



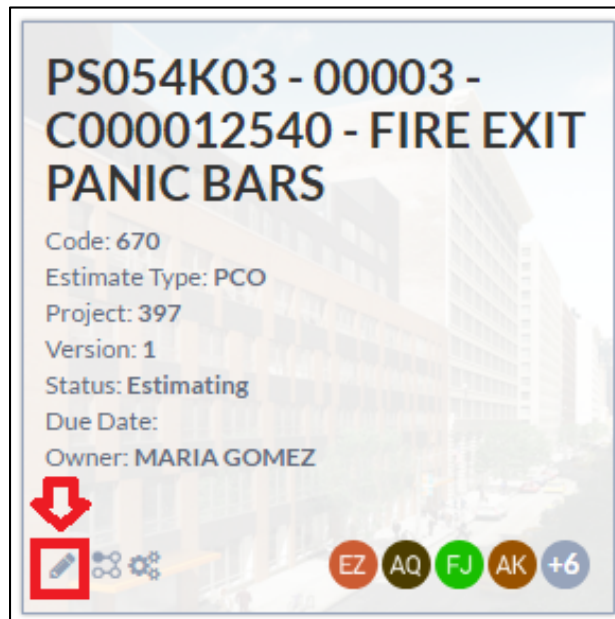
### Inviting 2<sup>nd</sup> Tier Sub Estimators to an Estimate

1. Click on the **Estimate Center**  icon.

1.1. Type in the Project Name in the Search field  located in the upper-right hand corner of screen to find the Estimate.

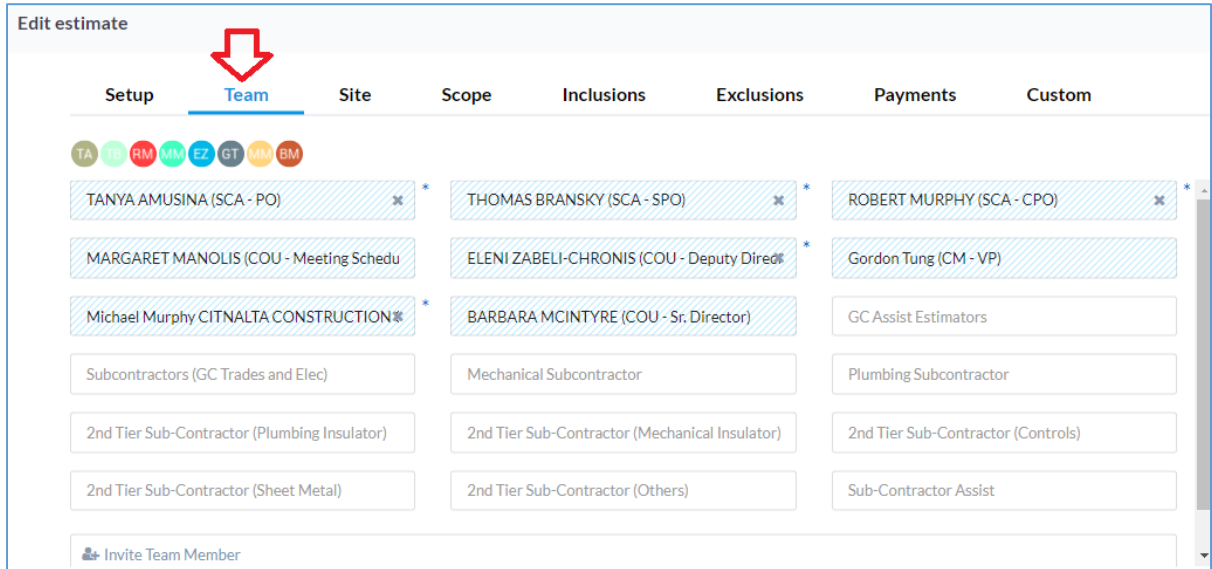
**Note:** Search can be used with the Project Name, LLW, NOD Number, Contract Number, Estimate Description, etc.

1.2 Click on the pencil icon  located inside the Estimate Tile of the Estimate.



## Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

1.3 In the **Edit estimate** popup, click on the **Team** tab.



**Edit estimate**

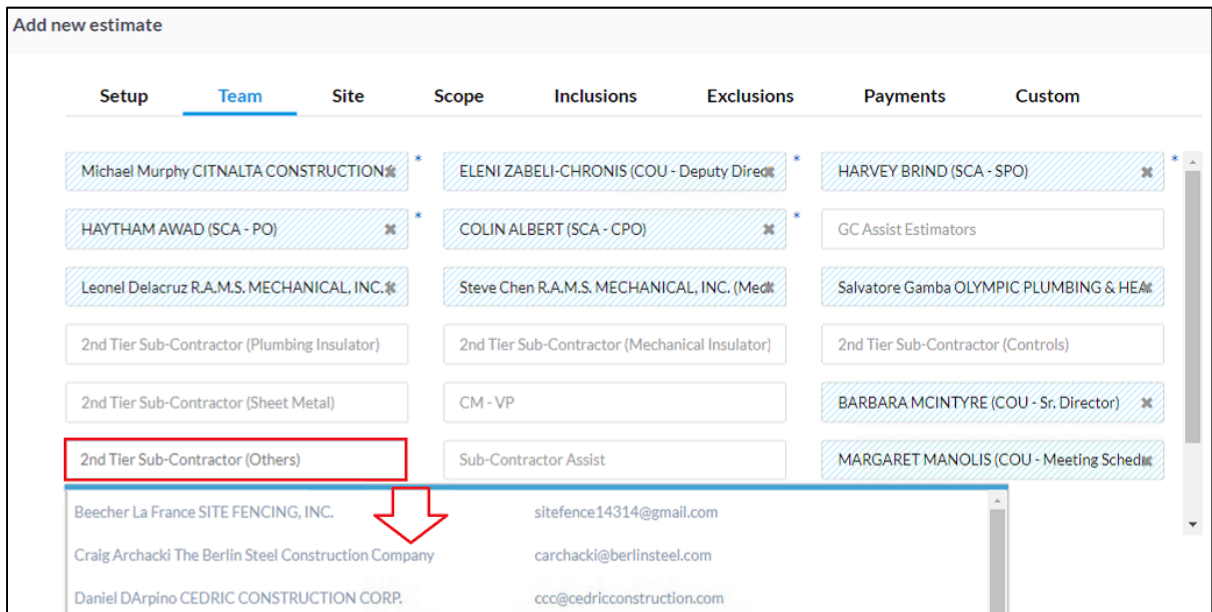
Setup **Team** Site Scope Inclusions Exclusions Payments Custom

TA TB RM MM EZ GT MM BM

TANYA AMUSINA (SCA - PO) ✕ *	THOMAS BRANSKY (SCA - SPO) ✕ *	ROBERT MURPHY (SCA - CPO) ✕ *
MARGARET MANOLIS (COU - Meeting Schedu	ELENI ZABELI-CHRONIS (COU - Deputy Direct	Gordon Tung (CM - VP)
Michael Murphy CITNALTA CONSTRUCTION ✕ *	BARBARA MCINTYRE (COU - Sr. Director)	GC Assist Estimators
Subcontractors (GC Trades and Elec)	Mechanical Subcontractor	Plumbing Subcontractor
2nd Tier Sub-Contractor (Plumbing Insulator)	2nd Tier Sub-Contractor (Mechanical Insulator)	2nd Tier Sub-Contractor (Controls)
2nd Tier Sub-Contractor (Sheet Metal)	2nd Tier Sub-Contractor (Others)	Sub-Contractor Assist

Invite Team Member

1.4 Find the field labeled **2<sup>nd</sup> Tier Sub-Contractor (Others)** and double-click to get drop down.



**Add new estimate**

Setup **Team** Site Scope Inclusions Exclusions Payments Custom

Michael Murphy CITNALTA CONSTRUCTION ✕ *	ELENI ZABELI-CHRONIS (COU - Deputy Direct ✕ *	HARVEY BRIND (SCA - SPO) ✕ *
HAYTHAM AWAD (SCA - PO) ✕ *	COLIN ALBERT (SCA - CPO) ✕ *	GC Assist Estimators
Leonel Delacruz R.A.M.S. MECHANICAL, INC. ✕ *	Steve Chen R.A.M.S. MECHANICAL, INC. (Mech ✕ *	Salvatore Gamba OLYMPIC PLUMBING & HE ✕ *
2nd Tier Sub-Contractor (Plumbing Insulator)	2nd Tier Sub-Contractor (Mechanical Insulator)	2nd Tier Sub-Contractor (Controls)
2nd Tier Sub-Contractor (Sheet Metal)	CM - VP	BARBARA MCINTYRE (COU - Sr. Director) ✕ *
<b>2nd Tier Sub-Contractor (Others)</b>	Sub-Contractor Assist	MARGARET MANOLIS (COU - Meeting Sched ✕ *

Beecher La France SITE FENCING, INC. sitefence14314@gmail.com

Craig Archacki The Berlin Steel Construction Company carchacki@berlinsteel.com

Daniel D'Arpino CEDRIC CONSTRUCTION CORP. ccc@cedricconstruction.com



## Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

1.5 Select the **2<sup>nd</sup> Tier Sub-Contractor (Others)** that you want added to the Estimate. That person will now show as part of the Team.

Add new estimate

Setup **Team** Site Scope Inclusions Exclusions Payments Custom

Michael Murphy CITNALTA CONSTRUCTION*	ELENI ZABELI-CHRONIS (COU - Deputy Director)*	HARVEY BRIND (SCA - SPO)*
HAYTHAM AWAD (SCA - PO)*	COLIN ALBERT (SCA - CPO)*	GC Assist Estimators
Mike Keller LEVINSON & SANTORO ELECTRIC	Steve Chen R.A.M.S. MECHANICAL, INC. (Mechanical)	Salvatore Gamba OLYMPIC PLUMBING & HEATING
2nd Tier Sub-Contractor (Plumbing Insulator)	2nd Tier Sub-Contractor (Mechanical Insulator)	2nd Tier Sub-Contractor (Controls)
2nd Tier Sub-Contractor (Sheet Metal)	CM - VP	BARBARA MCINTYRE (COU - Sr. Director)*
<b>Beecher La France SITE FENCING, INC. (2nd Tier Sub-Contractor (Others))</b>	Sub-Contractor Assist	MARGARET MANOLIS (COU - Meeting Scheduler)
Subcontractors (GC Trades and Elec)	2nd Tier Sub-Contractor (Others)	


Save Estimate \* required fields

Repeat steps 1.4 thru 1.5 to add any additional **2<sup>nd</sup> Tier Sub-Contractor (Others)** to the Estimate.

Add new estimate

Setup **Team** Site Scope Inclusions Exclusions Payments Custom

HAYTHAM AWAD (SCA - PO)*	COLIN ALBERT (SCA - CPO)*	GC Assist Estimators
Mike Keller LEVINSON & SANTORO ELECTRIC	Steve Chen R.A.M.S. MECHANICAL, INC. (Mechanical)	Salvatore Gamba OLYMPIC PLUMBING & HEATING
2nd Tier Sub-Contractor (Plumbing Insulator)	2nd Tier Sub-Contractor (Mechanical Insulator)	2nd Tier Sub-Contractor (Controls)
2nd Tier Sub-Contractor (Sheet Metal)	CM - VP	BARBARA MCINTYRE (COU - Sr. Director)*
<b>Beecher La France SITE FENCING, INC. (2nd Tier Sub-Contractor (Others))</b>	Sub-Contractor Assist	MARGARET MANOLIS (COU - Meeting Scheduler)
Subcontractors (GC Trades and Elec)	<b>Daniel D'Arpino CEDRIC CONSTRUCTION CO. (2nd Tier Sub-Contractor (Others))</b>	<b>Haley Haraden Certified Interiors, Inc. (2nd Tier Sub-Contractor (Others))</b>
2nd Tier Sub-Contractor (Others)		



Save Estimate \* required fields



# Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

1.7 Find the field labeled **2<sup>nd</sup> Tier Sub-Contractor (Plumbing Insulator)** and double-click to get drop down.

The screenshot shows the 'Add new estimate' form with the 'Team' tab selected. The form is organized into columns: Setup, Team, Site, Scope, Inclusions, Exclusions, Payments, and Custom. The 'Team' column contains several entries, each with a dropdown arrow. The entry '2nd Tier Sub-Contractor (Plumbing Insulator)' is highlighted with a red box. A red arrow points to the dropdown menu that appears below this entry, showing a list of potential team members with their names and email addresses.

Setup	Team	Site	Scope	Inclusions	Exclusions	Payments	Custom
	Michael Murphy CITNALTA CONSTRUCTION *		ELENI ZABELI-CHRONIS (COU - Deputy Dire			HARVEY BRIND (SCA - SPO) *	
	HAYTHAM AWAD (SCA - PO) *		COLIN ALBERT (SCA - CPO) *			GC Assist Estimators	
	Mike Keller LEVINSON & SANTORO ELECTRI		Steve Chen R.A.M.S. MECHANICAL, INC. (Med			Salvatore Gamba OLYMPIC PLUMBING & HEA	
	2nd Tier Sub-Contractor (Plumbing Insulator)		2nd Tier Sub-Contractor (Mechanical Insulator)			2nd Tier Sub-Contractor (Controls)	
	Craig Archacki The Berlin Steel Construction Company		carchacki@berlinsteel.com			OU - Sr. Director) *	
	Gerard Petri PHASE 1 GROUP, INC.		gpetri@phase1nyc.com			OU - Meeting Sched	
	John Liu R.A.M.S. MECHANICAL, INC.		john.liu@ramsmechanical.com			nteriors, Inc. (2nd Tier	
	Kashif Alam R.A.M.S. MECHANICAL, INC.		kashif.alam@ramsmechanical.com				
	Kristopher Swenson Certified Interiors, Inc.		kristopher@certifiedinteriors.com				

1.8 Select the **2<sup>nd</sup> Tier Sub-Contractor (Plumbing Insulator)** that you want added to the Estimate. That person will now show as part of the Team.

The screenshot shows the 'Add new estimate' form with the 'Team' tab selected. The '2nd Tier Sub-Contractor (Plumbing Insulator)' field is now highlighted with a red box. The dropdown menu is closed, and the field now displays the name of the selected subcontractor, 'Salvatore Gamba OLYMPIC PLUMBING & HEA'. The 'Save Estimate' button is visible at the bottom of the form.

Setup	Team	Site	Scope	Inclusions	Exclusions	Payments	Custom
	Michael Murphy CITNALTA CONSTRUCTION *		ELENI ZABELI-CHRONIS (COU - Deputy Dire			HARVEY BRIND (SCA - SPO) *	
	HAYTHAM AWAD (SCA - PO) *		COLIN ALBERT (SCA - CPO) *			GC Assist Estimators	
	Mike Keller LEVINSON & SANTORO ELECTRI		Steve Chen R.A.M.S. MECHANICAL, INC. (Med			Plumbing Subcontractor	
	Salvatore Gamba OLYMPIC PLUMBING & HEA		2nd Tier Sub-Contractor (Mechanical Insulator)			2nd Tier Sub-Contractor (Controls)	
	2nd Tier Sub-Contractor (Sheet Metal)		CM - VP			BARBARA MCINTYRE (COU - Sr. Director) *	
	Beecher La France SITE FENCING, INC. (2nd T		Sub-Contractor Assist			MARGARET MANOLIS (COU - Meeting Sched	
	Subcontractors (GC Trades and Elec)		Daniel D'Arpino CEDRIC CONSTRUCTION CO			Haley Haraden Certified Interiors, Inc. (2nd Tier	

[Save Estimate](#) \* required fields



## Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

1.9 Find the field labeled **2<sup>nd</sup> Tier Sub-Contractor (Mechanical Insulator)** and double-click to get drop down.

The screenshot shows the 'Add new estimate' form with the 'Team' tab selected. The form is divided into several sections: Setup, Team, Site, Scope, Inclusions, Exclusions, Payments, and Custom. The 'Team' section contains a list of team members. The '2nd Tier Sub-Contractor (Mechanical Insulator)' field is highlighted with a red box. A red arrow points to the dropdown menu below this field, which is currently open, showing a list of potential subcontractors including 'Craig Archacki The Berlin Steel Construction Company', 'Gerard Petri PHASE 1 GROUP, INC.', 'John Liu R.A.M.S. MECHANICAL, INC.', and 'Kashif Alam R.A.M.S. MECHANICAL, INC.'.

1.10 Select the **2<sup>nd</sup> Tier Sub-Contractor (Mechanical Insulator)** that you want added to the Estimate. That person will now show as part of the Team.

The screenshot shows the 'Add new estimate' form with the 'Team' tab selected. The '2nd Tier Sub-Contractor (Mechanical Insulator)' field is now populated with 'John Liu R.A.M.S. MECHANICAL, INC. (2nd Tier)'. The dropdown menu is no longer visible. The 'Save Estimate' button is visible at the bottom of the form.



# Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

1.11 Find the field labeled **2<sup>nd</sup> Tier Sub-Contractor (Controls)** and double-click to get drop down.

The screenshot shows the 'Add new estimate' form with the 'Team' tab selected. The '2nd Tier Sub-Contractor (Controls)' field is highlighted with a red box. A red arrow points to the dropdown menu below it, which lists several subcontractors including Muhammad Siddique R.A.M.S. MECHANICAL, INC., Peter Geiger Certified Interiors, Inc., Saul Marachinskas NORTH SHORE CLIMATE CONTROL INC., Sean Frey NORTH SHORE CLIMATE CONTROL INC., and Thomas Dutton NOBLE ELEVATOR COMPANY INC.

1.12 Select the **2<sup>nd</sup> Tier Sub-Contractor (Controls)** that you want added to the Estimate. That person will now show as part of the Team.

The screenshot shows the 'Add new estimate' form with the 'Team' tab selected. The 'Sean Frey NORTH SHORE CLIMATE CONTROL INC.' field is highlighted with a red box. A blue 'Save Estimate' button is visible at the bottom center, and a '\* required fields' note is at the bottom right.



## Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

- 1.13 Find the field labeled **2<sup>nd</sup> Tier Sub-Contractor (Sheet Metal)** and double-click to get drop down.

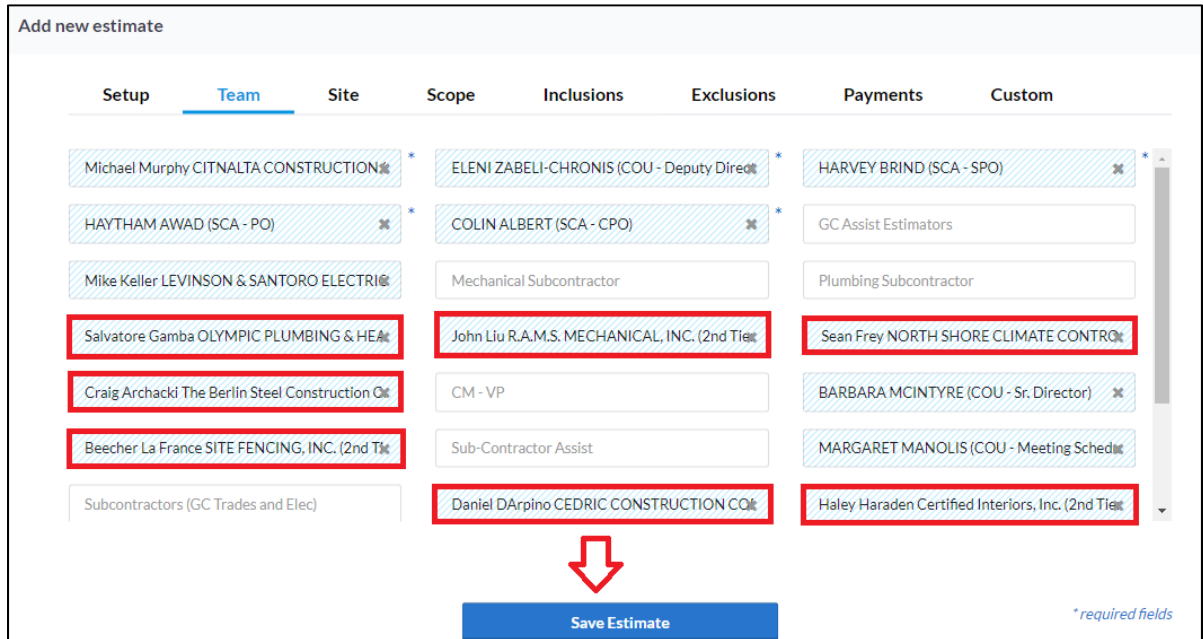
The screenshot shows the 'Add new estimate' form with the 'Team' tab selected. The '2nd Tier Sub-Contractor (Sheet Metal)' field is highlighted with a red box. A red arrow points to the dropdown menu below it, which lists various subcontractors. The dropdown menu is open, showing a list of names and email addresses. The first item in the list is 'Michael Psillos JD Consulting LLC' with email 'mikep@jdtraditional.com'. Other items include 'Muhammad Siddique R.A.M.S. MECHANICAL, INC.', 'Peter Geiger Certified Interiors, Inc.', 'Saul Marachinkas NORTH SHORE CLIMATE CONTROL INC.', and 'Thomas Dutton NOBLE ELEVATOR COMPANY INC.'.

- 1.14 Select the **2<sup>nd</sup> Tier Sub-Contractor (Sheet Metal)** that you want added to the Estimate. That person will now show as part of the Team.

The screenshot shows the 'Add new estimate' form with the 'Team' tab selected. The 'Craig Archacki The Berlin Steel Construction Co.' field is highlighted with a red box. A blue 'Save Estimate' button is visible at the bottom. The dropdown menu is closed, and the selected subcontractor is now visible in the 'Team' list.

## Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

- 1.15 Once all the 2<sup>nd</sup> Tier Sub Estimators have been added to the Team Tab, click on the **Save** button.



The screenshot shows the 'Add new estimate' interface with the 'Team' tab selected. The interface is divided into several columns: Setup, Team, Site, Scope, Inclusions, Exclusions, Payments, and Custom. The 'Team' tab contains a list of subcontractors, with several names highlighted in red boxes: Salvatore Gamba OLYMPIC PLUMBING & HEATING, John Liu R.A.M.S. MECHANICAL, INC. (2nd Tier), Sean Frey NORTH SHORE CLIMATE CONTROL, Craig Archacki The Berlin Steel Construction Co., Daniel D'Arpino CEDRIC CONSTRUCTION CO., Beecher La France SITE FENCING, INC. (2nd Tier), and Haley Haraden Certified Interiors, Inc. (2nd Tier). A red arrow points to the 'Save Estimate' button at the bottom of the interface.

## Assigning 2<sup>nd</sup> Tier Sub Estimators to line items in an Estimate

- 2.1 From the Estimate Center, locate the Estimate and click anywhere inside the Estimate Tile.





# Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

2.2 Click on the **Estimate** tab.

Code	Description	Quantity	Unit	Material Cost	Material Total	Labor Type	Crew
	Add New Item		Select			None	None

2.3 Click in **Add New item** to start adding line items to the Estimate.

Code	Description	Quantity	Unit	Material Cost	Material Total	Labor Type	Crew	Labor Cost	Labor Productivity	Man Hours	Crew Days	Labor Total	Labor Rate	Equipme
	Add New Item		Select			None	None		/ Select				Straight T...	
15400.15410.00210	AE - 8" Steam/chilled water piping	170.00	LF			None	None		/ Select				Straight T...	
15400.15410.00160	AE - Chilled water piping	130.00	LF			None	None		/ Select				Straight T...	
15400.15410.01010	AE - 10" Steam/chilled water piping	140.00	LF			None	None		/ Select				Straight T...	

2.4 In the **Assigned** column, click on the drop-down to see list of 2<sup>nd</sup> Tier Sub Estimators.

Code	Description	Quantity	Unit	Crew Days	Labor Total	Labor Rate	Equipment Cost	Equipment Total	Unit Cost	Total	Assigned	LLW	Trade Specialty
	Add New Item		Select			Straight T...					None	None	None
15400.15410.00210	AE - 8" Steam/chilled water piping	170.00	LF			Straight T...					CRUZ CONCR...	None	None
15400.15410.00160	AE - Chilled water piping	130.00	LF			Straight T...					CRUZ CONCR...	None	None
15400.15410.01010	AE - 10" Steam/chilled water piping	140.00	LF			Straight T...					None	None	None

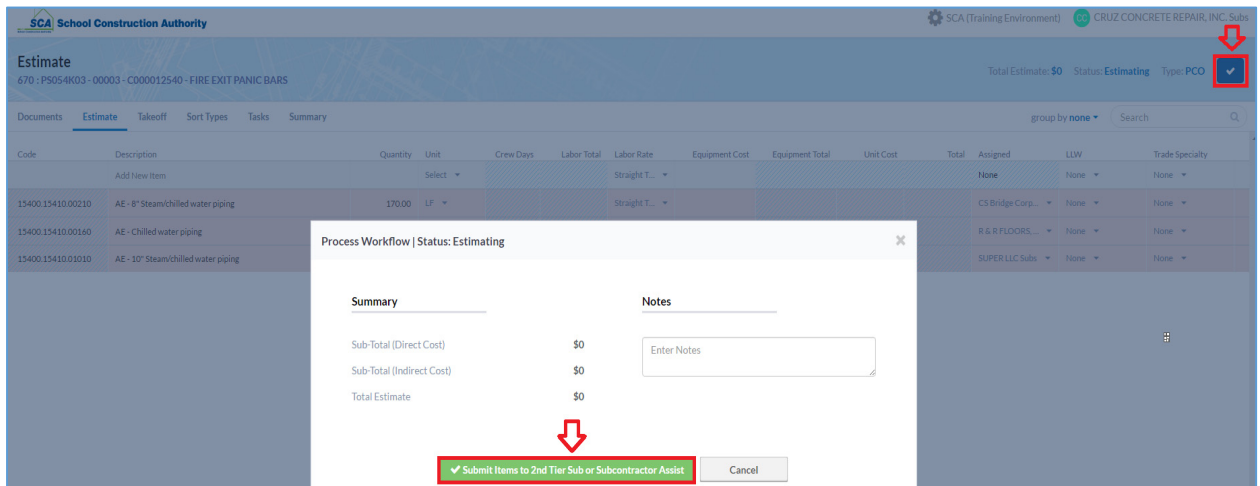
# Cost Estimating System: How to invite 2<sup>nd</sup> Tier Sub Estimators to an Estimate [for Subcontractor]

2.5 Select a 2<sup>nd</sup> Tier Sub Estimator for each line item.



Code	Description	Quantity	Unit	Crew Days	Labor Total	Labor Rate	Equipment Cost	Equipment Total	Unit Cost	Total	Assigned	LLW	Trade Specialty
	Add New Item		Select			Straight T...					None	None	None
15400.15410.00210	AE - 8" Steam/chilled water piping	170.00	LF			Straight T...					CS Bridge Corp...	None	None
15400.15410.00160	AE - Chilled water piping	130.00	LF			Straight T...					R & R FLOORS, ...	None	None
15400.15410.01010	AE - 10" Steam/chilled water piping	140.00	LF			Straight T...					SUPER LLC Subs	None	None

2.6 Once finished, click on the **Process Button**  and select **Submit Items to 2<sup>nd</sup> Tier Sub or Subcontractor Assist** button.



Process Workflow | Status: Estimating

Summary		Notes
Sub-Total (Direct Cost)	\$0	Enter Notes
Sub-Total (Indirect Cost)	\$0	
Total Estimate	\$0	