SUPERVISORS

MANAGE AN ESTIMATE REQUEST

Provides guidance for O&M Supervisors in reviewing and completing an Estimate Request.

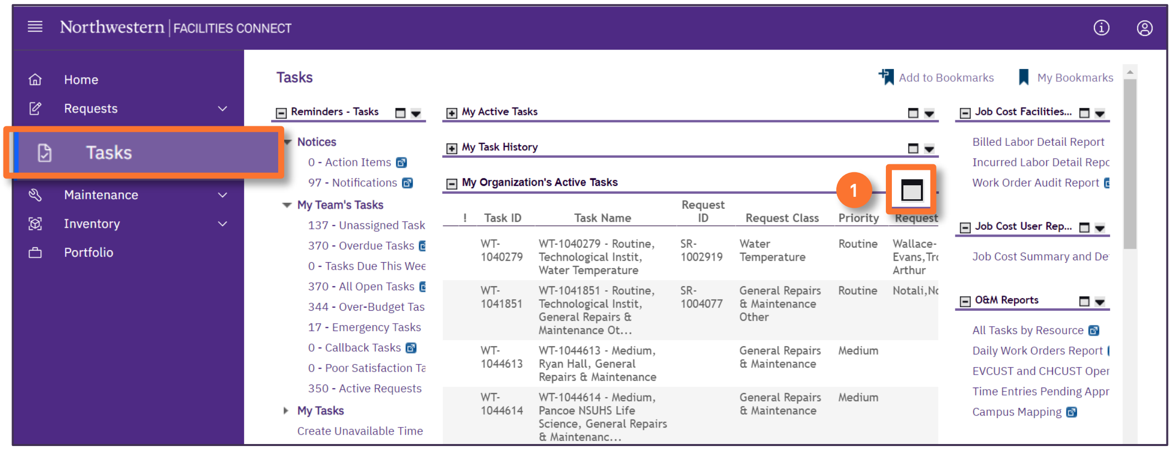
▼ GETTING STARTED

Estimate Requests are first received by **NU Facilities Customer Service**. Upon receipt, Customer Service reviews the request and routes it to the appropriate workgroup(s) for development of an estimate. This job aid begins on the **Facilities Connect Desktop > Tasks** screen. For more information, please see the **Supervisor: Task Screen** job aid.

DIRECTIONS:

1 From the **Facilities Connect > Tasks** screen:

1. Scroll to **My Organization's Active Tasks** and click on the **Maximize** button.

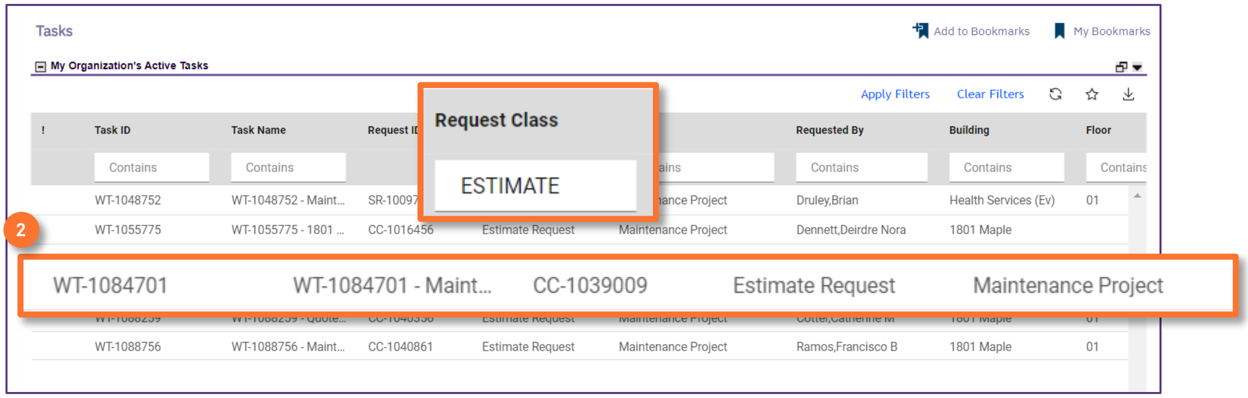


▼ IMPORTANT

Please note: If you have been added to an **Estimate Request Work Task** by another shop (i.e. a multi-shop estimate), you will be added at the **Resource** level and will find the **Estimate Request Work Task** in your **My Active Tasks** section.

2 Upon clicking, you will see the full screen view of **My Organization's Active Tasks**:

2. Locate the desired **Estimate Request Work Task** and click anywhere on the **Work Task Record** to open.



▼ TIP & TRICKS

The quickest way to locate **Estimate Requests** is to search for the keyword 'Estimate Request' in the **Request Class** column.

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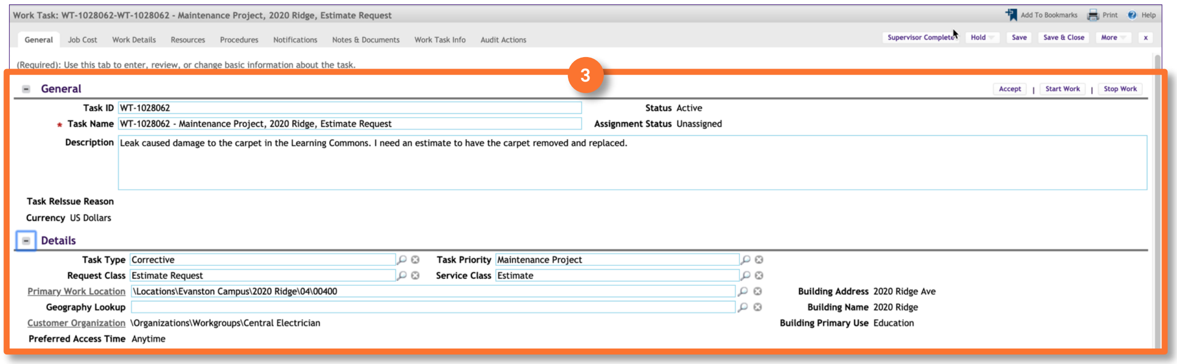
DIRECTIONS:

3 Upon clicking, the **Estimate Request Work Task** will open:

3 Review the general information in the **General** and **Details** sections.

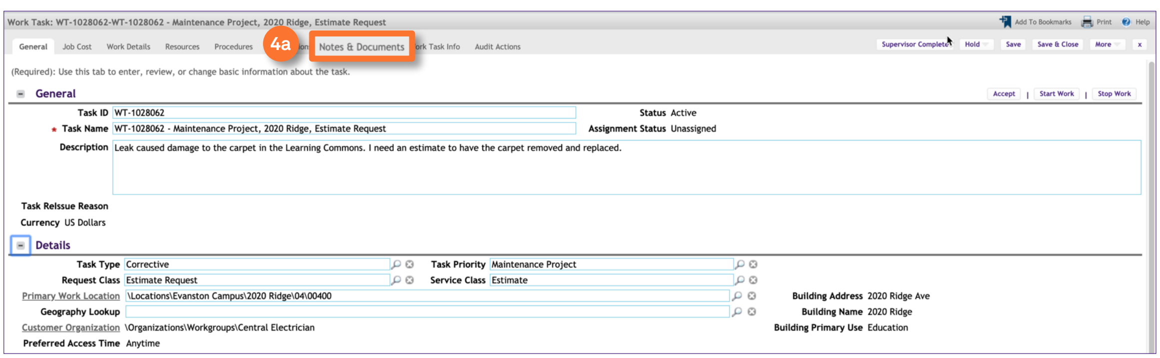


▼ **INFORMATION**

You may decide you need to add additional Shops (i.e. Shop Supervisors) as **Resources** in order to develop the full **Estimate**. For more information on adding **Resources** to a **Work Task**, please refer to the **Assign Work Tasks to Resources (Desktop)** job guide.

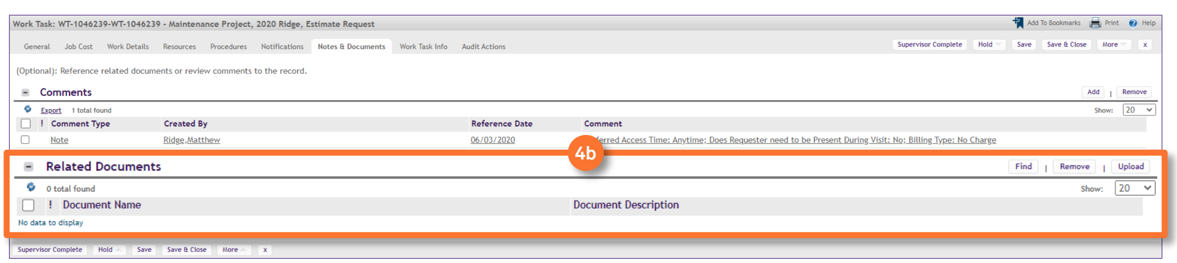
4 Outside of Facilities Connect, develop your cost estimate using your standard estimating forms and tools (e.g. **NU Facilities Estimate Form**). Once completed, you will upload the document(s) to the **Estimate Request Work Task**.

4a Click on the **Notes & Documents** tab.



Upon clicking, the **Notes & Documents** tab will open.

4b Locate the **Related Documents** section.



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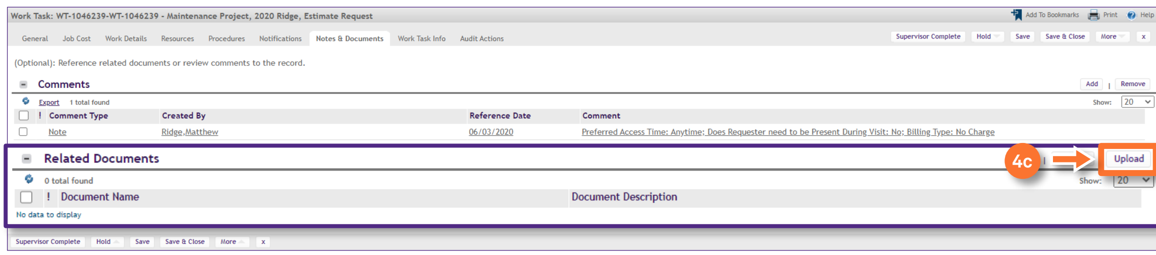
DIRECTIONS:

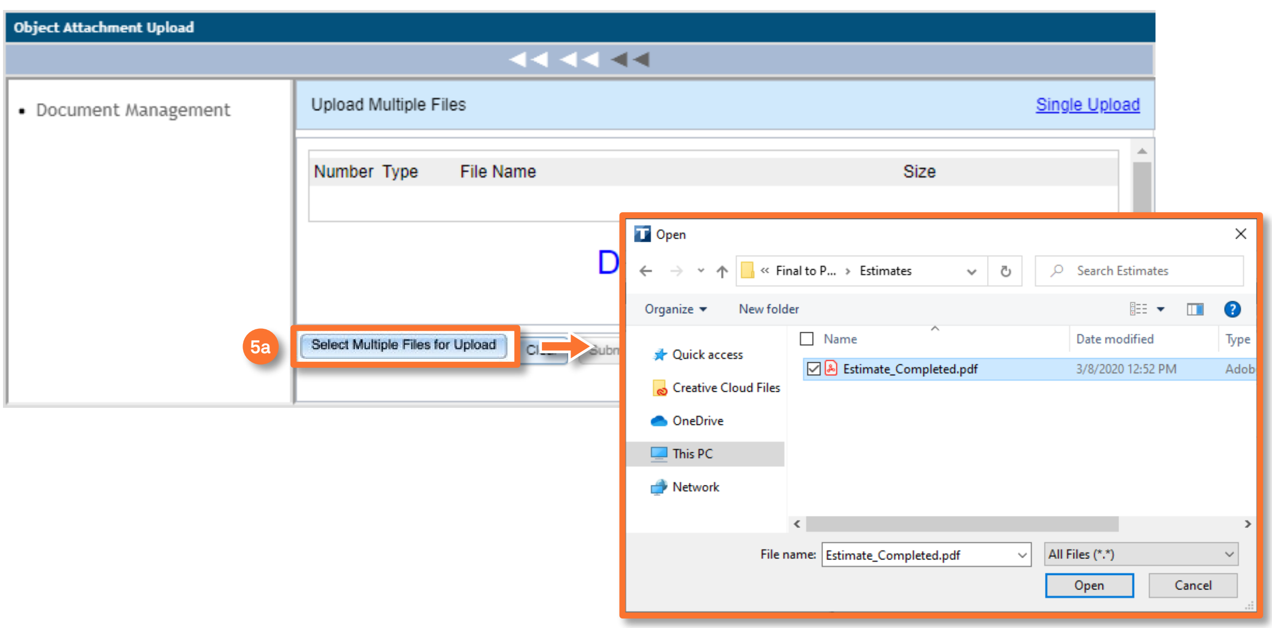
4 *Continued*. To upload completed **Estimate** documents:

4c Click on the **Upload** button.

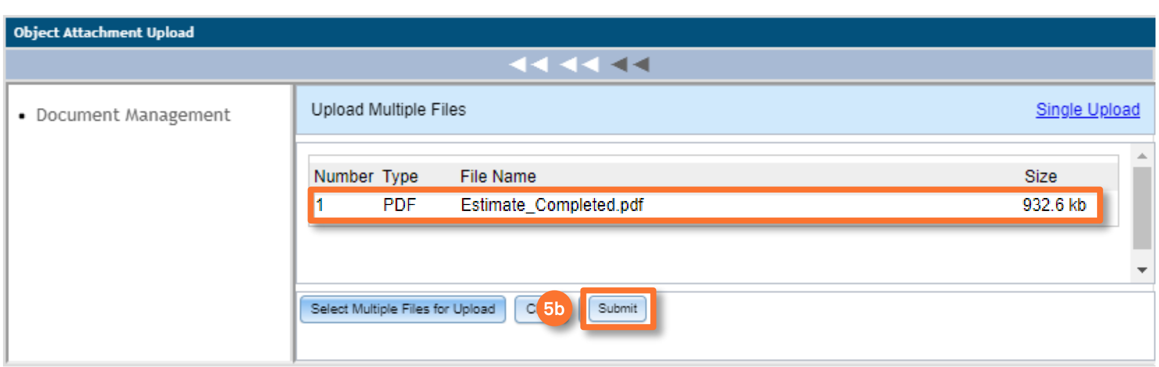


5 Upon clicking, the **Object Attachment Upload** pop-up will appear:

5a Click on the **Select Multiple Files for Upload** button and add the completed **Estimate** document(s).



5b Click on the **Submit** button to complete the upload.



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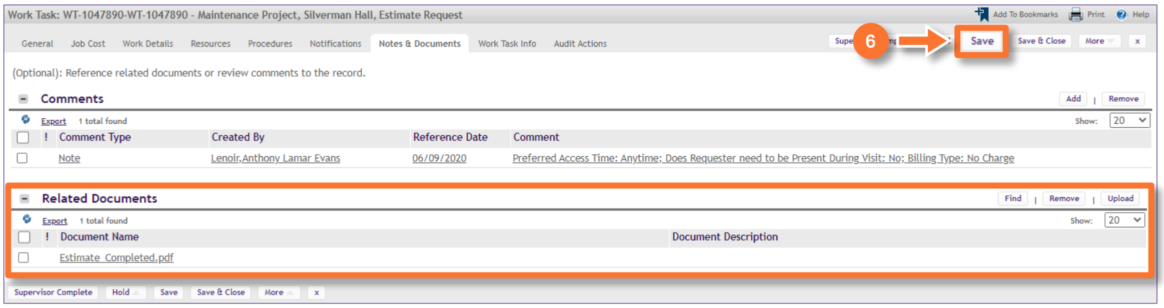
DIRECTIONS:

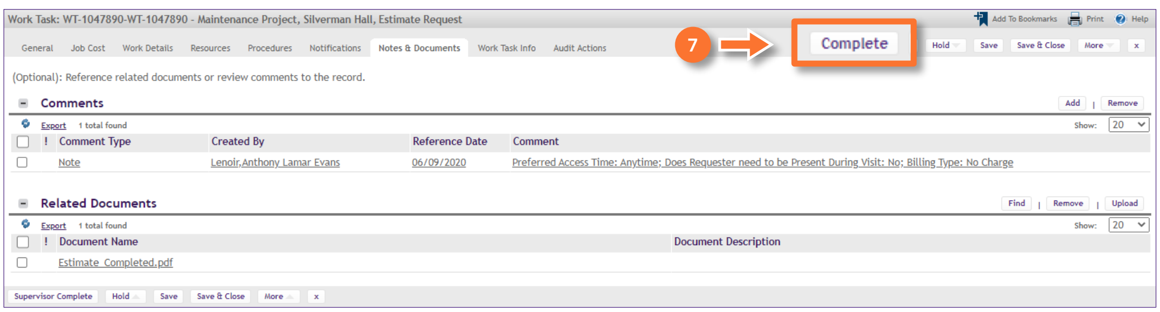
6 The uploaded **Estimate** document will now appear in the **Estimate Request Work Task**. To complete the document upload process:

6 Click on the **Save** button.



7 Once all shops have completed and uploaded their **Estimate Forms**, and entered any necessary **Time Entries**, the **Work Task** can be marked as complete:

7 Click on the **Complete** button.



▼ IMPORTANT

DO NOT click on Complete until estimate documentation has been completed and uploaded for all shops participating in the estimate.

Upon clicking **Complete**, the **Estimate Request Work Task** will be marked complete for all resources and estimate documents will be immediately routed to the **Customer** for review and approval.

▼ INFORMATION

Once the **Estimate Request Work Task** has been completed, the customer will receive a notification and will be able to access and review the estimate. If the customer chooses to proceed with the estimated work, he/she/they will need to contact **Facilities Customer Service** to give approval, and a new **Perform Estimated Work Task** will be created and routed to the applicable shop(s).

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