

Estimating Workflow Onboarding Program Map

Module 1: Bid & File Management

Email Management | Processing Bid Invitations | BuildingConnected Calendar | Project File Management | File Sharing

Overview: This module guides learners through managing emails, bid invitations, the BuildingConnected Calendar, and project files. Learners will navigate the calendar, analyze and respond to estimating emails, process bid invitations (both automatic and manual), and download, organize, and share project files using standardized workflows.

Business Outcomes: Improved efficiency and consistency in managing bid invitations, emails, and project files, resulting in better coordination, accurate tracking, and timely responses across estimating workflows.

- Reduces bid invitation time by 20 to 30%
- Achieves $\geq 85\%$ accuracy in scheduling bids
- Maintains $\geq 90\%$ compliance with naming convention

Lesson Title	Learning Outcome	Objective (Bloom's Level)
Lesson 1.1 Introduction to BuildingConnected	Learners will navigate the calendar in BuildingConnected and locate project files.	• Describe the calendar layout and its key features • Navigate calendar views and open invitations (Apply) • Identify the status of bids and the assigned estimator (Understand) • Locate project files (Apply)
Lesson 1.2 Managing Estimating Emails	Learners will analyze emails and execute the appropriate action.	• Identify the type of email using keywords and sender (Understand) • Determine the required action based on the email type (Analyze)
Lesson 1.3 Forwarding Email Invites to BuildingConnected	Learners will forward bid invitations to BuildingConnected.	• Forward bid invitations to BuildingConnected (Apply) • Record project details and date in the Bid List (Apply) • Confirm the invitation on the calendar (Apply)
Lesson 1.4 Entering Manual Bid Invites in BC	Learners will manually enter bid invitations in BuildingConnected.	• Analyze bid invitations to determine whether manual entry is required (Analyze) • Add bid invitation manually (Apply) • Confirm the invitation on the calendar (Apply)

Lesson 1.5 Downloading Project Files	Learners will locate, download, and unzip project files in BuildingConnected.	• Locate files in BuildingConnected (Understand / Apply) • Download and unzip the folder (Apply)
Lesson 1.6 Renaming Project Files	Learners will apply naming conventions and organize project files.	• Select the appropriate Bluebeam view (thumbnails or bookmarks) for the task (Analyze) • Locate key plan details (title block, revision, project name, discipline) (Understand) • Identify the most current revision set (Understand) • Apply naming conventions (Apply) • Create and organize a project folder (Apply)
Lesson 1.7 Sharing Project Plans with the India Team	Learners will upload files to the shared drive and email the files with the team in India.	• Identify emails requesting files (Apply) • Create a folder in the shared drive (Apply) • Upload project files to the folder (Apply) • Verify that the shared link is accessible (Apply) • Send files via email to the India Team (Apply)

Module 2: Change Order Management

Documentation | Change Order Types | Pricing | Accessories | Change Order Processing | Accuracy

Overview: This module focuses on creating accurate and complete change orders. Learners will review change order types and primary proof, verify key information, and determine accessories pricing to prepare a change order. Then, they will add and organize documentation in Bluebeam and ensure accuracy using the change order checklist.

Business Outcome: Accurate and efficient preparation of change orders to support project documentation, pricing integrity, and overall operational efficiency.

- Reduces change order processing time by 15–25%
- Maintains ≥95% compliance with change order documentation standards
- Achieves ≥90% accuracy in comparing change orders

Lesson Title	Learning Outcome	Objective (Bloom's Level)
Lesson 2.1 Introduction to Change Orders	Learners will be able to explain the purpose of change orders, recognize required components, and identify key terms.	• Describe the purpose of a change order (<i>Understand</i>) • Identify the required components of a change order (<i>Understand</i>) • Explain key change order terms: Takeoff, RFI, ASI, CN, DCN, Barlist (<i>Understand</i>)
Lesson 2.2 Types of Primary Documentation	Learners will be able to identify key information on each type of primary documentation.	• Compare the primary types of documentation used to create change orders (<i>Analyze</i>) • Identify the location of key information on each type of primary documentation (<i>Understand</i>)
Lesson 2.3 Types of Change Orders	Learners will be able to differentiate the four types of change orders.	• Describe the types of change orders (<i>Understand</i>) • Differentiate change order types by requester and primary documentation (<i>Analyze</i>)
Lesson 2.4 Change Order Pricing	Learners will be able to apply strategies to ensure accurate unit and delivery pricing.	• Locate unit and delivery pricing within the project quote (<i>Apply</i>) • Apply strategies to prevent errors when using special one-time pricing (<i>Apply</i>)
Lesson 2.5 Accessories Pricing	Learners will be able to accurately price accessories.	• Locate weights and accessories on a barlist (<i>Apply</i>) • Determine accessory prices using the quote's pricing tab (<i>Apply</i>)
Lesson 2.6 Preparing Change Orders	Learners will be able to accurately prepare complete change orders.	• Explain the required components of a complete change order (<i>Understand</i>)

		• Locate and verify the information needed to prepare a change order (Apply) • Apply standard procedures to accurately complete a change order (Apply) • Upload and organize change order documentation in Bluebeam (Apply)
Lesson 2.7 Change Order Checklist	Learners will be able to ensure the accuracy and quality of change orders.	• Identify common change order errors (Understand) • Review and verify change orders for accuracy and completeness using the Change Order Checklist (Evaluate)

Module 3: Rebar Projection Spreadsheet Management

Shipping Reports | Data Sorting | Projection Updates | Counter Sales | Backlog Tracking | Forecasting

Overview: This module focuses on analyzing shipping data to create projections. Learners will export and organize shipping reports from Applied Systems Associates (aSa), clean and sort data, calculate tons shipped and counter sales, update backlog and project start dates, and adjust projections using formulas and formatting to ensure accurate tracking and reporting.

Business Outcome: Accurate and timely tracking of shipping, backlog, and projections to support reliable forecasting and decision-making.

- Achieves $\geq 90\%$ accuracy in calculating tons shipped per job
- Ensures $\geq 90\%$ accuracy in calculating counter sales
- Maintains $\geq 90\%$ accuracy in job projections

Lesson Title	Learning Outcome	Objective (Bloom's Level)
Lesson 3.1 Downloading Shipping Data from aSa	Learners will create, export, and store the monthly shipping report.	• Locate the Shipping tab in aSa (Understand and Apply) • Apply filters to select shipping data for the correct month (Apply) • Export the shipping report (Apply) • Apply naming conventions to rename the report (Apply) • Store the report in the appropriate file location (Apply)
Lesson 3.2 Organizing and Sorting Data	Learners will filter, sort, and remove unnecessary data.	• Create filters (Apply) • Apply filters by location (Apply) • Delete Spokane data (Apply) • Sort data by order status and delete open or processed orders (Apply) • Sort data by job number (Apply)
Lesson 3.3 Calculating Tons Shipped per Job	Learners will update the Rebar Projection tab by creating formulas, recording tons shipped, and applying formatting.	• Copy the Rebar Projection tab and rename it for the previous month (Apply) • Create a formula to calculate tons shipped per month for each job in the Shipping Data spreadsheet (Apply) • Record tons shipped for each job in the Rebar Projection tab (Apply) • Apply formatting to highlight tons shipped in the current month yellow (Apply)
Lesson 3.4 Calculating Counter Sales	Learners will organize data, apply filters, and create formulas to calculate counter sales data.	• Insert a column between contracted and counter sales data (Apply) • Copy counter sales data, create a new tab, and paste the data (Apply) • Copy and insert the headings (Apply) • Apply filters and sort data by weight (Apply)

		• Create a formula to calculate total weight of mill direct, pallet orders, counter sales only orders (Apply) • Record counter sales data in the Summary tab of the Projection Spreadsheet (Apply)
Lesson 3.5 Recording Tons Remaining from the Backlog	Learners will update backlog data for each job.	• Insert a column in the Rebar Projection tab, to the right of previous month's backlog column (Apply) • Label the columns Backlog and Date (Apply) • Hide and unhide columns as needed (Apply) • Record the number of tons remaining for each job in the backlog column (Apply)
Lesson 3.6 Updating Project Start Dates	Learners will enter the date of the first rebar shipment in the Rebar Projection Spreadsheet.	• Locate the Order Entry tab in aSa (Understand and Apply) • Enter the job number (Apply) • Locate the date of the first release (Apply) • Record the date in the Actual Start Date column of the Rebar Projection tab (Apply)
Lesson 3.7 Modeling Tons per Month	Learners will update projections, verify totals, and apply proper formatting based on backlog and project data.	• Adjust rebar projections one month forward for jobs with no shipments (Apply) • Revise projected tons per month based on the tons remaining (Apply) • Verify that the total projection value matches the backlog (Analyze) • Apply formatting to color code projections by Project Manager (Apply)

Module 4: New Job Implementation Process

Project Setup | Customer Communication | Team Coordination | Database & Systems (aSa) Management | Project Tracking

Overview: This module walks learners through the new job setup process, including gathering project information, communicating with customers and internal teams, updating job databases, entering customer and job details in aSa, updating change orders, and the rebar project spreadsheet.

Business Outcome: Standardized and efficient job setup processes that improve data accuracy, streamline communication, and ensure consistent tracking across systems and teams.

- Achieves $\geq 95\%$ accuracy in job and customer data entry
- Ensures $\geq 90\%$ consistency in communications and documentation

Lesson Title	Learning Outcome	Objective (Bloom's Level)
Lesson 4.1 Gathering Project Info	Learners will recognize new job requests and send an email to gather customer data.	• Identify emails from the Estimation Manager that initiate the new job process (<i>Understand</i>) • Gather required information for customer email (Apply) • Customize and send the Gather Data Customer Email template (Apply)
Lesson 4.2 Introducing Customer to Team	Learners send the customer email with necessary forms.	• Customize New Project Info form (Apply) • Locate new project templates in the job folder (Understand & Apply) • Select the appropriate template for new versus existing customer (Understand) • Customize and send New or Estimating Customer Email (Apply)
Lesson 4.3 Announcing Job to Team	Learners send team email and update tracking databases.	• Locate Quote and Project Templates in the job folder (Understand & Apply) • Determine required resources to complete the Job Info tab in the quote (Understand) • Customize and send the Team Email (Apply) • Update New Job Follow-up database to reflect send date (Apply)
Lesson 4.4a Updating Job Databases	Learners will record job details in databases and organize project files.	• Record job details in the New Job Follow-up and Job List databases (Apply) • Store project files in the correct folder (Understand & Apply)

Lesson 4.4b Adding job data to aSa	Learners will enter customer and job details into aSa.	• Locate the Business Partners tab in aSa (Understand & Apply) • Enter customer name and billing address (Apply) • Locate the Job tab in aSa (Understand & Apply) • Enter job name, customer, shipping and will call addresses, and the contact (Apply) • Verify data was entered accurately (Apply)
Lesson 4.4c Revising Change Order Form	Learners will update change order pricing.	• Locate unit and delivery price in job quote (Understand and Apply) • Revise change order unit and delivery price to match quote (Apply)
Lesson 4.4d Updating Rebar Projection Spreadsheet	Learners will update the Rebar Projection and Contract Value tab for new jobs.	• Enter job name, job number, detailer, estimated start date, tons, and months in the Rebar Projection spreadsheet (Apply) • Model tons per month for each job using backlog data, total tons, and project duration (Apply) • Record job details in Contract Value tab (Apply)