**EST SCOPE REVIEW**

The Chief Estimator role will receive a workflow task to review Scopes submitted by the design project manager. To review the scope, login to AiM using your Auburn ID and password.

On your Workdesk, locate the Workflow Count channel. Click the words “Capital Project” to see the listing of project workflows currently assigned to you.

The screenshot above shows us that the Chief Estimator currently has 1 project workflow: Estimating Scope Review for project 15-184.
Click the date hyperlink to review the scope and respond to the workflow. The document type column will identify the documents that were flagged as “SCOPE” documents by the project lead.

Clicking the thumbnail will open the attachment.

One you have reviewed the documents, click Edit to record your response.

This allows you to select the Response dropdown

There are 2 possible responses: Approved or Revisions Required. If you select Revisions Required, please use the Notes Log to record your conditions/concerns.
ESTIMATE PROJECT

When a project reaches the ESTIMATE PROJECT status, a workflow is launched to the Chief Estimator. At this point, the chief estimator has already reviewed the scope to ensure enough detail is included for an estimate.

When the ESTIMATE PROJECT workflow is received, the Chief Estimator should first update the project; assigning an ESTIMATOR.

To assign an Estimator, open the project and click EDIT.

Note: You can drill into the project through the Workflow, or by using the Quick Search on your WorkDesk.

Next, Click on the Project Team link under the View menu on the left hand side of the screen:
Scroll down on the team until you see the ESTIMATOR responsibility. You can click the Zoom to see a list of employees, or enter an id.

Press **Done** and then **Save**.

Now that the Estimator has been assigned, respond to the workflow so that the estimator receives the next step.

Click AiM (located on the top right of the screen) to return to the main Workdesk.

Locate the Workflow Count Channel.

Click the Capital Project link.

A listing of the Capital Project workflows currently assigned to you is displayed.
Located the ESTIMATE PROJECT workflow for the project you just assigned, and click the date hyperlink.

Click EDIT.

Add any relevant NOTES to the Notes Log.

Drop down the RESPONSE menu, and select “Prepare/Submit Esitmate”. This will move the workflow forward to the next step, which is notifying the Estimator to prepare an estimate.