



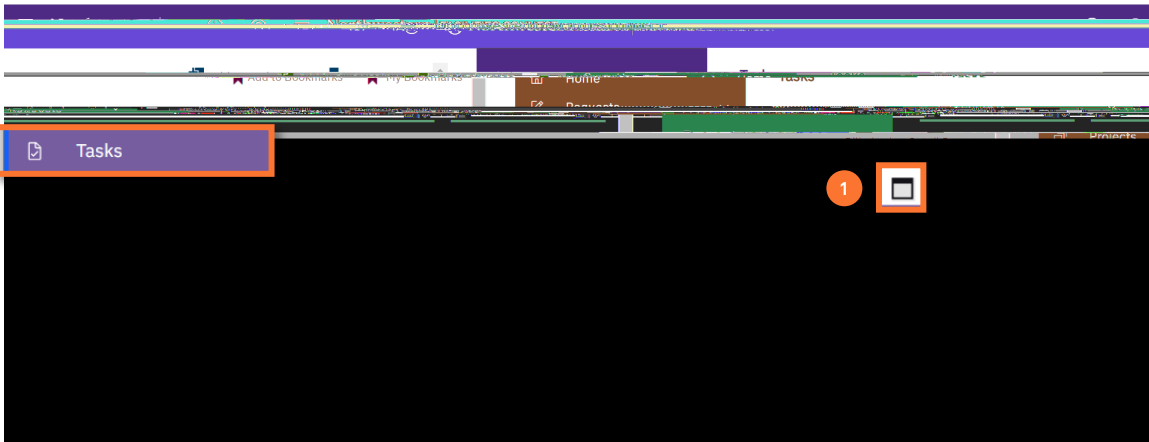
Provides guidance for O&M Supervisors in reviewing and completing an Estimate Request.

ESTIMATE

Estimate Requests are first received by **NU Facilities Customer Service**. Upon receipt, Customer Service reviews the request and routes it to the appropriate workgroup(s) for development of an estimate. This job aid begins on the **Facilities Connect Desktop > Tasks** screen. For more information, please see the **Supervisor: Task Screen** job aid.

1 From the **Facilities Connect > Tasks** screen:

- 1 Scroll to **My Organization's Active Tasks** and click on the **Maximize** button.

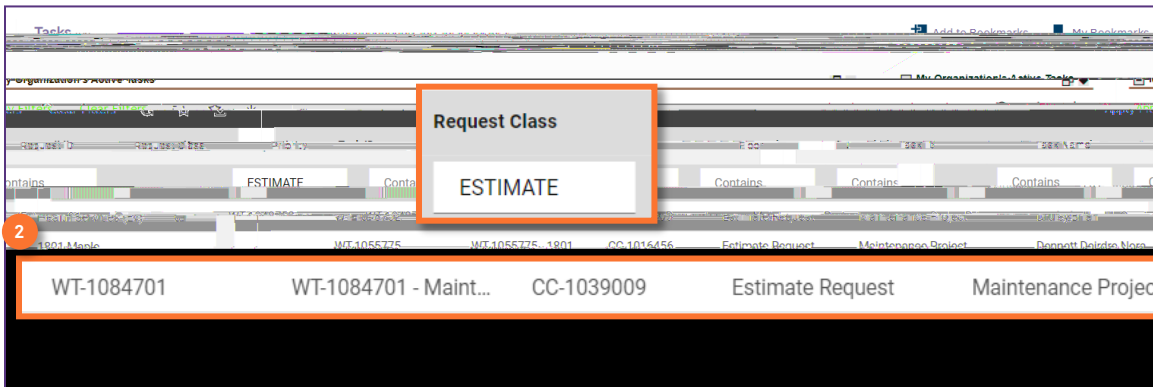


▼ IMPORTANT

Please note: If you have been added to an **Estimate Request Work Task** by another shop (i.e. a multi-shop estimate), you will be added at the **Resource** level and will find the **Estimate Request Work Task** in your **My Active Tasks** section.

2 Upon clicking, you will see the full screen view of **My Organization's Active Tasks**:

- 2 Locate the desired **Estimate Request Work Task** and click anywhere on the **Work Task Record** to open.



▼ TIP & TRICKS

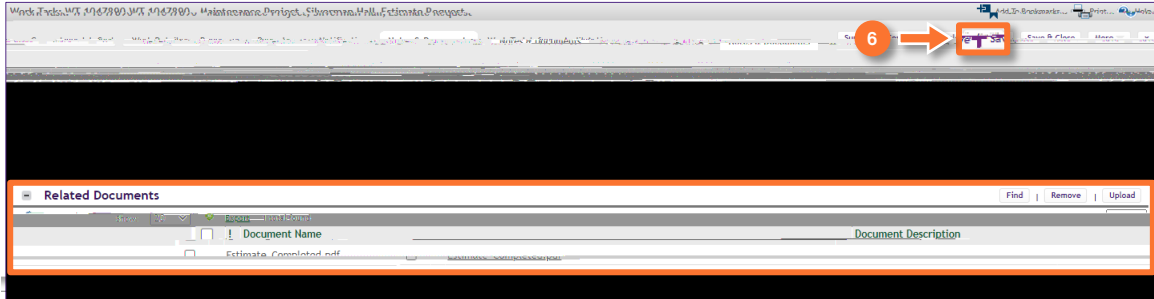
The quickest way to locate **Estimate Requests** is to search for the keyword 'Estimate Request' in the **Request Class** column.



DIRECTIONS:

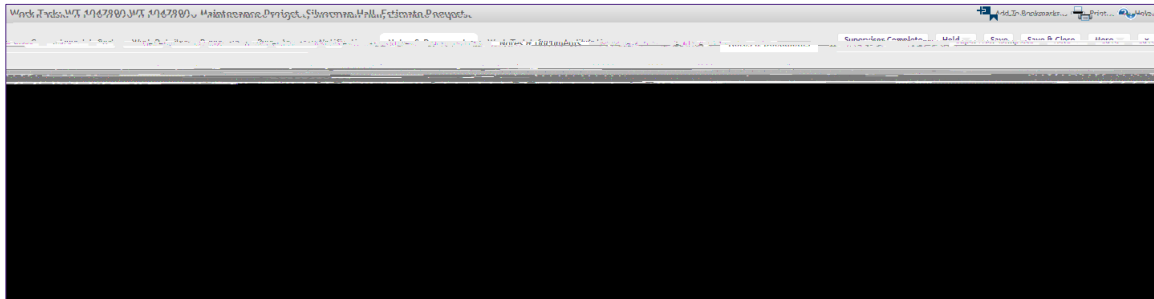
6 The uploaded **Estimate** document will now appear in the **Estimate Request Work Task**. To complete the document upload process:

Click on the **Save** button.



7 Once all shops have completed and uploaded their **Estimate Forms**, and entered any necessary **Time Entries**, the **Work Task** can be marked as complete:

7 Click on the **Complete** button.



DO NOT click on **Complete** until estimate documentation has been completed and uploaded for all shops