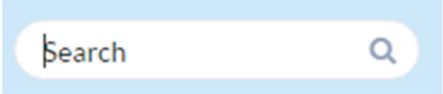



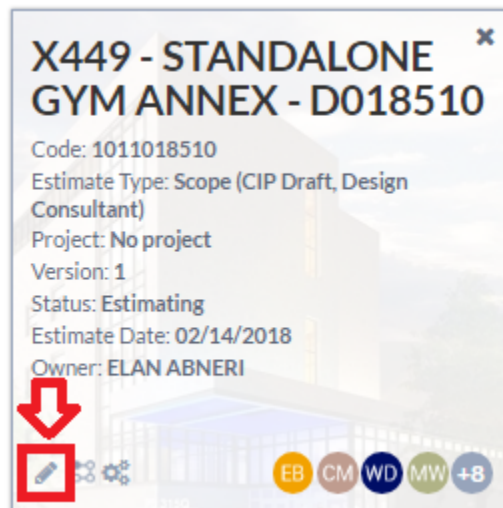
### Inviting Prime Consultant Assist Estimators to an Estimate

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

1.1. Type in the Design Number in the Search field  located in the upper-right hand corner of screen to find the Estimate that will be merged.

**Note:** Search can be used with the Design Number, LLW, School Code, Building ID, Estimate Description, etc.

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





# Cost Estimating System: How to invite and assign Prime Consultant Assist Estimators to an Estimate

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

The screenshot shows the 'Add new estimate' popup with the 'Team' tab selected. A red arrow points to the 'Team' tab. The form contains several input fields for team members, each with a required field asterisk (\*). The fields are arranged in a grid:

Setup	Team	Site	Scope	Inclusions	Exclusions	Payments	Custom
A&E Prime Consultant *	A&E TSS - Manager *	A&E Design Project Manager *					
A&E Design Manager *	A&E Studio Director	Sub Consultant or Prime Assist					
A&E TSS - Lead Estimator	ODC - CIP	CPMD - CIP					
A&E Assist or External Assist Estimator	Sub Consultant Assist						

At the bottom, there is an 'Invite Team Member' button and a 'Save Estimate' button. A note indicates '\* required fields'.

1.4 Find the field labeled **Sub Consultant or Prime Assist** and double-click to get drop down.

The screenshot shows the 'Add new estimate' popup with the 'Team' tab selected. The 'Sub Consultant or Prime Assist' field is highlighted with a red box, and a dropdown menu is open below it. The dropdown menu lists several options:

- Sen Architects LLP PRIME
- Sen Architects LLP PRIME
- STV Incorporated Sub Consultant
- STV Incorporated Sub Consultant
- Symphony Floors Inc. Sub Consultant
- Symphony Floors Inc. Sub Consultant
- Thorn Electric, Inc PRIME
- Thorn Electric, Inc PRIME
- Toscona, Inc External

A red arrow points to the dropdown menu.



## Cost Estimating System: How to invite and assign Prime Consultant Assist Estimators to an Estimate

- 1.5 Select the Prime Consultant Assist Estimator 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 form is divided into several sections: Setup, Team, Site, Scope, Inclusions, Exclusions, Payments, and Custom. The 'Team' section contains three rows of dropdown menus. The first row has 'ACCU COST CONSTRUC Consultant (A&E Prime)', 'Marion Washington (A&E TSS - Manager)', and 'DAISY MANLAPIG (A&E Design Project Manager)'. The second row has 'Abdul Khalid (A&E Design Manager)', 'Elan Abneri (A&E Studio Director)', and 'AE Prime One (Sub Consultant or Prime Assist)'. The third row has 'A&E TSS - Lead Estimator', 'ODC - CIP', and 'CPMD - CIP'. Below these are three more rows of dropdown menus: 'A&E Assist or External Assist Estimator', 'Sub Consultant Assist', and 'Sub Consultant or Prime Assist'. The 'AE Prime One (Sub Consultant or Prime Assist)' dropdown is highlighted with a red box.

- 1.6 Repeat steps 1.4 thru 1.5 to add any additional Prime Consultant Assist Estimators to the Estimate.

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 three rows of dropdown menus. The first row has 'ACCU COST CONSTRUC Consultant (A&E Prime)', 'Marion Washington (A&E TSS - Manager)', and 'DAISY MANLAPIG (A&E Design Project Manager)'. The second row has 'Abdul Khalid (A&E Design Manager)', 'Elan Abneri (A&E Studio Director)', and 'AE Prime One (Sub Consultant or Prime Assist)'. The third row has 'A&E TSS - Lead Estimator', 'ODC - CIP', and 'CPMD - CIP'. Below these are three more rows of dropdown menus: 'A&E Assist or External Assist Estimator', 'Sub Consultant Assist', and 'Josh - Prime Consultant One (Sub Consultant or Prime Assist)'. The 'AE Prime One (Sub Consultant or Prime Assist)' dropdown is highlighted with a red box. Below the form, a search box contains the text 'prime' and a dropdown list of search results is shown. The search results include 'ACCU COST CONSTRUC CONSULTANTS INC PRIME', 'ACCU COST CONSTRUC CONSULTANTS INC PRIME', 'A&J CONSULTING ENGINEERING Consultant', 'A&J-CONSULTING-ENGINEERING Consultant', 'A&J CONSULTING ENGINEERING SERVICES, P.C. PRIME', and 'A&J CONSULTING ENGINEERING SERVICES, P.C. PRIME'. A red arrow points to the first search result.



## Cost Estimating System: How to invite and assign Prime Consultant Assist Estimators to an Estimate

- 1.7 Once all the Prime Consultant Assist Estimators have been added to the Team Tab, click on the **Save** button.

Add new estimate

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

ACCU COST CONSTRUC Consultant (A&E Print)	Marion Washington (A&E TSS - Manager)	DAISY MANLAPIG (A&E Design Project Manag)
Abdul Khalid (A&E Design Manager)	Elan Abneri (A&E Studio Director)	<b>AE Prime One (Sub Consultant or Prime Assist)</b>
A&E TSS - Lead Estimator	ODC - CIP	CPMD - CIP
A&E Assist or External Assist Estimator	Sub Consultant Assist	<b>Josh - Prime Consultant One (Sub Consultant One)</b>
<b>Thorn Electric, Inc PRIME (Sub Consultant or Prime)</b>	Sub Consultant or Prime Assist	

Invite Team Member

**Save Estimate** \*required fields

### Assigning Prime Consultant Assist Estimators to line items in an Estimate

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

X449 - STANDALONE GYM ANNEX - D018510

Code: 1011018510  
Estimate Type: Scope (CIP Draft, Design Consultant)  
Project: No project  
Version: 1  
Status: Estimating  
Estimate Date: 02/14/2018  
Owner: ELAN ABNERI

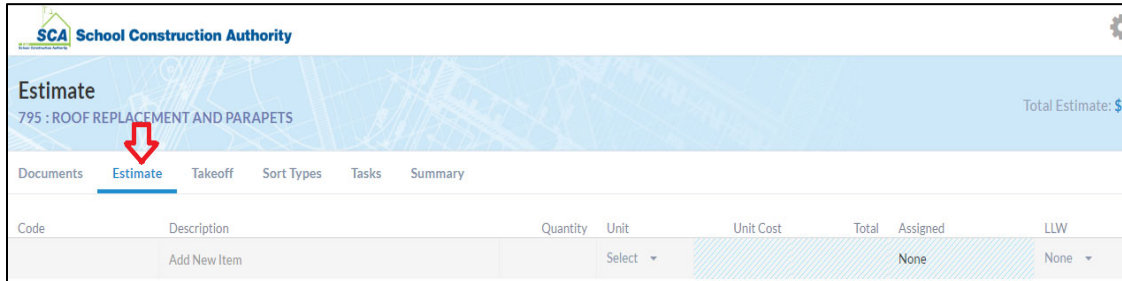
**Click anywhere in square**

EB CM WD MW +8

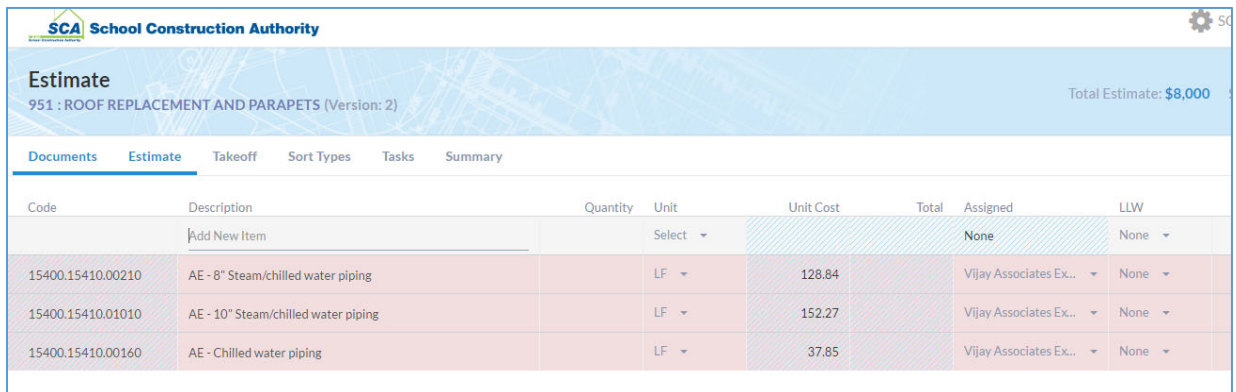


# Cost Estimating System: How to invite and assign Prime Consultant Assist Estimators to an Estimate

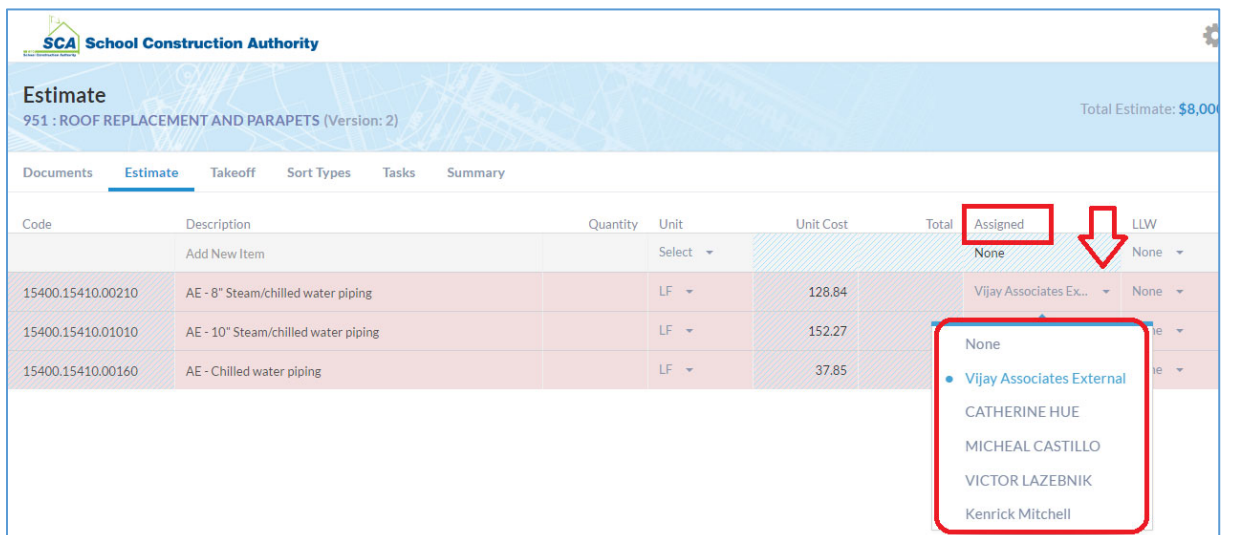
2.2 Click on the **Estimate** tab.



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



2.4 In the **Assigned** column, click on the drop-down to see list of Prime Consultant Assist Estimators.






## Cost Estimating System: How to invite and assign Prime Consultant Assist Estimators to an Estimate

2.5 Select a Prime Consultant Assist Estimator for each line item.

Estimate								Total Estimate: \$8,000
951 : ROOF REPLACEMENT AND PARAPETS (Version: 2)								
Documents	Estimate	Takeoff	Sort Types	Tasks	Summary			
Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW	
	Add New Item		Select ▾			None	None ▾	
15400.15410.00210	AE - 8" Steam/chilled water piping		LF ▾	128.84		CATHERINE HUE ▾	None ▾	
15400.15410.01010	AE - 10" Steam/chilled water piping		LF ▾	152.27		MICHEAL CASTILL... ▾	None ▾	
15400.15410.00160	AE - Chilled water piping		LF ▾	37.85		VICTOR LAZEBNIK ▾	None ▾	



2.6 Once finished, click on the Process Button  and select Submit Items to Prime Consultant Assist Estimator button.

Estimate								Total Estimate: \$8,000	Status: Estimating	Type: Scope (CIP, In-House) ▾	
951 : ROOF REPLACEMENT AND PARAPETS (Version: 2)											
Documents	Estimate	Takeoff	Sort Types	Tasks	Summary	group by none ▾		Search			
Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW				
	Add New Item		Select ▾			None	None ▾				
15400.15410.00210	AE - 8" Stea										
15400.15410.01010	AE - 10" Ste										
15400.15410.00160	AE - Chilled										

Process Workflow | Status: Estimating

<b>Summary</b>		<b>Notes</b>	
Sub-Total (Direct Cost)	\$0	Enter Notes	
Sub-Total (Indirect Cost)	\$0		
<b>Total Estimate</b>	<b>\$8,000.00</b>		

