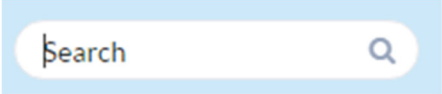


Inviting Assist Estimators to an Estimate

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.

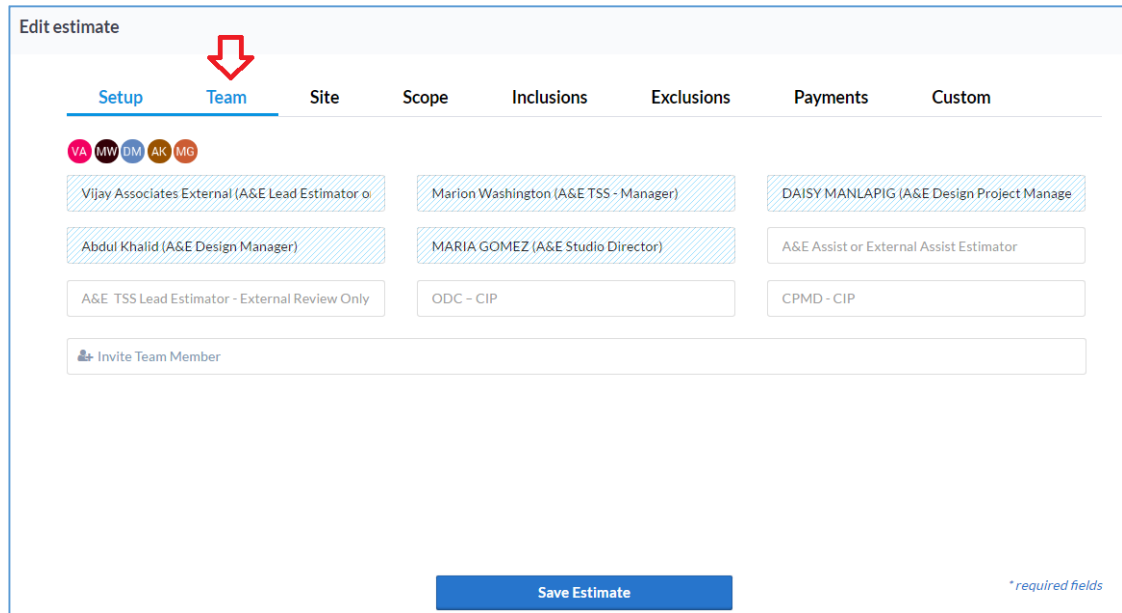
Note: Search can be used with the Design Number, LLW, School Code, Building ID, Estimate Description, etc.

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



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

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



Edit estimate

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

VA MW DM AK MG

Vijay Associates External (A&E Lead Estimator o

Marion Washington (A&E TSS - Manager)

DAISY MANLAPIG (A&E Design Project Manage

Abdul Khalid (A&E Design Manager)

MARIA GOMEZ (A&E Studio Director)

A&E Assist or External Assist Estimator

A&E TSS Lead Estimator - External Review Only

ODC - CIP

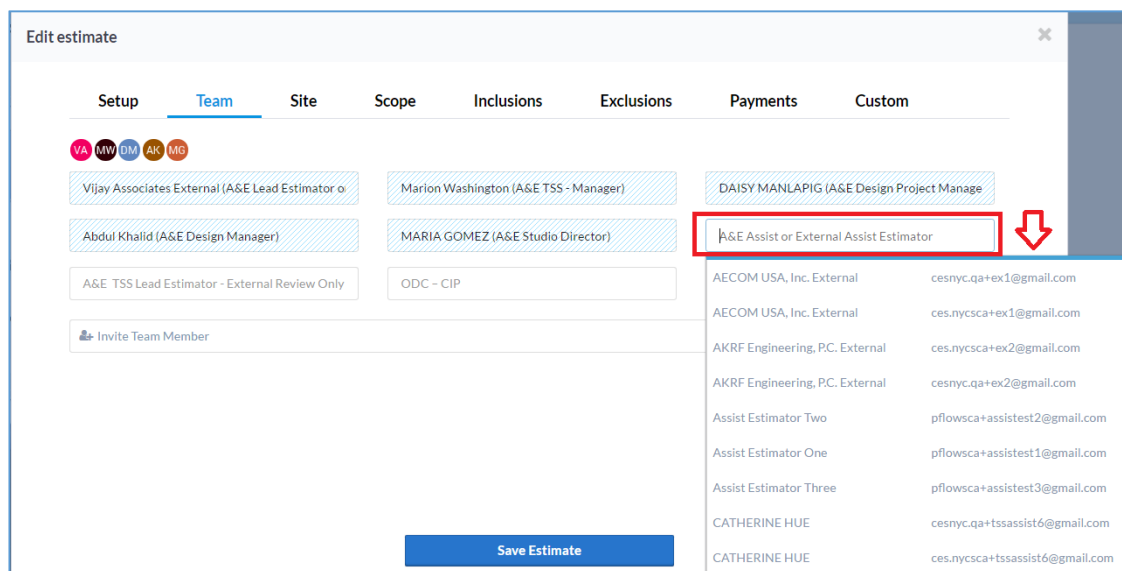
CPMD - CIP

Invite Team Member

Save Estimate

* required fields

1.4 Find the field labeled **A&E Assist or External Assist Estimator** and double-click to get drop down.



Edit estimate

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

VA MW DM AK MG

Vijay Associates External (A&E Lead Estimator o

Marion Washington (A&E TSS - Manager)

DAISY MANLAPIG (A&E Design Project Manage

Abdul Khalid (A&E Design Manager)

MARIA GOMEZ (A&E Studio Director)

A&E Assist or External Assist Estimator

A&E TSS Lead Estimator - External Review Only

ODC - CIP

Invite Team Member

Save Estimate

AECOM USA, Inc. External cesnyc.qa+ex1@gmail.com

AECOM USA, Inc. External ces.nycsca+ex1@gmail.com

AKRF Engineering, P.C. External ces.nycsca+ex2@gmail.com

AKRF Engineering, P.C. External cesnyc.qa+ex2@gmail.com

Assist Estimator Two pflowsca+assistest2@gmail.com

Assist Estimator One pflowsca+assistest1@gmail.com

Assist Estimator Three pflowsca+assistest3@gmail.com

CATHERINE HUE cesnyc.qa+tssassist6@gmail.com

CATHERINE HUE ces.nycsca+tssassist6@gmail.com



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

- 1.5 Select the Assist Estimator that you want added to the Estimate. That person will now show as part of the Team.

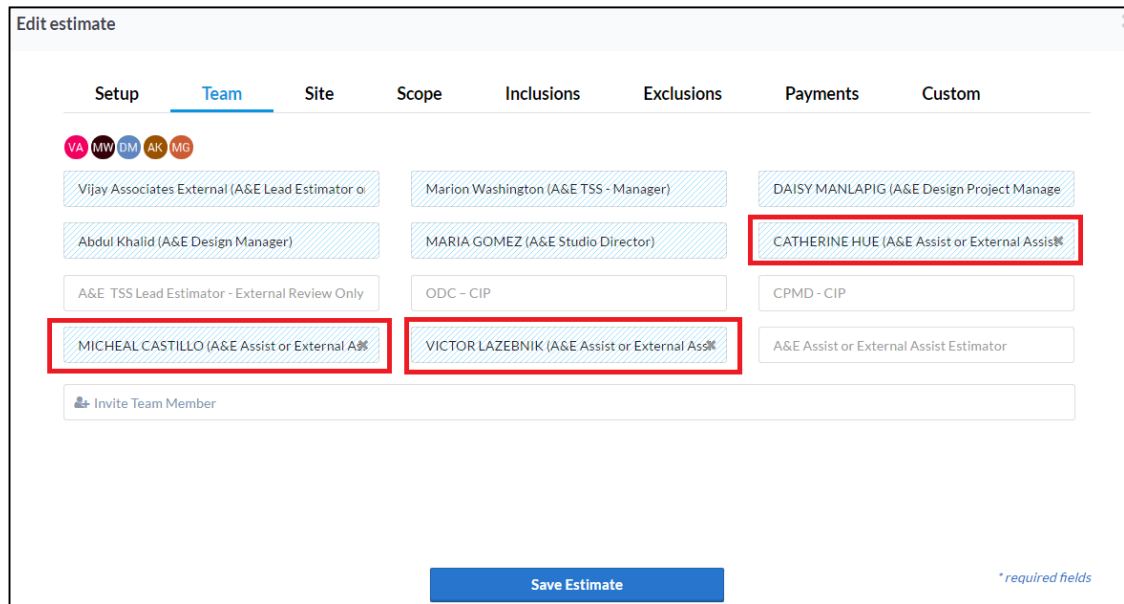
The screenshot shows the 'Edit estimate' window with the 'Team' tab selected. The interface includes tabs for Setup, Team, Site, Scope, Inclusions, Exclusions, Payments, and Custom. Under the Team tab, there are several roles listed in a grid. The role 'CATHERINE HUE (A&E Assist or External Assist)' is highlighted with a red box. Other roles include 'Vijay Associates External (A&E Lead Estimator o', 'Abdul Khalid (A&E Design Manager)', 'A&E TSS Lead Estimator - External Review Only', 'A&E Assist or External Assist Estimator', 'Marion Washington (A&E TSS - Manager)', 'MARIA GOMEZ (A&E Studio Director)', 'ODC - CIP', 'DAISY MANLAPIG (A&E Design Project Manage', and 'CPMD - CIP'.

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

The screenshot shows the 'Edit estimate' window with the 'Team' tab selected. The role 'MICHEAL CASTILLO (A&E Assist or External A&E)' is highlighted with a red box. A dropdown menu is open, showing a list of potential team members. The role 'A&E Assist or External Assist Estimator' is highlighted with a red box, and a red arrow points to it. Other roles in the dropdown include 'VICTOR LAZEBNIK', 'Vijay Associates External 1', 'Vijay Associates External', 'WILLIAM BENSON', and 'WILLIAM BENSON'. The interface also shows an 'Invite Team Member' button and a '* required fields' note.

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

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



Edit estimate

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

VA MW DM AK MG

Vijay Associates External (A&E Lead Estimator o
 Marion Washington (A&E TSS - Manager)
 DAISY MANLAPIG (A&E Design Project Manage

Abdul Khalid (A&E Design Manager)
 MARIA GOMEZ (A&E Studio Director)
 CATHERINE HUE (A&E Assist or External Assis

A&E TSS Lead Estimator - External Review Only
 ODC - CIP
 CPMD - CIP

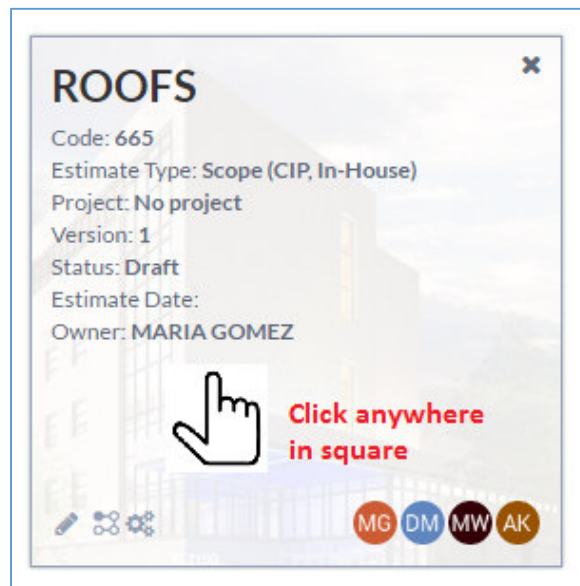
MICHEAL CASTILLO (A&E Assist or External A&E
 VICTOR LAZEBNIK (A&E Assist or External Assis
 A&E Assist or External Assist Estimator

Invite Team Member

Save Estimate * required fields

Assigning Assist 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 and assign Assist Estimators to an Estimate

2.2 Click on the **Estimate** tab.

The screenshot shows the SCA School Construction Authority interface. The page title is 'Estimate' for '795 : ROOF REPLACEMENT AND PARAPETS'. The 'Estimate' tab is highlighted with a red arrow. Below the tabs is a table with columns: Code, Description, Quantity, Unit, Unit Cost, Total, Assigned, and LLW. The 'Add New Item' row is visible.

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

The screenshot shows the SCA School Construction Authority interface. The page title is 'Estimate' for '951 : ROOF REPLACEMENT AND PARAPETS (Version: 2)'. The 'Estimate' tab is selected. Below the tabs is a table with columns: Code, Description, Quantity, Unit, Unit Cost, Total, Assigned, and LLW. The 'Add New Item' button is highlighted with a red arrow.

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

The screenshot shows the SCA School Construction Authority interface. The page title is 'Estimate' for '951 : ROOF REPLACEMENT AND PARAPETS (Version: 2)'. The 'Estimate' tab is selected. Below the tabs is a table with columns: Code, Description, Quantity, Unit, Unit Cost, Total, Assigned, and LLW. The 'Assigned' column is highlighted with a red box, and a red arrow points to the drop-down menu. The drop-down menu is open, showing a list of Assist Estimators: None, Vijay Associates External (selected), CATHERINE HUE, MICHEAL CASTILLO, VICTOR LAZEBNIK, and Kenrick Mitchell.



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

2.5 Select an Assist Estimator for each line item.

Estimate								Total Estimate: \$8,000
951 : ROOF REPLACEMENT AND PARAPETS (Version: 2)								
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 Assist Estimator button.

Estimate 951 : ROOF REPLACEMENT AND PARAPETS (Version: 2) Total Estimate: \$8,000 Status: Estimating Type: Scope (CIP, In-House) ▾

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" Steam						
15400.15410.01010	AE - 10" Stea						
15400.15410.00160	AE - Chilled						

Process Workflow | Status: Estimating

Summary

Sub-Total (Direct Cost)	\$0
Sub-Total (Indirect Cost)	\$0
Total Estimate	\$8,000.00

Notes

Enter Notes

Submit Items to Assist Estimator Cancel