Process - Estimate Document

Aptean Ltd
Copyright © 2011-2025.

Contents

1 Process - Estimate Document

This page clarifies the Estimation process, specifically production of an EST document.

1.1 Pre-Requirements

- One or many of:
    - ♦ BRD
    - ♦ SDD
    - ♦ Combined EST

1.2 Process

💡 **Note:** Regardless of who is doing the FS, the technical aspects should already have been discussed with R&D and noted.

1.3 Creating an EST

The Estimate may be created as a Word doc or within Assist Calidus Hub and exported as a PDF.

1.4 Using the EST Word Template

💡 **Note:** If an EST spreadsheet of any form has not been done yet, do this now. Instructions for doing this are here: Process - Using Office Templates

- Double click on the EST Template - this will create a new document
- Replace placeholder text with your text.
- Populate the header
- Copy the requirements from the EST/SDD/BRD into the Client Requirement section
- Create the Solution into the Solution section.
    - ♦ Strongly scope - if there are things that are not included or limited in the solution, make that clear in this section.
- Paste in the estimate values. Ensure that you account for your time, plus any time to issue/review the EST.
    - ♦ If multiple departments/people are involved in the specification of this change, then you should note your time on the estimate in hours in total (plus delta if you have returned to this following review) as a review note.
    - ♦ One of the authors should be assigned the final review, to total up all this time and amend the FS time, and remove any notes relating to this.
- Save as EST-{CaseNo}-{Client} {Desc} v{Version}.docx

{{Note|

- Document properties should be used for the Title.
- These are used in the Heading.
- You can refresh all references in the title using [CTRL-A]-[F9] when in the title section.

1.5 Using Assist Calidus Hub to create an EST

💡 **Note:** You must be logged in to be able to create new pages in Assist.

- Click the link here: Create New EST from Template
- Enter the EST name following convention EST-{CaseNo}-{Client} {Desc}. 💡 **Note:** No version in the page name.
- This will start an editor - this may be in Source mode or Visual Editing mode.
- Enter the #vardefine values, following the guidelines in the template.

Ready for **What's Next, Now**™

- Enter text in all sections following the guidelines for the Word Template above.
- Enter the estimate values in the Appendix template provided.
- Save and provide reasonable change notes e.g. v0.01 - initial creation.
- Export the PDF using the link provided - this will append the version number.

Note:

- Follow the guidelines and help here: Assist Editing Guide.

1.6 General Notes

Note: This document should NEVER contain technical notes e.g. packages/procedures, form names, etc. Be general - describe what is being provided, call out which areas are being changed and what is being changed and why this will fulfil the requirements. The ONLY exception is when this estimate is being provided to technical representatives rather than direct to the customers' operational staff.

Ready for **What's Next, Now**™