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:

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

1a Click on the Maximize button.

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

1b Enter Estimate into the Request Class column and press enter. Layer search filters if necessary.

1c Once you have located the desired Work Task, click on the Work Task Record link to open.
PERFORM ESTIMATED WORK

DIRECTIONS:

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

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

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

   3a Click on the Notes & Documents tab.

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

   3b Click on the link to open the Estimate Form.
SUPERVISOR

PERFORM ESTIMATED WORK

DIRECTIONS:

3c Review the completed Estimate Form and verify the details are correct.

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

3c Review the completed Estimate Form and verify the details are correct.

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).