



All Users

# ESTIMATE REQUEST PROCESS



# ESTIMATE REQUEST PROCESS

## DOCUMENT SUMMARY

This job guide provides step-by-step instruction for the complete Estimate Request process in Facilities Connect, from submitting the initial Estimate Request to the request to Perform the Estimated Work.

The purpose of this document is to serve as guided reference and/or new hire training on building equipment asset functionality.

## VERSION INFORMATION (THIS DOCUMENT)

Version	<b>1.0</b>	Release Date	<b>10/15/2024</b>
Owner	<b>NU Facilities</b>		
Version Notes	<b>This is the original version of the document; content within represents delivered system functionality at go-live (2/5/2019), and has been verified as up-to-date of this document's release (10/15/2024)</b>		

## REVISION HISTORY

	Version	Release Date	Action	Owner
Most Recent →	1.0	04/24/2019	Created	NU Facilities
	--	--	--	--
	--	--	--	--
	--	--	--	--
	--	--	--	--



## TABLE OF CONTENTS

This document has been structured by the key topic(s) and process(es) involved in the Estimate Request process. Please view the table below to locate a specific topic or process contained within the document.

SECTION #	TOPIC / PROCESS	PAGE
<b>1.1</b>	<b>Introduction of Estimate Types</b>	<b>4</b>
<b>2.1</b>	<b>Initial Estimate Request – Budgetary Allowance Cost Estimate</b>	<b>5</b>
<b>2.2</b>	<b>Initial Estimate Request – Detailed Construction Estimate</b>	<b>12</b>
<b>3.1</b>	<b>Locate Completed Estimate Request</b>	<b>14</b>
<b>3.2</b>	<b>Review the Estimate Request Form</b>	<b>20</b>
<b>4.1</b>	<b>Perform Estimated Work Request</b>	<b>25</b>



## ▼ GETTING STARTED

1.1

### Understanding Estimate Types

There are two types of initial estimate requests. Choose the one that most closely reflects your need.

## ► PROCESS

### Budgetary Allowance Cost Estimate

- There is **NO** fee and a Chartstring is **NOT** required.
- Presents a high-level range of expected costs and timelines, based on similar work.
- Appropriate for determining if the project will align with the available funding or schedule.
- Provided based on the customer's description of the scope without a site visit, investigation, or contractor engagement.
- Operations may return request for a more detailed estimate.
- The Detailed Construction Estimate can be requested after receiving the initial BAC Estimate.

### Detailed Construction Estimate

- A departmental charge associated, and a **Chartstring is required.**
- Developed with a greater level of detail, and very often with support from a design team and/or contractors.
- Intended to be used for finalizing a project budget and, while not guaranteed, is intended to present a more detailed and accurate cost estimate



## GETTING STARTED

For most Facilities Connect Users, **Request Central** will appear on the **Facilities Connect Home Screen**. (A)

For Facilities Connect users with expanded Facilities Management responsibilities, **Request Central** will appear within the **Requests Tab**. (B)

## PROCESS

### 2.1 Budgetary Allowance Cost Estimate

From **Request Central**,

- 1) Ensure the toggle arrow is pointing down to reveal the available **Request Categories**.
- 2) Click on **Estimate**.

<<Upon clicking, the **Service Request Form** screen will open in the main window>>

Northwestern | FACILITIES CONNECT

Home

Request Central

Select the type of request you would like to make

Facilities Request facility repair

Facilities Request facility repair

Alarm Response

Bike

Electrical & Lighting

Elevator

Estimate

Exterior Services/Grounds

Furniture & Appliances

General Repairs & Maintenance

Health & Safety

Housekeeping

Key/Lock/Access

Pest & Animal Control

Plumbing & Leaks

Temperature

Vandalism

Request ID	Request Classification	Description	Created Date/Time	Requested For	Requested By
SB-	Doorbell	ring	01/31/2022 09:03:45	Berry,Emily a	Berry,Emily a
		ha, Martin	01/24/2022 14:14:17	Berry,Emily a	Berry,Emily a
		requesting a	01/24/2022 13:51:25	Berry,Emily a	Berry,Emily a
		out in my please fix	01/24/2022 13:22:09	Berry,Emily a	Berry,Emily a
		ting to be (more details called) this is n ...	10/14/2021 14:24:05	Ebels Duggan,Sea Christopher	
		from a ned friend. an we do? hanks, Emily	07/20/2021 08:17:45	Berry,Emily a	

Northwestern | FACILITIES CONNECT

Requests

Request Central

Select the type of request you would like to make

Facilities Request facility repair

Facilities Request facility repair

Alarm Response

Bike

Electrical & Lighting

Elevator

Estimate

Exterior Services/Grounds

Furniture & Appliances

General Repairs & Maintenance

Health & Safety

Housekeeping

Key/Lock/Access

Pest & Animal Control

Plumbing & Leaks

Temperature

Vandalism

Request ID	Request Classification	Description	Created Date/Time	Requested For	Requested By
021	Estimate Request				
021	Estimate Request				
020	Refrigerant				
020	New or Replacement Key				
020	Painting				

## PROCESS

To complete the Service Request Form, fill in the required fields,

- 2) If the request is for you, keep the **Me** radio button checked.
- 3) If you want an alternative person to receive notifications, select the **Someone Else** radio button. Fill in the contact details.

## INFORMATION

For a detailed walkthrough of entering a Service Request, please refer to the [Create a New Service Request](#) training guide.

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Graphic Notifications Notes & Documents System Workflow Instance Associations Audit Actions Create Draft Submit x

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

2 **Request is for**  Me  Someone Else

3 **Requested For**

Net ID: mrx2009

Name: Ridge, Matthew

Work Phone:

Email: matt.ridge@northwestern.edu

Preferred Access Time:

I need to be present during your visit?  Yes  No

**Billing Type**

Billing Type

**Service Request**

Name	Description
<input type="radio"/> <a href="#">Budgetary Allowance Cost Estimate Request</a>	Request an estimate. Please be specific in the request.
<input type="radio"/> <a href="#">Detailed Construction Estimate Request</a>	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input type="radio"/> <a href="#">Perform Estimated Work</a>	Perform estimated work. Please clearly identify estimate. (Department Charge)

Items per page: 500 1 - 3 of 3 items 1 of 1 pages

## PROCESS

- 4) Click on the **Search** buttons and select a **Building, Floor, and Room**.
- 5) Click on the **Preferred Access Time** drop-down menu and select a timeframe.
- 6) Click on the **Yes** or **No** radio button to decide whether the **Requestor** needs to be present during the work.

## INFORMATION

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Graphic Notifications Notes & Documents System Workflow Instance Associations Audit Actions Create Draft Submit x

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

\* Request is for  Me  Someone Else

**Request Details** Select From Floor Plan

**If this is an emergency please call 911.**  
For urgent Facilities issues such as a leak, drastic change in temperature, or power outage, please call Facilities Customer Service at 847-491-5201 (Evanston), or 312-503-8000 (Chicago).

\* Building Abbott Hall 4

Floor 03

Room 00301

Organization Z6ENG

\* Preferred Access Time Anytime 5

\* I need to be present during your visit?  Yes  No 6

**Billing Type**

Billing Type

**Service Request**

Name	Description
<input type="radio"/> Budgetary Allowance Cost Estimate Request	Request an estimate. Please be specific in the request.
<input type="radio"/> Detailed Construction Estimate Request	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input type="radio"/> Perform Estimated Work	Perform estimated work. Please clearly identify estimate. (Department Charge)

Items per page: 500 1 - 3 of 3 items 1 of 1 pages

## PROCESS

- 7) Select from **Budgetary Allowance Cost Estimate** from the Service Request options by clicking on the **radio button** to the left.

<<Upon clicking, the *Estimate Request Details* section will appear above >>

## INFORMATION

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Graphic Notifications Notes & Documents System Workflow Instance Associations Audit Actions Create Draft Submit x

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

\* Request is for  Me  Someone Else

**Request Details** Select From Floor Plan

**If this is an emergency please call 911.**  
For urgent Facilities issues such as a leak, drastic change in temperature, or power outage, please call Facilities Customer Service at 847-491-5201 (Evanston), or 312-503-8000 (Chicago).

\* Building

Floor

Room

Organization

\* Preferred Access Time

\* I need to be present during your visit?  Yes  No

**Billing Type**

Billing Type

**Service Request**

Name	Description
<input checked="" type="radio"/> <b>Budgetary Allowance Cost Estimate Request</b>	Request an estimate. Please be specific in the request.
<input type="radio"/> <b>Detailed Construction Estimate Request</b>	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input type="radio"/> <b>Perform Estimated Work</b>	Perform estimated work. Please clearly identify estimate. (Department Charge)

7



## ▼ PROCESS

- 8) In the **Estimate Request Details** section, complete the following information:
- **Intended budget or budget range** – estimated amount to spend on entire project.
  - **Intended timeline for completion** – estimated date range from beginning to intended use.
  - **Funding source** – select Yes or No from dropdown
  - **Restrictions** – Any restrictions around implementing the work.  
For example:
    - *if the work can only be performed outside of business hours*
    - *must be completed during a specific calendar window*
    - *if there are constraints around noise/vibration or other disruptions, etc.*
- 9) Please note that **NO** Chartstring is required.

## ▶ INFORMATION

Northwestern | FACILITIES CONNECT

Home / Preferred Access Time

**8** Estimate Request Details

\* Intended budget or budget range?

\* Intended timeline for completion?

\* Funding source identified?

\* Any restrictions?

Note: If additional details are needed please upload a document below and mention in the description.

**9** Billing Type

Billing Type No Charge

Name	Description
<input checked="" type="radio"/> Budgetary Allowance Cost Estimate Request	Request an estimate. Please be specific in the request.
<input type="radio"/> Detailed Construction Estimate Request	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input type="radio"/> Perform Estimated Work	Perform estimated work. Please clearly identify estimate. (Department Charge)

Items per page: 500 1 - 3 of 3 items 1 of 1 pages

## PROCESS

- 10) Fill in any additional details about the project or estimate in the **Description box**. Please provide as much information as possible on the intended scope of work.
- 11) If needed, use the **Add** button to insert additional **comments**.
- 12) If needed, use the **Upload** button to insert related documents, such as photographs or sketches, that can help clarify the scope description.

## INFORMATION

Northwestern | FACILITIES CONNECT

Home /

**10** Describe Your Request (Required)

Other Locations

Find Remove

Apply Filters Clear Filters

Image	Name	Hierarchy Path	Parent Building	Parent Floor
No data to display				

**11** Add Remove

Apply Filters Clear Filters

Comment Type	Created By	Reference Date	Comment
No data to display			

Upload documents, pictures, emails, etc. to help aid in the completion of your work request

**12** Upload

Apply Filters Clear Filters

Document Name	Modified By	Created Date/Time	Document Description
No data to display			

## PROCESS

- 13) Once all the information has been entered, click the **Submit** button at the top or the bottom of the form.

<<Upon clicking, the Service Request form will close, and you will be re-directed to the home page>>

## INFORMATION

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Notifications Audit Actions Create Draft **Submit**

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

\* Request is for  Me  Someone Else

**Request Details** Select From Floor Plan

**If this is an emergency please call 911.**  
**For urgent Facilities issues such as a leak, drastic change in temperature, or power outage, please call Facilities Customer Service at 847-491-5201 (Evanston), or 312-503-8000 (Chicago).**

\* Building 2020 Ridge

Floor 04

Room 00413

No data to display

**Work Task**

<input type="checkbox"/>	T...	Task Name	Created Date	Description	Status	Total Time L...
No data to display						

Create Draft **Submit**

## ▼ PROCESS

2.2

**Detailed Construction Estimate**

To enter the second type of Estimate Request, complete the same steps as Process 1.2, except for the service request type:

- 1) Select from **Detailed Construction Estimate** from the Service Request options by clicking on the **radio button** to the left.

<<Upon clicking, the *Estimate Request Details* section will appear above >>

## ▶ INFORMATION

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Graphic Notifications Notes & Documents System Workflow Instance Associations Audit Actions Create Draft Submit x

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

\* Request is for  Me  Someone Else

**Request Details** Select From Floor Plan

**If this is an emergency please call 911.**  
For urgent Facilities issues such as a leak, drastic change in temperature, or power outage, please call Facilities Customer Service at 847-491-5201 (Evanston), or 312-503-8000 (Chicago).

\* Building

Floor

Room

Organization

\* Preferred Access Time

\* I need to be present during your visit?  Yes  No

**Billing Type**

Billing Type

**Service Request**

Name	Description
<input type="radio"/> Budgetary Allowance Cost Estimate Request	Request an estimate. Please be specific in the request.
<input checked="" type="radio"/> Detailed Construction Estimate Request	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input type="radio"/> Perform Estimated Work	Perform estimated work. Please clearly identify estimate. (Department Charge)

1

## PROCESS

- 2) In the **Estimate Request Details** section, complete the following information:
  - **Previous Estimate Request** – use the Search button to locate any related requests entered previously.
  - **Intended budget or budget range** – estimated amount.
  - **Intended timeline for completion** – estimated date range.
  - **Funding source** – select Yes or No from dropdown
  - **Restrictions** – Any restrictions around implementing the work.  
For example:
    - if the work can only be performed outside of business hours
    - must be completed during a specific calendar window
    - if there are constraints around noise/vibration or other disruptions, etc.
- 3) Please note that a Chartstring is **required**.
- 4) Click the **Add** button to enter the Chartstring information in the request.

## INFORMATION

Northwestern | FACILITIES CONNECT

Home /

Organization FADMIN

\* Preferred Access Time

**2**

**Estimate Request Details**

Previous Estimate Request

\* Intended budget or budget range?

\* Intended timeline for completion?

\* Funding source identified?

\* Any restrictions?

Note: If additional details are needed please upload a document below and mention in the description.

**3**

**Billing Type**

Billing Type Non-Building

Add | Remove

Apply Filters Clear Filters

**4**

**Requested Chart String(s)**

Add Remove

Apply Filters Clear Filters

<input type="checkbox"/>	Request Chart String	Requested Percent	Revenue Account Code	Chart String Status	Name	Description
No data to display						
<input type="radio"/>	Budgetary Allowance Cost Estimate Request					Request an estimate. Please be specific in the request.
<input checked="" type="radio"/>	Detailed Construction Estimate Request					Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input type="radio"/>	Perform Estimated Work					Perform estimated work. Please clearly identify estimate. (Department Charge)

Items per page: 500 1 - 3 of 3 items 1 of 1 pages

## ▼ PROCESS

3.1

### Locate Completed Estimate

- 1) Once the appropriate shop has reviewed the estimate, you will receive an email notifying you that the request is complete.
- 2) The **Estimate Request Form** will be attached to that email.
- 3) For more information, you can click the **link** at the bottom of the email to open the Estimate Request record in Facilities Connect.

## ▶ INFORMATION

1

### Request Estimate Request (SR-1182160-0) in 2020 Ridge 00413 has been Completed

😊 ↩ Reply ↩ Reply All ➔ Forward 📧 ⋮

2

Completed Estimate Request .xls

66 KB

Your Request for Estimate Request (SR-1182160-0) in 2020 Ridge 00413 was Completed on 10/17/2024 13:30:19.

**DO NOT REPLY TO THIS EMAIL.** In the event that you need to modify or cancel your service request, please contact Facilities Customer Service directly at 847-491-5201 (Evanston) or 312-503-8000 (Chicago).

### Links

- Click To Open the Linked Record

3

Thu 10/17/2024 1:30 PM

### Links

- [Click To Open the Linked Record](#)



PROCESS

Alternately, you can search through your request history to find the estimate record.

From the **Home** page,

- Click to maximize your **My Request History** section.

<<Upon clicking, the **My Request History** report will open in the main window >>

INFORMATION

**Home**

**Request Central**  
Select the type of request you would like to make

**Facilities**  
Request facility repair

- Alarm Response
- Bike
- Electrical & Lighting
- Elevator
- Estimate
- Event Support
- Exterior Services/Grounds
- Furniture & Appliances
- General Repairs & Maintenance
- Health & Safety
- Housekeeping
- Key/Lock/Access
- Pest & Animal Control
- Plumbing & Leaks
- PM Corrective Maintenance
- Risk/Facilities
- Temperature
- University Vehicle Maintenance
- Vandalism

**My Completed Requests**

Request ID	Request Classification	Description	Created Date/Time
SR-1134909	Window Leak	There is a leak in the 4th floo...	02/22/2023 13:02:44

Items per page: 10 | 1 - 1 of 1 items | 1 of 1 pages

**My Request History**

My Request History

Request ID	Created Date/Time	Service Requested	Description
SR-1182160	10/17/2024 13:19:27	Budgetary Allowance Cost Estimate Request	We want to update
SR-1182159	10/17/2024 09:45:44	Gas Alarm	TEST
SR-1182126	08/06/2024 11:59:55	Door Alarm	TEST for Notificatio
SR-1134909	02/22/2023 13:02:44	Window Leak	There is a leak in th
CC-1182127	08/06/2024 13:26:51	Fire Alarm	TEST of Notificatio
1001483	06/11/2024 14:37:31	Report Request	TEST

Items per page: 10 | 1 - 6 of 6 items | 1 of 1 pages

**FM Reports**

- My Responsible Spaces

**All Service Requests**

**O&M Reports**

- All Tasks by Resource
- Daily Service Request Report
- Open Contractor and NUPD Work Tasks
- Time Entries Pending Approval
- Campus Mapping
- Notification History
- Active Work Tasks
- Estimate Requests

**My Bookmarks**

- Project Costing Audit Report
- Revenue Analysis for Capital Projects
- Revenue Analysis of Work Task Job Cost
- Work Order Audit Report

## PROCESS

5) Click on the desired **Service Request**.

<<Upon clicking, the *Service Request record* will open in a new window >>

## INFORMATION

Northwestern | FACILITIES CONNECT

Home Personalize Open In New Window My Bookmarks

My Request History Apply Filters Clear Filters Refresh Download Settings

Request ID	Created Date/Time	Service Requested	Description	Status	Requested For	Requested By
<a href="#">SR-1182160</a>	10/17/2024 13:19:27	Budgetary Allowance Cost Estimate Request		Completed	Marshall,CJ	Marshall,CJ
<a href="#">SR-1182159</a>	10/17/2024 09:45:44	Gas Alarm	TEST	Issued	Marshall,CJ	Marshall,CJ
<a href="#">SR-1182126</a>	08/06/2024 11:59:55	Door Alarm	TEST for Notifications Reque...	Issued	Marshall,CJ	Reiter,Scott
<a href="#">SR-1134909</a>	02/22/2023 13:02:44	Window Leak	There is a leak in the 4th floo...	Completed	Johnson,Christina M	Johnson,Christina M
<a href="#">CC-1182127</a>	08/06/2024 13:26:51	Fire Alarm	TEST of Notifications via Co...	Issued	Rajani,Nasreen	Marshall,CJ
<a href="#">1001483</a>	06/11/2024 14:37:31	Report Request	TEST	Issued	Marshall,CJ	Marshall,CJ

Items per page: 10 1 - 6 of 6 items 1 of 1 pages



## PROCESS

- 6) Scroll all the way to the bottom of the record and locate the Work Task link, click on the **Work Task** to open the record.

<<Upon clicking, the **Work Task** record will open in a new window >>

## INFORMATION

Estimate Request: SR-1182160-0 Add To Bookmarks Print ?

General Graphic Notifications Notes & Documents System Workflow Instance Associations Audit Actions Re-Open More

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

**General**

Request ID SR-1182160 Status Completed

\* Request is for  Me  Someone Else

**Requested For**

Should I be prevented from viewing this record?  No

**Estimate Request Details**

\* Intended budget or budget range? 25000

\* Intended timeline for completion? January 2025

\* Funding source identified? Yes

\* Any restrictions? none

Note: If additional details are needed please upload a document below and mention in the description.

**Billing Type**

Billing Type No Charge

**Describe Your Request (Required)**

We want to update training room with fresh paint and new carpeting. Also adding shelving along the back of the room.

**Work Task**

Task ID	Task Name	Created Date	Description	Status	Total T
WT-1404424	WT-1404424 - Maintenance Project, 2020 Rid...	10/17/2024 1...	We want to update training room with paint and new carpeting. Also a...	Completed	

6

## PROCESS

- 7) Navigate to the Notes & Documents tab.
- 8) Locate the Related Documents section and click on the **Completed Estimate Form** attached.

<<Upon clicking, the **Document download page** will open in a new window >>

## INFORMATION

Work Task: WT-1404424-WT-1404424 - Maintenance Project, 2020 Ridge, Budgetary Allowance Cost Estimate Request

General Work Task Info Job Cost Work Details Resources Procedures Notifications **Notes & Documents** Workflow Instance

(Optional): Reference related documents or review comments to the record.

**Comments** Add Remove

Apply Filters Clear Filters

<input type="checkbox"/>	!	Comment Ty...	Created By	Reference D...	Comment
		Contains	Contains	Equals	Contains
<input type="checkbox"/>		Note	Marshall,CJ	10/17/2024	Budget: 25000; Timeline: January 2025; Funding: Yes; Restrictions: none
<input type="checkbox"/>		Note	Marshall,CJ	10/17/2024	Preferred Access Time: Anytime; Does Requester need to be Present During Visit: No; Billing Type: No Charge

Items per page: 15 1 - 2 of 2 items 1 of 1 pages

**Related Documents** Find Remove Upload

Apply Filters Clear Filters

<input type="checkbox"/>	!	Document Name	Modified By	Created Date/Time	Document Description
<input type="checkbox"/>		Completed Estimate Request .xls	Smith, Brian - 1096007	10/17/2024 13:30:01	

Items per page: 20 1 - 1 of 1 items 1 of 1 pages

Close Re-Open Save Save & Close More x

## ▼ PROCESS

- 9) Click on the **Download** button.
- 10) The document will appear in the upper right-hand corner. Click the **document** to open.

<<Upon clicking, the *Estimate Request Form* will open in a new window >>

## ▶ INFORMATION

The screenshot shows a document viewer window titled "Document: Completed Estimate Request .xls". The window has a menu bar with "Print Preview", "Description", "Comments", "Discussions", "Files Referen...", and "Download...". A red circle with the number "10" is positioned above the "Download..." button. Below the menu bar, there is a text area with "(Optional): Display the formatted document." and a large empty space. In the center of this space, the text "Preview is not available for this document type." is displayed. Below this text, a red circle with the number "9" is positioned above a blue "Download" button. In the top right corner of the window, a notification box is visible, containing a document icon, the text "Completed Estimate Request", and "66.0 KB • Done". A red box highlights this notification box.

## PROCESS

3.2

### Review the Estimate Request Form

#### Requestor Instructions Tab

- 1) **How to Read this Estimate:** details about each section of the Estimate Form.
- 2) **How to Proceed:** Next steps if you approve the estimate.
- 3) **Questions:** Facilities contact information.

## IMPORTANT

If you do not wish to continue with completing the estimate work, simply save the completed form for your records.

The completed form will be valid for **90 days** if you decide to have the work completed at a later date.

Otherwise, a new **Estimate Request** will be required.

	A	B	C	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
2																		
3			<b>How to Read This Estimate:</b>															
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		
13																		
14																		
15																		
16																		
17																		
18																		
19																		
20																		
21																		
22			<b>How To Proceed:</b>															
23																		
24																		
25																		
26																		
27																		
28																		
29																		
30																		
31																		
32																		
33																		
34																		
35																		
36			<b>Questions?</b>															
37																		
38																		
39																		
40																		
41																		
			<b>Requestor Instructions</b>	Budgetary Allowance Estimate														



▼ PROCESS

3.2 Review the Estimate Request Form

Estimate Tab

- 4) **Project Details:** project information, including the **Estimate Number**. This is a unique number and will be used as the reference for the estimate.
- 5) **Description of Work:** provides a narrative of the scope that was estimated. This will largely be information you provided to Facilities but may also include supplemental details.
- 6) **Clarifications/Assumptions/Exclusions:** additional information that is pertinent to the costs that were estimated. Please review this section carefully to ensure that the full scope of work is aligned with your expectations.

► INFORMATION

Northwestern   FACILITIES	
BUDGETARY ALLOWANCE COST ESTIMATE	
<p><b>4 PROJECT:</b> Training Room Refresh</p> <p><b>Contact:</b> CJ Marshall</p> <p><b>Dept.:</b> Business Infrastructure</p> <p><b>Phone:</b></p> <p><b>e-mail:</b></p>	<p><b>Estimate No.:</b> 567891</p> <p><b>Date Prepared:</b> 10/1/2024</p> <p><b>Building:</b> 2020 Ridge Ave</p> <p><b>Bldg. no.:</b> 8844</p> <p><b>Room:</b> 404</p>
<p><b>5 Description of Work:</b></p> <p>Fresh paint and new carpenting. Also adding shelves along the back of the room</p>	
<p><b>6 Clarifications/Assumptions/Exclusions:</b></p> <p>standard paint to be used, carpeting and shelving to be purchased by NU preferred vendor,</p>	
<p><u>Budgetary Range</u></p>	
Detailed Estimate, if Required	
Design Services	
Construction Costs	\$ 12,500 -
Contingency	\$ 2,000 -
Risk	
Permit Fees	
Management Fees & Shop Support	-
<b>Total Project</b>	<b>\$ 14,500 - \$ -</b>
Alternates (Additional cost):	
<p><u>Range of Weeks</u></p>	
Schedule Estimate (excluding alternates):	
Construction Estimate	
Project Approval	
Design	
Construction Bidding	
< >	Requestor Instructions <b>Budgetary Allowance Estimate</b> +



▼ PROCESS

3.2 Review the Estimate Request Form

Estimate Tab

- 7) **Cost Estimate Elements:** provides a high-level range of costs for the main scope elements.
  - Any elements that are not applicable to the scope are noted as N/A.
  - Any Alternate scope elements are listed separately, and are NOT included in the Total Project budget range.
  
- 8) **Schedule Estimate:** provides information on an expected timeline for the major project milestone steps and are listed in weeks following full approval of the estimate.

► INFORMATION

# Northwestern FACILITIES

## BUDGETARY ALLOWANCE COST ESTIMATE

<b>PROJECT:</b> Training Room Refresh	<b>Estimate No.:</b> 567891
<b>Contact:</b> CJ Marshall	<b>Date Prepared:</b> 10/1/2024
<b>Dept.:</b> Business Infrastructure	<b>Building:</b> 2020 Ridge Ave

standard paint to be used, carpeting and shelving to be purchased by DU preferred vendor.

**7 Cost Estimate Elements:**

	<u>Budgetary Range</u>
Detailed Estimate, if Required	n/a
Design Services	n/a
Construction Costs	\$ 12,500 -
Contingency	\$ 2,000 -
Risk	n/a
Permit Fees	n/a
Management Fees & Shop Support	n/a -
<b>Total Project</b>	<b>\$ 14,500 - \$ -</b>

Alternates (Additional cost):

**8 Schedule Estimate (excluding alternates):**

	<u>Range of Weeks</u>
Construction Estimate	
Project Approval	
Design	
Construction Bidding	
Permitting, Lead Time, Construction	2 - 3
<b>Total time from approval:</b>	<b>2 - 3</b>

This estimate is valid for 90 days and is limited to the scope elements included above.  
 Unforeseen conditions or additional code requirements may impact the pricing and/or timelines

- This work may require enabling projects, to be confirmed during design or Detailed estimate
- Design documents will be required to complete this work
- Design documents will be required to perform a Detailed estimate

Requestor Instructions

Budgetary Allowance Estimate

+

## ▼ PROCESS

3.2

## Review the Estimate Request Form

Estimate Tab

9) **Notes:** identifies any supplemental information around this estimate or subsequent steps in the project process.

10) **Estimator:** the shop personnel that completed the Estimate.

## ▶ INFORMATION

## Northwestern | FACILITIES

## BUDGETARY ALLOWANCE COST ESTIMATE

**PROJECT:** Training Room Refresh**Estimate No.:** 567891**Contact:** CJ Marshall**Date Prepared:** 10/1/2024**Dept.:** Business Infrastructure**Building:** 2020 Ridge Ave**Phone:****Bldg. no.:** 8844**e-mail:****Room:** 404

Permitting, Lead Time, Construction

3

Total time from approval:

2 - 3

9

**Notes:**

This estimate is valid for 90 days and is limited to the scope elements included above.

Unforeseen conditions or additional code requirements may impact the pricing and/or timelines

- This work may require enabling projects, to be confirmed during design or Detailed estimate
- Design documents will be required to complete this work
- Design documents will be required to perform a Detailed estimate

The following reviews/approvals may be required to initiate this work:

- Resource Planning Committee
- Capital Facilities Workgroup
- City of Evanston / City of Chicago
- Provost (eg, Reassignment or Change in Use of Space)

Provost (eg, Reassignment or Change in Use of Space)

10

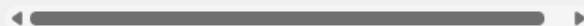
Estimator: Brian Smith

Reviewer:



Requestor Instructions

Budgetary Allowance Estimate





▶ INFORMATION

3.2  
**Review the Estimate Request Form**

Full view of the Estimate Form

▶ PROCESS

Northwestern FACILITIES			
BUDGETARY ALLOWANCE COST ESTIMATE			
<b>PROJECT:</b>	Training Room Refresh	<b>Estimate No.:</b>	567891
<b>Contact:</b>	CJ Marshall	<b>Date Prepared:</b>	10/1/2024
<b>Dept.:</b>	Business Infrastructure	<b>Building:</b>	2020 Ridge Ave
<b>Phone:</b>		<b>Bldg. no.:</b>	8844
<b>e-mail:</b>		<b>Room:</b>	404
<b>Description of Work:</b>			
Fresh paint and new carpentering. Also adding shelves along the back of the room			
<b>Clarifications/Assumptions/Exclusions:</b>			
standard paint to be used, carpeting and shelving to be purchased by NU preferred vendor,			
<b>Cost Estimate Elements:</b>			
		<b>Budgetary Range</b>	
Detailed Estimate, if Required	n/a		
Design Services	n/a		
Construction Costs	\$ 12,500	-	
Contingency	\$ 2,000	-	
Risk	n/a		
Permit Fees	n/a		
Management Fees & Shop Support	n/a		-
<b>Total Project</b>	<b>\$ 14,500</b>	<b>- \$</b>	<b>-</b>
Alternates (Additional cost):			
<b>Schedule Estimate (excluding alternates):</b>			
		<b>Range of Weeks</b>	
Construction Estimate			
Project Approval			
Design			
Construction Bidding			
Permitting, Lead Time, Construction	2	3	
<b>Total time from approval:</b>	<b>2</b>	<b>3</b>	
<b>Notes:</b>			
This estimate is valid for 90 days and is limited to the scope elements included above.			
Unforeseen conditions or additional code requirements may impact the pricing and/or timelines			
<input type="checkbox"/>	This work may require enabling projects, to be confirmed during design or Detailed estimate		
<input type="checkbox"/>	Design documents will be required to complete this work		
<input type="checkbox"/>	Design documents will be required to perform a Detailed estimate		
The following reviews/approvals may be required to initiate this work:			
<input type="checkbox"/>	Resource Planning Committee		
<input type="checkbox"/>	Capital Facilities Workgroup		
<input type="checkbox"/>	City of Evanston / City of Chicago		
<input type="checkbox"/>	Provost (eg, Reassignment or Change in Use of Space)		
Estimator: <u>Brian Smith</u>			
Reviewer: _____			



## ▼ PROCESS

4.1

**Perform Estimated Work Request**From **Request Central**,

- 1) Ensure the toggle arrow is pointing down to reveal the available **Request Categories**.
- 2) Click on **Estimate**.

<<Upon clicking, the *Service Request Form* screen will open in the main window>>

## ▶ INFORMATION

Northwestern | FACILITIES CONNECT

Home

Request Central

Select the type of request you would like to make

Facilities Request facility repair

Reminders - Request Central

My Active Requests

Request ID	Request Classification	Description	Created Date/Time	Requested For	Requested By
SB-	Doorbell	ring	01/31/2022 09:03:45	Berry,Emily a	Berry,Emily a
		ha... etin	01/24/2022 14:14:17	Berry,Emily a	Berry,Emily a
		requesting a	01/24/2022 13:51:25	Berry,Emily a	Berry,Emily a
		out in my please fix	01/24/2022 13:22:09	Berry,Emily a	Berry,Emily a
		ting to be (more details called) this is n ...	10/14/2021 14:24:05	Ebels Duggan,Sea Christopher	
		from a ned friend. an we do? hanks, Emily	07/20/2021 08:17:45	Berry,Emily a	

Facilities Request facility repair

- Alarm Response
- Bike
- Electrical & Lighting
- Elevator
- Estimate**
- Exterior Services/Grounds
- Furniture & Appliances
- General Repairs & Maintenance
- Health & Safety
- Housekeeping
- Key/Lock/Access
- Pest & Animal Control
- Plumbing & Leaks
- Temperature
- Vandalism

Northwestern | FACILITIES CONNECT

Home

Requests

Request Central

Select the type of request you would like to make

Facilities Request facility repair

Reminders - Request Central

My Active Requests

My Completed Requests

Facilities Request facility repair

Request facility repair

- Alarm Response
- Bike
- Electrical & Lighting
- Elevator
- Estimate**
- Exterior Services/Grounds
- Furniture & Appliances
- General Repairs & Maintenance
- Health & Safety
- Housekeeping
- Key/Lock/Access
- Pest & Animal Control
- Plumbing & Leaks
- Temperature
- Vandalism

Request ID	Request Classification	Description	Created Date/Time	Requested For	Requested By
021	Estimate Request				
021	Estimate Request				
020	Refrigerant				
020	New or Replacement Key				
020	Painting				

## PROCESS

To complete the Service Request Form, fill in the required fields,

- If the request is for you, keep the **Me** radio button checked.
- If you want an alternative person to receive notifications, select the **Someone Else** radio button. Fill in the contact details.

## INFORMATION

For a detailed walkthrough of entering a Service Request, please refer to the [Create a New Service Request](#) training guide.

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Graphic Notifications Notes & Documents System Workflow Instance Associations Audit Actions Create Draft Submit x

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

3 **Request is for**  Me  Someone Else

Request Details Select From Floor Plan

4 **Requested For**

Net ID: mrx2009

\* Name: Ridge, Matthew

Work Phone:

Email: matt.ridge@northwestern.edu

Preferred Access Time:

\* I need to be present during your visit?  Yes  No

**Billing Type**

Billing Type:

**Service Request**

Name	Description
<input type="radio"/> <a href="#">Budgetary Allowance Cost Estimate Request</a>	Request an estimate. Please be specific in the request.
<input type="radio"/> <a href="#">Detailed Construction Estimate Request</a>	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input type="radio"/> <a href="#">Perform Estimated Work</a>	Perform estimated work. Please clearly identify estimate. (Department Charge)

Items per page: 500 1 - 3 of 3 items 1 of 1 pages

## PROCESS

- 5) Click on the **Search** buttons and select a **Building, Floor, and Room**.
- 6) Click on the **Preferred Access Time** drop-down menu and select a timeframe.
- 7) Click on the **Yes** or **No** radio button to decide whether the **Requestor** needs to be present during the work.

## INFORMATION

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Graphic Notifications Notes & Documents System Workflow Instance Associations Audit Actions Create Draft Submit x

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

\* Request is for  Me  Someone Else

**Request Details** Select From Floor Plan

**If this is an emergency please call 911.**  
For urgent Facilities issues such as a leak, drastic change in temperature, or power outage, please call Facilities Customer Service at 847-491-5201 (Evanston), or 312-503-8000 (Chicago).

\* Building Abbott Hall 5

Floor 03

Room 00301

Organization Z6ENG

\* Preferred Access Time Anytime 6

\* I need to be present during your visit?  Yes  No 7

**Billing Type**

Billing Type

**Service Request**

Name	Description
<input type="radio"/> Budgetary Allowance Cost Estimate Request	Request an estimate. Please be specific in the request.
<input type="radio"/> Detailed Construction Estimate Request	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input type="radio"/> Perform Estimated Work	Perform estimated work. Please clearly identify estimate. (Department Charge)

Items per page: 500 1 - 3 of 3 items 1 of 1 pages

## PROCESS

- 8) Select the **Perform Estimated Work** from the Service Request options by clicking on the **radio button** to the left.

<<Upon clicking, the *Estimate Request Details* section will appear above >>

## INFORMATION

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Graphic Notifications Notes & Documents System Workflow Instance Associations Audit Actions Create Draft Submit x

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

\* Request is for  Me  Someone Else

**Request Details** Select From Floor Plan

**If this is an emergency please call 911.**  
For urgent Facilities issues such as a leak, drastic change in temperature, or power outage, please call Facilities Customer Service at 847-491-5201 (Evanston), or 312-503-8000 (Chicago).

\* Building

Floor

Room

Organization

\* Preferred Access Time

\* I need to be present during your visit?  Yes  No

**Billing Type**

Billing Type

**Service Request**

Name	Description
<input type="radio"/> Budgetary Allowance Cost Estimate Request	Request an estimate. Please be specific in the request.
<input type="radio"/> Detailed Construction Estimate Request	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input checked="" type="radio"/> Perform Estimated Work	Perform estimated work. Please clearly identify estimate. (Department Charge)

8

## ▼ PROCESS

9) In the **Estimate Request Details** section, complete the following information:

- **Previous Estimate Request** – use the Search button to locate the related requests entered previously.

(Optional)

- **Intended budget or budget range** – estimated amount.
- **Intended timeline for completion** – estimated date range.
- **Funding source** – select Yes or No from dropdown
- **Restrictions** – Any restrictions around implementing the work.

For example:

- *if the work can only be performed outside of business hours*
- *must be completed during a specific calendar window*
- *if there are constraints around noise/vibration or other disruptions, etc.*

10) Please note that a Chartstring is **required**.

11) Click the **Add** button to enter the Chartstring information in the request.

## ▶ INFORMATION

Northwestern | FACILITIES CONNECT

Home / Organization: FADMIN

### Estimate Request Details

\* Previous Estimate Request

Intended budget or budget range?

Intended timeline for completion?

Funding source identified?

Any restrictions?

**Note: If additional details are needed please upload a document below and mention in the description.**

### Billing Type

Billing Type: Non-Building

### Requested Chart String(s)

11 Add Remove

Request Chart String	Requested Percent	Revenue Account Code	Chart String Status	Name	Description
No data to display					

Name	Description
<input type="radio"/> Budgetary Allowance Cost Estimate Request	Request an estimate. Please be specific in the request.
<input type="radio"/> Detailed Construction Estimate Request	Request a detailed construction estimate. Please be specific in the request. (Department Charge)
<input checked="" type="radio"/> Perform Estimated Work	Perform estimated work. Please clearly identify estimate. (Department Charge)

Items per page: 500 | 1 - 3 of 3 items | 1 of 1 pages

## ▼ PROCESS

- 12) Fill in any additional details about the project or estimate in the **Description box**.
- 13) If needed, use the **Add** button to insert additional **comments**.
- 14) If needed, use the **Upload** button to insert **related documents**.

## ▶ INFORMATION

Northwestern | FACILITIES CONNECT

Home /

**12** Describe Your Request (Required)

Other Locations

Find | Remove

Apply Filters Clear Filters

<input type="checkbox"/>	!	Image	Name	Hierarchy Path	Parent Building	Parent Floor
No data to display						

**13** Add Remove

Apply Filters Clear Filters

<input type="checkbox"/>	!	Comment Type	Created By	Reference Date	Comment
No data to display					

Upload documents, pictures, emails, etc. to help aid in the completion of your work request

**14** Upload

Apply Filters Clear Filters

<input type="checkbox"/>	!	Document Name	Modified By	Created Date/Time	Document Description
No data to display					

## PROCESS

- 15) Once all the information has been entered, click the **Submit** button at the top or the bottom of the form.

<<Upon clicking, the Service Request form will close, and you will be re-directed to the home page>>

## INFORMATION

If you have any questions on the Estimate Request Process, reach out to Facilities Customer Service at (847) 491-5201 (Evanston) or (312) 503-8000 (Chicago).

Northwestern | FACILITIES CONNECT

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

General Notifications Audit Actions

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

\* Request is for  Me  Someone Else

Request Details Select From Floor Plan

**If this is an emergency please call 911.**  
**For urgent Facilities issues such as a leak, drastic change in temperature, or power outage, please call Facilities Customer Service at 847-491-5201 (Evanston), or 312-503-8000 (Chicago).**

\* Building 2020 Ridge

Floor 04

Room 00413

No data to display

Work Task

<input type="checkbox"/>	T...	Task Name	Created Date	Description	Status	Total Time L...
No data to display						

Create Draft **Submit**