

All Users

ESTIMATE REQUEST PROCESS

TABLE OF CONTENTS

This document has been structured by the key topic(s) and process(es) involved in the Estimate Request process. Please view the table below to locate a specific topic or process contained within the document.

| SECTION # | TOPIC / PROCESS | PAGE |
|-----------|--|------|
| 1.1 | Introduction of Estimate Types | 4 |
| 2.1 | Initial Estimate Request – Budgetary Allowance Cost Estimate | 5 |
| 2.2 | Initial Estimate Request – Detailed Construction Estimate | 12 |
| 3.1 | Locate Completed Estimate Request | 14 |
| 3.2 | Review the Estimate Request Form | 20 |
| 4.1 | Perform Estimated Work Request | 25 |

GETTING STARTED

1.1

Understanding Estimate Types

There are two types of initial estimate requests. Choose the one that most closely reflects your need.

Budgetary Allowance Cost Estimate

- There is NO fee and a Chartstring is NOT required.
- Presents a high- level range of expected costs and timelines, based on similar work.
- Appropriate for determining if the project will align with the available funding or schedule.
- Provided based on the customer's description of the scope without a site visit, investigation, or contractor engagement.
- Operations may return request for a more detailed estimate.
- The Detailed Construction Estimate can be requested after receiving the initial BAC Estimate.

Detailed Construction Estimate

- A departmental charge associated, and a Chartstring is required .
- Developed with a greater level of detail, and very

PROCESS

PROCESS

To complete the Service Request Form, fill in the required fields,

- 2) If the request is for you, keep the **Me** radio button checked.
- 3) If you want an alternative person to receive notifications, select the **Someone Else** radio button. Fill in the contact details.

INFORMATION

For a detailed walkthrough of entering a Service Request, please refer to the [Create a New Service Request](#) training guide.

Home / Estimate

Print Open In New Window Add to Bookmarks My Bookmarks

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

Me Someone Else

Request Details

If this is an emergency please call 911. 8000 (Chicago)

PROCESS

- 4) Click on the **Search** buttons and select a **Building** , **Floor** , and **Room**.
- 5) Click on the **Preferred Access Time** drop-down menu and select a timeframe.
- 6) Click on the **Yes** or **No** radio button to decide whether the **Requestor** needs to be present during the work.

Home / Estimate

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

Request to for: Me Someone Else

911. **If this is an emergency please call 8000 (Chicago).**

* Building Abbott Hall

Floor 03

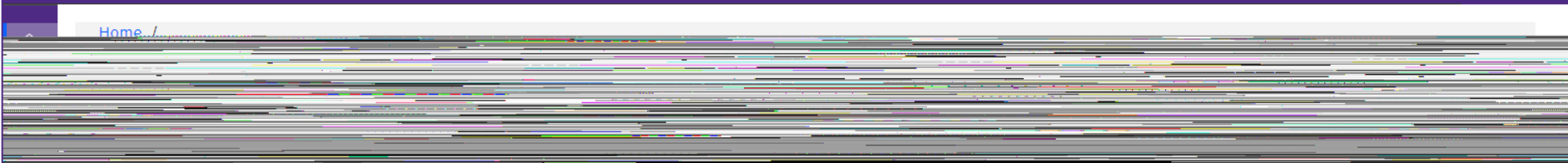
Room 00301

* Preferred Access Time Anytime

* I need to be present during your work Yes No

Callouts: 4 (Search icons), 5 (Preferred Access Time dropdown), 6 (I need to be present radio buttons)

INFORMATION





NOW VIEWING

2.2
Detailed Construction Estimate

To enter the second type of Estimate Request, complete the same step

INFORMATION

NOW VIEWING

PROCESS

Alternately, you can search through your request history to find the estimate record.

From the Home page,

- 4) Click to maximize your [My Request History](#) section.

<<Upon clicking, the report will open in the main window >>

INFORMATION

The screenshot displays the Northwestern FACILITIES CONNECT web application. The header includes the Northwestern logo and 'FACILITIES CONNECT' text. Below the header, there is a navigation bar with a 'Home' button. The main content area shows a report titled 'Billed Labor Detail Report' with a sub-header 'Capital Project Job Cost'. A large black rectangular area is overlaid on the report content, indicating a zoomed-in view. In the bottom right corner of the zoomed-in area, there are two icons: a red circle with the number '4' and a white square icon with a black border, representing a maximize button.



PROCESS

3.2

Review the Estimate Request Form

Estimate Tab

- 4) Project Details : project information, including the **Estimate Number** . This is a unique number and will be used as the reference for the estimate.
- 5) Description of Work: provides a narrative of the scope that was estimated. This will largely be information you provided to Facilities but may also include supplemental details.
- 6) Clarifications/Assumptions/Exclusions: additional information that is pertinent to the costs that were estimated. Please review this section carefully to ensure that the full scope of work is aligned with your expectations.

INFORMATION

The screenshot shows a web-based form for an estimate request. At the top, there is a header with the text 'NOW VIEWING ESTIMATE REQUEST FORM'. Below this, the form is divided into several sections. Three sections are highlighted with orange boxes and numbered 4, 5, and 6. Section 4 is the 'Project Details' section, which includes fields for 'PROJECT: Training Room Refresh', 'Estimate No.: 567891', 'Date Prepared: 10/1/2024', 'Building: 2020 Ridge Ave', 'Room no: 8844', 'Dept.: Business Infrastructure', and 'Phone:'. Section 5 is the 'Description of Work' section, which is currently blank. Section 6 is the 'Clarifications/Assumptions/Exclusions' section, which contains the text 'Hard paint to be used, carpeting and shelving to be purchased by NU preferred vendor, stand'. At the bottom of the form, there is a yellow box containing the text 'Budgetary Allowance Estimat'.

PROCESS

3.2

Review the Estimate Request Form

Estimate Tab

- 9) Notes: identifies any supplemental information around this estimate or subsequent steps in the project process.
- 10) Estimator: the shop personnel that completed the Estimate.

The screenshot displays the 'Estimate Request Form' interface. At the top, it shows the project name 'PROJECT: Training Room Refresh' and the estimate number 'Estimate No. 663004'. Below this, there are fields for 'Building: 2020 Ridge Ave' and 'Bldg. no.: 8844'. The 'Notes' section, highlighted with a red box and a red circle containing the number '9', contains the following text:

Notes:

Unforeseen conditions or additional code requirements may impact the pricing and/or timelines

- This work may require enabling projects, to be confirmed during design or Detailed estimate
- Design documents will be required to complete this work on 2/20/25. See design documents for more information.
- Design documents will be required to perform a Detailed estimate

Below the notes, there are checkboxes for 'City of Evanston / City of Chicago' and 'Provost (eg. Reassignment or Change in Use of Space)'. The 'Estimator' field, highlighted with a red box and a red circle containing the number '10', is filled with 'Brian Smith'. The 'Reviewer' field is currently empty. At the bottom of the form, the 'Budgetary Allowance Estimate' tab is selected.

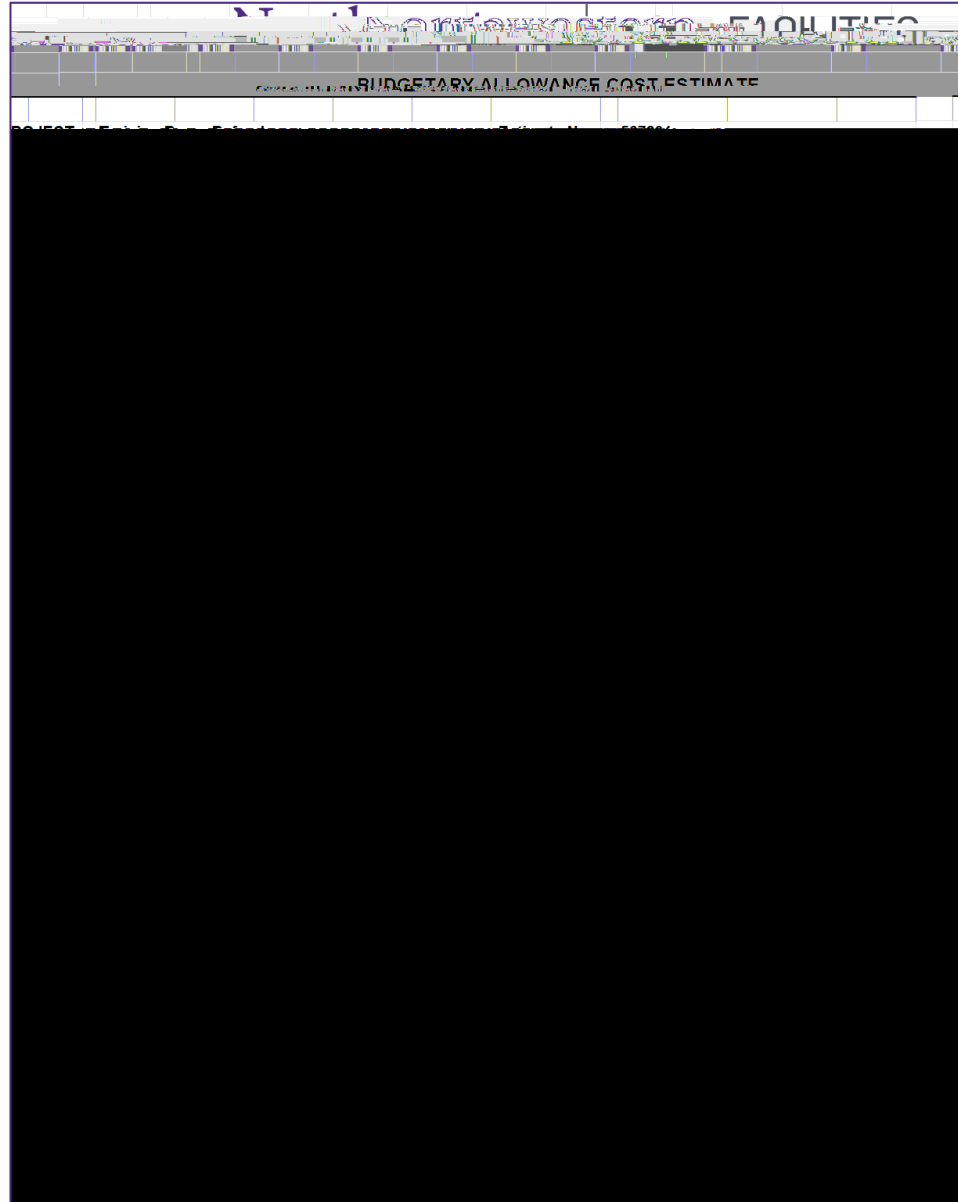
INFORMATION

INFORMATION

3.2
Review the Estimate Request Form

Full view of the Estimate Form

PROCESS



PROCESS

4.1
Perform Estimated Work Request

From Request Central ,

- 1) Ensure the toggle arrow is pointing down to reveal the available Request Categories .
- 2) Click on Estimate .

<<Upon clicking, the screen will open in the main window>>

INFORMATION

NOW VIEWING HOME SCREEN

The image displays two screenshots of a software interface, labeled A and B, illustrating the process of performing an estimated work request.

Screenshot A: Shows the 'My Active Requests' section. A dropdown menu is open, revealing various request categories. The 'Estimate' option is highlighted with a green box and a red circle labeled '2'. A red circle labeled '1' points to the toggle arrow on the dropdown menu.

Screenshot B: Shows the 'Requests' section. A dropdown menu is open, revealing various request categories. The 'Estimate' option is highlighted with a green box and a red circle labeled '2'. A red circle labeled '1' points to the toggle arrow on the dropdown menu.

To complete the Service Request Form, fill in the required fields,

3) If the request is for you, keep the **Me** radio button checked.

4)

INFORMATION

For a detailed walkthrough of entering a Service Request, please refer to the [Create a New Service Request](#) training guide.

5) Click on the [Search](#) buttons and select a [Building](#) , [Floor](#) , and [Room](#).

6) Click on the

INFORMATION

PROCESS

9) In the [Estimate Request Details](#) section, complete the following information:

- Previous Estimate Request – use the Search button to locate the related requests entered previously.

(Optional)

- Intended budget or budget range – estimated amount.
- Intended timeline for completion – estimated date range.
- Funding source – select Yes or No from dropdown
- Restrictions – Any restrictions around implementing the work.
For example:
 - o if the work can only be performed outside of business hours
 - o must be completed during a specific calendar window
 - o if there are constraints around noise/vibration or other disruptions, etc.

10) Please note that a Chartstring is [required](#).

11) Click the [Add](#) button to enter the Chartstring information in the request.

The screenshot displays the 'Estimate Request Details' section of the Service Request Form. The interface includes a header with the text 'NOW VIEWING SERVICE REQUEST FORM'. Below the header, there are several input fields and a search button. The main content area is currently blank, suggesting that the user is in the process of entering information. The form is designed with a clean, professional layout, using a combination of white, light blue, and dark blue colors.

INFORMATION

15)

Estimate

Request Details

If this is an emergency please call 911

312-503-8000 (Chicago).

Floor 04

Room 00412

Building 2020 Bldg

INFORMATION