ROBINS & MORTON

OP-010.1 – Estimate Number Request Procedure

Updated 08/27/24

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Unanet Login

Estimate numbers are assigned using Unanet. If you do not have a Unanet account, email Adria Klein and she will add you to Unanet.

Login Instructions Email

You should receive an email that your Unanet User Account was activated and instructions on logging into Unanet through HUB with single sign-on. Your login instructions will be sent in a separate email with a link to create a password for your account.

Hi

Your Unanet user account was activated, and login instructions were sent in a separate email.

You can also access Unanet with single sign-on through **HUB**. Please see the Unanet link at the top of the main page and also on the Marketing page. If you click the link you will be asked to sign in with your Robins & Morton login, which will automatically log you into Unanet without a separate login. Please let me know if you have any issues or questions or if you would like an overview of Unanet.

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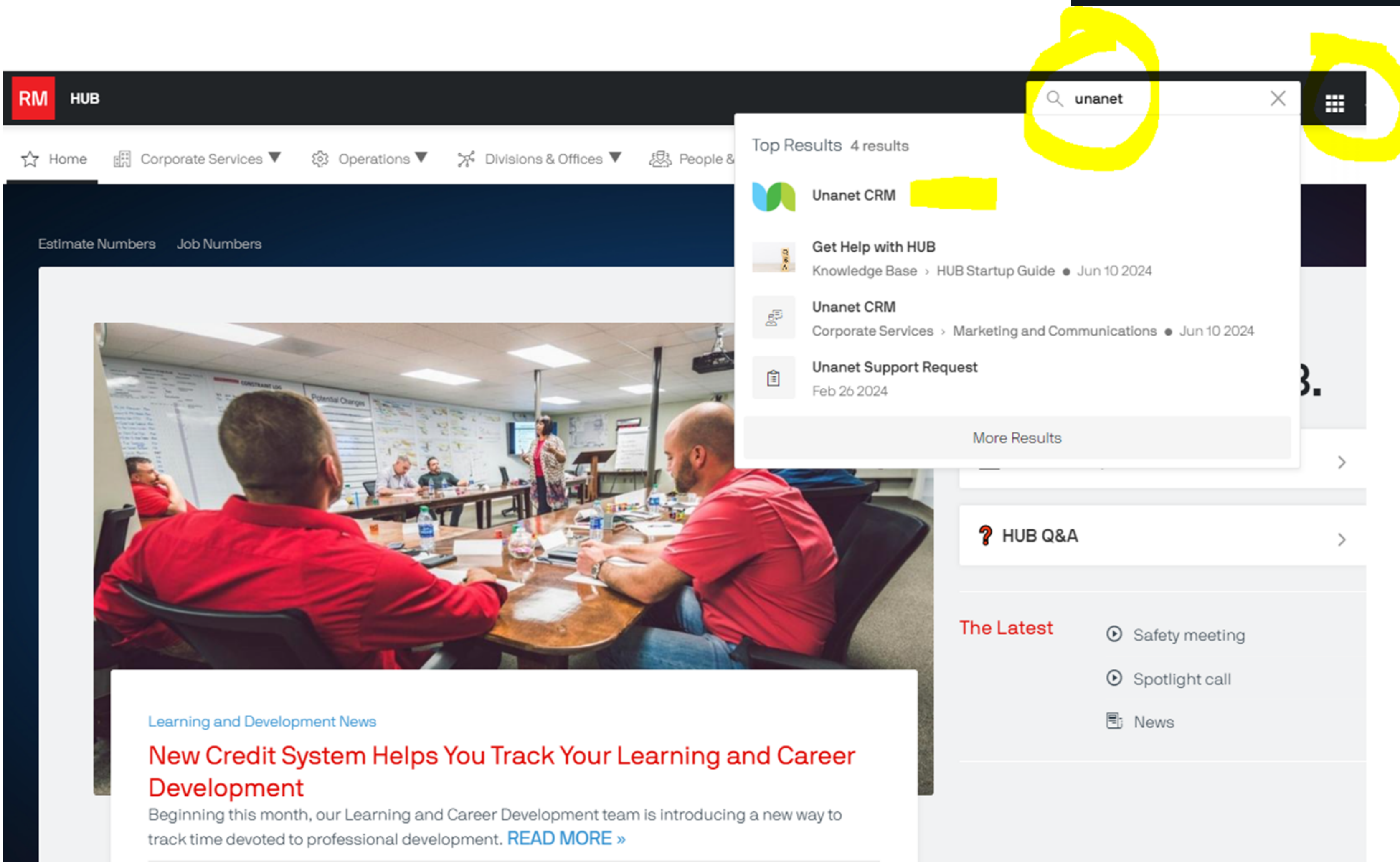
Access Unanet through Hub

From the main page or marketing page you can select the Unanet link as highlighted in yellow in the screenshot below.



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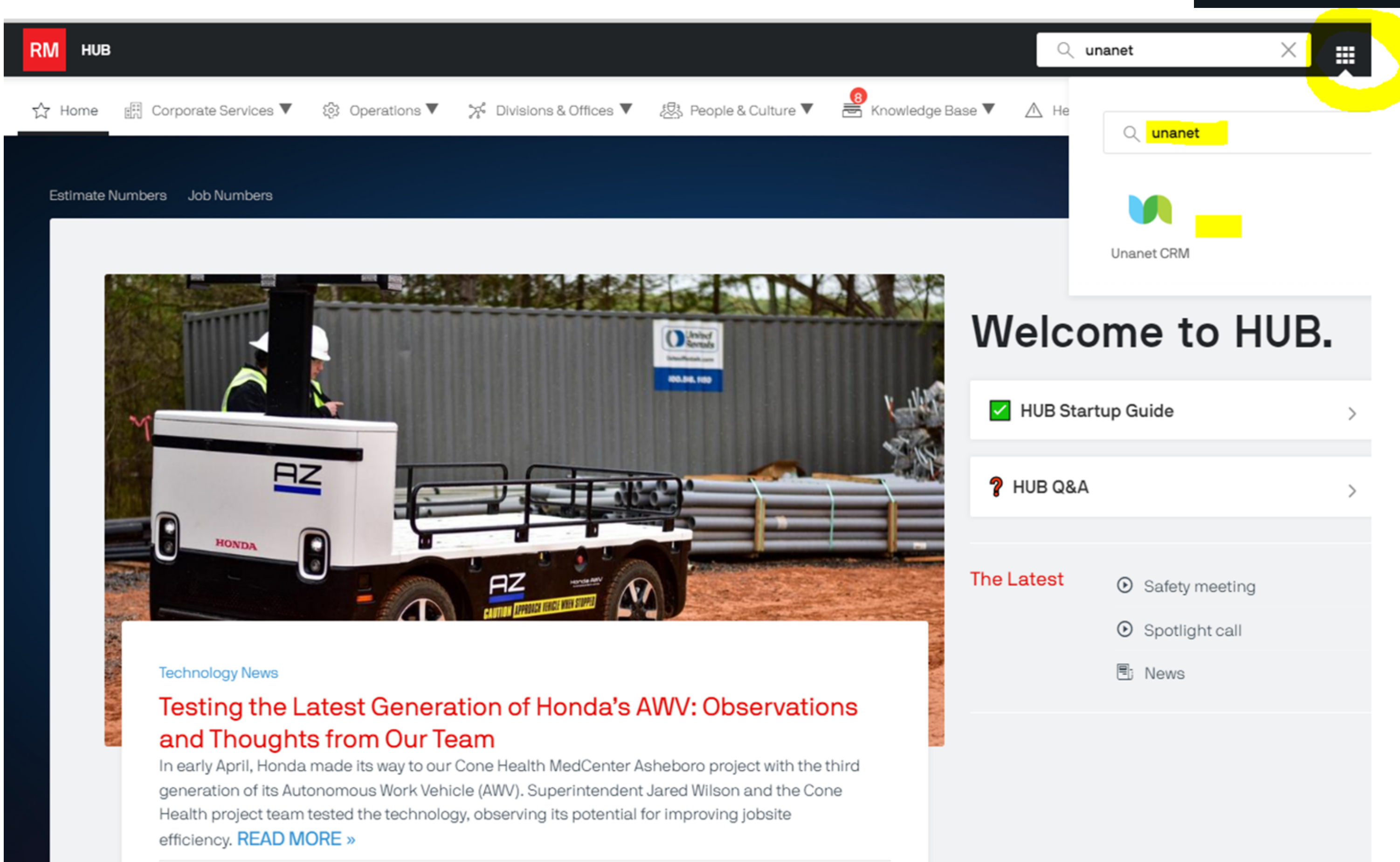
Unanet Single Sign-On

Click on the waffle icon on the top right search Unanet and click on the Unanet logo.

Select Unanet to access Single Sign-On Link.



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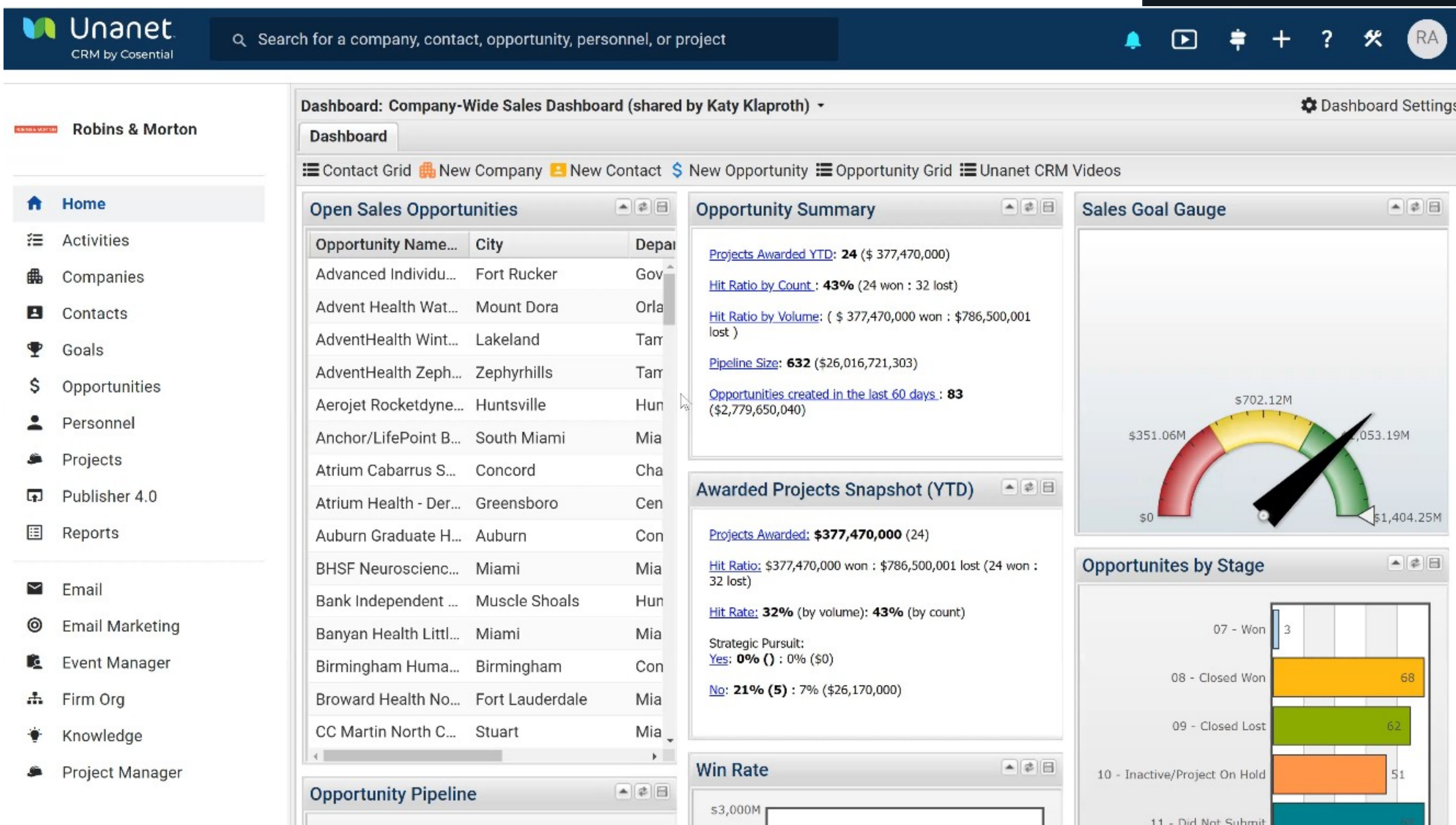
Step 1

After logging into Unanet, your screen will look like the screenshot below:



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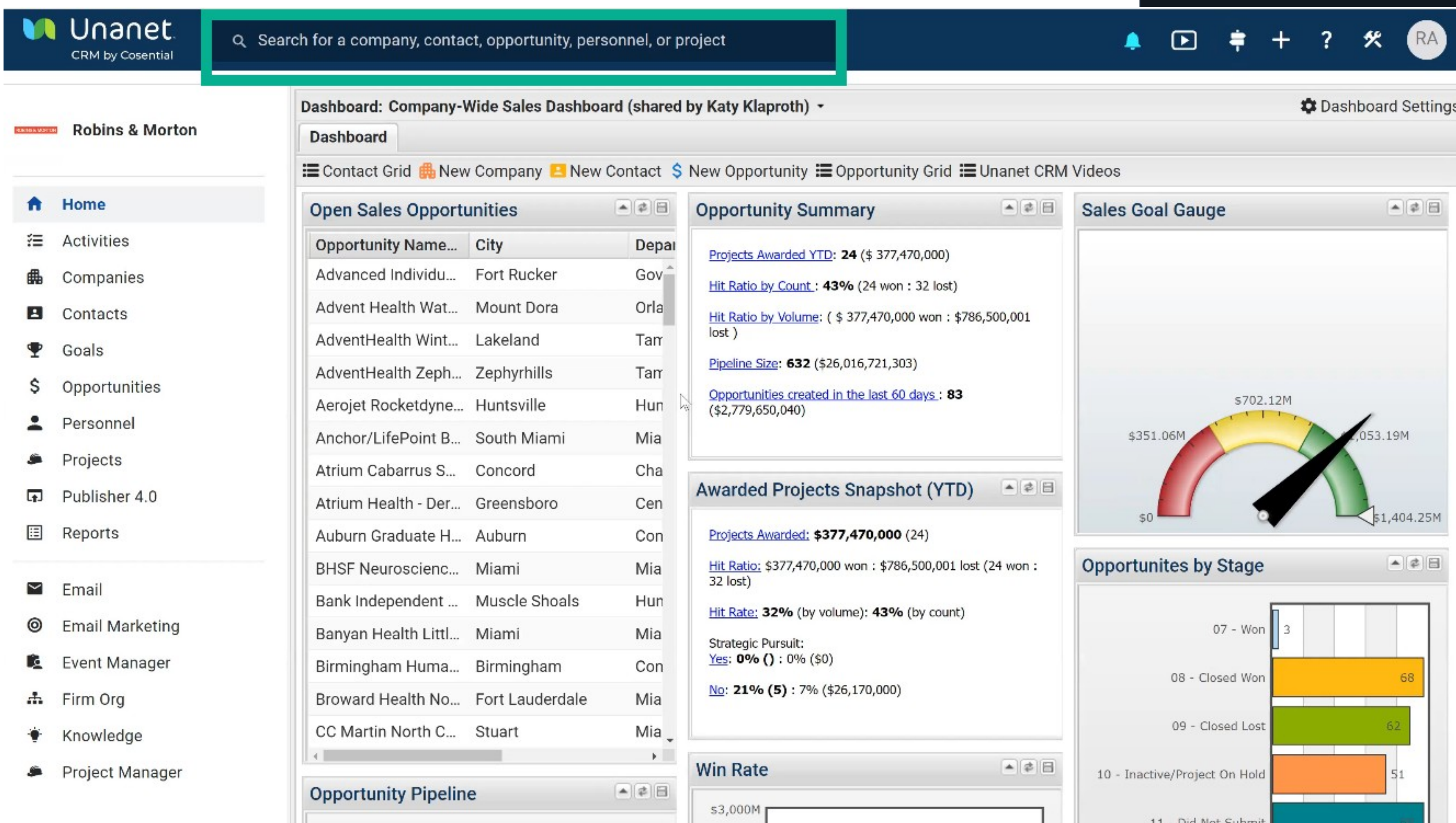
Step 2

Select the search bar at the top of the screen.



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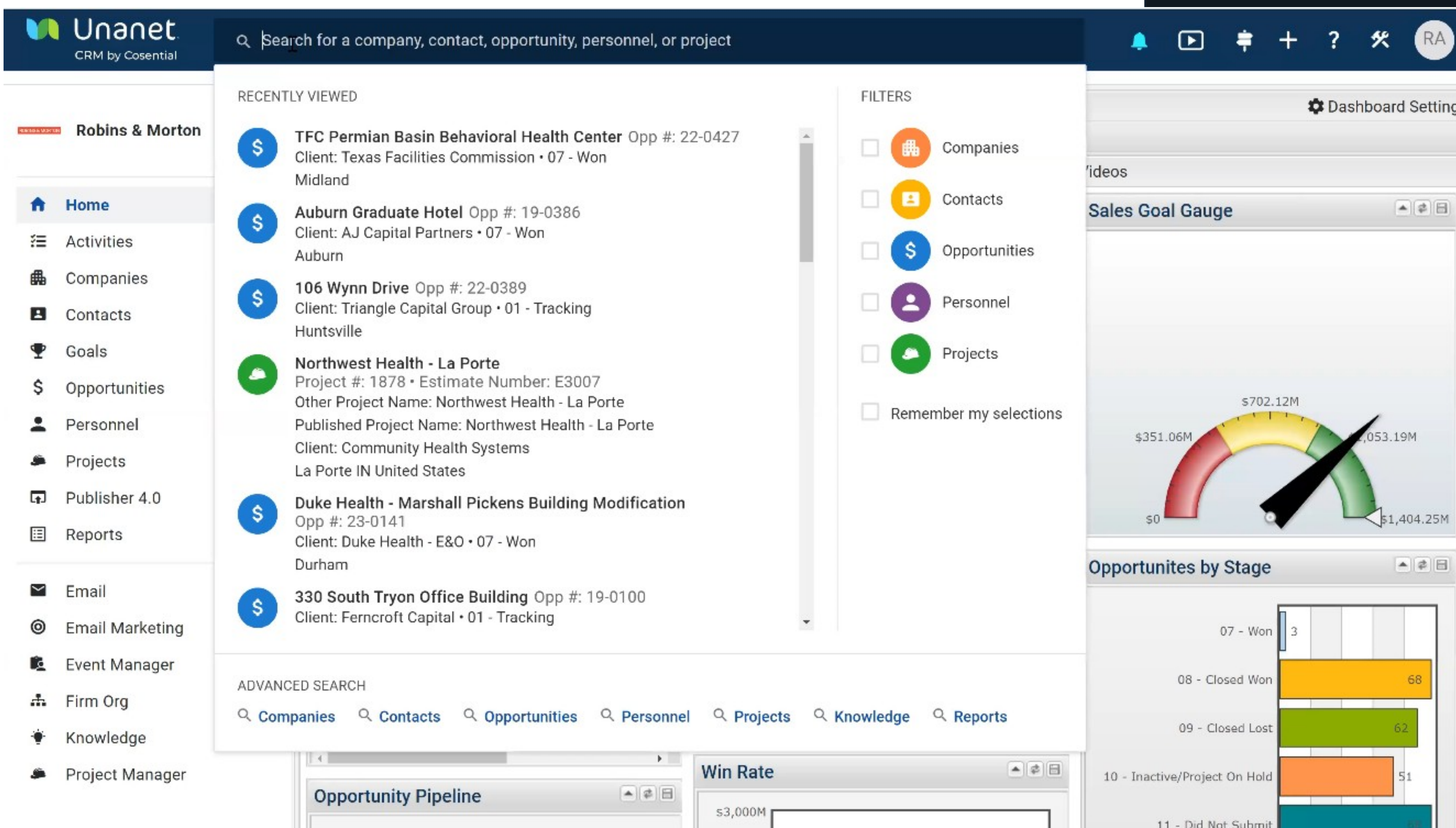
Step 3

Click into the search bar and a drop-down box will appear.



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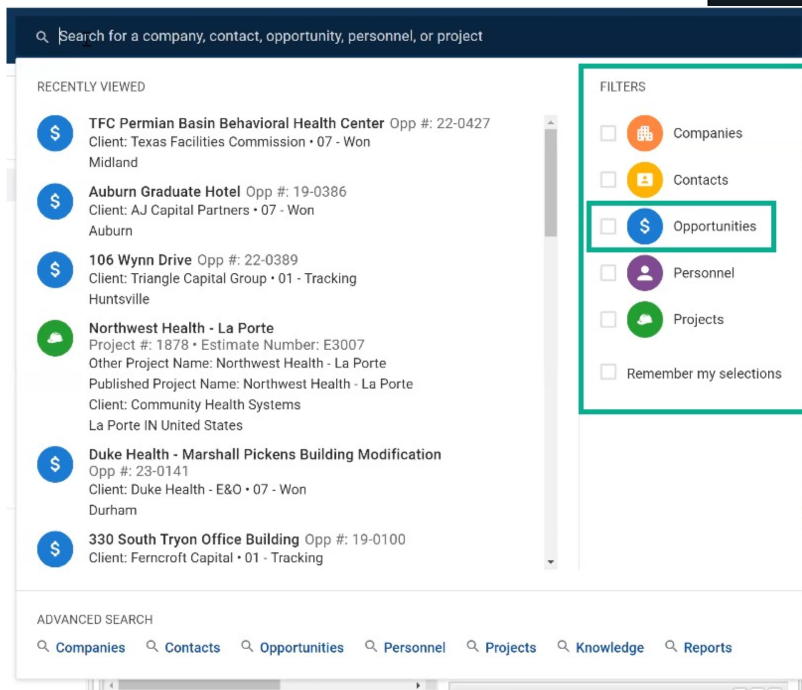
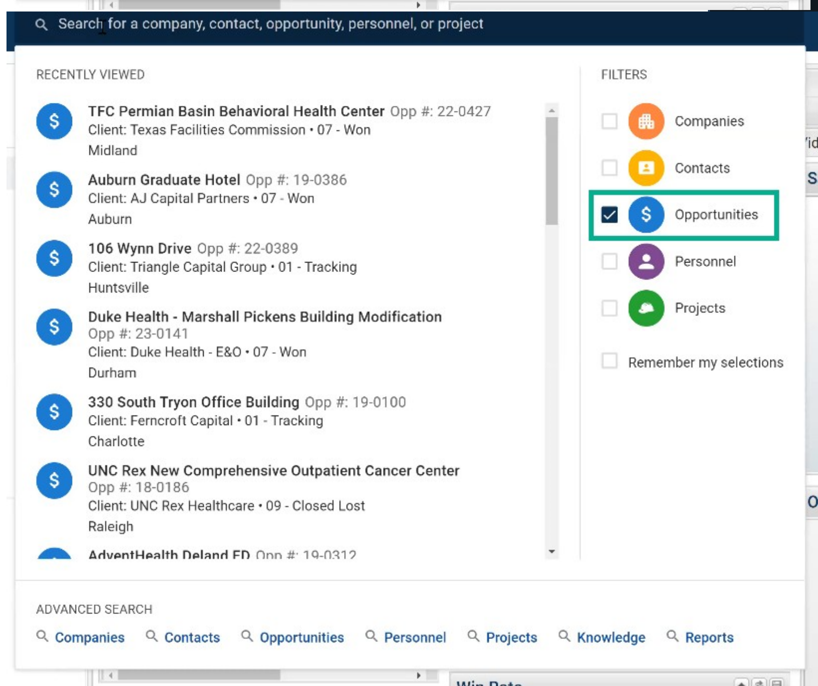
Step 4

On the right side of the drop-down, select the Opportunities in the Filters.





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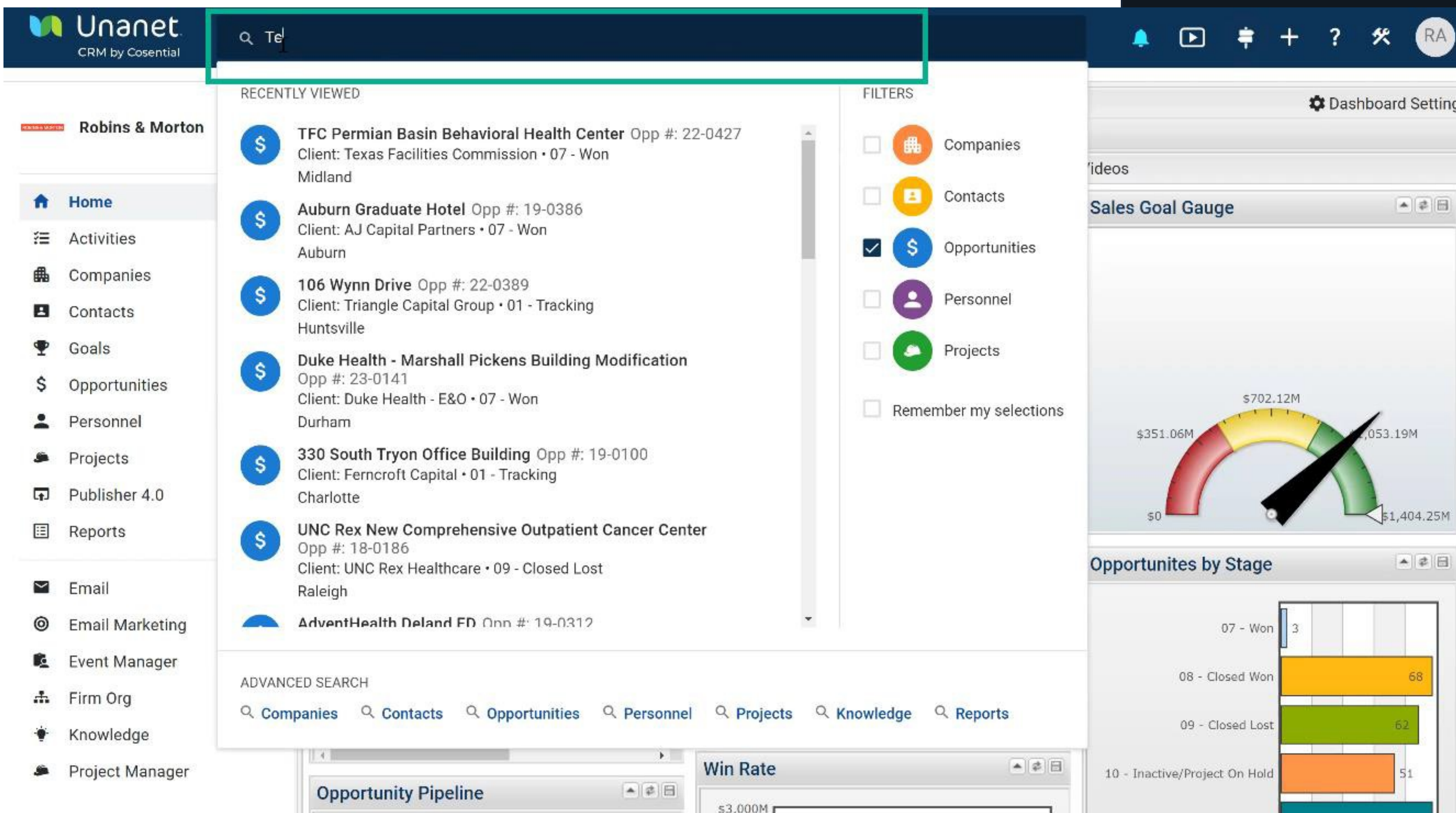
Step 5

In the search bar, type the name of the opportunity. If you do not see your opportunity, contact Farrah Mote and your marketing manager.



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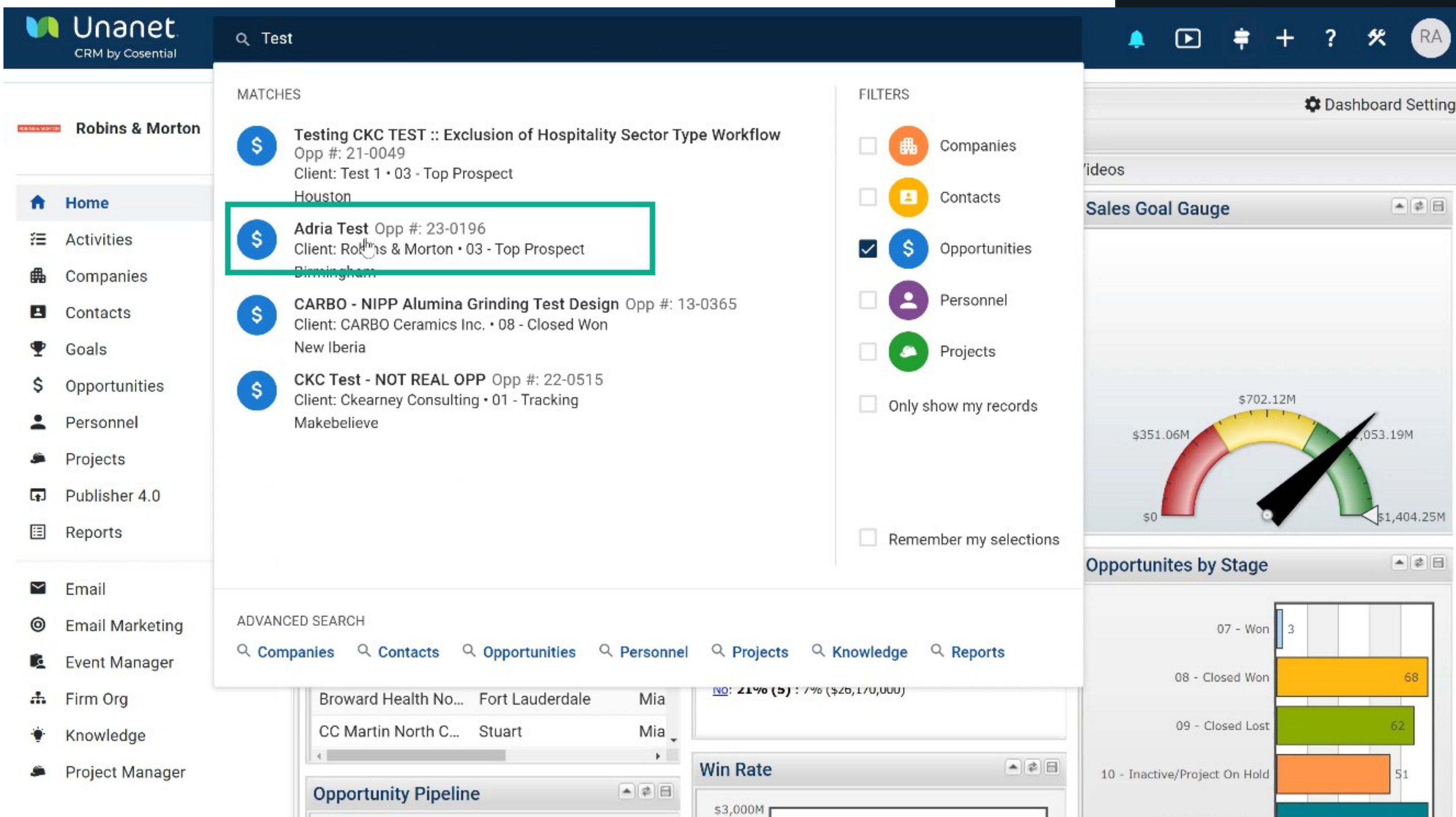
Step 6

Select the opportunity.



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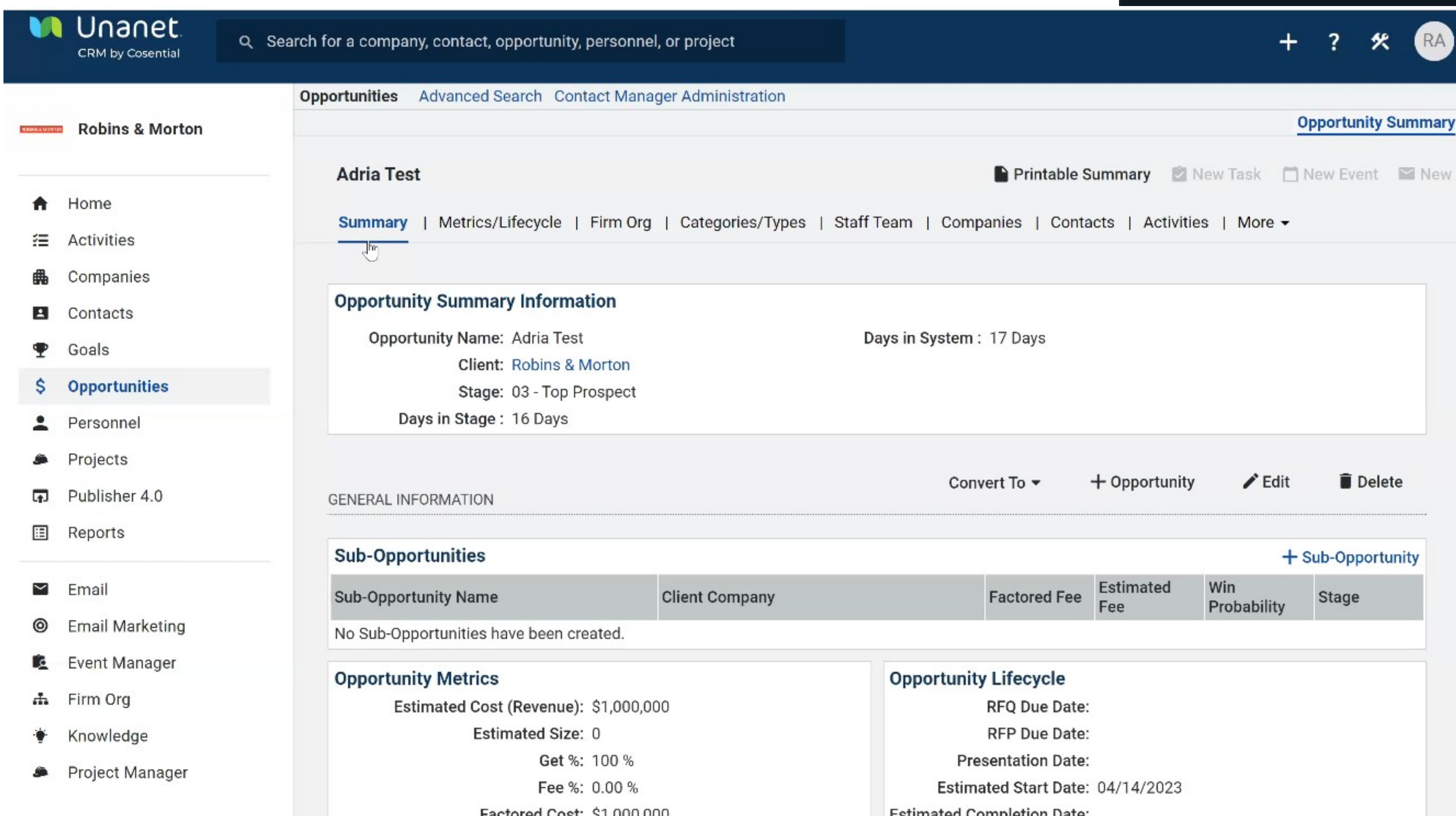
Step 7

The opportunity record will open to the summary page.



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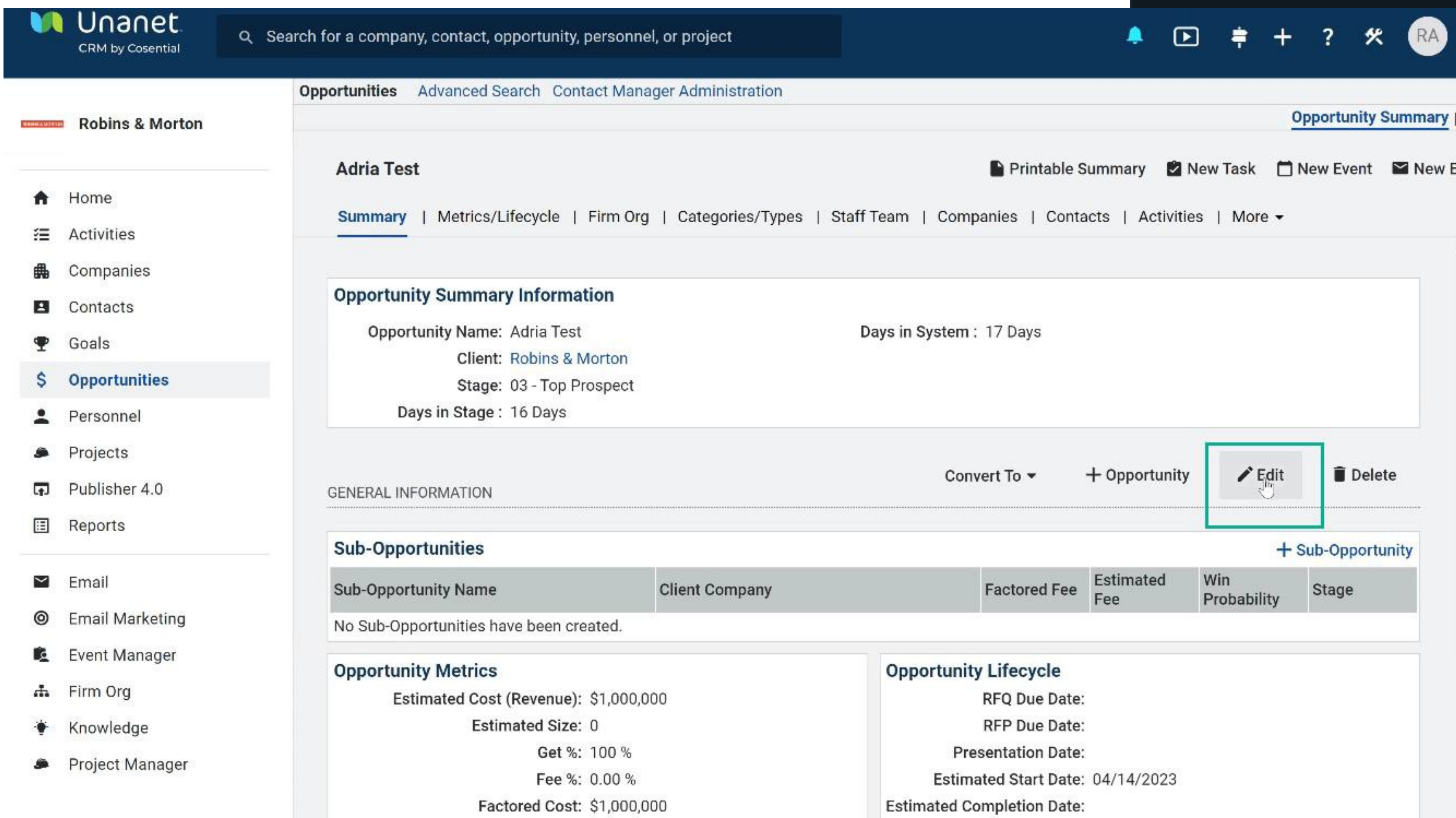
Step 8

Select the “Edit” button to make updates to the fields.



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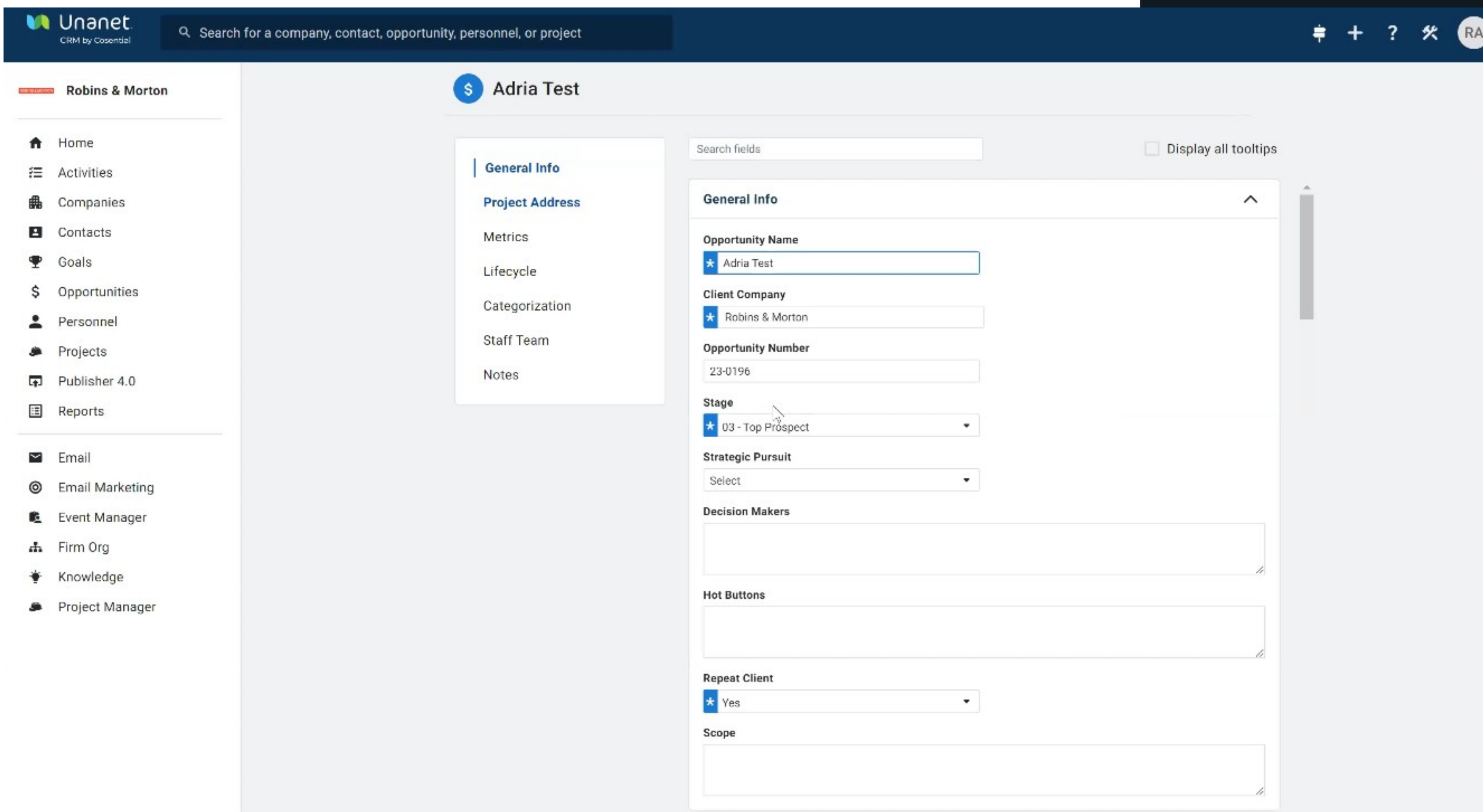
Step 9

The opportunity will open to the editable view. Scroll to the fields that need to be populated.



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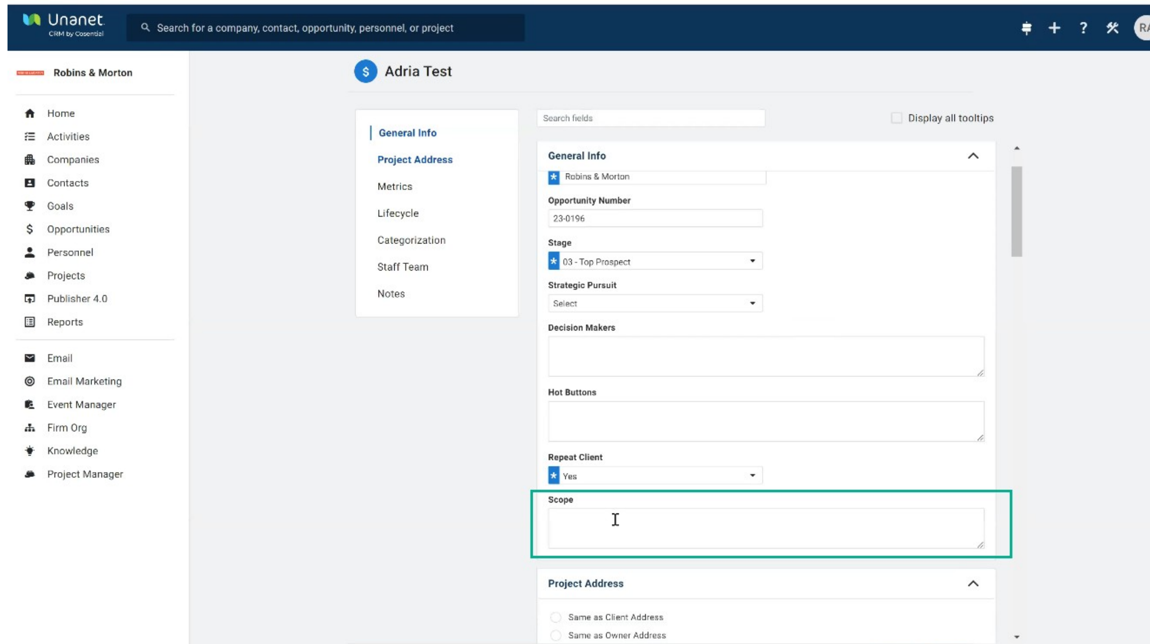
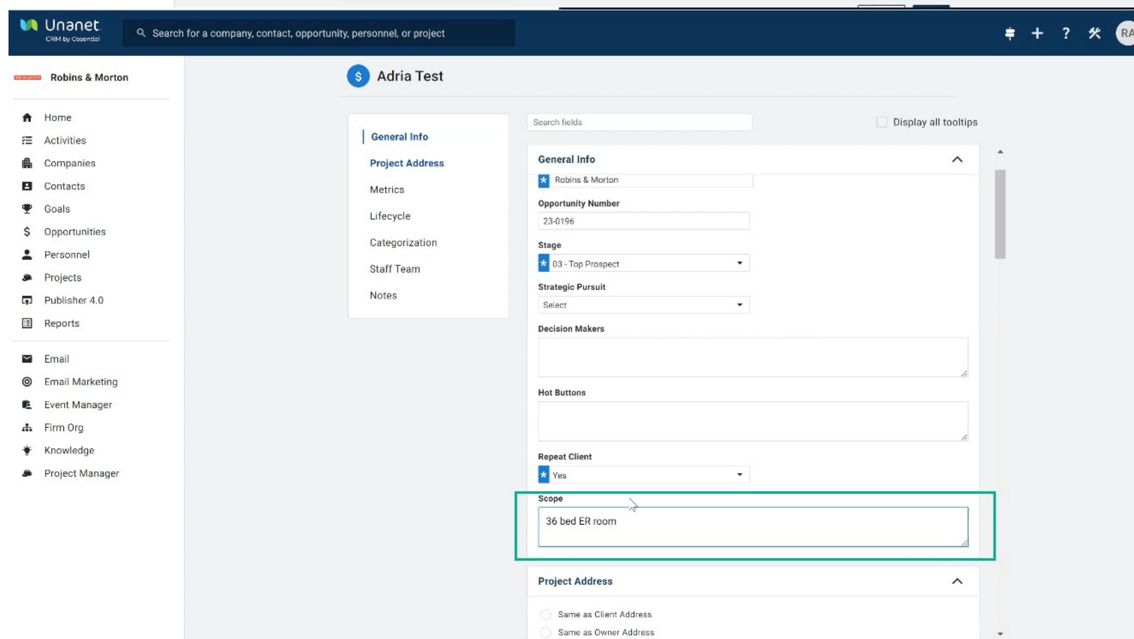
Step 10

If the scope field is blank,
enter the relevant information.





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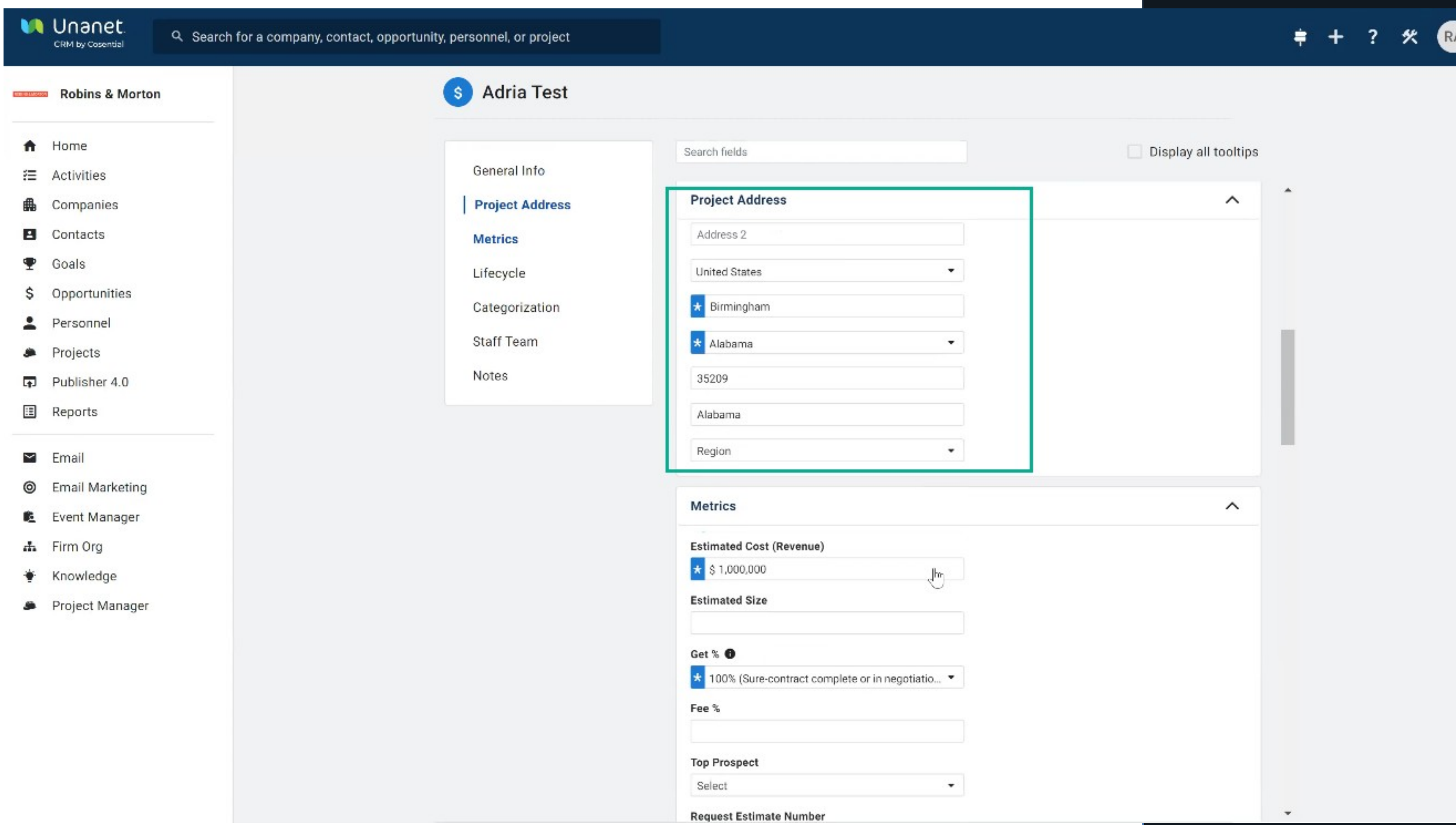
Step 11

Scroll down to the Project Address section. Make sure the city and state fields are populated. If not, enter in the information.



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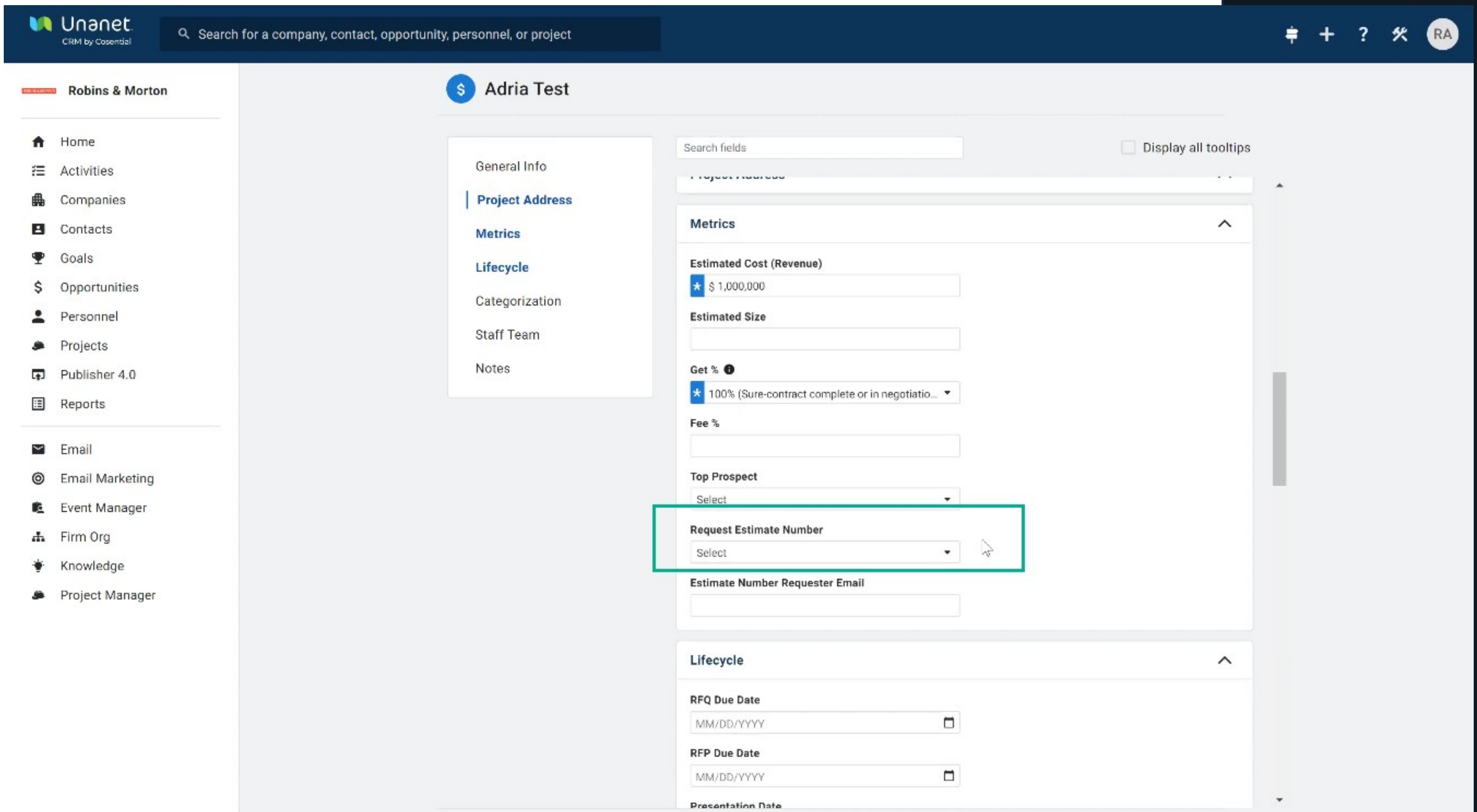
Step 12

Scroll down the page to the Metrics section for the Request Estimate Number field. Make note of this field, but do not fill out this field until you have finished entering all the other information.

Updating this field will be the last step you complete before saving and submitting your opportunity.



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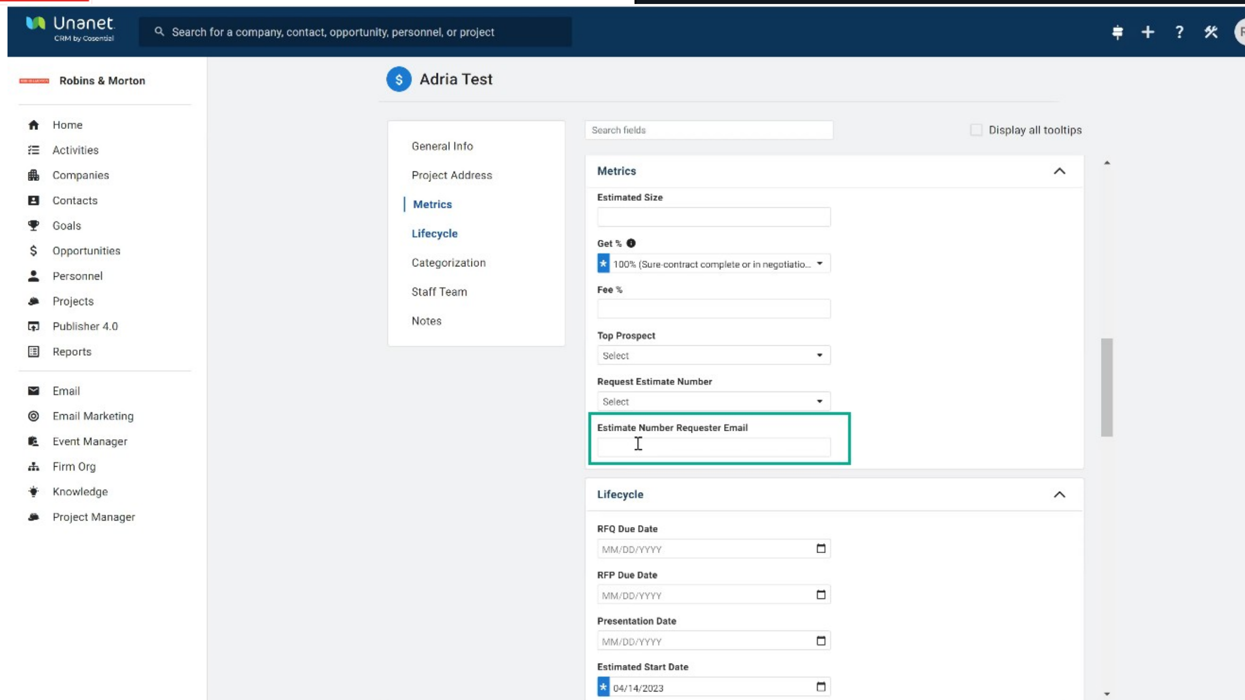
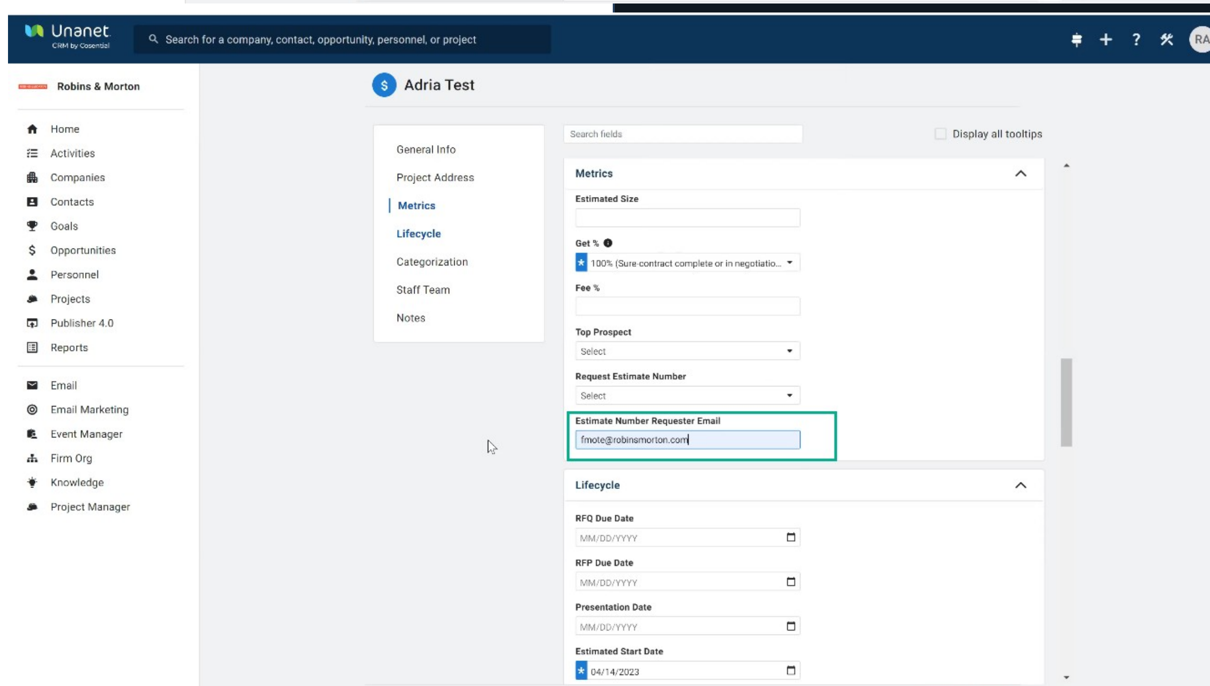
Step 13

Enter in your email information into the Estimate Number Requestor Email field.





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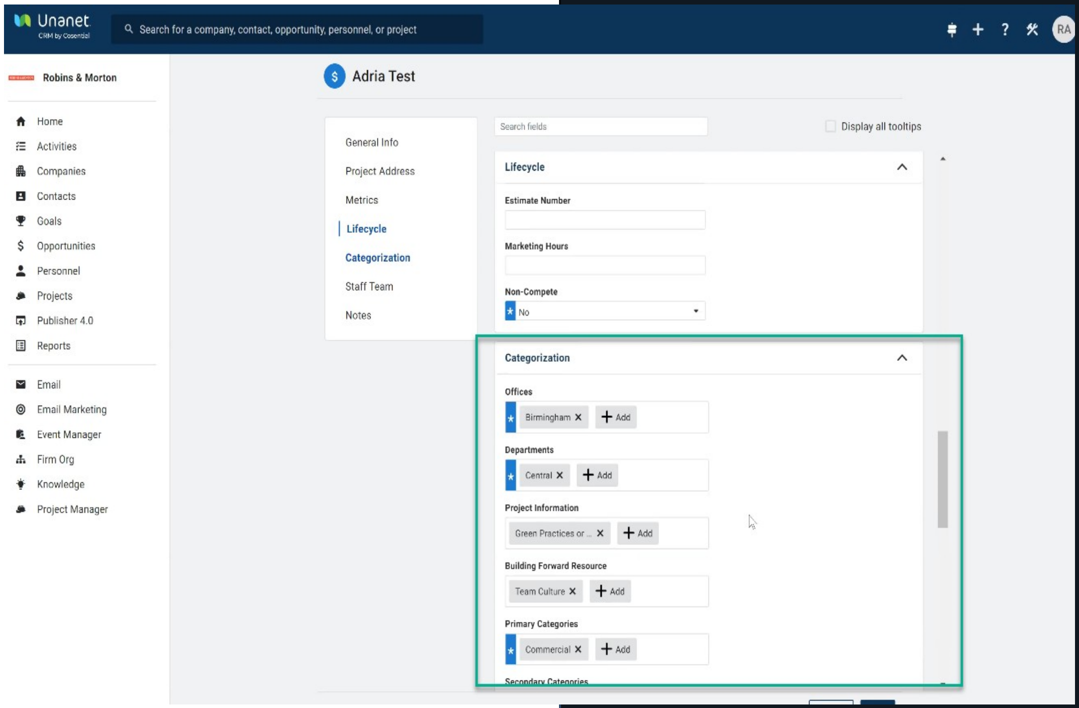
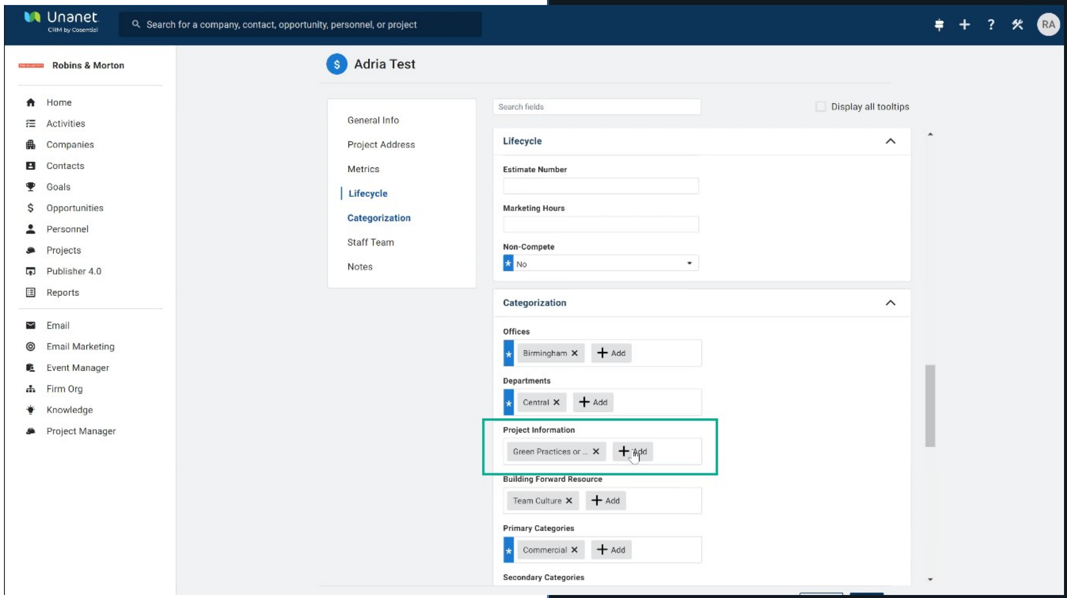
Step 14

Scroll down to the Categorization section. Select the Project Information field to add additional fields. Select the Add button to open the product information options window.





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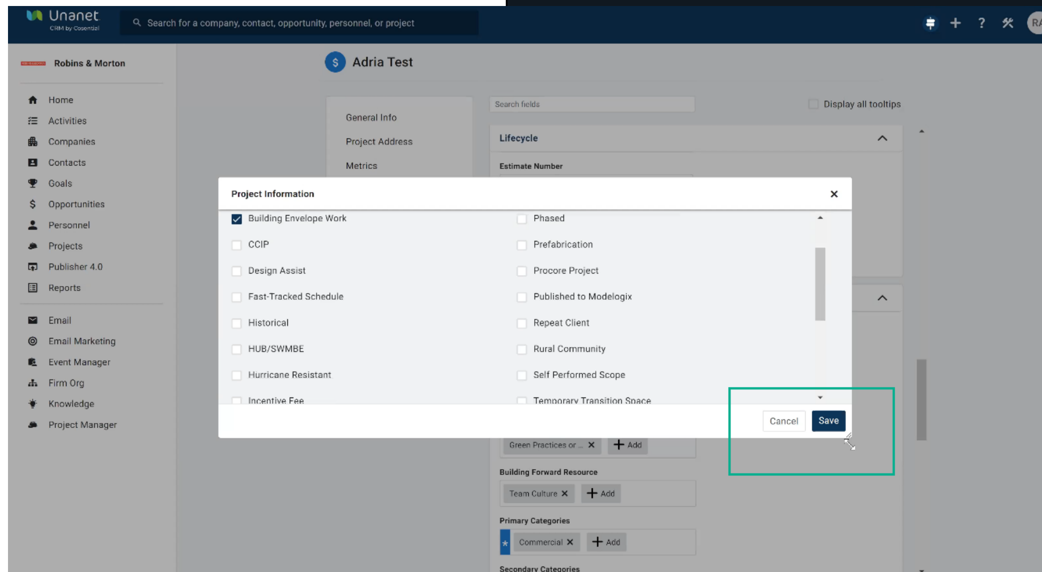
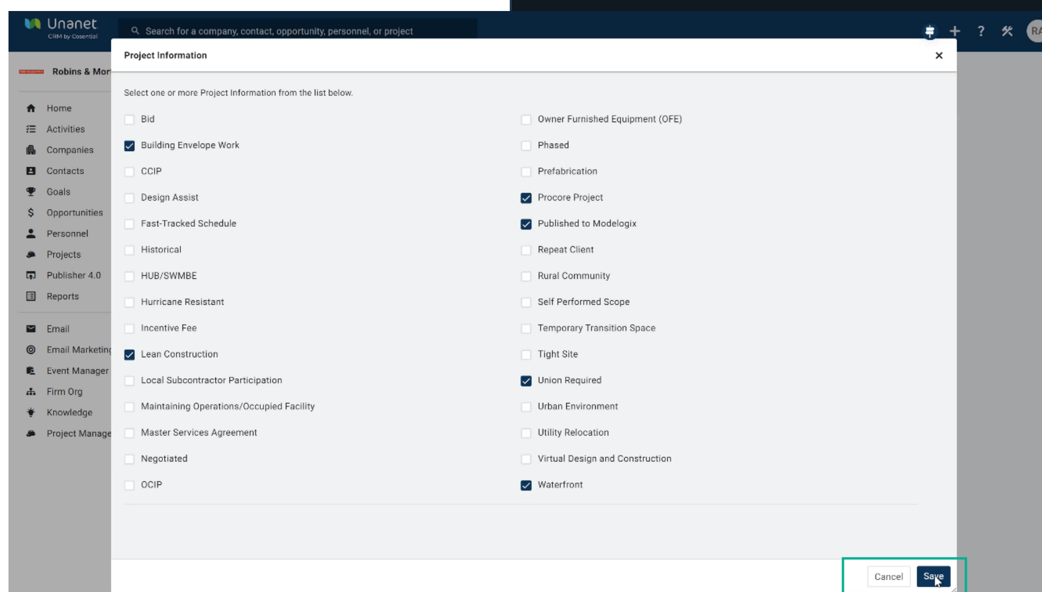
Step 15

The product information window will open with the available options for the project information.

Select the checkboxes next to the information that is applicable to the project.

You can resize the box by going to the lower right corner with the cursor and dragging the window to your preferred size. When you have finished selecting all the applicable information, click the save button in the window. It will return you to the editable view.





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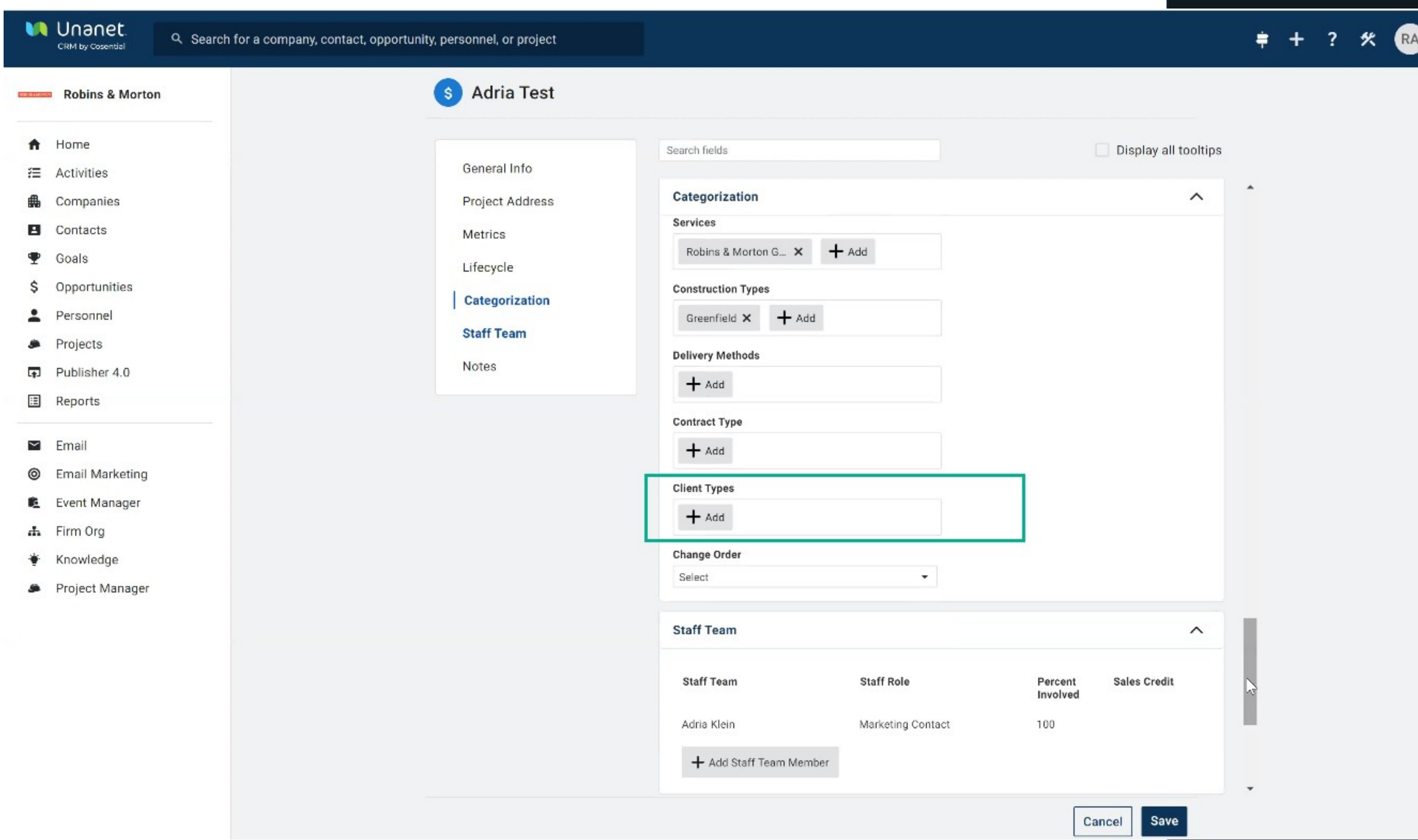
Step 16

Scroll down the page to the client type field in the Categorization section.



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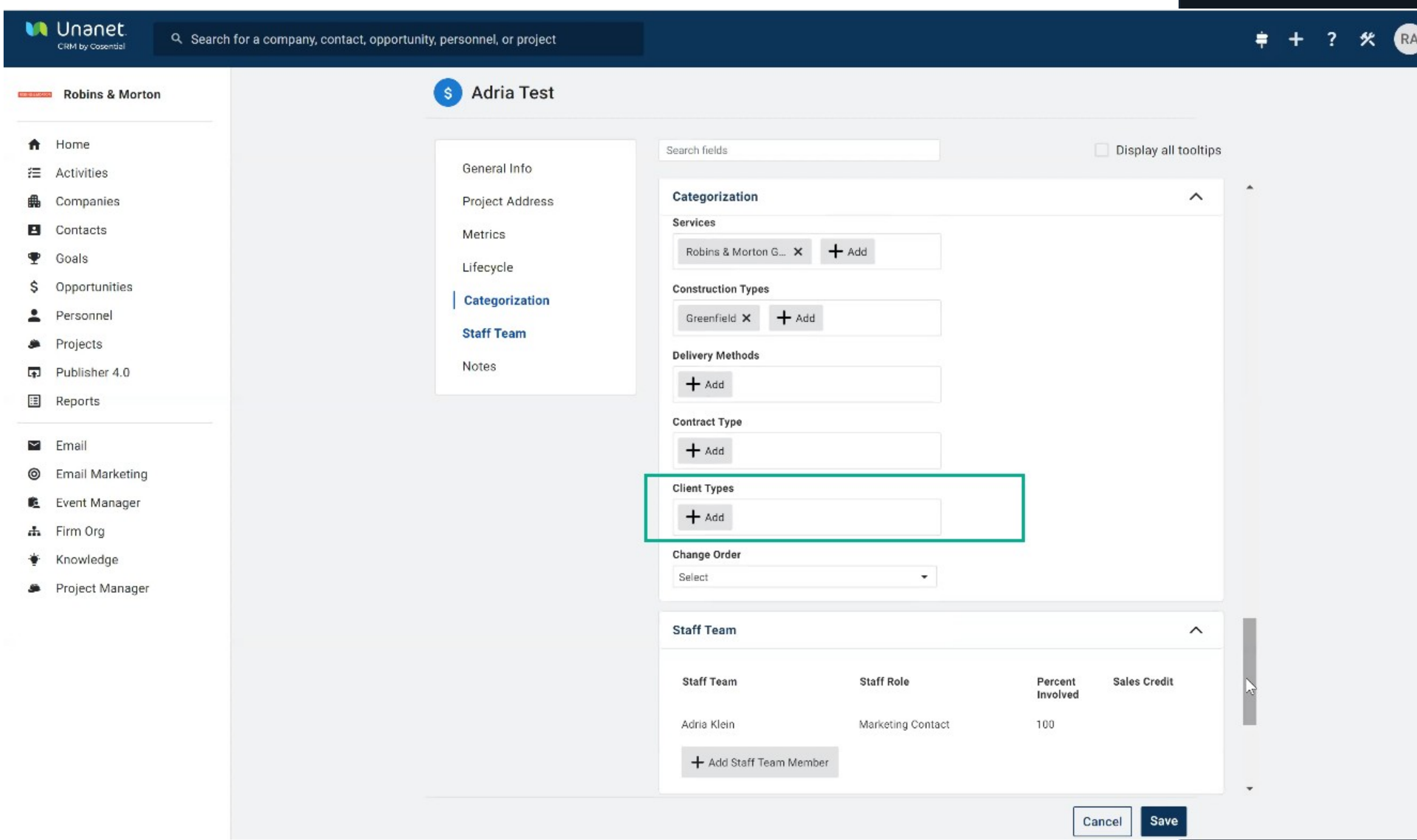
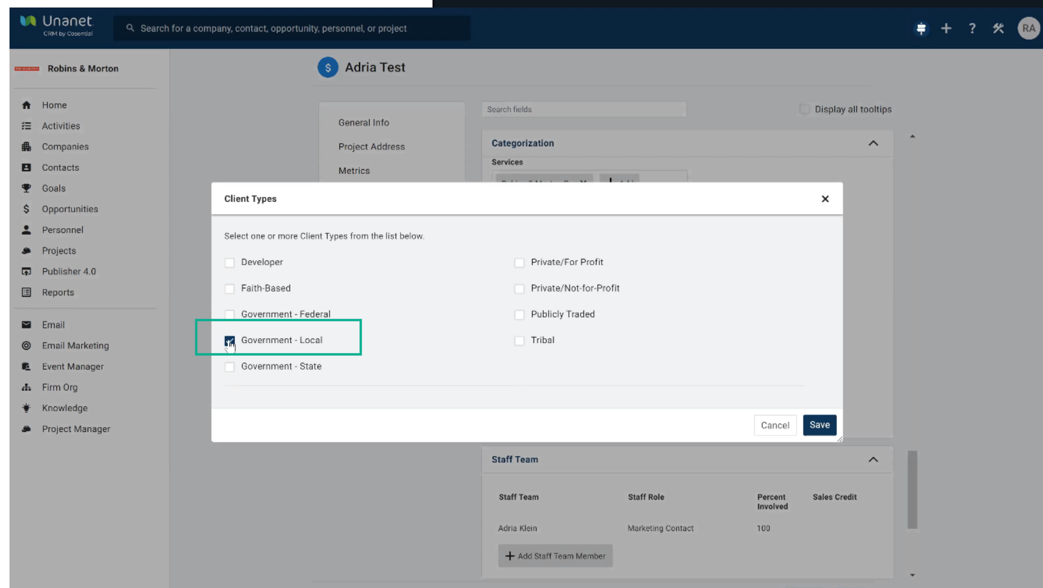
Step 17

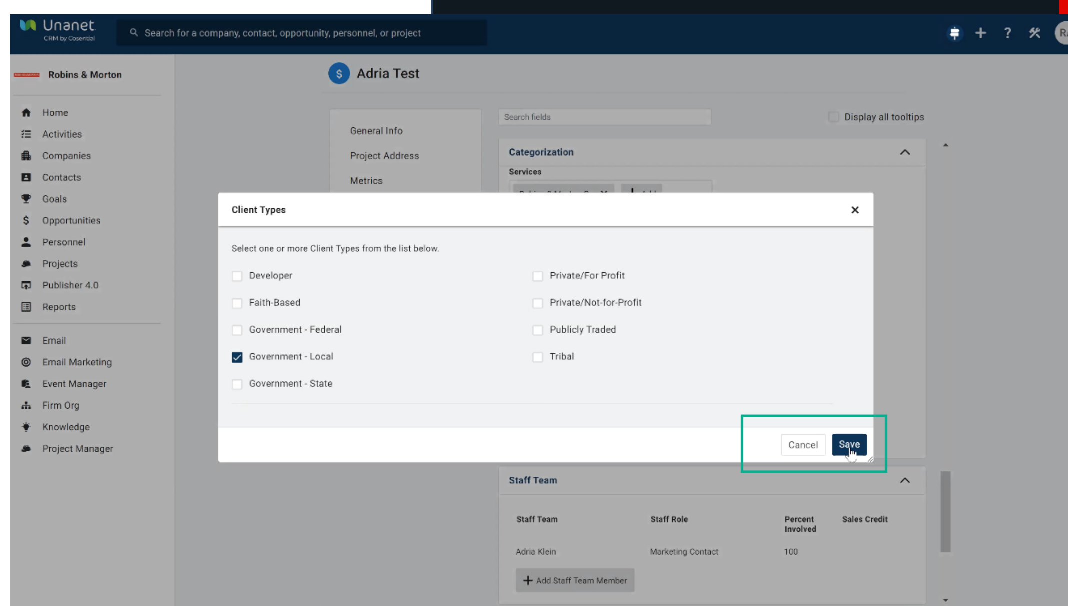
Select the Add button to add the Client Type. A window will open with the client type options.



Step 17 Continued

Select the checkbox of the Client Type that applies and click save in the window. The screen will return to the editable view. Select Save.





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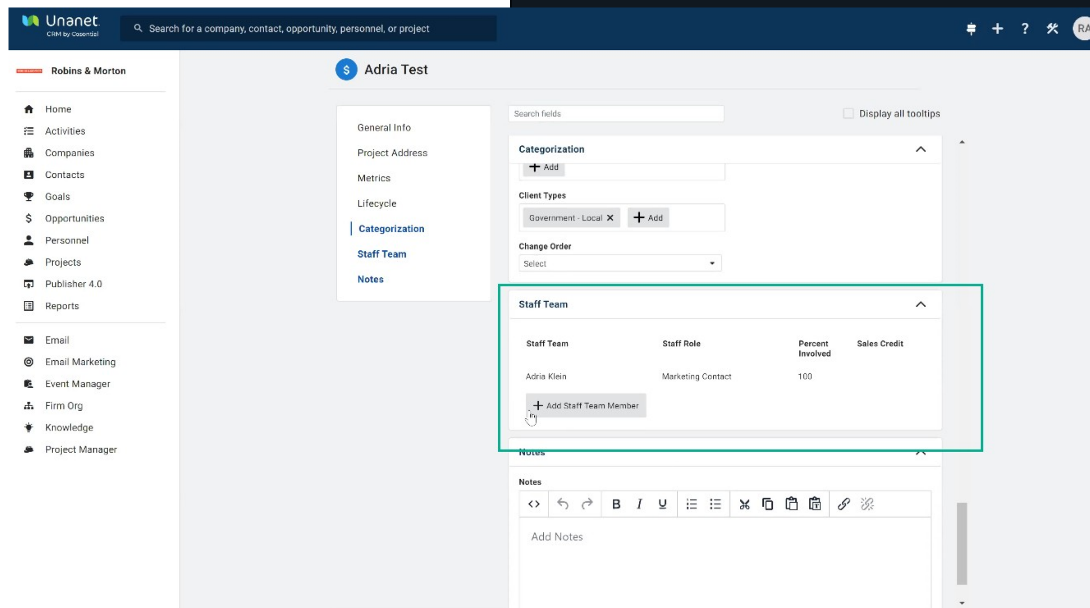
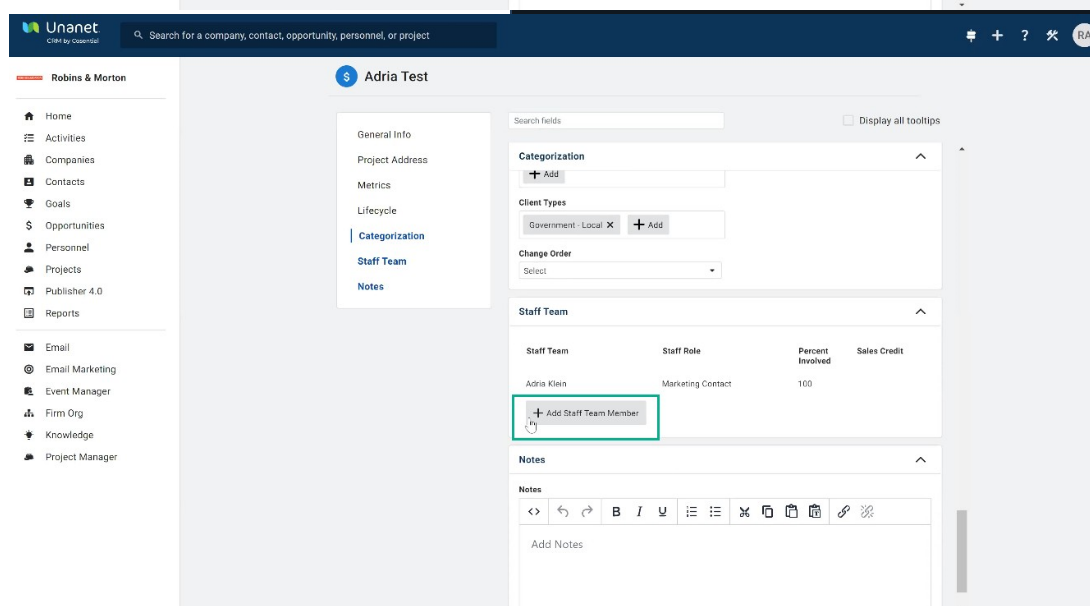
Step 18

Scroll down the page to the Staff Team section. There must be a person assigned to the following positions: **Lead Estimator, Operations Manager, and Project Manager**. If there are not people already with these positions assigned to the opportunity, select the “Add Staff Team Member” button to open a window to add members to Staff Team section.





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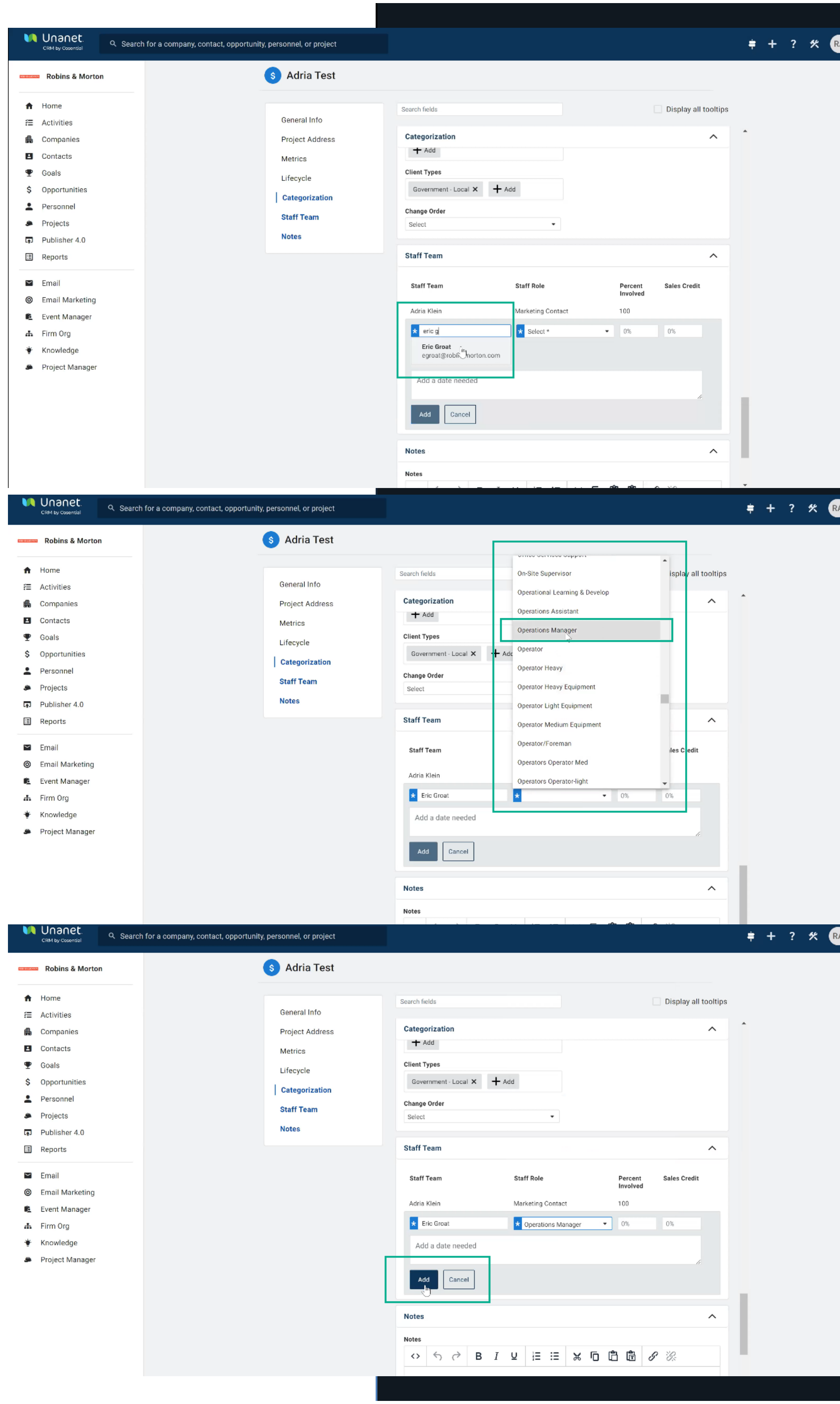
Step 19

Enter in the personnel name to add the person to the Staff Team. Start typing the person's name and then click in the drop-down when their name appears.

Select their Staff Role from the list. Select the Add button to add the person. Repeat the steps to add more members. There must be a person assigned to the Lead Estimator, Operations Manager, and Project Manager for the Staff Team section.



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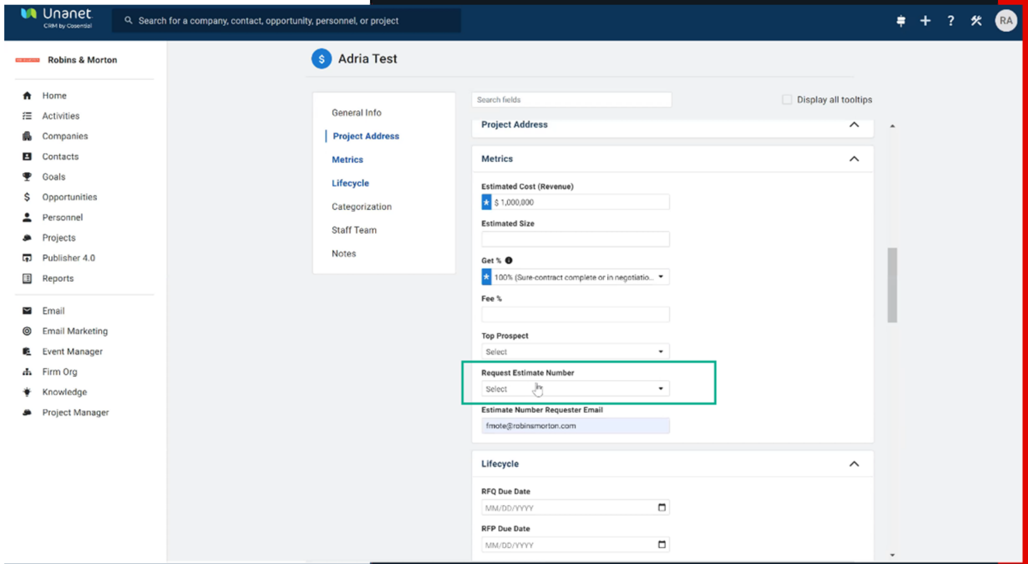
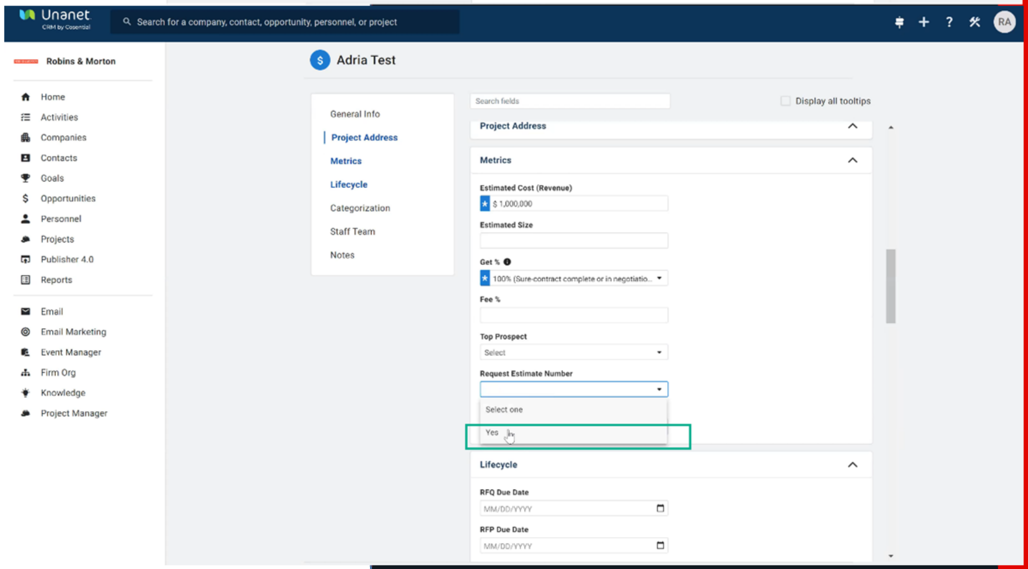
Step 20

Scroll up on the page to return to the Metrics section. Once you have finished entering the information for the sections, select the Request Estimate Number field and select Yes.





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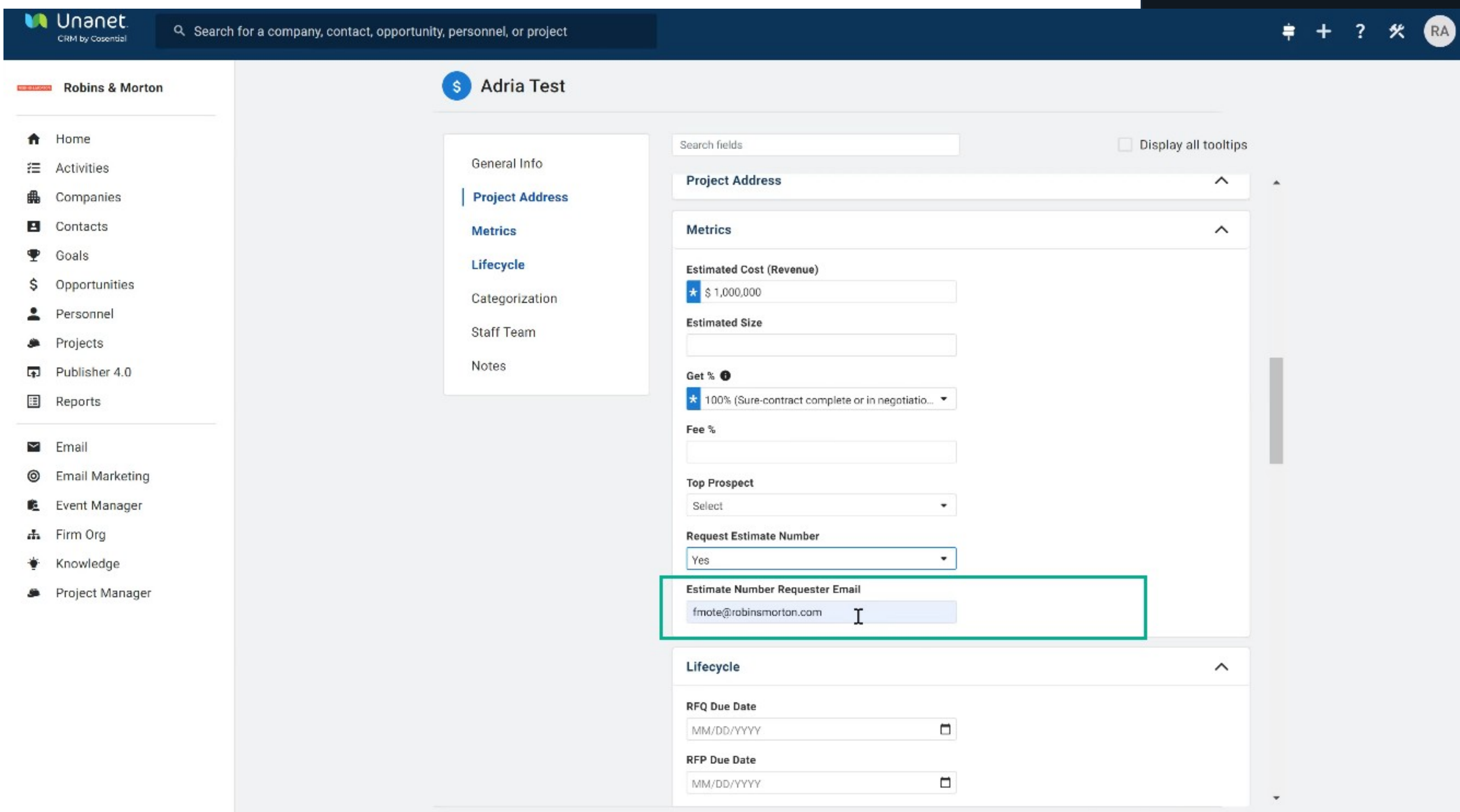
Step 21

Make sure the requestor email field is completed because it will notify you once it has been put into HUB and the estimate number list.



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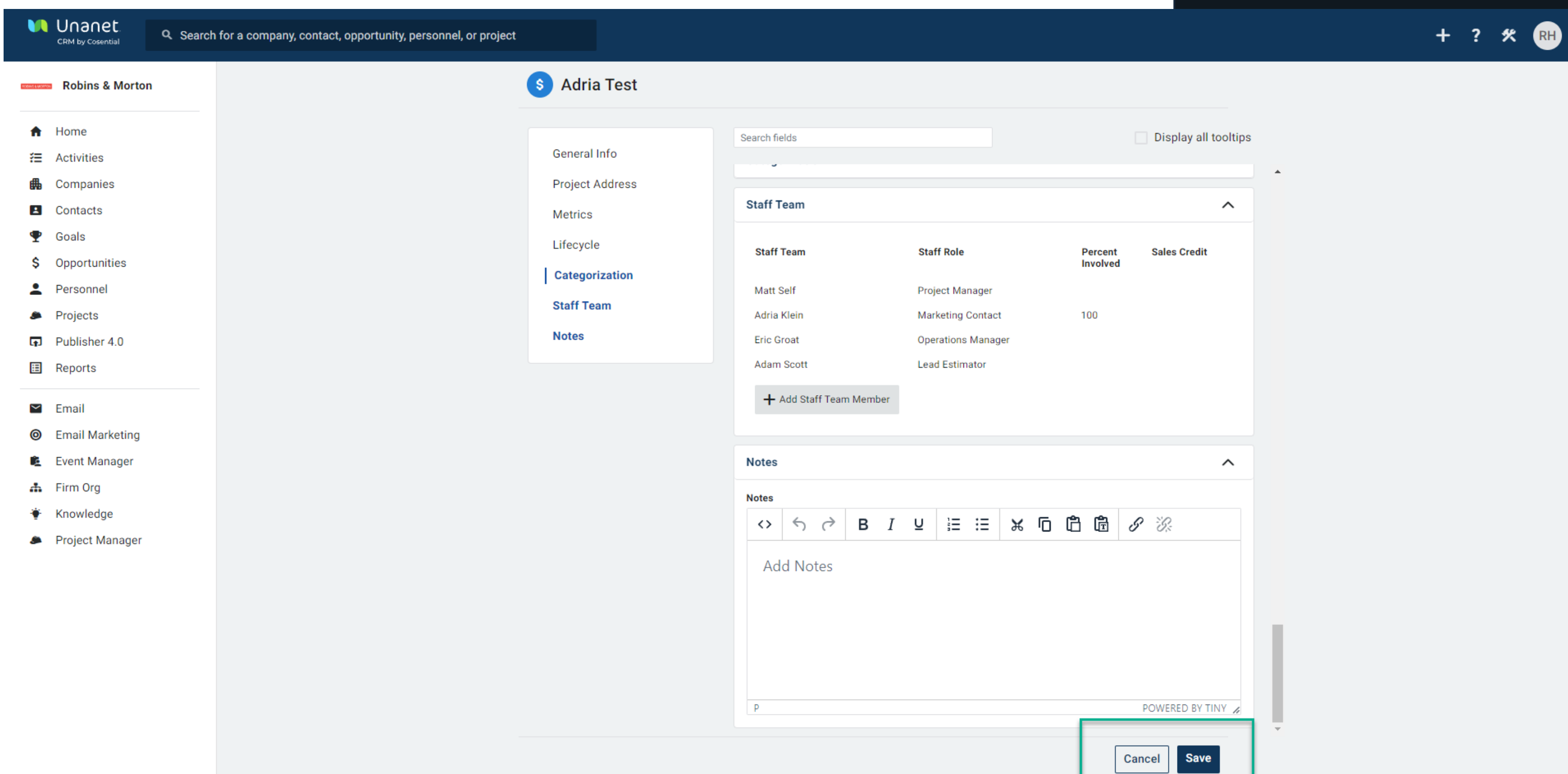
Step 22

Once you have entered the information and selected yes for the request estimate number field and would like to finish, select save at the bottom right of the page.



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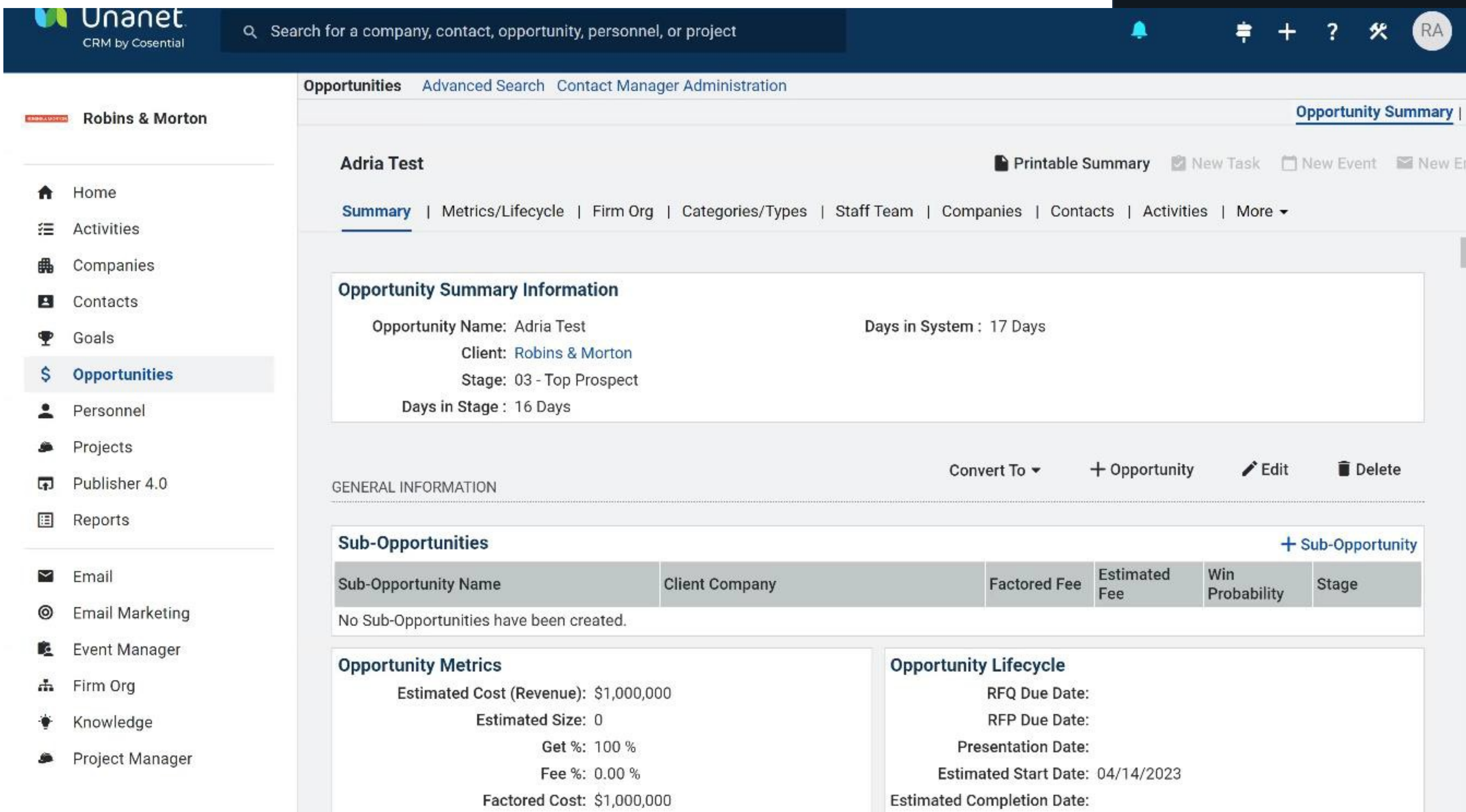
Step 23

Once you have saved, the screen will return to the opportunity summary page. The automated process will begin and will place the information here into the estimate number request list in HUB.



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Step 23

You will be notified with an email once the process has been completed.

Your request for an estimate number has been generated in the Estimate Request List in SharePoint for the following opportunity:

Opportunity Number: 23-0313
Opportunity Name: Nemours Jacksonville 9th Floor Buildout

Here are the Estimate Number Details:

Estimate Number: E4329
Job Name: Nemours Jacksonville 9th Floor Buildout
Operations Manager: Mark Fernung
Lead Estimator: Lisa Mcknight
Location: Jacksonville, FL
Scope: Demolition and Buildout of 9th Floor
Owner's Name: Nemours Children's Hospital
Green Practices and/or LEED Project: No
Procore Project: No
Building Envelope Work: No