

Estimators: Formal Construction Estimates

FM construction estimates are initiated by a project manager in LRFP or FM Construction Contract Services. It is the beginning of a *formal* estimating process in AiM that ties into AiM Capital Planning & Project Management.

Your AiM estimate will include your department costs as well as the indirect markup automatically applied to materials and services. The estimate will be created in AiM, and the standard **FM Formal Estimate** form will be generated in AiM and emailed to the CPPM project manager. *Note that estimates recorded on spreadsheets, word documents and other formats will not be accepted.*

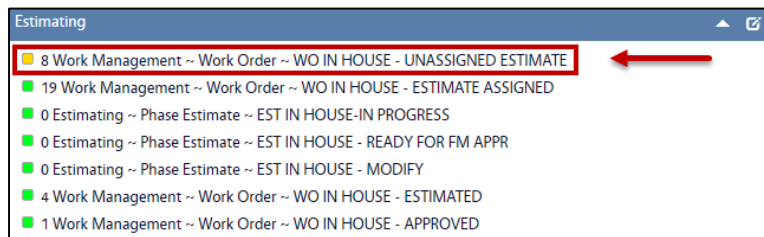
The CPPM project manager will include your estimate along with other department or OCCM estimates, charges and fees that may be applied to this project, and he or she will prepare a *final* estimate for the requesting parties.

In addition to construction related estimates, formal estimates may be produced by zone managers to build estimates for deferred maintenance projects. Energy Services will also use this process to prepare pricing for RFP (Request for Proposal) documents prior to bid.

Estimate Process

Shop Manager – Assigning Estimate Tasks to Estimators

1. Within the **Construction Estimates** channel there is a link called **Unassigned Estimates**.



2. Click: **Unassigned Estimates** query and select a work order.
3. Click: **Edit**
4. To assign an **Estimator** on a **Phase**, click: **Phase Number** link at the bottom of the work order.

Phase							Add
Phase	Description	Location	Shop	Work Code	Priority	Status	
001	PLEASE HAVE INHOUSE CONSTRUCTION PROVIDE AN ESTIMATE FOR RE-CONNECTION OF A MIXING VALVE AND PIPING FOR A HAND HELD EYE WASH STATION AND SHOWER. GET WITH KENNY DAVIS FOR DETAILS	241	INHOUSE CONSTRUCTION	ESTIMATE	ROUTINE	ESTIMATE	

The screenshot shows the AiM Phase form for phase 001. The form is divided into several sections: Action, View, and Shop Person. The Shop Person section contains a table with the following data:

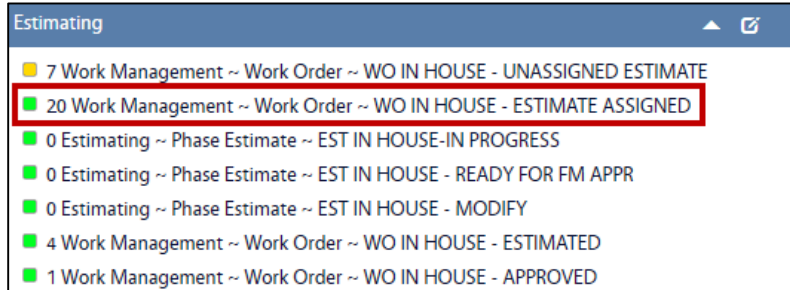
Shop Person	Name	Primary	Certified	Assigned By	Assigned Date	
<input type="checkbox"/>	10032962	AUBREY NEWMAN	Yes	No	AUNEWMA	Nov 03, 2015

The 'Primary' column in the table is highlighted with a red box. A red arrow points to the 'Load' button in the bottom right corner of the form.

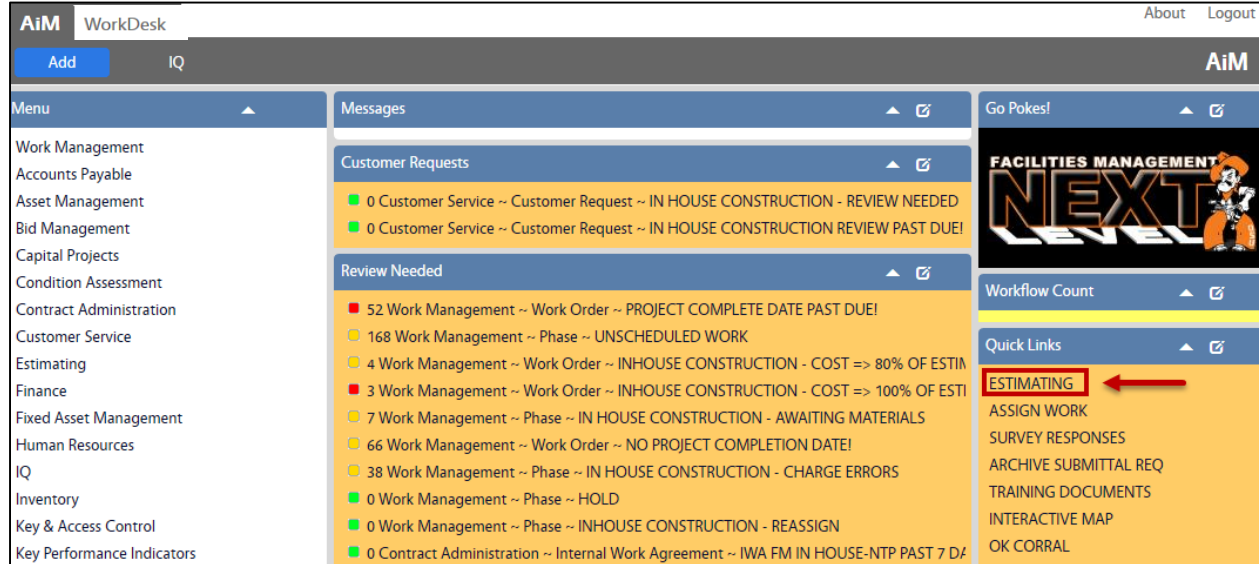
5. Check the **Shop** on the phase, change if necessary for proper employee assignment.
6. In the **Phase**, click on the **Load Shop Person** link to assign an Estimator.
7. The manager will select a shop person as the **Estimator**, and set the **Primary** setting to **Yes**.
8. Once the **Estimator** is selected, Click: **DONE**
9. Click: **DONE**
10. Click: **SAVE**

Construction Project Manager – Creating an Estimate

- From the Construction Project Manager’s work desk, there should be a channel called **Estimating**. A query link called **Estimate Assigned** will contain a count of new assignments.



- Click on the query **Estimate Assigned** and select a work order.
 - Review work order and follow up with customer, as needed.
- To add a **Phase Estimate**, there should be a channel called **Quick Links** on your work desk underneath the OSU Next Level logo on the right side of the screen. Click: **Estimating**



Phase Estimate Screen

1. Create a new phase estimate. On the first screen, select **In-House Cost** as the type, enter a description and select the work order and phase.

AiM Phase Estimate Once ready for review, change status to "Ready for Approval" About Logout

Save Cancel **AiM**

View **1144** Last Edited by

Extra Description
Notes Log
User Defined Fields
[Status History](#)
Related Documents

Phase estimate: RE-CONNECTION OF A MIXING VALVE AND PIPING FOR A HAND HELD EYE WASH STATION AND SHOWER. GET WITH KENNY DAVIS FOR DETAILS

Status **IN PROGRESS**

Type **In-House Cost**

Review Date

Total Labor Hours 1.333

Work Order **16-0167074** Phase **001**

PLEASE HAVE INHOUSE Contract PLEASE HAVE INHOUSE CONSTRUCTION PROVIDE

Status ESTIMATE NEEDED Status ESTIMATE

Budget \$0.00 Budget \$0.00

Estimate \$0.00 Estimate \$0.00

Actual \$0.00 Actual \$0.00

Labor \$46.59
Material \$159.35
Equipment \$0.00
Contract \$0.00
Total Cost \$205.94

2. In the Line Item section, Click: **Add**

Line Items **Remove** **Add**

Line	Price Book	Item	Description	Unit Cost	Quantity	UOM	Total Cost
------	------------	------	-------------	-----------	----------	-----	------------

3. Click: **Zoom** (located next to the **Price Book** field)

Line Item AUBREY About Logout

Done **Add** Cancel **AiM**

View **1** Last Edited by AUBREY NEWMAN On 11/03/2015 10:43 PM

Extra Description
Notes Log
User Defined Fields
Related Documents

Enter description

Type In-House Cost

Price Book **MEANS2014-CONS**

RSMEANS FACILITIES

Coefficient Index **1**

ENID - CKIS ADDED 6.95 TO ENID

4. Select a Price Book. Generally estimates are created using the **OSU** or **MEANS2014-CONST** price books, but any of the three options can be used.

Price Book **AiM**

Done **Search** Reset Cancel

Price Book #	Description
MEANS2014-CONST	RSMEANS FACILITIES CONSTRUCTION COST DATA 2014
MEANS2014-MR	RSMEANS FACILITIES MAINTANCE AND REPAIR COST DATA 2014 Select One
OSU	OSU PRICE BOOK.

5. Select the **Coefficient Index**. *This selection will automatically add the 6.95% indirect markup to all material and contract service estimates.*

	Book Cost	Add \$	Add %	Coefficient	Total
Labor	\$76.50			60.9	\$46.59
Material	\$153.00			104.15	\$159.35
Equipment	\$0.00			106.95	\$0.00
Contract				106.95	\$0.00
Total	\$229.50				\$205.94

6. Click: **Zoom** (next to the **Level 1**).
7. Select a **Level 1** value.
8. Click: **Zoom** next to the **Item** field.
9. Select an **Item** from the list.

NOTE: EACH ITEM IS RELATED TO THE LEVEL 1 VALUE THAT WAS CHOSEN IN STEP #6.

10. When selecting an Item, the **Description field will auto populate with the item name.**
11. Enter **Quantity** and **UOM** (Unit of Measurement), click:
12. After refreshing the Totals; the labor, material, and equipment cost will auto sum the total cost of the line item.

	Book Cost	Add \$	Add %	Coefficient	Total
Labor	\$76.50			60.9	\$46.59
Material	\$153.00			104.15	\$159.35
Equipment	\$0.00			106.95	\$0.00
Contract				106.95	\$0.00
Total	\$229.50				\$205.94

13. Click: **DONE** to return to the Phase Estimate screen.
14. A line item will be located at the bottom of the Phase Estimate.

15. If all information in the Phase Estimate is correct, Click: **Save**

Once an estimate is ready for review, the user will have to set the status of the phase estimate from **In Progress** to **Ready to Approve**.

Phase Estimate Status

Done Search

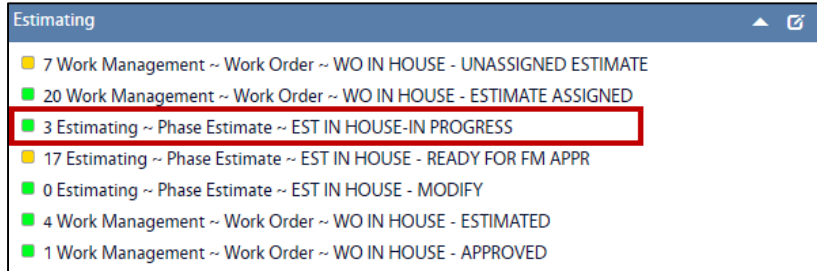
Status

IN PROGRESS

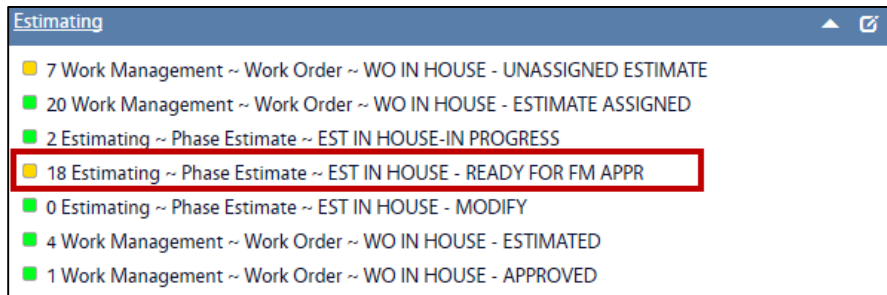
READY FOR APPROVAL

Phase Estimate – Ready to Approve

1. In the **Estimating** channel on the work desk, there will be query called **EST {your Shop}-IN PROGRESS**, click link and select the phase to change the status. This query will list all phase estimates with a status of **In Progress**.
2. Click: **EDIT**
3. From Status, click: **ZOOM** and select **READY FOR APPROVAL**
4. Click: **SAVE**



Once the phase estimate is saved, the user will now have an estimate waiting to be approved.



In-House Construction Manager - Approving a Phase Estimate

Once an estimate is ready to be set for review, the user will have to set the status of the phase estimate from **In Progress** to **Ready for Approval**.

1. Bring up the Phase Estimate that is ready to be set for approval. To find all estimates in progress, the user should have a query count channel on their work desk called In-House Construction Estimates. Click on the query link that reads **PHASE ESTIMATE-EST IN HOUSE-READY FOR FM APPR**

NOTE: IF YOU DON'T SEE A QUERY COUNT CHANNEL, CONTACT YOUR AIM ADMINISTRATOR TO ASSIST IN THE SETUP OF A CHANNEL.

1. Click on the **WO/PHASE ESTIMATE READY FOR APPROVAL** link to view all phase estimates that are ready to be reviewed and approved. Select the estimate number that will be approved.

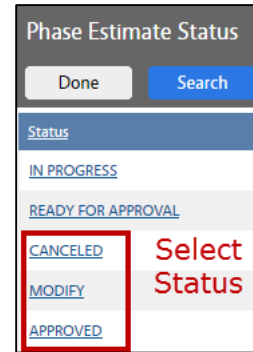
The screenshot shows the 'Phase Estimate' interface in AiM. It features a search bar and a 'New' button. Below is a table with columns: Estimate #, Description, Type, Status, Work Order, Phase, Editor, and Edit Date. A red arrow points to the second row of the table, which has an estimate number of 1144.

Estimate #	Description	Type	Status	Work Order	Phase	Editor	Edit Date
1143	NATURAL GAS RELOCATION FOR INTRAMURAL FIELDS.	In-House Cost	READY FOR APPROVAL	16-0167493	001	GASKINS	Oct 06, 2015 03:49 PM
1144	Phase estimate: RE-CONNECTION OF A MIXING VALVE AND PIPING FOR A HAND HELD EYE WASH STATION AND SHOWER. GET WITH KENNY DAVIS FOR DETAILS	In-House Cost	READY FOR APPROVAL	16-0167074	001	AUNEWMA	Nov 04, 2015 12:23 AM



2. Click: **Edit** to change the status from **Ready for Approval** to **Approved**
3. Click: **zoom** (next to the status field), select **Approved, Canceled or Modify**

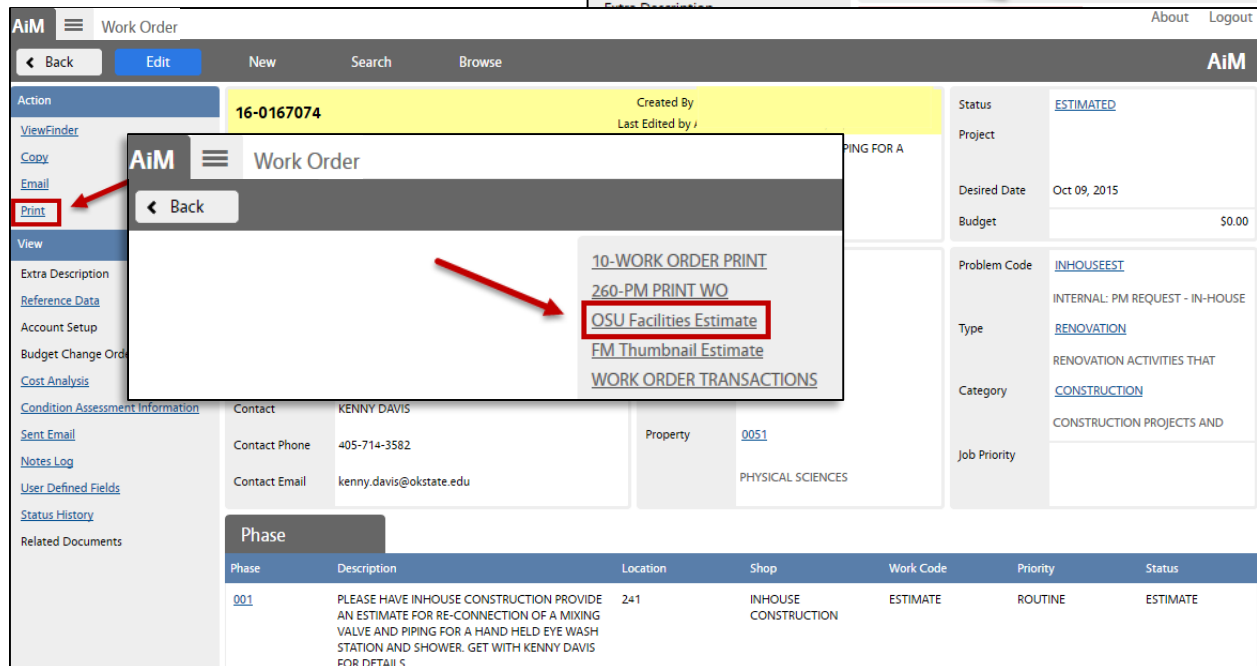
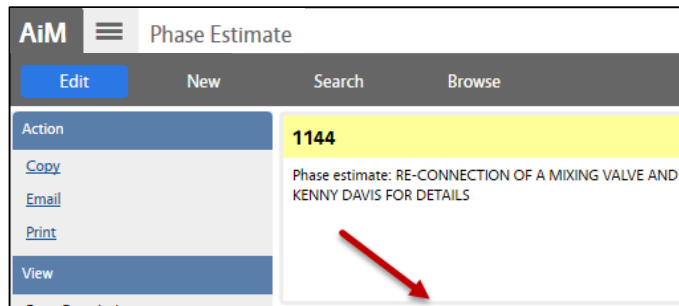
Note: If status is set to **Modify**, the phase estimate will return to the Manager.



4. Once the Status has been selected, click: **SAVE**

Print Customer Support Estimate and Send to Customer


5. From the **phase estimate screen**, click the work order number to open.
6. From the Work Order Screen, click **Print** and select **OSU Facilities Estimate**.



7. Send to Customer.

BIRT Report Viewer

Showing page 1 of 1



**FACILITIES MANAGEMENT
CONSTRUCTION ESTIMATE**

AiM Work Order#	
16-0167074	

Work Order	
Work Order:	16-0167074
Scope of Work:	PLEASE HAVE INHOUSE CONSTRUCTION PROVIDE AN ESTIMATE FOR RE-CONNECTION OF A MIXING VALVE AND PIPING FOR A HAND HELD EYE WASH STATION AND SHOWER. GET WITH KENNY DAVIS FOR DETAILS
Date Created:	Oct 2, 2015, 10:28 AM
Requested By:	
Department:	CONSTRUCTION & CONTRACT SERVICES
Facility:	CENTRAL CAMPUS
Property:	PHYSICAL SCIENCES
Status:	ESTIMATED

Line Items	Material	Equipment	Contract
22			
1 Shower, mix	35	\$0.00	\$0.00
Totals			
Estimate:		\$0.00	\$0.00

Export Report

Export Format: PDF

Pages: All pages



Fit To: Auto

OK Cancel

Total Estimate: \$

Facilities Project Coordinator:

Approved By:

- a. Click:  **Export**.
- b. Select **PDF** and Click **OK**.
- c. Report opens in a pdf viewer, email file to the customer.
 - i. Click:  email icon
 - ii. Choose an email account
- d. Click: **OK** to send

8. Return to the **Work Order** in AiM.

- a. Set the **Work Order** status to **ESTIMATED**
- b. Set the **Phase** status to **WORK COMPLETE**

9. *When you hear from the requestor, set the Work Order status to **ESTIMATE APPROVED**, and set the phase to **ESTIMATE APPROVED**. If AiM prompts to **close the work order**, select **NO**. The work order needs to stay open as new phases will be opened once an NTP has been issued.*

Note: The LRF or Construction & Service Contracts project manager will review your estimate and create an Internal Work Agreement (IWA) that you can track on your Capital Projects Dashboard.

Refer to **ES-02-CPPM IWA Approval and NTP** to move forward or cancel the work order.