

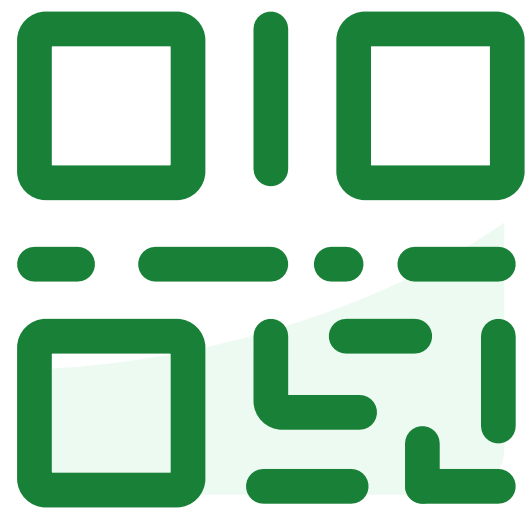
Tracking & Managing Estimate Versions for Auditability

Doug Maiden



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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

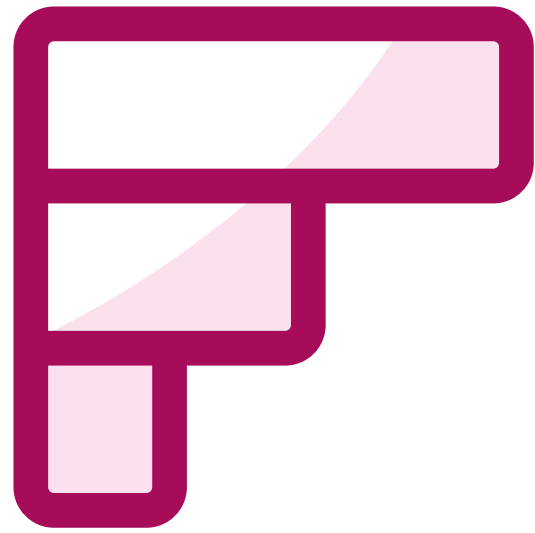
Rules of Engagement

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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Do you use the Create Version feature for estimates?

Begin with the End in Mind

DESTINI Estimator Start View
Beck Tech Power BI Dashboard

Introduction

Objectives of Presentation:

- Improve Version Control Practices
- Encourage Adoption of BI Tools for Auditing/Comparisons/Cost History

Why Version Control Matters

Common Issues without Proper Version Tracking:

- Discrepancies in Reporting
- Data Loss or Overrides
- Unclear Changes or Authorship



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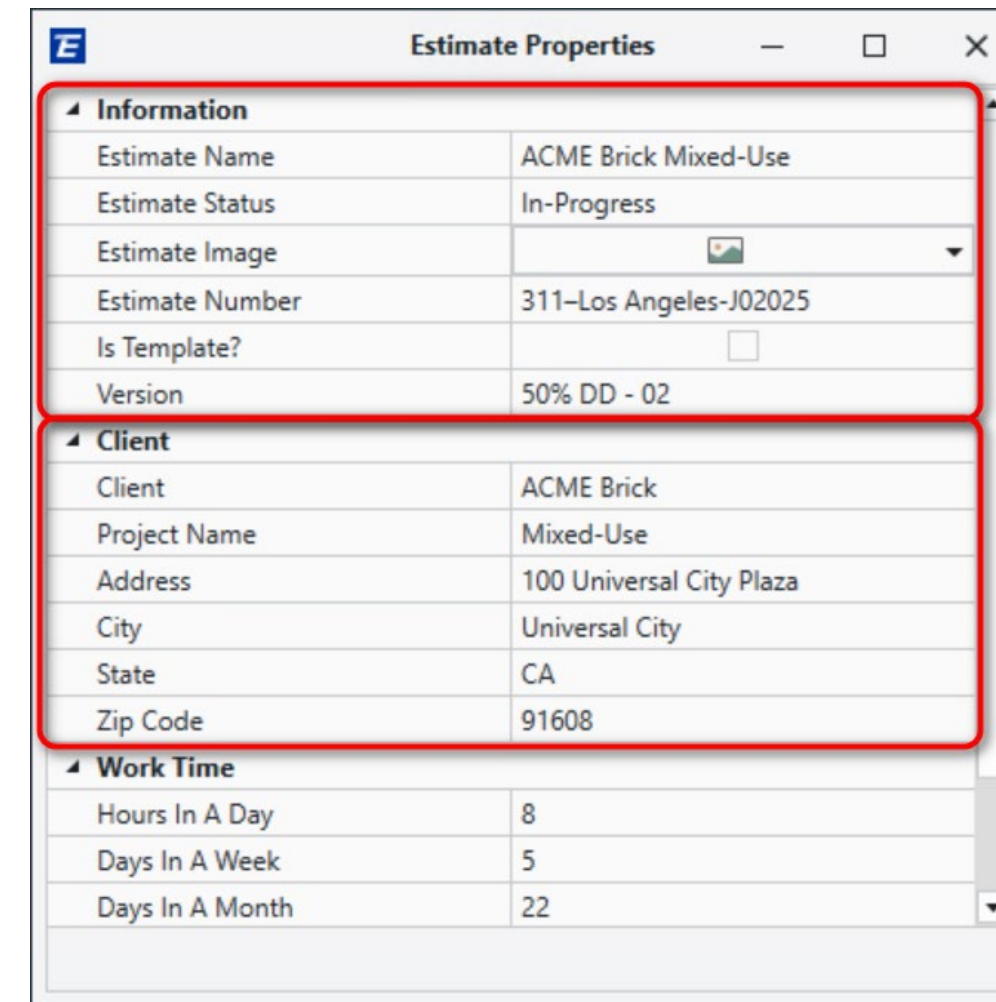


Audience Q&A

Key Elements of Version Management

Estimate Properties

- Estimate Name
- Estimate Status
- Version Identification (Naming Conventions)
- Client/Project Information



The screenshot shows a software window titled "Estimate Properties" with a blue 'E' icon in the top-left corner. The window contains three expandable sections, each with a red border. The "Information" section includes fields for Estimate Name (ACME Brick Mixed-Use), Estimate Status (In-Progress), Estimate Image (with a small image icon), Estimate Number (311-Los Angeles-J02025), Is Template? (checkbox), and Version (50% DD - 02). The "Client" section includes fields for Client (ACME Brick), Project Name (Mixed-Use), Address (100 Universal City Plaza), City (Universal City), State (CA), and Zip Code (91608). The "Work Time" section includes fields for Hours In A Day (8), Days In A Week (5), and Days In A Month (22).

Information	
Estimate Name	ACME Brick Mixed-Use
Estimate Status	In-Progress
Estimate Image	
Estimate Number	311-Los Angeles-J02025
Is Template?	☐
Version	50% DD - 02

Client	
Client	ACME Brick
Project Name	Mixed-Use
Address	100 Universal City Plaza
City	Universal City
State	CA
Zip Code	91608

Work Time	
Hours In A Day	8
Days In A Week	5
Days In A Month	22

Version: Include the Budget/Estimate Type and Revision here. Tailor to your company list:

RFP
Program
Concept
SD (incl prefix %)
DD (incl prefix %)
CD (incl prefix %)
GMP
BP
PC – As Bid
PC – At Completion
Archive



Audience Q&A



Project View Variables

- Utilize **Project Type**
Company Standard Drop-down list
- Implement **Cost History** Toggle
Yes/No



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DESTINI Estimator - ACME Brick Mixed-Use [85% CD - 01]

Home Project Estimate Rates & Resources Dashboard Insert View Comparison Takeoff

Open Save 3 Refresh Template Changes B I U Font A Merge & Center Alignment Add Property Sheet Remove Property Sheet Property Sheets Add Remove Link Tag Clear Estimate Properties Sync Estimate and Lock Spreadsheet Unlock Spreadsheet Team

Project
_7e2b0bd97a224c Yes

1							
2		Project Name:	Mixed-Use	Enter as shown in Estimate Properties window			
3		Location (Zip Code):	91608	Enter as shown in Estimate Properties window			
4		Client Name:	ACME Brick	Enter as shown in Estimate Properties window			
5		Designer Name:	Bugs Bunny				
6		Structural Engineer:	Elmer Fudd				
7		Civil Engineer:	Yosemite Sam				
8		Electrical Engineer:	Pepe LePew				
9		Mechanical Engineer:	Marvin Martian				
10		JV Partner Name:	Road Runner				
11							
12		Approved for Cost History:	Yes	p to YES if approved for Cost History use in PowerBI Dashboard			
13		Contract Type:	CM at Risk				
14		Level of Detail:	DD				
15		Vertical Market:	Residential				
16		Project Type:	Multi Use Buildings				
17		Construction Type:	New Construction				
18		Site Type:	Green Field				
19		LEED Rating:	Certified				
20		Minority:	Good Faith Effort				
21							
22		Construction Duration:	28.00	MO			
23		Precon Duration:	9.00	MO			
24							
25		Lead Estimator:					
26		Support Estimator:					
27		Mechanical Estimator:					
28		Electrical Estimator:					
29							
30		Building Structure:	Concrete				
31		Foundation Type:	Deep				

Item Value Notes

Building 1 GBA	125,000.00	
Building 2 GBA	75,000.00	
Building Structure	Concrete	
Civil Engineer	Yosemite Sam	
Client	ACME Brick	
Construction Duration	28.00	
Construction Type	New Construction	
Contract Type	CM at Risk	
Cost History	Yes	
Designer	Bugs Bunny	
Electrical Engineer	Pepe LePew	
Electrical Estimator		
Elevator Cores	6.00	
Foundation Type	Deep	
JV Partner	Road Runner	
Lead Estimator		
LEED Rating	Certified	
Level of Detail	DD	
Mechanical Engineer	Marvin Martian	
Mechanical Estimator		
Minority	Good Faith Effort	
Number of Units	0.00	
Precon Duration	9.00	
Project Name	Mixed-Use	
Project Type	Multi Use Buildings	
Roof Type	Membrane	
Site Type	Green Field	
Stair Cores	4.00	
Structural Engineer	Elmer Fudd	

Project Metrics / Conceptual Areas / Setup

Project Estimate Rates & Resources Dashboard Comparison Takeoff

Cost Information



What Project View Variables do you Use?



Project/Estimating Team

Order of Operation

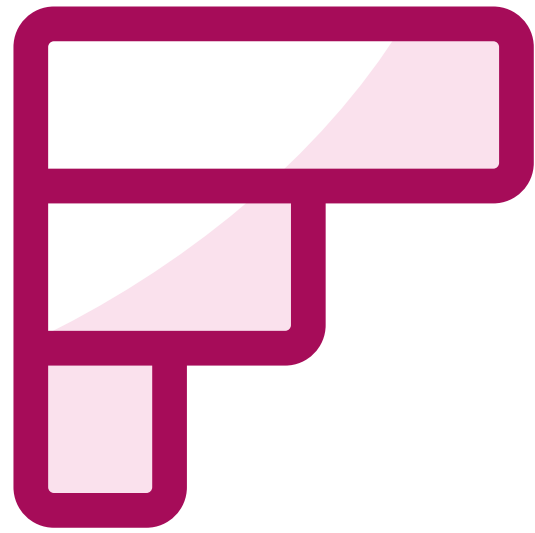
1. Implement Review and Approval Workflow
2. Publish Collateral
3. Set Project View Variables
4. Close Version

Solutions Manager/SME

Business Intelligence Tools

- Periodic Audits and Validation of Centralized Repository
- Promptly Notify Estimating Teams to Observe SOP's

Maintain Good Data Hygiene



Do you have documented Best Practices/SOPs?



Audience Q&A

Recap

Common Challenges

- Version Sprawl
- Copy Estimate vs Versioning
- User Error
- Non-adherence to SOP's/Standards

Mitigation

- Training and Encouragement
- Periodic Audits



Audience Q&A



Call to Action

- Publish Naming Conventions
- Demonstrate to Users the Value of Data Hygiene
- Implement Business Intelligence Dashboard for Periodic Audits of Centralized Repository

Long-term Impact

- Marketing Differentiator
- Increased Awareness of Estimated Project Cost



Audience Q&A

THANK YOU