Submitting an Estimate in AiM

Estimators will receive an email notification when a project has been assigned to them in order to prepare an estimate.

Login to AiM, and locate the Workflow Count channel in the upper right section of the Workdesk:



Click the Words "Capital Project" to see a list of the items assigned to you.

Click on the Date hyperlink of the project you want to open/review.

You will see any documents currently attached to the project, for example, the PIF, Scope, Strategy document, etc.

You may click the thumbnail to open and review any of these attachments.

When ready to submit your estimate:

- 1) Go to the project itself to enter the total estimate amount:
 - a) Click on the blue hyperlink with the project #.

AIM = Workflow Response WILLIAM						
K Back Edit	Search					
Action	2		Workflow	219539		
Download Email	Estimate Project ~ F	repare estimate and attach as a related docum		Request Estimate - Use this workflow to request an		
View Notes Log						
<u>Status History</u>	Capital Project	14-100	Responsibility	ESTIMATOR		
		Comer Hall - Provide An Exterior Fire		Estimator		
	Document L	isting				Reset Filter

b) Click on the blue EDIT button, scroll down to the Project Component Group section, and click on the **"Construction"** component.

Project Component Group
Component Group
PRE-DESIGN
DESIGN
CONSTRUCTION
FF AND E
CONTINGENCY

c) Enter the estimate total amount in the **"Planned Budget"** field for the Construction component:

AiM Project Componen	t Group			WILLIAM	About	Help	Logo
View	CONSTRUCTION	Last Edited by CHARLES BERRY On 05/18/2016 02:14 PM	Group Sequence	200			
Extra Description	CONSTRUCTION						
Labor Charges							
Notes Log							
Related Documents			Planned Budget	<	1400	00	>

d) Click on Done \rightarrow Save.

Now, you can upload your Estimate and respond to the Project's Workflow to route it to the Chief Estimator.

- 2. Go back to the AiM Workdesk.
- 3. From your Workflow Count channel, go to the Workflow Response screen of the project that you are updating.
 - a) Click EDIT on the Workflow Response page.
 - b) Click the blue Add button to upload your Estimate.

Save Cancel								AiM		
View <u>Notes Log</u> Status History	2 Estimate Project				Last Edited by WALKER DAVIS On 08/19/2015 01:35 PM	Workflow	7651 Estimate Project			
						Response	•			
	Capital Project	14-035		Responsibility	ESTIMATOR			1		
		Lowder Hall - Suite 025, Interior Refurbis	hments & New		Estimator			L L		
	Document Li	sting					Attach Link	Remove Add		
	🔲 Thumbnail	Title	Current Version	Document Type	Extra Description			Related On		
	Click to view	Status Flows by Project Type xlsx	1.0	SCOPE				Aug 11, 2015		
		15002 PSPO to Mark A 02162015.pdf	1.0	ESTIMATE				Aug 19, 2015		
		Capital Project	1.0	GENERAL	FiRE: CAPITALPROJECT = 14-035			Aug 11, 2015		

c) Click Browse and locate the estimate you prepared.

Please select document(s) to load:	
Browse No files selected.	

- d) Click Next.
- e) In the Type field, click the Zoom and select "ESTIMATE".
- f) Click Next.
- g) Click Next again to bypass the Attributes screen.
- h) Click Next.
- i) Click Next again to bypass the Permissions screen.
- j) You have now uploaded the document and will be returned to the Workflow Response screen.
- 4. When you are ready to Submit the estimate for review, select "**Prepare/Submit Estimate**" from the Response dropdown.

Workflow	7651	
	Estimate Project	
Response	PREPARE/SUBMIT ESTIMATE 👻	
		Estimate Project

5. Press Save.

Your estimate has now been submitted to the Chief Estimator for review.