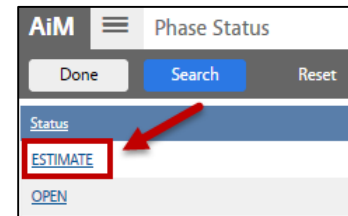
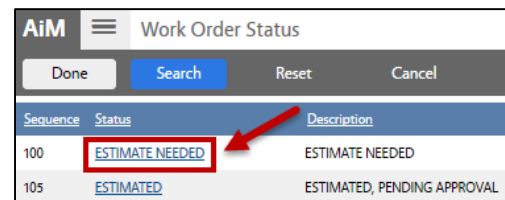


Managers and Supervisors: Thumbnail Estimates

With the exception of In-House Construction, Energy Services and Landscape Installation Services **all** other FM departments can create estimates in AiM using thumbnail estimates for general campus requests. Project supports requests from LRFP and FM Construction & Contract Services. A thumbnail estimate is an approximation of how much a service will cost based on conversations with the requesting party and prior experience. Thumbnail estimates are entered directly on to a phase and printed on the **FM Thumbnail Estimate** form. The following is an example for event estimates; keep in mind that **all estimate requests will follow this process**.

- For Customer Support related requests such as events, keys, signage and moves, the initial work order status will be OPEN. If you determine that an estimate is needed, start by changing the work order status to ESTIMATE NEEDED, the phase status to ESTIMATE, and set work code to ESTIMATING (or EVENT PLANNING for event related work orders).

- From the work order screen, click: **Edit**
- Change **Work Order** status to **ESTIMATE NEEDED**
- Open the first **Phase**, change Status to **ESTIMATE**
- From the Phase Screen, Click **Done**
- From the work order Screen, Click **Save**



- The work order will show in your estimates queue, click link to open.

Estimating	
9	Work Management ~ Work Order ~ WO IN HOUSE - UNASSIGNED ESTIMATE
19	Work Management ~ Work Order ~ WO IN HOUSE - ESTIMATE ASSIGNED
0	Estimating ~ Phase Estimate ~ EST IN HOUSE-IN PROGRESS
0	Estimating ~ Phase Estimate ~ EST IN HOUSE - READY FOR FM APPR
0	Estimating ~ Phase Estimate ~ EST IN HOUSE - MODIFY
3	Work Management ~ Work Order ~ WO IN HOUSE - ESTIMATED
1	Work Management ~ Work Order ~ WO IN HOUSE - APPROVED

- Select Work Order

Property	Work Order	Description	Date Created #	Status	Contact	Contact Phone	Contact Email
0005	16-0152530	ESTIMATE NEEDED TO DEMO ALL CARPET SQUARES OF ROOMS 120 AND 103 (CALLED CLICK HALL). REPLACE ALL 5,928 SQFT OF THAT AREA WITH NEW CARPET TILES. SEEKING 3 WORK ORDERS MADE FOR ESTIMATE ONLY: 1) EHS REVIEW, 2) ASBESTOS REVIEW, AND 3) [SEE WO EXTRA DESC]	Jul 07, 2015 09:57 AM	ESTIMATE NEEDED	GABRIEL DREILING	405-744-7290	gabe.dreiling@okstate.edu

- Open the first phase.** This is the initial phase Work Control opened with the work order.
 - Click: **Edit**
 - Click: **Load, select a shop person** and click: **Done**

- c. Identify Shop Person as the primary person for this phase. *This identifies the Estimator and will be referenced on the estimate form.*

Shop Person					
<input type="checkbox"/> Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
<input type="checkbox"/> 10015424	LUKE ENNIS	Yes	No	AUNEWMA	Oct 29, 2015

- d. From **View** menu, select **Cost Analysis** and enter estimates:

- i. **Labor Hours** Estimate hours to complete work.
- ii. **Labor Cost** Estimate cost of labor.
- iii. **Material Cost** Estimate cost of materials. Include: warehouse, shop stock, special order
- iv. **Equipment Cost** Estimated cost of equipment.
- v. **Contract Cost** Quoted price from hired Contractors.

Subledger	Labor Hours	Labor Cost	Material Cost	Equipment Cost	Contract C
Estimate	16	800.00	2649.00	\$0.00	\$0.00
Actual	0.00	\$0.00	\$0.00	\$0.00	\$0.00
Encumbered		\$0.00	\$0.00	\$0.00	\$0.00
Billed		\$0.00	\$0.00	\$0.00	\$0.00

AiM Phase

Done Add

Action

Copy

View

Extra Description

Account Setup

Shop Stock

Budget Change Order

Condition Assessment Information

Checkpoint Measurements

Cost Analysis

- e. Click: **Done**

Add Scope of Work and Update Work Order Status

- 5. In the Work Order **Extra Description**, add a description of the scope of work for the event. **This description will be printed on the customer estimate.**

- a. Select **Extra Description** (left side bar)
- b. Enter Scope of work, click: **Done**

AiM Work Order

Save Cancel

View

Extra Description

Reference Data

Account Setup

Budget Change Order

Extra Description

Done Cancel

16-0152530

ESTIMATE NEEDED TO DEMO ALL CARPET SQUARES OF ROOMS 120 AND 103 (CALLED CLICK HALL). REPLACE ALL 5,928 SQFT OF THAT AREA WITH NEW CARPET TILES. SEEKING 3 WORK ORDERS MADE FOR ESTIMATE ONLY: 1) EHS REVIEW, 2) ASBESTOS REVIEW, AND 3) IN-HOUSE CONSTRUCTION TEAM ESTIMATE. GABE DREILING IS PCQ FOR MORE INFORMATION. REF: CP16-0293.


- 6. From the Work Order, change the status to **Estimated**
- 7. Click: **Save.**

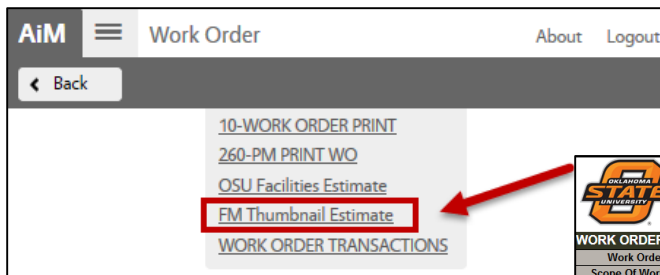
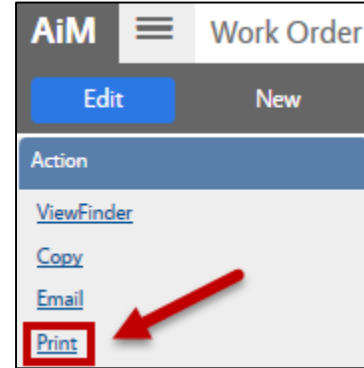
AiM Work Order Status


Done Search Reset Cancel

Sequence	Status	Description
100	ESTIMATE NEEDED	ESTIMATE NEEDED
105	ESTIMATED	ESTIMATED, PENDING APPROVAL

Print Customer Support Estimate and Send to Customer

8. Print customer support estimate.
 - a. From the Work Order Screen, Click: **Print**
 - b. Select **FM Thumbnail Estimate**.
9. 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

FACILITIES MANAGEMENT ESTIMATE					
WORK ORDER					
Work Order:	16-0152530				
Scope Of Work:	ESTIMATE NEEDED TO DEMO ALL CARPET SQUARES OF ROOMS 120 AND 103 (CALLED CLICK HALL). REPLACE ALL 5,928 SQFT OF THAT AREA WITH NEW CARPET TILES. SEEKING 3 WORK ORDERS MADE FOR ESTIMATE ONLY: 1) EHS REVIEW, 2) ASBESTOS REVIEW, AND 3) IN-HOUSE CONSTRUCTION TEAM ESTIMATE. GABE DREILING IS PCO FOR MORE INFORMATION. REF: CP16-0293.				
Date Created:	Jul 7, 2015, 9:57 AM	Facility:	ALUMNI ASSOCIATION		
Requested By:		Property:	CONOCOPHILLIPS OSU ALUMNI CENTER		
Department:	CONSTRUCTION & CONTRACT SERVICES	Status:	ESTIMATED		
Cost Analysis					
	Hours	Labor	Material	Equipment	Contract
Estimate:	0	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Total Estimate: \$ 0.00					
Approved By: _____					

10. Click: **OK** to send

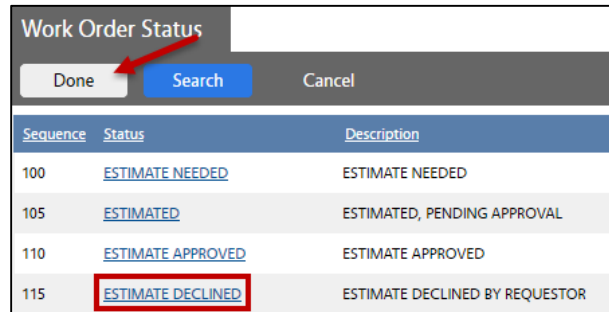
Approved Estimates

11. From Work Order, click: **Edit** and change Work Order Status to **OPEN**
12. **Create additional phases**, as needed for the actual services to be performed. *Note: The estimate itself only exists on phase 001, work performed will be entered onto new phases.* For each new phase, click: **Add**
 - a. Enter **specific description for the phase**
 - b. Select **Shop**. If service will be provided by an outside vendor, select Shop overseeing service.
 - c. Select **Priority**
 - d. Set **Estimated** Start and End dates based on the event date
 - e. Select **Work Code**
 - f. **If this is a Contract:** select **Contract Type, contractor and Address Code**.
 - g. Click: **Done** again from the Phase screen
13. Click: **SAVE**

14. Now the Work Order and phases are **OPEN**, you may initiate material purchases, if needed and/or begin scheduling work.

Declined Estimates

1. From Work Order, click: **Edit**
2. Change Status to Change Status to **ESTIMATE DECLINED**



Sequence	Status	Description
100	ESTIMATE NEEDED	ESTIMATE NEEDED
105	ESTIMATED	ESTIMATED, PENDING APPROVAL
110	ESTIMATE APPROVED	ESTIMATE APPROVED
115	ESTIMATE DECLINED	ESTIMATE DECLINED BY REQUESTOR

****This training guide is for thumbnail estimates only.** For **Capital Project Support estimates**, refer to the training document **ESTIMATING – IWA Approval or Decline of an FM Estimate**.