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

Review the general information in the General and Details sections.

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.

\[\text{INFORMATION}\]

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.
OPERATIONS & MAINTENANCE

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DIRECTIONS:

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Continued. To upload completed Estimate documents:

4c Click on the Upload button.

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).