

## SUPERVISOR PERFORM ESTIMATED WORK

Provides guidance for reviewing and completing a "Perform Estimated Work" Work Task.

#### ▼ GETTING STARTED

Customer Service is responsible for receiving and routing NU Facilities Estimate Requests. Once an Estimate Request is received, Customer Service will review the request and route it to the appropriate workgroup(s) along with the Estimate Form. Once the new Work Task has been created under the Perform Estimated Work Request Class, Customer Service will again assign the Work Task to the appropriate shop.

This job aid begins on the Facilities Connect **Task** screen. For more information on navigating to the **Tasks** screen, please refer to the **Supervisor: Tasks Screen** job aid.

#### **DIRECTIONS:**

To locate the new Work Task, from the My Organization's Active Tasks section:



Click on the Maximize button.

■	Northwestern   FACILITIES CONNEC	ст								Û 8
۵	Home									My Bookmarks
Ľ	🖃 Reminders - Tasks 🛛 🗖 💌	€ My A	Active Tasl	ks						🖃 Job Cost Facilities Reports 🛛 🗨
đ	▼ Notices		Task Histo	ry		Billed Labor Detail Report 🔞				
D	0 - Action Items 🖻									Incurred Labor Detail Report 👩
es.	97 - Notifications 🛛 🔄 My Organization's Active Tasks									Work Order Audit Report 🔯
	<ul> <li>My Team's Tasks</li> </ul>		Task ID	Task Name	Request ID	Request Class	Priority	Requested By		
Ø	137 - Unassigned Tasks 🔂		Idsk ID	Task Name	ID	Request Class	Priority	Requested by	Dunuing	🖃 Job Cost User Reports 🛛 🗖 🔽
ð	370 - Overdue Tasks 🖬		WT-	WT-1040279 - Routine,	SR-	Water	Routine		Technologica Instit	Job Cost Summary and Detail Rep
	0 - Tasks Due This Week 🚳		1040279	Technological Instit, Water Temperature	1002919	Temperature		Evans, Troyer Arthur	Instit	Job Cost Summary and Detail Rep
	370 - All Open Tasks 👩		WT-	WT-1041851 - Routine.	SR-	General Repairs	Routine	Notali.Notali E	Technologica	
	344 - Over-Budget Tasks 🖻		1041851	Technological Instit,	1004077	& Maintenance			Instit	🖃 O&M Reports 📃 💌
	17 - Emergency Tasks 🖻			General Repairs & Maintenance Ot		Other				All Tasks by Resource 👩

Upon clicking, the full screen view of **My Organization's Active Tasks** will open. To locate the **Estimate Request Work Task:** 

Enter Estimate into the Request Class column and press enter. Layer search filters if necessary.

Once you have located the desired Work Task, click on the Work Task Record link to open.

1 🔳	Northwe	Stern   FACILITIES C	ONNECT					í (		
ώ	Tasks						🙀 Add to Bookmarks	My Bookmarks		
e	🖃 My C	Organization's Active Tas	sks					6 ▼		
đ				Ъ	Request Class		Apply Filters Clear Filters			
	1	Task ID	Task Name	Request ID		atus 个	Priority	Requested By		
& Ø		Contains	ntains Contains		ESTIMATE	Contains	Contains	Contains		
۵.		WT-1084906	WT-1084906 - Maintenanc	CC-1039218	Estimate Request	Active	Maintenance Project	Simons,Lacy		
	1c	WT-1098475	5 - Lurie WT-109847	75	Corrective	Estimate	Z60	ARP		
		WT-1088756	WT-1088756 - Maintenanc	CC-1040861	Estimate Request	Active	Maintenance Project	Ramos,Franci		

1b



### SUPERVISOR PERFORM ESTIMATED WORK

#### **DIRECTIONS:**



Upon clicking, the selected **Work Task** (**Perform Estimated Work**) will open:

Review the general details and description of the request to confirm there have been no changes to the work requested.

Work Task: WT-1028062-WT-1028062 - Maintenance Project, 2020 Ridge, Estimate Request	🖏 Add To Bookmanks 😹 Print 🥹 Help
General Job Cost Work Details Resources Procedures Notifications Notes & Documents Work Task Info Audit Act	ions Supervisor Completes Hold Save Save & Close More x
(Required): Use this tab to enter, review, or change basic information about the task.	
<ul> <li>General</li> </ul>	Accept   Start Work   Stop Work
Task ID WT-1028062	Status Active
* Task Name WT-1028062 - Maintenance Project, 2020 Ridge, Estimate Request	Assignment Status Unassigned
Description Leak caused damage to the carpet in the Learning Commons. I need an estimate to have the ca	Irpet removed and replaced.
Task Relssue Reason	
Currency US Dollars	
😑 Details	
Task Type Corrective D S Task Priority Mai	intenance Project 🔎 🕄
Request Class Estimate Request 🔎 🛽 Service Class Esti	
Primary Work Locations \Evanston Campus\2020 Ridge\04\00400	P 😒 Building Address 2020 Ridge Ave
Geography Lookup	P 😳 Building Name 2020 Ridge
Customer Organization \Organizations\Workgroups\Central Electrician	Building Primary Use Education
Preferred Access Time Anytime	

Next, confirm the details of the work in the Estimate Form. To open the Estimate Form:

### 3a Click on the Notes & Documents tab.

											-
Vork Task: WT-1028062-WT	I-1028062 - Maintenance Project, 2020 Ridge, Estimate Reques	t								Idd To Bookmarks	📇 Print (
	A Details Resources Proced 3a pt Notes & Docu	ment	s <sup>sk Info Auc</sup>	it Actions				Supervisor Complet	Hold Sav	e Save & Close	More
= General			_						Accept	Start Work	Stop Wor
Task ID W	T-1028062				Status Active						
* Task Name W	T-1028062 - Maintenance Project, 2020 Ridge, Estimate Reques	t			Assignment Status Unassigned						
Task Reissue Reason Currency US Dollars											
Details											
Task Type	Corrective	PB	Task Priority	Maintenance Project	t	PO					
Request Class	Estimate Request	PO	Service Class	Estimate		$\rho$ $\Theta$					
Primary Work Location	\Locations\Evanston Campus\2020 Ridge\04\00400					P 🖸	Building Addres	s 2020 Ridge Ave			
Geography Lookup						PØ	Building Nam	a 2020 Ridge			
Customer Organization	\Organizations\Workgroups\Central Electrician						Building Primary Us	Education			
Preferred Access Time	Anvtime										

Upon clicking, the **Notes & Documents** tab will open. In the **Related Documents** section, locate the **Estimate Form**:



Click on the link to open the Estimate Form.

			tereserves a server			Supervisor Complete Ho	d Enus	Save & Close	Hara
General Job Cost Work D	etails Resources Procedures Notif	fications Notes & Documents	Work Task Info Audit Actions			supervisor complete ho	u save	Jare u Ciose	mare
otional): Reference related	documents or review comments to the	record.							
Comments								Ade	IR
Export 1 total found									how:
! Comment Type	Created By		Reference Da	ce Con	nment				
Note	Campos,CJ		01/13/2020	Pref	ferred Access Time: Anytime; Does Requester nee	to be Present During Visit: No			
Related Document	s						Fit	nd   Remov	e
0 total found								9	how:
! Document Name			0.	ument D 3b	10				



#### **OPERATIONS & MAINTENANCE**

## SUPERVISOR PERFORM ESTIMATED WORK

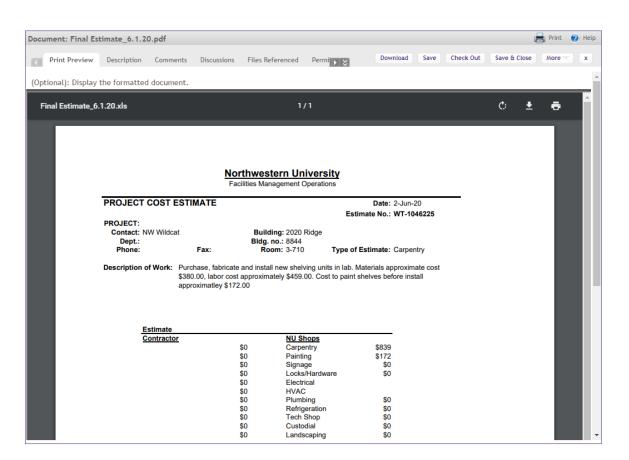
#### **DIRECTIONS:**

# 3

Continued.

Upon clicking, the **Document** pop-up window will appear.

Review the completed Estimate Form and verify the details are correct.



#### ▼ INFORMATION

Once you have validated the information in the **Work Task** and the attached completed **Estimate Form**, complete the work through your shops standard process.

If other shops are involved, you will need to add additional **Resources** and/or shops to the **Work Task**. For more information on adding **Resources** to a **Work Task**, refer to Job Aid #XX Assign Work **Tasks to Resources (Desktop).**