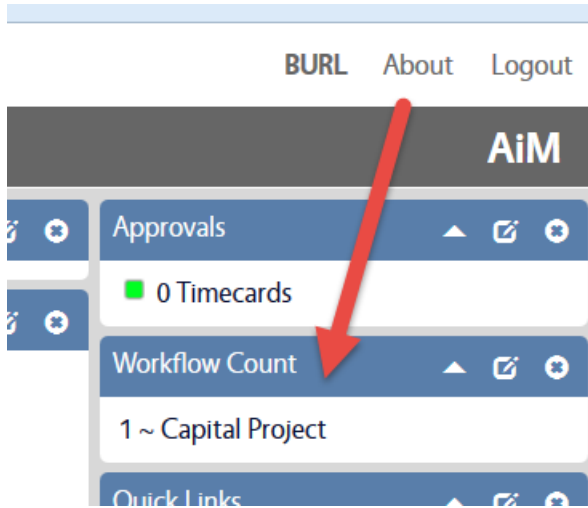


EST SCOPE REVIEW

The Chief Estimator role will receive a workflow task to review Scopes submitted by the design project manager. To review the scope, login to AiM using your Auburn ID and password.

On your Workdesk, locate the Workflow Count channel. Click the words “Capital Project” to see the listing of project workflows currently assigned to you.



Capital Project					
Date	Source Record	Description	Workflow Description	Responsibility	
Jul 22, 2015 03:16 PM	15-184	Chemistry Building - Rm 357, Provide Power For A New Autoclave	Estimating Scope Review	CHIEF ESTIMATOR	

The screenshot above shows us that the Chief Estimator currently has 1 project workflow: Estimating Scope Review for project 15-184.

Click the date hyperlink to review the scope and respond to the workflow. The document type column will identify the documents that were flagged as "SCOPE" documents by the project lead.

The screenshot shows the 'Workflow Response' interface. At the top, there are navigation buttons for 'Back' and 'Edit', and a search bar. The main content area displays a document listing table. A red arrow points to the first row of the table, which is highlighted in blue. The table has the following columns: Thumbnail, Title, Current Version, Document Type, Extra Description, and Related On. The first row contains a thumbnail for 'E1.0.pdf', the title 'E1.0.pdf', current version '1.0', document type 'SCOPE', and related on date 'Jul 24, 2015'. The second row contains a thumbnail for '15-184 Scope of Work (Signed).pdf', the title '15-184 Scope of Work (Signed).pdf', current version '1.0', document type 'SCOPE', and related on date 'Jul 24, 2015'. The third row contains a thumbnail for 'PIF - Project No. 15-184.pdf', the title 'PIF - Project No. 15-184.pdf', current version '1.0', document type 'PIF', and related on date 'Jul 24, 2015'. Above the table, there is a search bar with a 'contains' dropdown and 'From' and 'To' date pickers. A 'Reset' button and a 'Filter' button are also present.

Clicking the thumbnail will open the attachment.

Once you have reviewed the documents, click Edit to record your response.

The screenshot shows the 'Capital Project' interface. At the top, there are navigation buttons for 'Edit', 'New', 'Search', and 'Br'. Below this, there is a section for 'Action' with a yellow highlight and the text '15-188'. Below the 'Action' section, there is a 'Response' dropdown menu.

This allows you to select the Response dropdown

The screenshot shows the 'Response' dropdown menu. The dropdown is open, showing a list of options. The first option is 'Construction Scope Review'. Below this, there is a search bar and a 'Filter' button.

There are 2 possible responses: Approved or Revisions Required. If you select Revisions Required, please use the Notes Log to record your conditions/concerns.

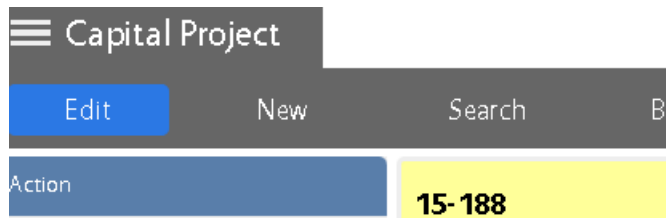
ESTIMATE PROJECT

When a project reaches the ESTIMATE PROJECT status, a workflow is launched to the Chief Estimator. At this point, the chief estimator has already reviewed the scope to ensure enough detail is included for an estimate.

When the ESTIMATE PROJECT workflow is received, the Chief Estimator should first update the project; assigning an ESTIMATOR.

To assign an Estimator, open the project and click EDIT.

Note: You can drill into the project through the Workflow, or by using the Quick Search on your WorkDesk.



Next, Click on the Project Team link under the View menu on the left hand side of the screen:

Capital Project

Save

Cancel

View

[Extra Description](#)

[Workflow](#)

Account Setup

Planned Budget Forecast

[Project Team](#)

Milestones

Activities

[Property/Asset List](#)

Labor Charges

Work Orders

Issues

Received Email

Notes Log

[User Defined Fields](#)

[Status History](#)

[Related Documents](#)




Scroll down on the team until you see the ESTIMATOR responsibility. You can click the Zoom to see a list of employees, or enter an id.

Project Team

Done Cancel

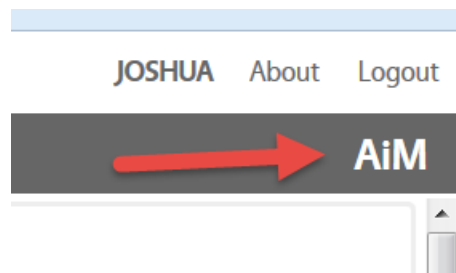
<input type="checkbox"/>	22	DIR DESIGN	ADERHMW MARK ADERHOLDT	3348449194	ADERHMW@AUBURN.EDU
<input type="checkbox"/>	25	UNIV ARCHITECT	JJC0019 JAMES CARROLL	3348448406	JJC0019@AUBURN.EDU
<input type="checkbox"/>	30	CONSTR PM	SUMLIBQ BURL SUMLIN	3348449145	SUMLIBQ@AUBURN.EDU
<input type="checkbox"/>	35	AD CONSTR	SUMLIBQ BURL SUMLIN	3348449145	SUMLIBQ@AUBURN.EDU
<input type="checkbox"/>	38	DIR CONSTRUCTION	WALLEJM JAMES WALLEY	3348449239	WALLEJM@AUBURN.EDU
<input type="checkbox"/>	42	EXEC DIR	FULLEDS DOUGLAS FULLER	3347030377	FULLEDS@AUBURN.EDU
<input type="checkbox"/>	50	CHIEF ESTIMATOR	DAVISW4 WALKER DAVIS	3347030050	DAVISW4@AUBURN.EDU
<input type="checkbox"/>	55	ESTIMATOR			



Press **Done** and then **Save**.

Now that the Estimator has been assigned, respond to the workflow so that the estimator receives the next step.

Click AiM (located on the top right of the screen) to return to the main Workdesk.



Locate the Workflow Count Channel.

Click the Capital Project link.

A listing of the Capital Project workflows currently assigned to you is displayed.

Located the ESTIMATE PROJECT workflow for the project you just assigned, and click the date hyperlink.

Capital Project				
Date	Source Record	Description	Workflow Description	Responsibility
Jul 28, 2015 09:23 PM	15-184	Chemistry Building - Rm 357, Provide Power For A New Autoclave	Estimate Project	CHEF ESTIMATOR
Jul 29, 2015 09:28 AM	IT_1	Facilities Building 1: Renovate former IT area, creating an open workspace.	Estimate Project	CHEF ESTIMATOR

Click EDIT.

Add any relevant NOTES to the Notes Log.

Drop down the RESPONSE menu, and select "Prepare/Submit Estimate". This will move the workflow forward to the next step, which is notifying the Estimator to prepare an estimate.