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*.
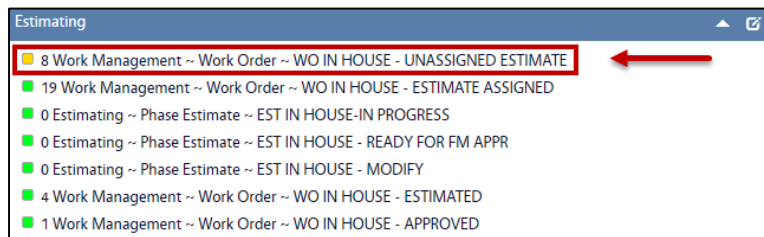
2.   Click: *Unassigned Estimates* query and select a work order.

3.   Click: **Edit**

4.   To assign an **Estimator** on a **Phase**, click: **Phase Number** link at the bottom of the work order.

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

1. 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.
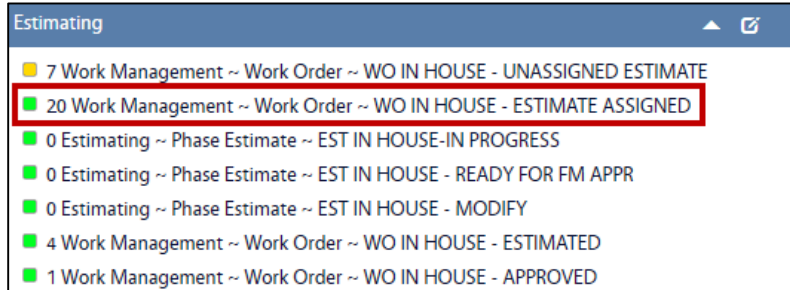
   a. Click on the query ***Estimate Assigned*** and select a work order.

   b. Review work order and follow up with customer, as needed.

2. 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**
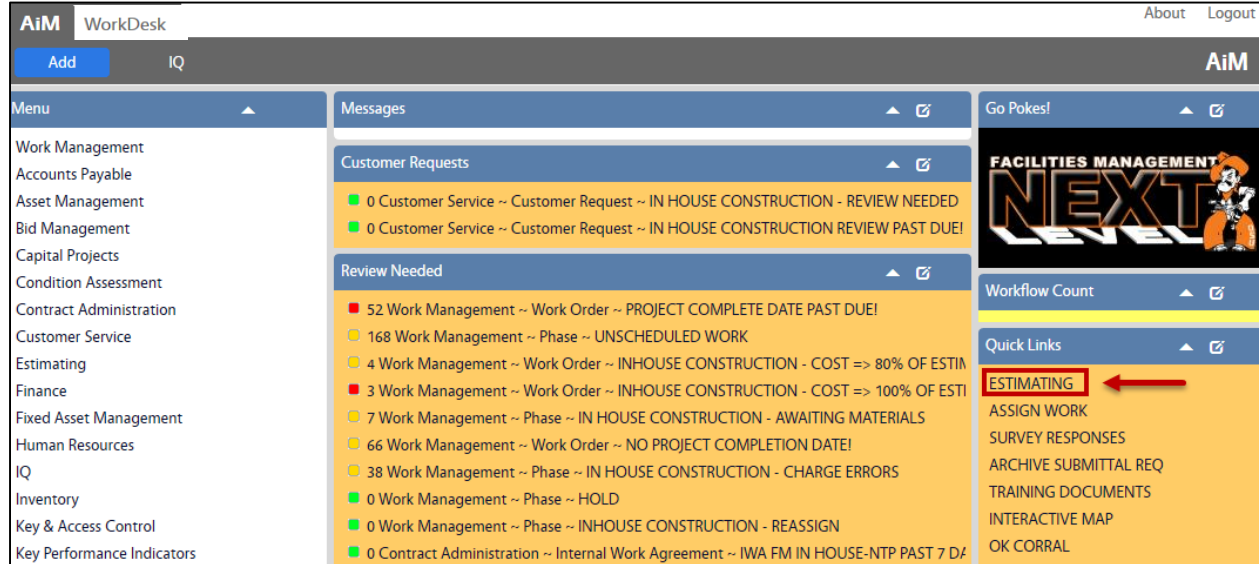
Phase Estimate Screen

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.

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

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

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.

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

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: 🔄 Totals

12. After refreshing the Totals; the labor, material, and equipment cost will auto sum the total cost of the line item.

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*.
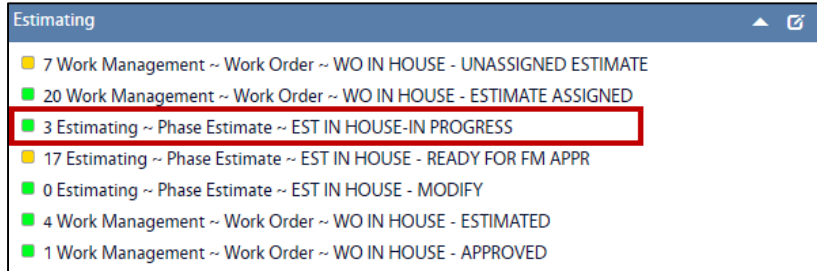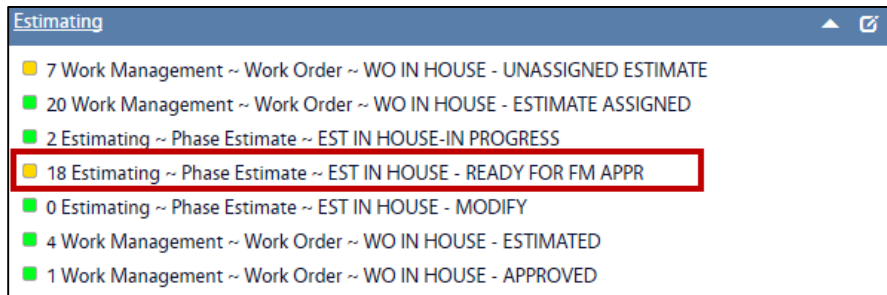
Phase Estimate – Ready to Approve

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**

Estimating   ▲ ☑
🟨 7 Work Management ~ Work Order ~ WO IN HOUSE - UNASSIGNED ESTIMATE
🟩 20 Work Management ~ Work Order ~ WO IN HOUSE - ESTIMATE ASSIGNED
🟩 3 Estimating ~ Phase Estimate ~ EST IN HOUSE-IN PROGRESS
🟨 17 Estimating ~ Phase Estimate ~ EST IN HOUSE - READY FOR FM APPR
🟩 0 Estimating ~ Phase Estimate ~ EST IN HOUSE - MODIFY
🟩 4 Work Management ~ Work Order ~ WO IN HOUSE - ESTIMATED
🟩 1 Work Management ~ Work Order ~ WO IN HOUSE - APPROVED

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

Estimating   ▲ ☑
🟨 7 Work Management ~ Work Order ~ WO IN HOUSE - UNASSIGNED ESTIMATE
🟩 20 Work Management ~ Work Order ~ WO IN HOUSE - ESTIMATE ASSIGNED
🟩 2 Estimating ~ Phase Estimate ~ EST IN HOUSE-IN PROGRESS
🟨 18 Estimating ~ Phase Estimate ~ EST IN HOUSE - READY FOR FM APPR
🟩 0 Estimating ~ Phase Estimate ~ EST IN HOUSE - MODIFY
🟩 4 Work Management ~ Work Order ~ WO IN HOUSE - ESTIMATED
🟩 1 Work Management ~ Work Order ~ WO IN HOUSE - 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.

	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

AiM ☰ Phase Estimate   About   Logout
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2. Click: **Edit** to change the status from **Ready for Approval** to **Approved**

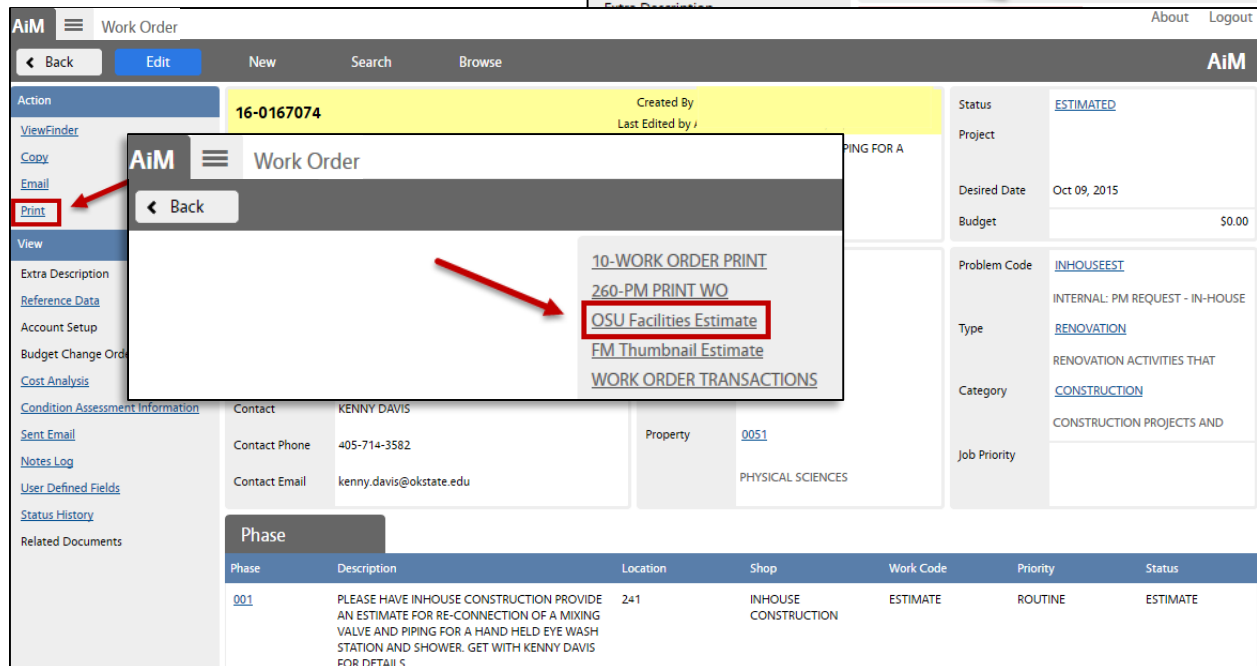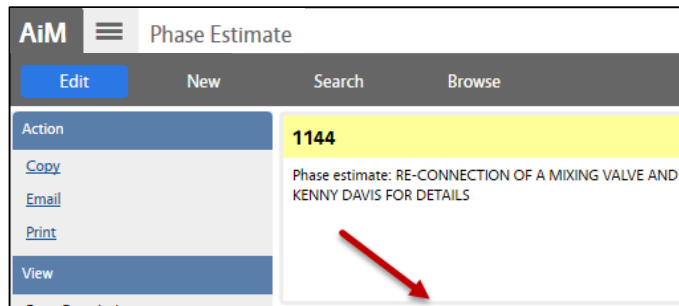3. Click: 🔍 **zoom** (*next to the status field*), select **Approved, Canceled or Modify**

   Note: If status is set to Modify, the phase estimate will return to the Manager.
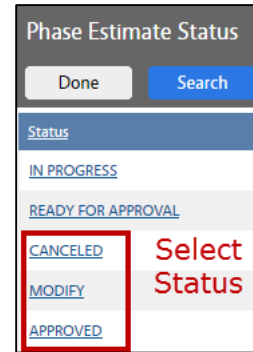
4. Once the Status has been selected, click: **SAVE**

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.**

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 LRFP 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.