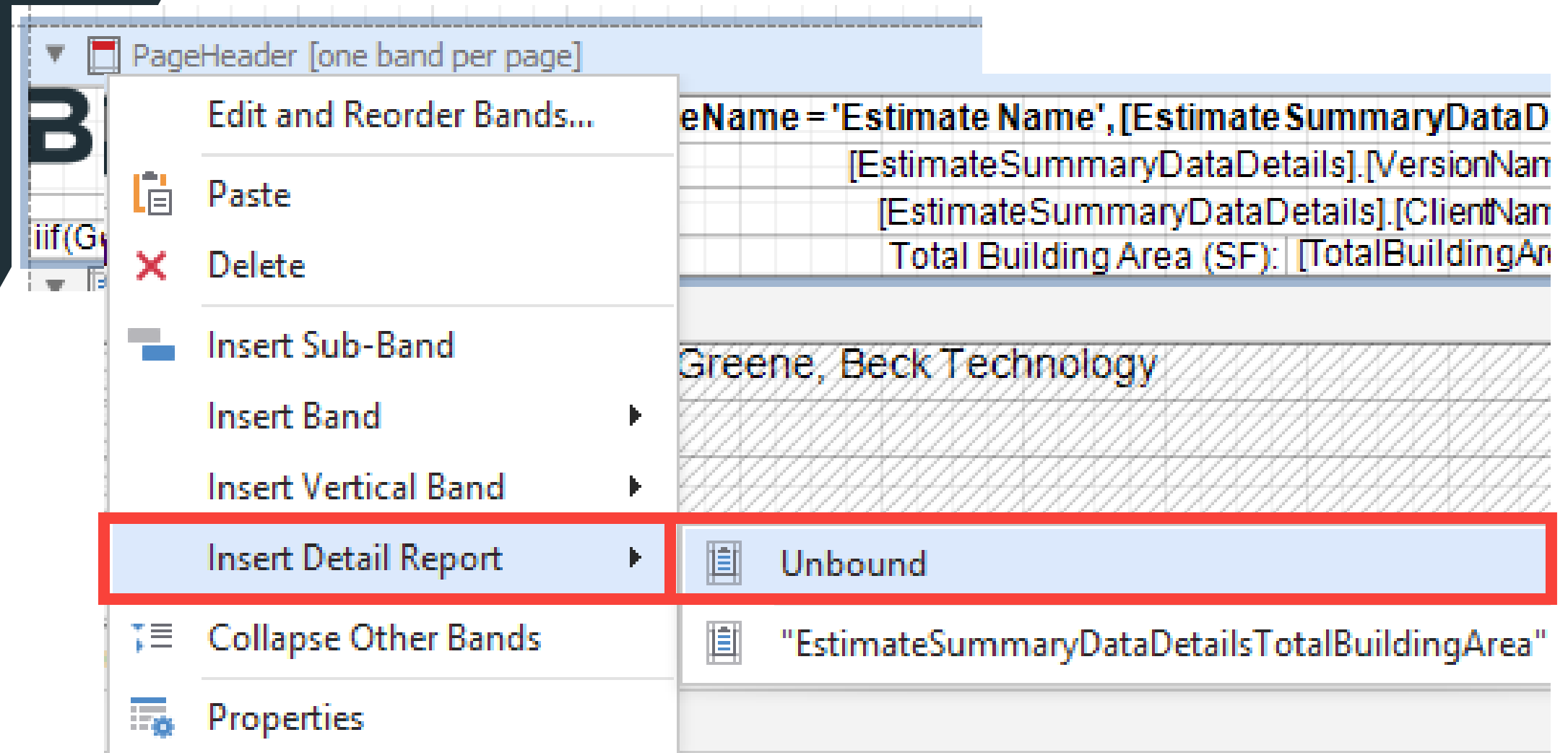
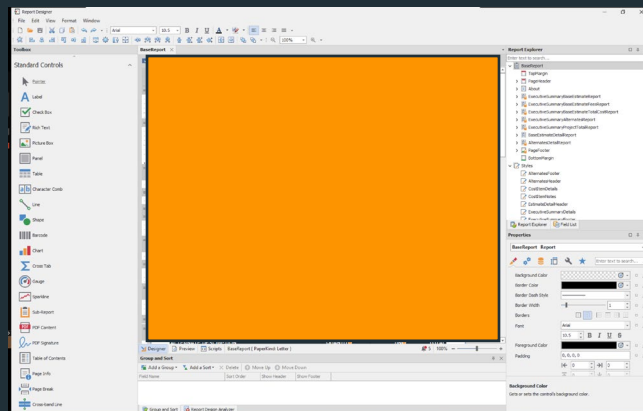
1. Add a new String (Text) parameter

Name:	ProjectProperties		Value Source:	Dynamic List
Description:	Project Properties		Data Source:	DESTINIData
Visible:	Yes	<i>f</i>	Data Member:	EstimatePropertyDataDetails
Enabled:	Yes	<i>f</i>	Value Member:	Property
Type:	String		Display Member:	Property
Default Value:	Client,Project Duration,Total <i>f</i>		Filter String:	...
	☒ Allow null value		Sort Member:	Property
	☒ Allow multiple values		Sort Order:	Ascending
	☐ Select all values			

4

C. Print Project Properties

2. Insert Detail Report

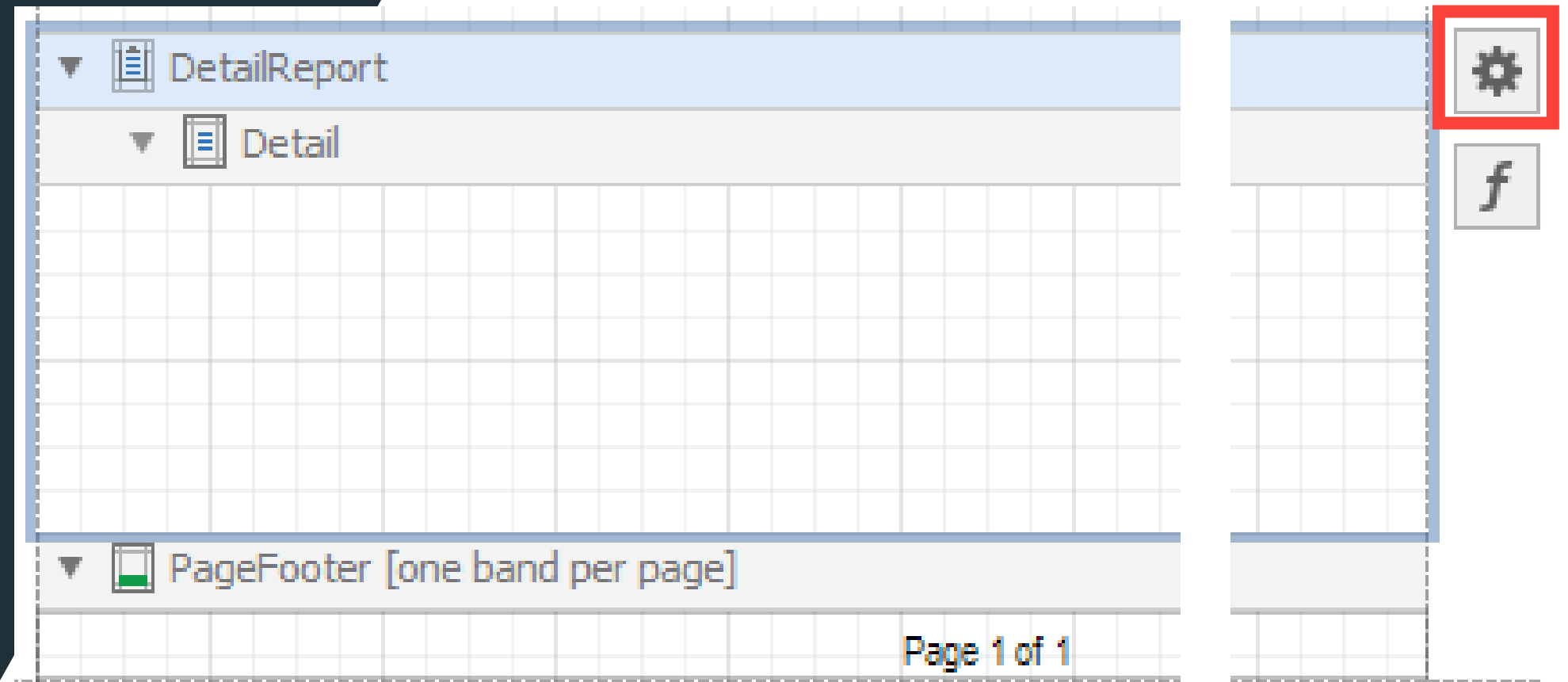


4

C. Print Project Properties

2. Insert Detail Report

1. EstimatePropertyDataDetails



Detail Report Tasks

[Edit and Reorder Bands...](#)

Data Source	DESTINIData
Data Member	EstimatePropertyDataDetails
Filter String	...
Detail Count at Design Time	0
Page Break	None

4

C. Print Project Properties

2. Insert Detail Report

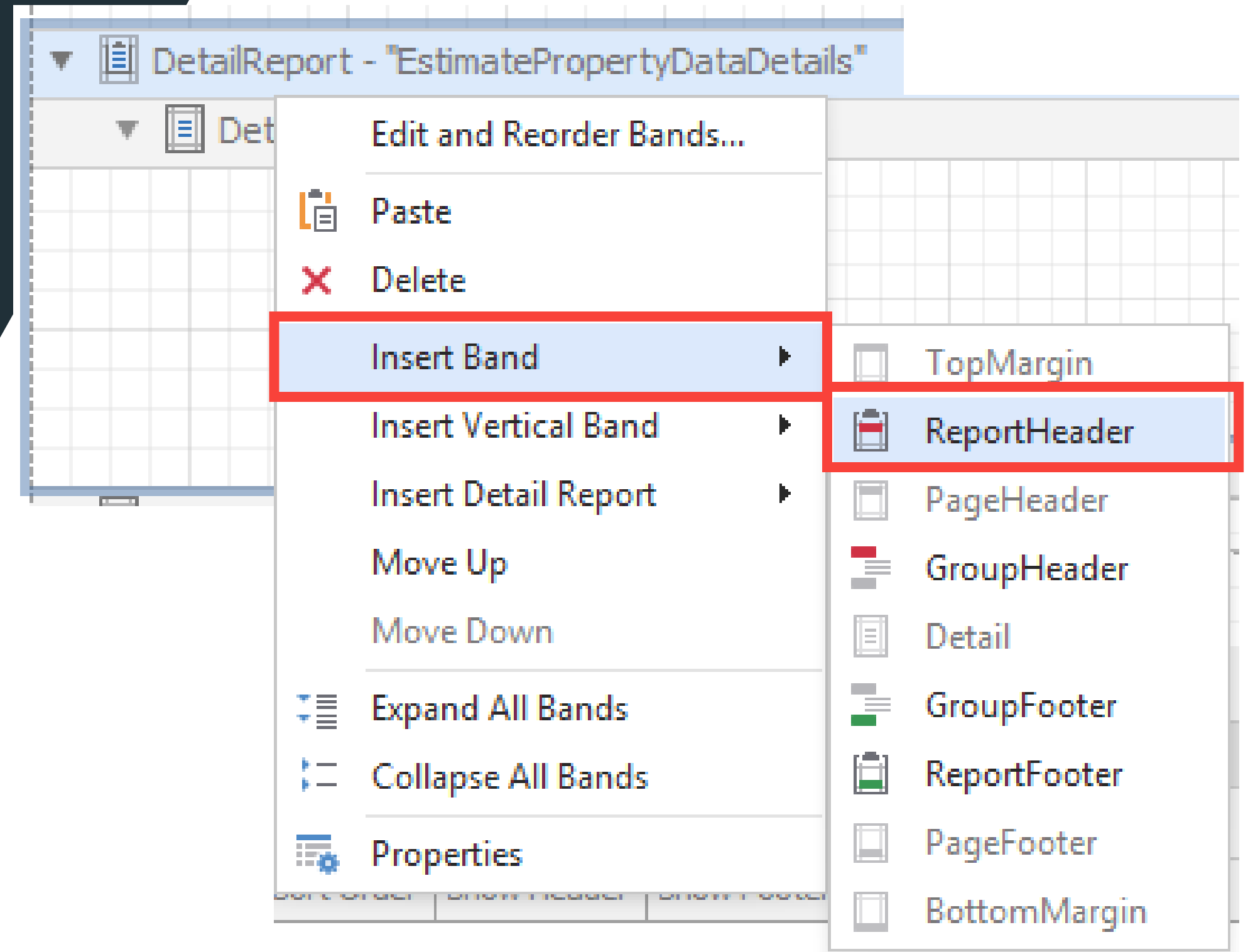
1. EstimatePropertyDataDetails
2. Filter String

The screenshot shows a 'FilterString Editor' dialog box. It contains a visual rule builder with the following components: a pink 'And' connector, an orange 'Property' box, a blue 'Is any of' connector, a green box with a lightbulb icon containing 'ProjectProperties', a green 'Enter a value...' box with a pencil icon, and an orange 'Property' box with a list icon. Below this visual representation is a text field containing the filter string: `[Property] In (?ProjectProperties)`. At the bottom right are 'OK' and 'Cancel' buttons.

4

C. Print Project Properties

3. Insert Band: ReportHeader

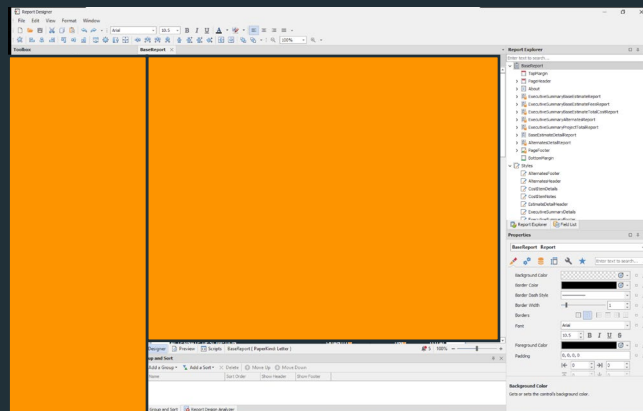
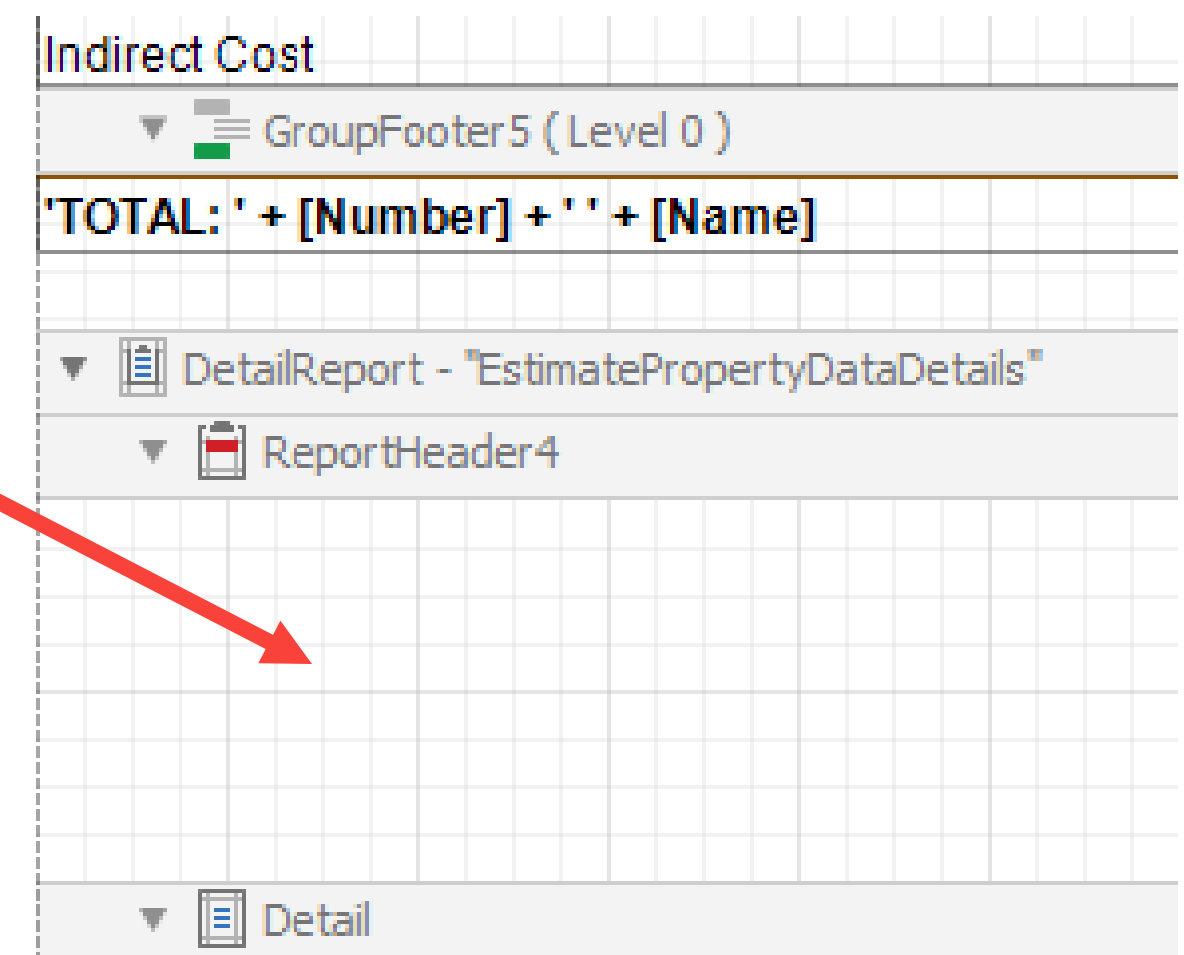
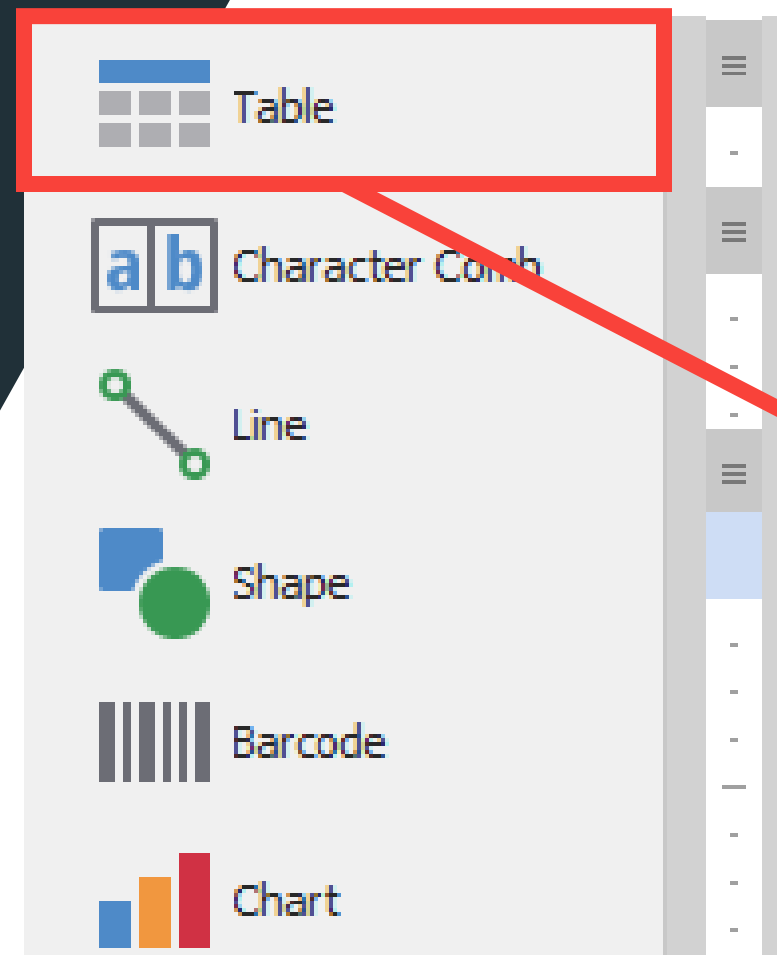


4

C. Print Project Properties

3. Insert Band: ReportHeader

1. Add Table

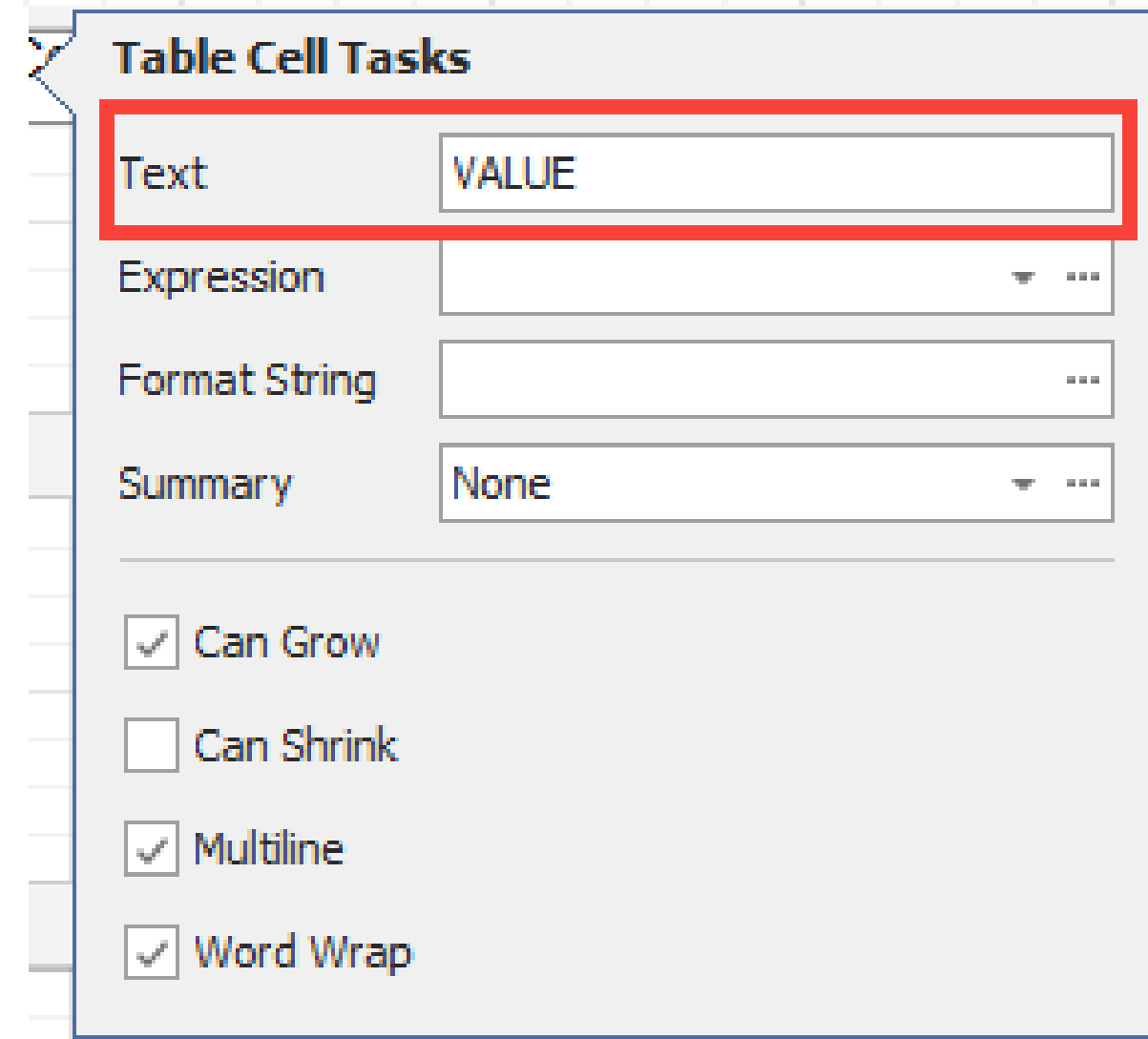
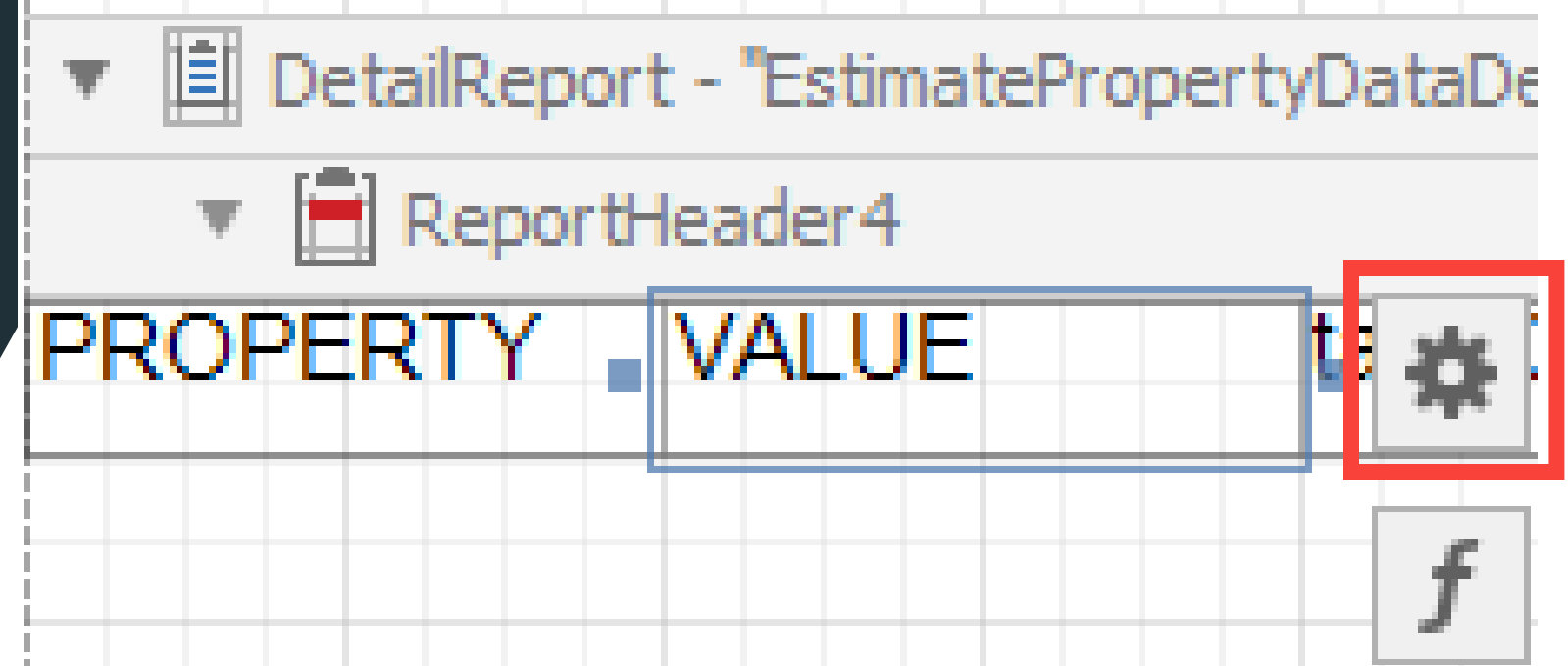
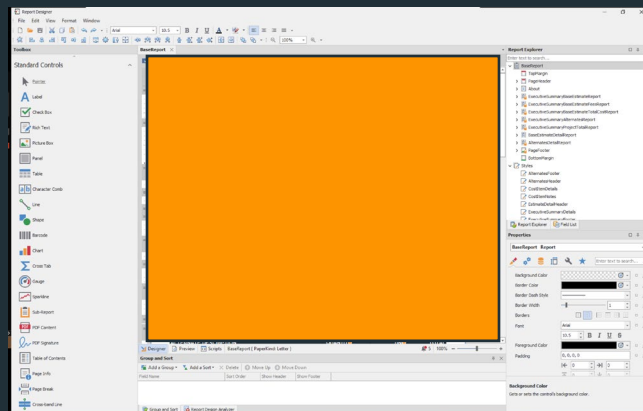


4

C. Print Project Properties

3. Insert Band: ReportHeader

1. Add Table

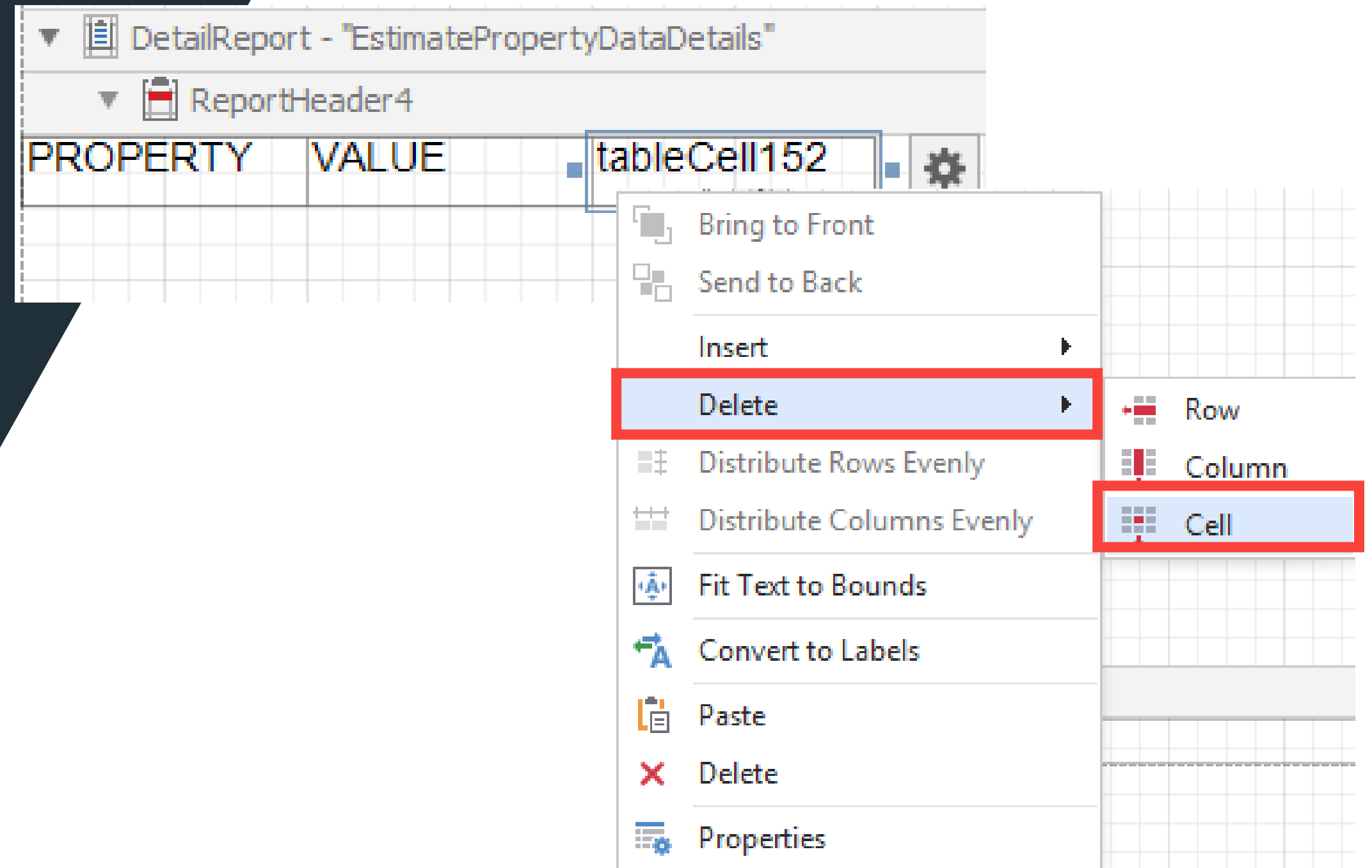


4

C. Print Project Properties

3. Insert Band: ReportHeader

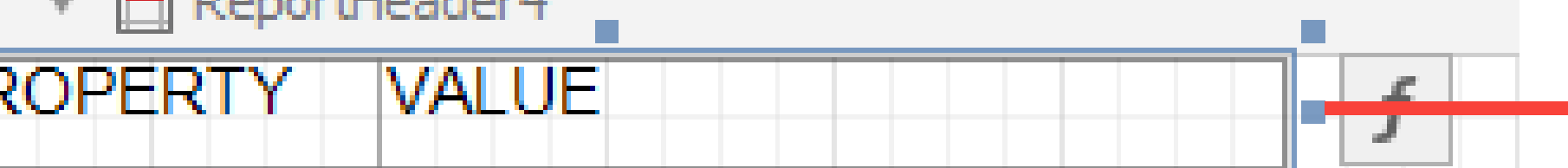
1. Add Table



4

C. Print Project Properties

- ### 3. Insert Band: ReportHeader
1. Add Table
 2. Adjust spacing



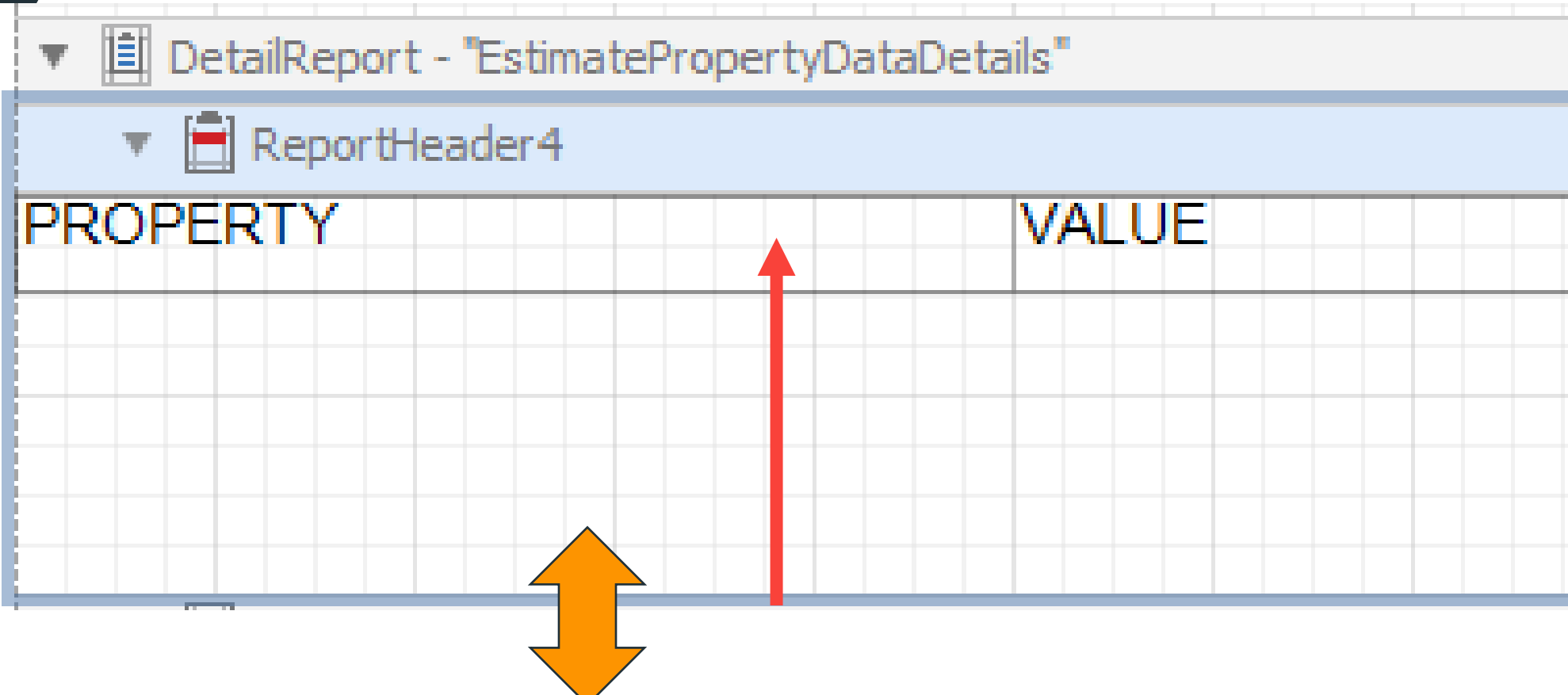
The screenshot shows a report header titled "ReportHeader4" containing a table with two columns: "PROPERTY" and "VALUE". A red arrow points from the "VALUE" column to a formula icon (f), indicating that a formula is being applied to the "VALUE" column.

4

C. Print Project Properties

3. Insert Band: ReportHeader

1. Add Table
2. Adjust spacing



DetailReport - "EstimatePropertyDataDetails"

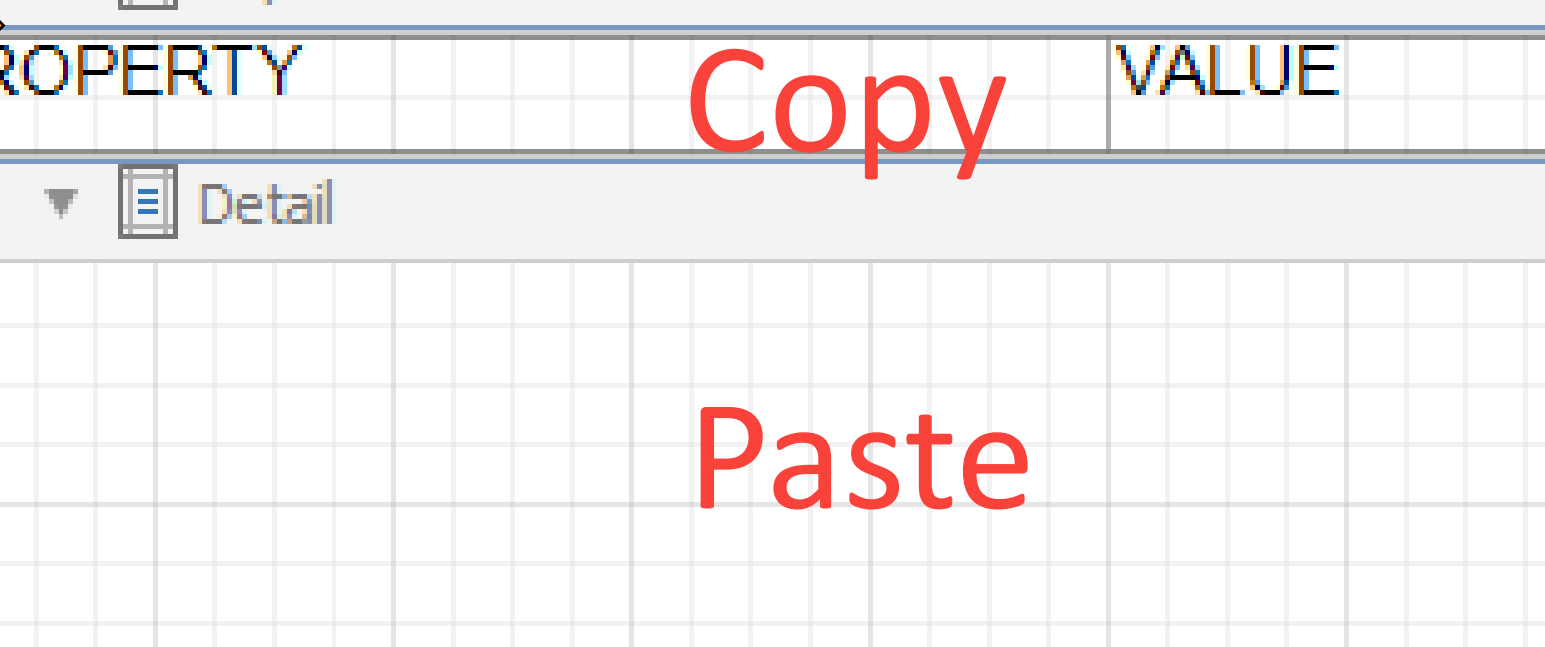
ReportHeader4

PROPERTY	VALUE
----------	-------

4

C. Print Project Properties

- ## 4. Populate Detail band
1. Add Table



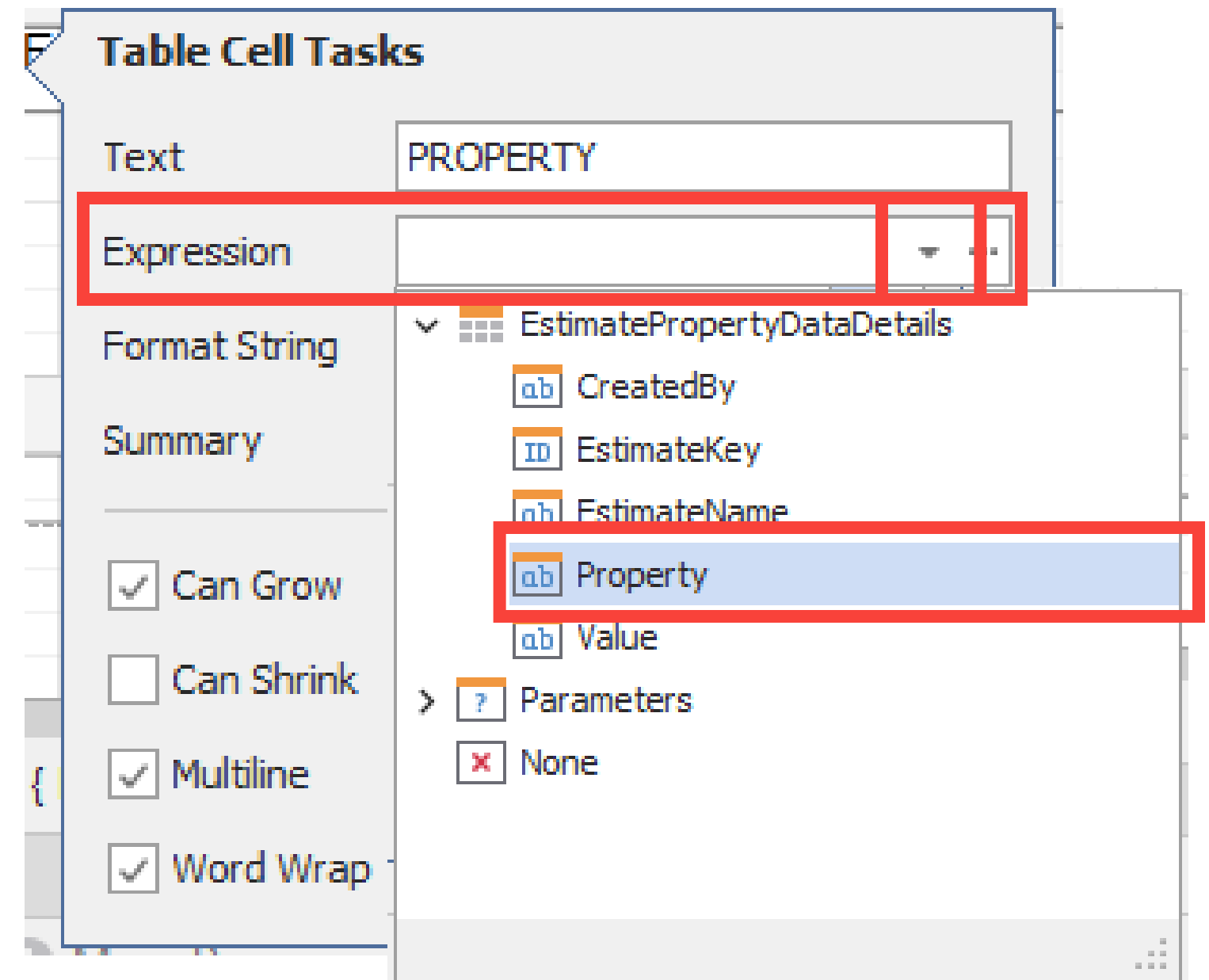
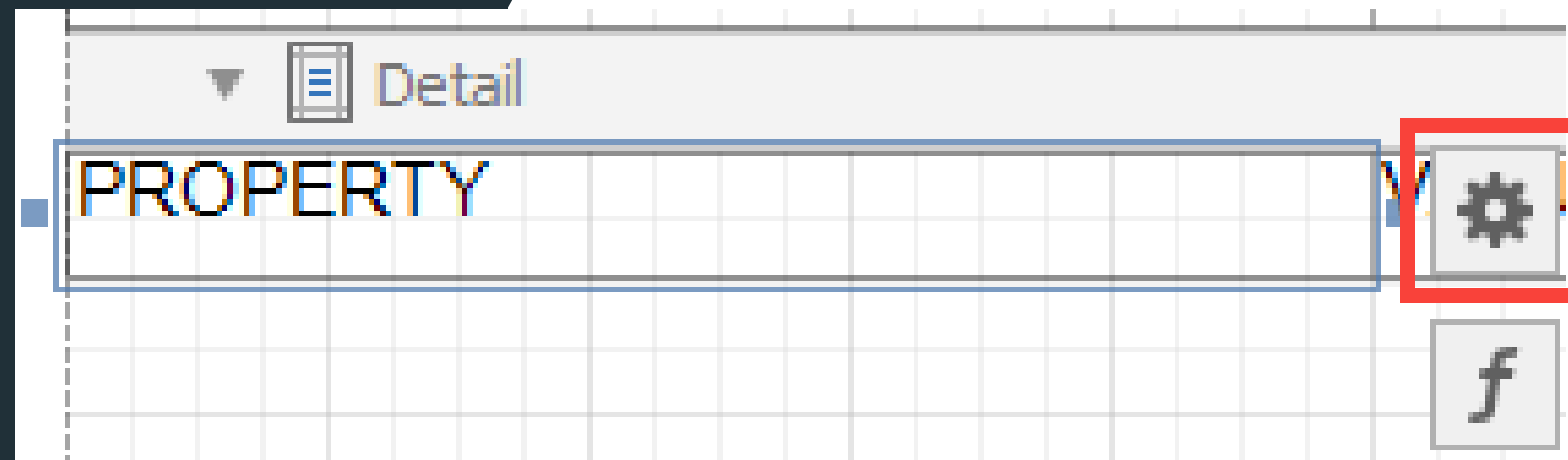
The screenshot displays a report viewer interface. At the top, a section header 'ReportHeader4' is visible. Below it is a table with two columns: 'PROPERTY' and 'VALUE'. A red 'Copy' label is positioned over the header row. Underneath the table is a 'Detail' section, which is currently empty. A red 'Paste' label is positioned over this 'Detail' section. An orange cursor icon is located in the top-left corner of the image.

4

C. Print Project Properties

4. Populate Detail band

1. Add Table



4

C. Print Project Properties

4. Populate Detail band

1. Add Table

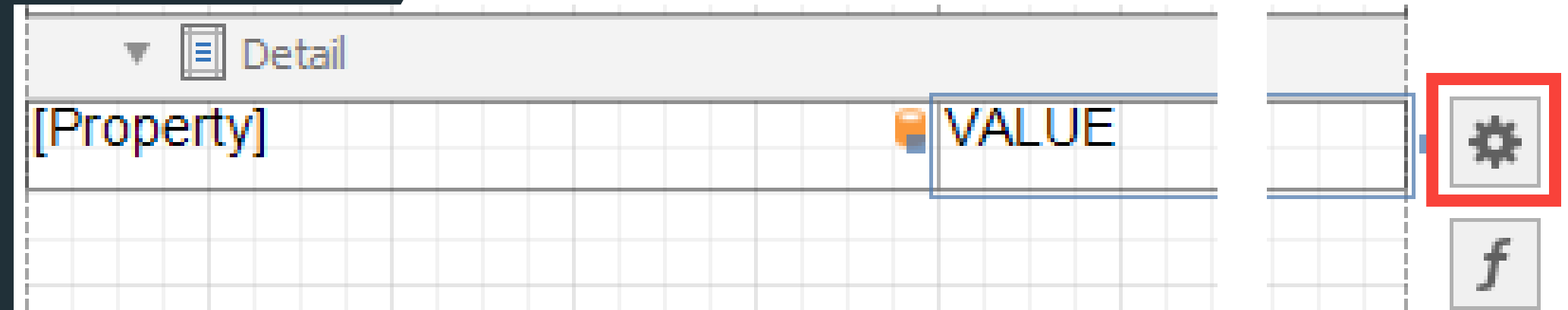


Table Cell Tasks

Text	VALUE
Expression	...
Format String	{0:n0} ...
Summary	None ...

☒ Can Grow

☐ Can Shrink

☒ Multiline

☒ Word Wrap

4

C. Print Project Properties

4. Populate Detail band

1. Add Table

```
Iif(  
    Contains([Value], ""'),  
    Replace([Value], ""', '''),  
    ToDecimal([Value])  
)
```

4

C. Print Project Properties

4. Populate Detail band

1. Add Table
2. Adjust spacing

ReportHeader4	
PROPERTY	VALUE
Detail	
[Property]	lif(

4

C. Print Project Properties

4. Populate Detail band

1. Add Table
2. Adjust spacing
3. Sort alphabetically

ReportHeader4	
PROPERTY	VALUE
Detail	
[Property]	lif(

The diagram shows a vertical stack of horizontal bars representing neurons in a layer. The second bar from the top is highlighted in blue. To the right of this bar, there is a red square containing a black gear icon, representing the neuron's configuration or weights. Below the red square is a gray square containing a black italicized f , representing the activation function.

Detail Tasks

Edit and Reorder Bands...

Sort Fields

(Collection)

...

Multi-Column Mode

None

Multi-Column Layout

First Down, then Across

Column Count

1

Column Width

0

Column Spacing

0

Page Break

None

☐ Keep Together

☐ Fill Empty Space

4

C. Print Project Properties

4. Populate Detail band

1. Add Table
2. Adjust spacing
3. Sort alphabetically

Group Field Collection Editor

GroupField - Property

Behavior

Field Name	Property
Sort Order	Ascending

Field Name

Specifies the name of a data field that is used as a criterion for creating a group in a report.

Add Remove ↑ ↓

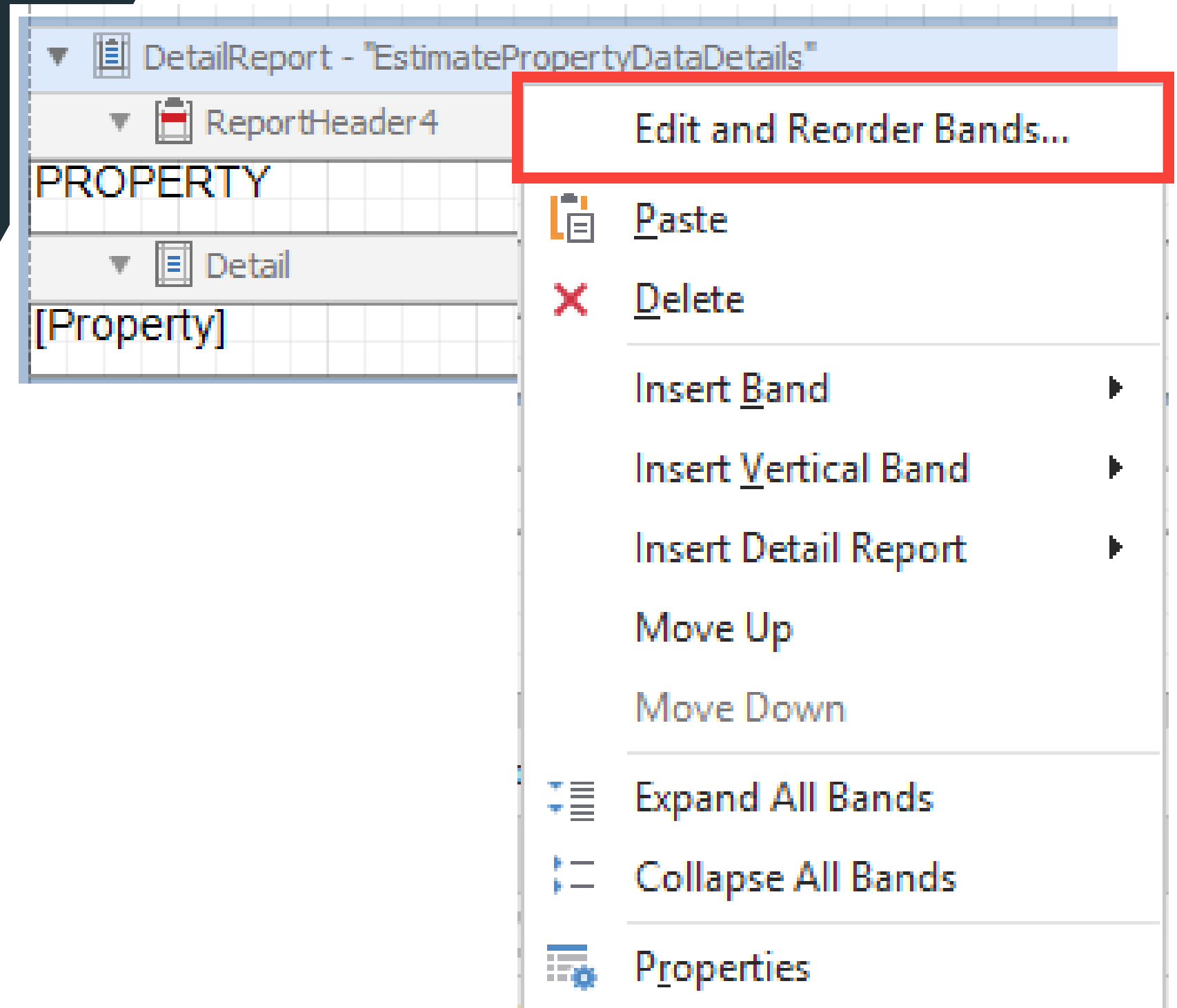
OK Cancel

4

C. Print Project Properties

5. Final touches

1. Relocate to Executive Summary

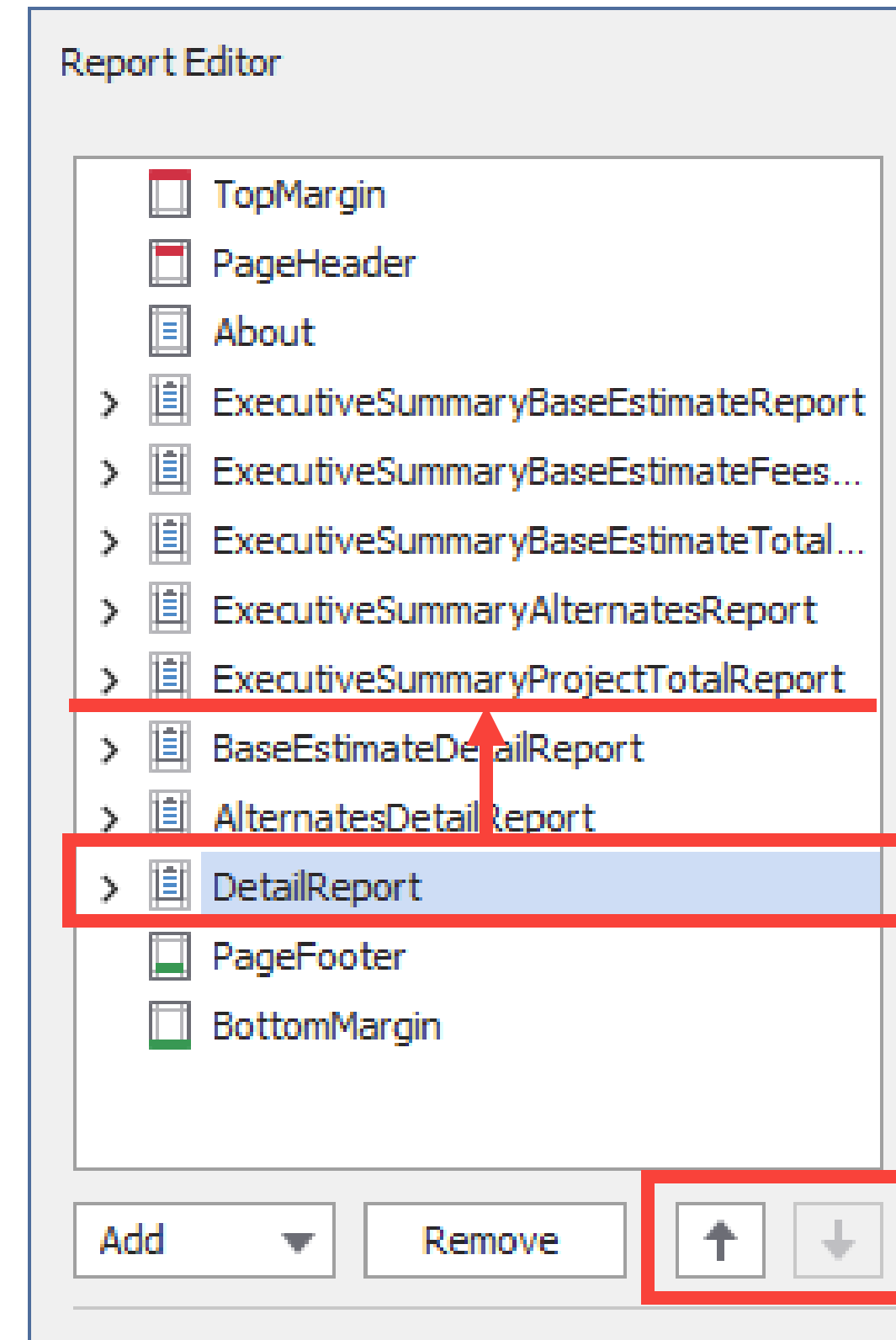


4

C. Print Project Properties

5. Final touches

1. Relocate to Executive Summary

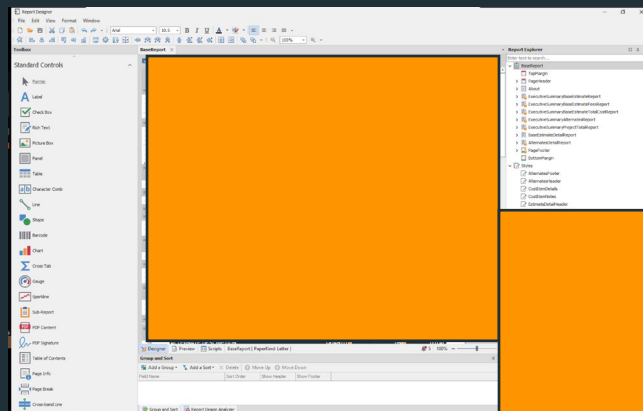


4

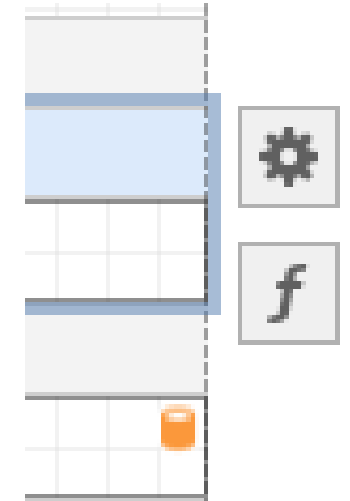
C. Print Project Properties

5. Final touches

1. Relocate to Executive Summary
2. Apply Styles



▼ DetailReport - "EstimatePropertyDataDetails"	
▼ ReportHeader4	
PROPERTY	VALUE
▼ Detail	
[Property]	lif(



Properties

ReportHeader4 Report Header

9.75

B I U

Foreground Color

Padding

0, 0, 0, 0

0

0

0

0

Style Priority

(Style Priority)

▼ Styles

(Collection)

▼ Style

ExecutiveSummaryHeader

Text Alignment

Height

25

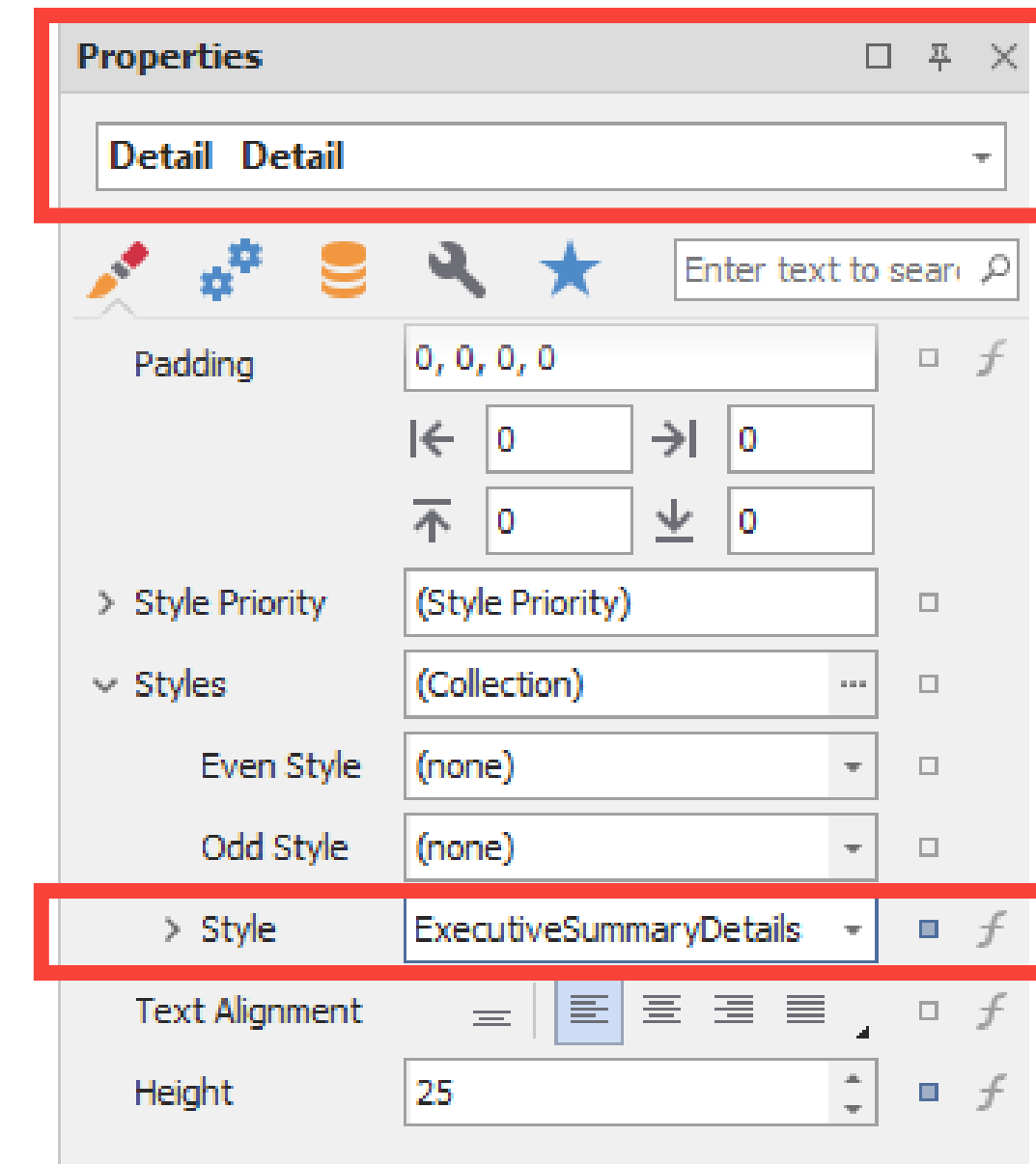
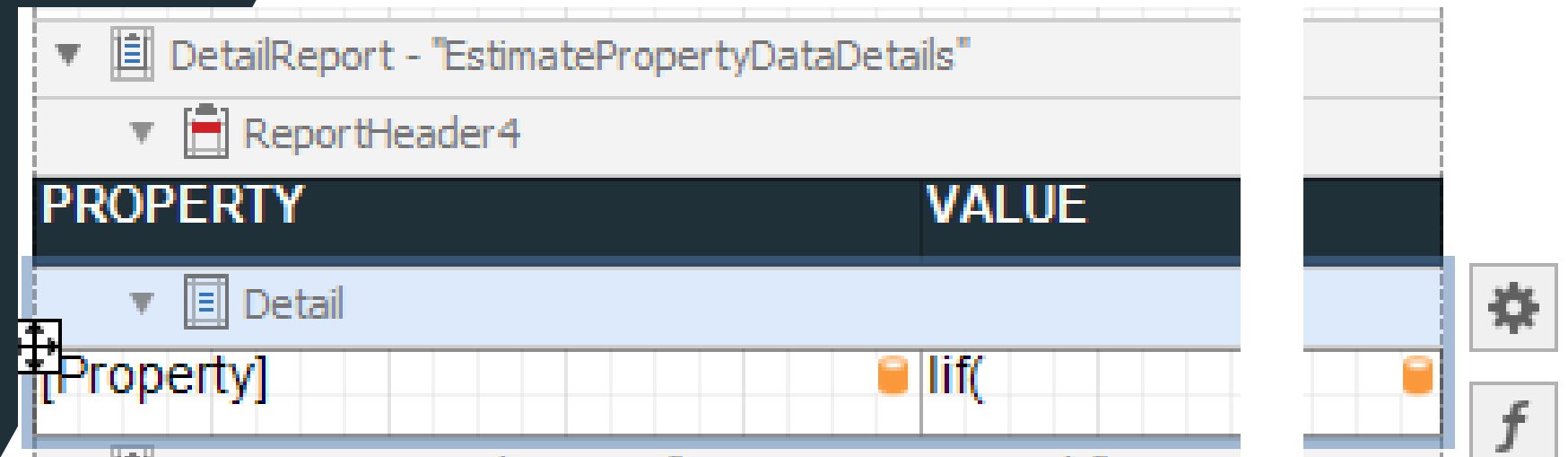
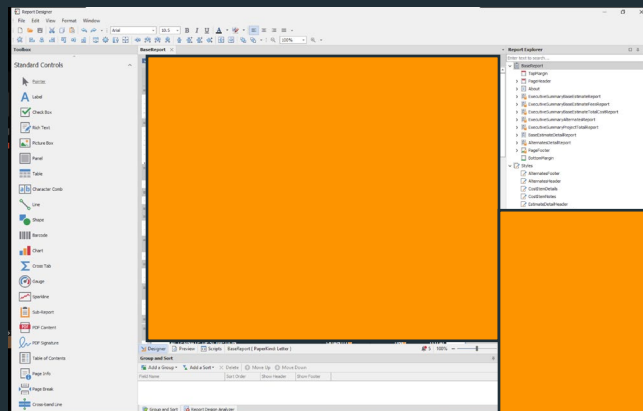

PRECON
 WORLD
 2025

4

C. Print Project Properties

5. Final touches

1. Relocate to Executive Summary
2. Apply Styles





Audience Q&A

The End!

