

# PCI Basics (ADF)

## Quick Guide

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# Internal (In Scope)

---

## Overview – Internal PCIs

PCIs of the Internal type only affect JC Cost Budgets for Cost Codes and their Categories.

# Enter PCI – Screen

## General – Tab

**POTENTIAL CHANGE ITEMS** Table Mode Save Exit Print Help Info Warning Refresh

**SELECTION CRITERIA**

Company: CCC CMiC Test Construction Company  
Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 Change Item Markup Rules

**PCI INFORMATION**

Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type

\* Type: INT Internal Change Orders \* Status: PENDING Pending

\* PCI NO: COI000004 SC A1MASONS-0002 - 10k Increase Total Budgeted: 0.00 Total Billing: 0.00

**General** **Detail** **Summary** **RFQ** **Approval** **Notes** **Attachment** **History**

Allowance: Neither Owner Allowance Amt Due to Owner 08/Nov/2017 Proceed Forecast Post Vendor Contracts with PCI Update Projected Amount during Posting Recalculate Projected Amount

Source: \* Date 08/Nov/2017 Start Date End Date Post Date

Source Type: Reason Days Impact 0 Owner CO# Scope Desc

Entered By: Mike Fernandes

On the **General** tab of the Enter PCI screen, select “**INT**” via the **Type** field (Internal PCI type) and select its Approval Status via the **Status** field.

## Detail – Tab (Parameters for PCI)

**POTENTIAL CHANGE ITEMS** Table Mode Save Exit Print Help Search Refresh

**SELECTION CRITERIA**

Company: CCC CMIC Test Construction Company  
Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 Change Item Markup Rules

**PCI INFORMATION**

Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type

\* Type: INT Internal Change Orders \* Status: PENDING Pending  
\* PCI NO.: COI000004 SC A1MASONS-0002 - 10k Increase Total Budgeted: 10,000.00 Total Billing: 0.00

**General** **Detail** **Summary** **RFQ** **Approval** **Notes** **Attachment** **History**

Show Rates Hide Rates Calc.Markups Allowance Tracking PCI Participation SCO Line Notes

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export Attachments Notes ECM Documents

| Vendor   | Contract    | * Job   | * Cost Code | * Category | WM | Billing Code | Days Impact | Cost Code Qty | Cost Code WM | Estimated Amount | > | Quoted Amount | > | Final Amount | Billing Amou |
|----------|-------------|---------|-------------|------------|----|--------------|-------------|---------------|--------------|------------------|---|---------------|---|--------------|--------------|
| A1MASONS | A1MASON-000 | J448957 | 04 4000     | S          | LS |              | 0           |               | NA           |                  | > |               | > | 10,000.00    |              |
|          |             |         |             |            |    |              |             |               |              |                  |   |               |   | 10,000.00    |              |

Vendor Name: A1 Masons Cost Code Desc: Masonry - Stone

## Main Change Order Parameters

On the **Detail** tab, click the **[Insert]** button (framed above) and enter details for the following fields:

### 1. Vendor

Used if Cost Code & Category are handled by a Subcontract and you want to change Subcontract's value (use **Final Amount** field to specify change amount).

### 2. Contract (Subcontract)

Used if Cost Code & Category are handled by a Subcontract and you want to change Subcontract's value.

### 3. Job

Auto-populated with Project's associated Job.

#### 4. **Cost Code**

Cost Code being updated.

#### 5. **Category**

Category of the Cost Code being updated.

#### 6. **Final Amount**

If the Cost Code & Category's JC Cost Budget Amount is to be changed, enter the amount in this field.

#### 7. **Billing Amount**

Enter the amount of the change for the Cost Code & Category's JB Revenue Budget Amount in this field.

### **Applying PCI Line to Subcontract**

---

There are 3 different ways to apply the PCI Line to a Subcontract:

1. Apply line to existing unposted Subcontract Change Order by selecting it from **Subcontract Change** field and entering a Task ID in the **Task ID** field.
2. Apply line to new Subcontract Change Order by manually entering Change Order Number. The Task ID will be automatically generated for you. The system will then prompt you to decide if you want to create the Change Order now or when the PCI is posted. To keep the manually entered number, you must select create now option. If you opt for when it is posted, the system will convert your manual numbering to "**TBD**".
3. Apply the line to next available Subcontract Change Order by entering the code "**TBD**" (to be determined) in the **Subcontract Change** field and the Task ID in the **Task ID** field. The system will ask you if you want to create the Change Order now or when the PCI is posted.

# Records & Fields Affected

## Job Costing Budget

JC ENTER BUDGET

Save

Exit

SELECTION CRITERIA

Company

CCC

CMiC Test Construction Company

Job

J448957

Freshmart Office Building - Chicago Il

Create Contract

Assign Overhead Cost Rates

BUDGET DETAIL

View

Freeze

Detach

Search

Workflows

Report Options

Export

Import

ECM Documents

User Extensions

| * Cost Code | Cost Code Name      | * Category | Meth | Budgeted Amount | Budgeted Quantity | WM | Budgeted Unit Rate | Budgeted Revenue Amount | Budgeted Revenue Rate | P | Projected Final | Freeze Pro Amt Flag |
|-------------|---------------------|------------|------|-----------------|-------------------|----|--------------------|-------------------------|-----------------------|---|-----------------|---------------------|
| 04 4000     | Masonry - Stone     | S          | A    | 25,000.00       | 0.000             | NA |                    | 21,000.00               |                       | L | 25,000.00       |                     |
| 08-100      | Adjustment - Groups | CC         | A    |                 |                   | \$ |                    |                         |                       | L |                 |                     |
| 08-100      | Adjustment - Groups | CFB        | A    |                 |                   | \$ |                    |                         |                       | L |                 |                     |
| 08-100      | Adjustment - Groups | CFBNR      | A    |                 |                   | \$ |                    |                         |                       | L |                 |                     |
| 08-100      | Adjustment - Groups | L          | A    |                 |                   | NA |                    |                         |                       | L |                 |                     |

The **Budgeted Amount** and **Projected Final** fields in the JC Enter Budget screen are changed by the change amount for the Cost Code & Category.

## Job Billing Contract

No change to the JB Contract, since the PCI was of the Internal type, which only affects JC cost budgets.

## Subcontract

**SUBCONTRACT MAINTENANCE**

Table ModeSaveExit?⚠️📄🔄

SELECTION CRITERIA

CompanyCCC▲CMIC Test Construction CompanyShow SubcontractsOpen▼  
ProjectP448957▲Freshmart Office Building - Chicago IISub CodeJ448957Back

SUBCONTRACT INFORMATION

SearchInsertPreviousNextWorkflowsReport OptionsAttachmentsNotesECM DocumentsUser Extensions

PostOriginal ParticipationOverall ParticipationComplianceJoint CheckCopy From Contract

\* VendorA1MASONSVendor NameA1 Masons  
ContractA1MASON-0002\* DescriptionExterior stone walkways, walls & curbs

SummaryGeneralSchedule of ValuesChange OrdersDatesText CodesFree FormAttachmentSpecial PricingInclusionsExclusions

|                 | Original  | Changes To Date                        | Revised                                                |
|-----------------|-----------|----------------------------------------|--------------------------------------------------------|
| Contract Value  | 15,000.00 | 10,000.00                              | 25,000.00                                              |
| Completion Date |           | 0 Days                                 |                                                        |
| Contract Type   | Lump Sum▲ | Default Retainage %10Do Not Exceed     |                                                        |
| * Status        | POSTED▼   | <input type="checkbox"/> * Self Billed | <input type="checkbox"/> Override Do Not Exceed Amount |

The Subcontract's **Changes To Date** and **Revised** fields will be changed by the Change Order's change amount for the Cost Code & Category.

**NOTE:** A Subcontract's **Contract Value** is the JC Cost Budget Amount (not JB Revenue Budget Amount) for the Subcontract's SOV Lines.

# Contract Forecasting – JSP

## Cost Status Query – xProjects Screens

### Cost Status Query

| Cost Status Query |          |                                  |                 |                          |             |                |            |               |                  |          |                     |           |                 |                    |                       |                      |                   |                    |              |                      |                      |
|-------------------|----------|----------------------------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|----------|---------------------|-----------|-----------------|--------------------|-----------------------|----------------------|-------------------|--------------------|--------------|----------------------|----------------------|
| Job Code          | Phase    | Phase Name                       | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent    | Committed Remaining | Committed | Spent/Committed | Amount To Complete | Calculated Projection | Proceeding Projected | Non-Proceeding CO | Pending Projection | Forecast     | Projected Over/Under | Projected ETC Budget |
| J448957           | 02-100   | Structural Demolition            | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00     | 0.00                | 0.00      | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00         | 0.00                 | 0.00                 |
| J448957           | 03 31 13 | Heavy Weight Structural Concrete | 1,218,500.00    | 10,000.00                | 0.00        | 1,228,500.00   | 0.00       | 0.00          | 1,228,500.00     | 0.00     | 0.00                | 0.00      | 0.00            | 1,228,500.00       | 1,228,500.00          | 0.00                 | 0.00              | 1,228,500.00       | 1,228,500.00 | 0.00                 | 1,228,500.00         |
| J448957           | 03-100   | Structural Concrete              | 747,000.00      | 10,100.00                | 0.00        | 757,100.00     | 0.00       | 0.00          | 757,100.00       | 0.00     | 86,160.00           | 86,160.00 | 86,160.00       | 597,000.00         | 683,160.00            | 0.00                 | 0.00              | 683,160.00         | 683,160.00   | 73,940.00            | 757,100.00           |
| J448957           | 03-200   | Architectural Concrete           | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00     | 0.00                | 0.00      | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00         | 0.00                 | 0.00                 |
| J448957           | 04 0500  | Masonry                          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 3,675.00 | 61,425.00           | 65,100.00 | 65,100.00       | 0.00               | 65,100.00             | 0.00                 | 0.00              | 65,100.00          | 65,100.00    | -65,100.00           | 0.00                 |
| J448957           | 04 0510  | Masonry - Mortar & Grout         | 15,000.00       | 0.00                     | 0.00        | 15,000.00      | 0.00       | 0.00          | 15,000.00        | 0.00     | 0.00                | 0.00      | 0.00            | 15,000.00          | 15,000.00             | 0.00                 | 0.00              | 15,000.00          | 15,000.00    | 0.00                 | 15,000.00            |
| J448957           | 04 4000  | Masonry - Stone                  | 13,400.00       | 10,000.00                | 0.00        | 23,400.00      | 0.00       | 0.00          | 23,400.00        | 0.00     | 15,000.00           | 15,000.00 | 15,000.00       | 8,400.00           | 23,400.00             | 0.00                 | 0.00              | 23,400.00          | 23,400.00    | 0.00                 | 23,400.00            |
| J448957           | 08-100   | Adjustment - Groups              | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00     | 0.00                | 0.00      | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00         | 0.00                 | 0.00                 |
| J448957           | 08-200   | Adjustment - Contract            | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00     | 0.00                | 0.00      | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00         | 0.00                 | 0.00                 |

As shown above, the **Internal And Transfer CO** field displays the accumulated amount of the change to the budgeted amount for the Cost Code. The other highlighted fields had their amounts changed accordingly.

### Cost Status Query (Category)

| Cost Status Query (Category) |         |                     |               |                 |                          |             |                |            |               |                  |       |           |                     |                 |                    |                       |                      |                   |                    |           |                      |                      |
|------------------------------|---------|---------------------|---------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|-------|-----------|---------------------|-----------------|--------------------|-----------------------|----------------------|-------------------|--------------------|-----------|----------------------|----------------------|
| Job Code                     | Phase   | Phase Name          | Category Code | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent | Committed | Committed Remaining | Spent/Committed | Amount To Complete | Calculated Projection | Proceeding Projected | Non-Proceeding CO | Pending Projection | Forecast  | Projected Over/Under | Projected ETC Budget |
| J448957                      | 04 4000 | Masonry - Stone     | INS           | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 04 4000 | Masonry - Stone     | S             | 15,000.00       | 10,000.00                | 0.00        | 25,000.00      | 0.00       | 0.00          | 25,000.00        | 0.00  | 15,000.00 | 15,000.00           | 15,000.00       | 10,000.00          | 25,000.00             | 0.00                 | 0.00              | 25,000.00          | 25,000.00 | 0.00                 | 25,000.00            |
| J448957                      | 08-100  | Adjustment - Groups | CC            | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 08-100  | Adjustment - Groups | CFB           | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 08-100  | Adjustment - Groups | CFBNR         | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 08-100  | Adjustment - Groups | L             | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |

As shown above, the **Internal And Transfer CO** field displays the accumulated amount of the change to the budgeted amount for the Cost Code & Category. The other highlighted fields had their amounts changed accordingly.

## **Budget Status Query – xProjects Screens**

---

No changes to the Budget Status Query screens in the xProjects module, since the PCI was of the Internal type, which only affects JC Cost Budgets.

# External (Out of Scope)

## Overview – External PCIs

PCIs of the External type are used to change the JB Revenue Budget Amounts for Cost Codes and their Categories. Optionally, the JC Cost Budget Amount can also be changed for Cost Codes and their Categories.

## Enter PCI – Screen

### General – Tab

**POTENTIAL CHANGE ITEMS** Table Mode Save Exit Print Info Help Warn Refresh

**SELECTION CRITERIA**

Company: CCC CMIC Test Construction Company  
Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 [Change Item Markup Rules](#)

**PCI INFORMATION**

Search Insert Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type

\* Type: EXT External Change Orders \* Status: APPROVED Approved

\* PCI NO. COE0000003 03 31 13.2000 10K Increase for extra concrete Total Budgeted: 10,000.00 Total Billing: 15,000.00

**General** Detail Summary RFQ Approval Notes Attachment History

Allowance: Neither Owner Allowance Amt: Due to Owner: 09/Nov/2017  
Source: \* Date: 09/Nov/2017  
Source Type: Start Date: End Date: Recalculate Projected Amount

☒ Proceed  
☒ Forecast  
☒ Post Vendor Contracts with PCI  
☒ Update Projected Amount during Posting

On the **General** tab of the Enter PCI screen, select “**EXT**” via the **Type** field (External PCI type) and select its Approval Status via the **Status** field.

## Detail – Tab (Parameters for PCI)

**POTENTIAL CHANGE ITEMS**

Table Mode

SaveExitPrintInfoHelpWarningUndoRedo

SELECTION CRITERIA

CompanyCCC▲CMIC Test Construction Company  
ProjectP448957▲Freshmart Office Building - Chicago IIContractJ448957Change Item Markup Rules

PCI INFORMATION

SearchInsertPreviousNextWorkflowsReport OptionsAttachmentsNotesECM DocumentsUser Extensions

PostOwner COCopyModify Type

\* TypeEXT▲External Change Orders\* StatusAPPROVED▲Approved  
\* PCI NO.COEO00000303 31 13.2000 10K Increase for extra concreteTotal Budgeted10,000.00Total Billing15,000.00

GeneralDetailSummaryRFQApprovalNotesAttachmentHistory

Show RatesHide RatesCalc.MarkupsAllowance TrackingPCI ParticipationSCOLine Notes

ViewFreezeDetachSearchWorkflowsReport OptionsExportAttachmentsNotesECM DocumentsUser Extensions

| Vendor   | Contract  | * Job    | * Cost Code | * Category | WM  | Billing Code | Days Impact | Cost Code Qty | Cost Code WM | Estimate Amount | Quoted Amount | Final Amount | Billing Amount | Subcontract Change | Task ID | St  |
|----------|-----------|----------|-------------|------------|-----|--------------|-------------|---------------|--------------|-----------------|---------------|--------------|----------------|--------------------|---------|-----|
| A1CEMEI▲ | A1CEMEN-▲ | J448957▲ | 03 31 13▲   | 2000▲      | CY▲ | J448957 03▲  |             |               | NA           |                 |               | 10,000.00    | 15,000.00      | 001▲               | COE000▲ | API |
|          |           |          |             |            |     |              |             |               |              |                 |               | 10,000.00    | 15,000.00      |                    |         |     |

Vendor NameA1 CEMENT INDUSTRIES.Cost Code DescHeavy Weight Structural Concrete

## Main Change Order Parameters

On the **Detail** tab, click the **[Insert]** button (framed above) and enter details for the following fields:

### 1. Vendor

Used if Cost Code & Category are handled by a Subcontract, and you want to change Subcontract's value (use **Final Amount** field to specify change amount).

### 2. Contract (Subcontract)

Used if Cost Code & Category are handled by a Subcontract, and you want to change its value.

### 3. Job

Auto-populated with Project's associated Job.

### 4. Cost Code

Cost Code being updated.

### 5. Category

Category of the Cost Code being updated.

### 6. Final Amount

If the Cost Code & Category's JC Cost Budget Amount is to be changed, enter the amount in this field.

### 7. Billing Amount

Enter the amount of the change for the Cost Code & Category's JB Revenue Budget Amount in this field.

## Applying PCI Line to Subcontract

---

If the Change Order is related to a Subcontract, there are 3 different ways to apply the PCI Line to it:

1. Apply line to existing unposted Subcontract Change Order by selecting it from **Subcontract Change** field and entering a Task ID in the **Task ID** field.
2. Apply line to new Subcontract Change Order by manually entering Change Order Number. The Task ID will be automatically generated for you. The system will then prompt you to decide if you want to create the Change Order now or when the PCI is posted. To keep the manually entered number, you must select create now option. If you opt for when it is posted, the system will convert your manual numbering to "**TBD**".
3. Apply the line to next available Subcontract Change Order by entering the code "**TBD**" (To be determined) in the **Subcontract Change** field and the Task ID in the **Task ID** field. The system will ask you if you want to create the Change Order now or when the PCI is posted.

# Records & Fields Affected

## Job Costing Budget

JC ENTER BUDGET

Save

Exit

SELECTION CRITERIA

Company

CCC

▲

CMIc Test Construction Company

Job

J448957

▲

Freshmart Office Building - Chicago II

Create Contract

Assign Overhead Cost Rates

BUDGET DETAIL

View

▼

Freeze

Detach

Search

Workflows

▼

Report Options

▼

Export

Import

ECM Documents

▼

User Extensions

| * Cost Code | Cost Code Name                   | * Category | Meth | Budgeted Amount | Budgeted Quantity | WM | Budgeted Unit Rate | Budgeted Revenue Amount | Budgeted Revenue Rate | P | Projected Final | Freez Amt I |
|-------------|----------------------------------|------------|------|-----------------|-------------------|----|--------------------|-------------------------|-----------------------|---|-----------------|-------------|
| 03 31 13    | Heavy Weight Structural Concrete | 1500       | A    | 145,000.00      |                   | HR |                    | 205,000.00              |                       | L | 145,000.00      |             |
| 03 31 13    | Heavy Weight Structural Concrete | 2000       | U    | 22,000.00       | 0.000             | CY |                    | 34,000.00               |                       | L | 22,000.00       |             |
| 03 31 13    | Heavy Weight Structural Concrete | 3000       | A    | 235,000.00      |                   | DY |                    | 295,000.00              |                       | L | 235,000.00      |             |
| 03 31 13    | Heavy Weight Structural Concrete | 4000       | A    | 75,000.00       |                   | LS |                    | 115,000.00              |                       | L | 75,000.00       |             |
| 03 31 13    | Heavy Weight Structural Concrete | 5000       | A    | 67,500.00       |                   | LS |                    | 110,500.00              |                       | L | 67,500.00       |             |
| 03 31 13    | Heavy Weight Structural Concrete | CC         | A    | 150,000.00      |                   | \$ |                    | 200,000.00              |                       | L | 150,000.00      |             |

The **Budgeted Revenue Amount** field for the Cost Code & Category is changed accordingly by the JB Original Budgeted Revenue change amount.

If a change for the JC Original Cost Budget was made, the **Budgeted Amount** and **Projected Final** fields for the Cost Code & Category are changed accordingly.

# Job Billing Contract

CONTRACT ENTRY

Table Mode

Save Exit

CREATE CONTRACT

\* Company

CCC

CMIC Test Construction Company

JB - Assign Billing Codes to a Contract

JB - Assign Billing Codes to Cost Phase/Categories

JB - Billing P

Use Sub-Contract Vendor on New Bill Lines

Show Closed Contracts

Show NR Bill Codes

CONTRACT INFORMATION

Billing Items

Defaults

Rounding Methods

Address

Description

Officials

Surcharges

Risk Management

Separate Billing Information

Mapping Groups

Search

Insert

Delete

Previous

Next

Workflows

Report Options

Attachments

Notes

ECM Documents

User Extensions

Job

J448957

Freshmart Office Building - Chicago II

\* Contract

J448957

\* Contract Currency

US Dollars

Contract Billing Type

\* Customer

FRSHMART

Freshmart Groceries Inc.

Budg. Billing Amt

2,500,000.00

\* Time Phased

Exclude Non-Inv Receipts

Max Billing Amt

Bid Date

\* Contract Date

16/Mar/2017

Spread Rule

Approved Date

16/Mar/2017

Closed Date

Rate Code

ONERATE

Start Date

01/Mar/2017

End Date

31/Dec/2018

Create Contract Details

Bill Rates

Add New Bill Codes

Reset All Bill Code Budgets

Default Compliance Codes

Invoice Preview

Billing Codes

Group 1

Group 2

Group 3

Group 4

Group 5

View

Freeze

Detach

Search

Insert

Insert Multiple

Delete

Workflows

Report Options

Export

Import

ECM Documents

User Extensions

| Billing Code          | * Type | Description             | Budg. Billing Amt | Curr \$ | Budg. Qty. | WM | Billing Rate | Max Billing Amt | Max Qty | % of Constr. |  |
|-----------------------|--------|-------------------------|-------------------|---------|------------|----|--------------|-----------------|---------|--------------|--|
| J448957 03 31 13 1000 | COST   | Heavy Weight Structural | 295,000.00        | US      | 0.000      | HR |              |                 |         |              |  |
| J448957 03 31 13 2000 | COST   | Heavy Weight Structural | 34,000.00         | US      | 0.000      | HR |              |                 |         |              |  |
| J448957 03 31 13 3000 | COST   | Heavy Weight Structural | 295,000.00        | US      |            | DY |              |                 |         |              |  |
| J448957 03 31 13 4000 | COST   | Heavy Weight Structural | 115,000.00        | US      |            | LS |              |                 |         |              |  |

The **Budg. Billing Amt** field is changed by the change amount for the Cost Code & Category.

PCI Basics (ADF) - Quick Guide

13 • External (Out of Scope)

## Subcontract

| SUBCONTRACT MAINTENANCE                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                           | Table Mode                                                                                    |                                                    | Save Exit ? ? ▲ ▼ ↺                  |                       |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------------------------|-----------------------|
| <b>SELECTION CRITERIA</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                           |                                                                                               |                                                    |                                      |                       |
| Company                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <input type="text" value="CCC"/>          | <input type="text" value="CMIC Test Construction Company"/>                                   | Show Subcontracts                                  | <input type="text" value="Open"/>    |                       |
| Project                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <input type="text" value="P448957"/>      | <input type="text" value="Freshmart Office Building - Chicago II"/>                           | Job Code                                           | <input type="text" value="J448957"/> | <button>Back</button> |
| <b>SUBCONTRACT INFORMATION</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                           |                                                                                               |                                                    |                                      |                       |
| Search Insert Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions                                                                                                                                                                                                                                                                                                                                                                                         |                                           |                                                                                               |                                                    |                                      |                       |
| <input type="button" value="Post"/> <input type="button" value="Original Participation"/> <input checked="" type="button" value="Overall Participation"/> <input type="button" value="Compliance"/> <input type="button" value="Joint Check"/> <input type="button" value="Copy From Contract"/>                                                                                                                                                                                             |                                           |                                                                                               |                                                    |                                      |                       |
| * Vendor                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <input type="text" value="A1CEMENT"/>     | Vendor Name                                                                                   | <input type="text" value="A1 CEMENT INDUSTRIES."/> |                                      |                       |
| Contract                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <input type="text" value="A1CEMEN-0003"/> | * Description                                                                                 | <input type="text" value="Concrete Parking Lot"/>  |                                      |                       |
| <input checked="" type="button" value="Summary"/> <input type="button" value="General"/> <input type="button" value="Schedule of Values"/> <input type="button" value="Change Orders"/> <input type="button" value="Dates"/> <input type="button" value="Text Codes"/> <input type="button" value="Free Form"/> <input type="button" value="Attachment"/> <input type="button" value="Special Pricing"/> <input type="button" value="Inclusions"/> <input type="button" value="Exclusions"/> |                                           |                                                                                               |                                                    |                                      |                       |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Original                                  | Changes To Date                                                                               | Revised                                            |                                      |                       |
| Contract Value                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <input type="text" value="12,000.00"/>    | <input type="text" value="10,000.00"/>                                                        | <input type="text" value="22,000.00"/>             |                                      |                       |
| Completion Date                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <input type="text"/>                      | <input type="text" value="0 Days"/>                                                           | <input type="text"/>                               |                                      |                       |
| Contract Type                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <input type="text"/>                      | Default Retainage %                                                                           | <input type="text" value="10"/>                    | Do Not Exceed <input type="text"/>   |                       |
| * Status                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <input type="text" value="POSTED"/>       | <input type="checkbox"/> * Self Billed <input type="checkbox"/> Override Do Not Exceed Amount |                                                    |                                      |                       |

If the Change Order was related to a Subcontract, and it included a change for the JC Cost Budget Amount for the Cost Code & Category being handled by the Subcontract, the Subcontract's **Changes To Date** and **Revised** fields will be updated accordingly.

**NOTE:** A Subcontract's **Contract Value** is the JC Cost Budget Amount (not JB Revenue Budget Amount) for the Subcontract's SOV Lines.

# Contract Forecasting – JSP

## Cost Status Query – xProjects Screens

### Cost Status Query

| Cost Status Query |          |                                  |                 |                          |             |                |            |               |                  |          |                     |           |                 |                    |                       |                      |                   |                    |              |                      |                      |
|-------------------|----------|----------------------------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|----------|---------------------|-----------|-----------------|--------------------|-----------------------|----------------------|-------------------|--------------------|--------------|----------------------|----------------------|
| Job Code          | Phase    | Phase Name                       | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent    | Committed Remaining | Committed | Spent/Committed | Amount To Complete | Calculated Projection | Proceeding Projected | Non-Proceeding CO | Pending Projection | Forecast     | Projected Over/Under | Projected ETC Budget |
| J448957           | 02-100   | Structural Demolition            | 0.00            | 3,785.00                 | 0.00        | 3,785.00       | 0.00       | 0.00          | 3,785.00         | 0.00     | 16,535.00           | 16,535.00 | 16,535.00       | 0.00               | 16,535.00             | 0.00                 | 0.00              | 16,535.00          | 16,535.00    | -12,750.00           | 3,785.00             |
| J448957           | 03 31 13 | Heavy Weight Structural Concrete | 1,080,500.00    | 10,000.00                | 10,000.00   | 1,100,500.00   | 0.00       | 0.00          | 1,100,500.00     | 0.00     | 22,000.00           | 22,000.00 | 22,000.00       | 1,078,500.00       | 1,100,500.00          | 0.00                 | 0.00              | 1,100,500.00       | 1,100,500.00 | 0.00                 | 1,100,500.00         |
| J448957           | 03-100   | Structural Concrete              | 747,000.00      | 10,100.00                | 0.00        | 757,100.00     | 0.00       | 0.00          | 757,100.00       | 0.00     | 86,160.00           | 86,160.00 | 86,160.00       | 597,000.00         | 683,160.00            | 0.00                 | 0.00              | 683,160.00         | 683,160.00   | 73,940.00            | 757,100.00           |
| J448957           | 03-200   | Architectural Concrete           | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00     | 0.00                | 0.00      | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00         | 0.00                 | 0.00                 |
| J448957           | 04 0500  | Masonry                          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 3,675.00 | 61,425.00           | 65,100.00 | 65,100.00       | 0.00               | 65,100.00             | 0.00                 | 0.00              | 65,100.00          | 65,100.00    | -65,100.00           | 0.00                 |

If the External Change Order included a change for the JC Cost Budget Amount for the Cost Code, the **External CO** field is changed by the amount of the change to the budgeted cost amount for the Cost Code. The other highlighted fields are changed accordingly.

## Cost Status Query (Category)

| Cost Status Query (Category) |          |                                  |               |                 |                          |             |                |            |               |                  |       |           |                     |                 |                    |                       |                      |                   |                    |            |                      |                      |
|------------------------------|----------|----------------------------------|---------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|-------|-----------|---------------------|-----------------|--------------------|-----------------------|----------------------|-------------------|--------------------|------------|----------------------|----------------------|
| Job Code                     | Phase    | Phase Name                       | Category Code | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent | Committed | Committed Remaining | Spent/Committed | Amount To Complete | Calculated Projection | Proceeding Projected | Non-Proceeding CO | Pending Projection | Forecast   | Projected Over/Under | Projected ETC Budget |
| J448957                      | 02-100   | Structural Demolition            | 2000          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 10,000.00 | 10,000.00           | 10,000.00       | 0.00               | 10,000.00             | 0.00                 | 0.00              | 10,000.00          | 10,000.00  | -10,000.00           | 0.00                 |
| J448957                      | 02-100   | Structural Demolition            | 5000          | 0.00            | 3,785.00                 | 0.00        | 3,785.00       | 0.00       | 0.00          | 3,785.00         | 0.00  | 6,535.00  | 6,535.00            | 6,535.00        | 0.00               | 6,535.00              | 0.00                 | 0.00              | 6,535.00           | 6,535.00   | -2,750.00            | 3,785.00             |
| J448957                      | 02-100   | Structural Demolition            | CC            | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00       | 0.00                 | 0.00                 |
| J448957                      | 02-100   | Structural Demolition            | CFB           | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00       | 0.00                 | 0.00                 |
| J448957                      | 02-100   | Structural Demolition            | CFBNR         | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00       | 0.00                 | 0.00                 |
| J448957                      | 03 31 13 | Heavy Weight Structural Concrete | 1000          | 220,000.00      | 10,000.00                | 0.00        | 230,000.00     | 0.00       | 0.00          | 230,000.00       | 0.00  | 0.00      | 0.00                | 0.00            | 230,000.00         | 230,000.00            | 0.00                 | 0.00              | 230,000.00         | 230,000.00 | 0.00                 | 230,000.00           |
| J448957                      | 03 31 13 | Heavy Weight Structural Concrete | 1500          | 145,000.00      | 0.00                     | 0.00        | 145,000.00     | 0.00       | 0.00          | 145,000.00       | 0.00  | 0.00      | 0.00                | 0.00            | 145,000.00         | 145,000.00            | 0.00                 | 0.00              | 145,000.00         | 145,000.00 | 0.00                 | 145,000.00           |
| J448957                      | 03 31 13 | Heavy Weight Structural Concrete | 2000          | 12,000.00       | 0.00                     | 10,000.00   | 22,000.00      | 0.00       | 0.00          | 22,000.00        | 0.00  | 22,000.00 | 22,000.00           | 22,000.00       | 0.00               | 22,000.00             | 0.00                 | 0.00              | 22,000.00          | 22,000.00  | 0.00                 | 22,000.00            |
| J448957                      | 03 31 13 | Heavy Weight Structural Concrete | 3000          | 235,000.00      | 0.00                     | 0.00        | 235,000.00     | 0.00       | 0.00          | 235,000.00       | 0.00  | 0.00      | 0.00                | 0.00            | 235,000.00         | 235,000.00            | 0.00                 | 0.00              | 235,000.00         | 235,000.00 | 0.00                 | 235,000.00           |

If the External Change Order included a change for the JC Cost Budget Amount for the Cost Code & Category, the **External CO** field is changed by the change amount to the budgeted cost amount for the Cost Code & Category. The other highlighted fields are changed accordingly.

## Budget Status Query – xProjects Screens

### Budget Status Query

| Budget Status Query |          |                                  |                         |                          |             |                        |            |               |                          |
|---------------------|----------|----------------------------------|-------------------------|--------------------------|-------------|------------------------|------------|---------------|--------------------------|
| Job Code            | Phase    | Phase Name                       | Original Revenue Budget | Internal And Transfer CO | External CO | Current Revenue Budget | Pending CO | Prepending CO | Projected Revenue Budget |
| J448957             | 02-100   | Structural Demolition            | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957             | 03 31 13 | Heavy Weight Structural Concrete | 1,495,500.00            | 0.00                     | 35,000.00   | 1,530,500.00           | 0.00       | 0.00          | 1,530,500.00             |
| J448957             | 03-100   | Structural Concrete              | 1,080,000.00            | 0.00                     | 100,000.00  | 1,180,000.00           | 0.00       | 0.00          | 1,180,000.00             |
| J448957             | 03-200   | Architectural Concrete           | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957             | 04 0500  | Masonry                          | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957             | 04 0510  | Masonry - Mortar & Grout         | 23,500.00               | 0.00                     | 0.00        | 23,500.00              | 0.00       | 0.00          | 23,500.00                |
| J448957             | 04 4000  | Masonry - Stone                  | 53,500.00               | 0.00                     | 0.00        | 53,500.00              | 0.00       | 0.00          | 53,500.00                |

As shown above, the **External CO** field is updated by the amount of the change to the budgeted amount for the Cost Code. The other highlighted fields are updated accordingly.

## Budget Status Query (Category)

| Budget Status Query (Category) |          |                                  |               |                         |                          |             |                        |            |               |                          |
|--------------------------------|----------|----------------------------------|---------------|-------------------------|--------------------------|-------------|------------------------|------------|---------------|--------------------------|
| Job Code                       | Phase    | Phase Name                       | Category Code | Original Revenue Budget | Internal And Transfer CO | External CO | Current Revenue Budget | Pending CO | Prepending CO | Projected Revenue Budget |
| J448957                        | 02-100   | Structural Demolition            | CFBNR         | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957                        | 03 31 13 | Heavy Weight Structural Concrete | 1000          | 275,000.00              | 0.00                     | 20,000.00   | 295,000.00             | 0.00       | 0.00          | 295,000.00               |
| J448957                        | 03 31 13 | Heavy Weight Structural Concrete | 1500          | 205,000.00              | 0.00                     | 0.00        | 205,000.00             | 0.00       | 0.00          | 205,000.00               |
| J448957                        | 03 31 13 | Heavy Weight Structural Concrete | 2000          | 19,000.00               | 0.00                     | 15,000.00   | 34,000.00              | 0.00       | 0.00          | 34,000.00                |
| J448957                        | 03 31 13 | Heavy Weight Structural Concrete | 3000          | 295,000.00              | 0.00                     | 0.00        | 295,000.00             | 0.00       | 0.00          | 295,000.00               |
| J448957                        | 03 31 13 | Heavy Weight Structural Concrete | 4000          | 115,000.00              | 0.00                     | 0.00        | 115,000.00             | 0.00       | 0.00          | 115,000.00               |
| J448957                        | 03 31 13 | Heavy Weight Structural Concrete | 5000          | 110,500.00              | 0.00                     | 0.00        | 110,500.00             | 0.00       | 0.00          | 110,500.00               |

As shown above, the **External CO** field is updated by the amount of the change to the budgeted amount for the Cost Code, and the other highlighted fields are updated accordingly.

# Transfer

## Overview – Transfer PCIs

Transfer PCIs are used to transfer a JC Cost Budget Amount and/or JB Budget Amount from one Cost Code & Category combo to another.

## Enter PCI – Screen

### General – Tab

POTENTIAL CHANGE ITEMS

Table Mode Save Exit Print Info Help Warn Undo Redo

SELECTION CRITERIA

Company CCC CMIC Test Construction Company

Project P448957 Freshmart Office Building - Chicago II Contract J448957

Change Item Markup Rules

PCI INFORMATION

Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type

\* Type TFR Transfer Change Orders

\* Status APPROVED Approved

\* PCI NO. COT000001 Trans. 26 0500.1000 to 26 0500.2000

Total Budgeted 0.00 Total Billing 0.00

General Detail Summary RFQ Approval Notes Attachment History

Allowance Neither Owner Allowance Amt Due to Owner 10/Nov/2017

Source \* Date 10/Nov/2017

☒ Proceed

☒ Forecast

☒ Post Vendor Contracts with PCI

On the **General** tab of the Enter PCI screen, select “**TFR**” via the **Type** field (Transfer PCI type) and select its Approval Status via the **Status** field.

## Detail – Tab (Parameters for PCI)

**POTENTIAL CHANGE ITEMS** Table Mode Save Exit Print Info Help Alert Refresh

**SELECTION CRITERIA**

Company: CCC CMIC Test Construction Company  
 Project: P448957 Freshmart Office Building - Chicago II Contract: J448957 Change Item Markup Rules

**PCI INFORMATION**

Search Insert Delete Previous Next Workflows Report Options Attachments Notes ECM Documents User Extensions

Post Owner CO Copy Modify Type

\* Type: TFR Transfer Change Orders \* Status: PENDING Pending  
 \* PCI NO.: COT000001 Trans. 26 0500.1000 to 26 0500.2000 Total Budgeted: 0.00 Total Billing: 0.00

General **Detail** Summary RFQ Approval Notes Attachment History

Show Rates Hide Rates Calc.Markups Allowance Tracking **PCI Participation** SCO Line Notes

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export Attachments Notes ECM Documents User Extensions

| Vendor | Contract    | * Job   | * Cost Code | * Category | WM | Billing Code  | Days Impact | Cost Code Qty | Cost Code WM | Estimated Amount | Quoted Amount | Final Amount | Billing Amount | Subcontract Change | Task ID   | Status  |
|--------|-------------|---------|-------------|------------|----|---------------|-------------|---------------|--------------|------------------|---------------|--------------|----------------|--------------------|-----------|---------|
| A1ELEC | A1ELEC-0005 | J44895  | 26 0500     | 2000       |    | J448957.26 05 |             |               | NA           |                  |               | -10,000.00   | -15,000.00     | TBD                | COT000001 | PENDING |
|        |             | J448957 | 26 0500     | 1000       | HR | J448957.26 05 |             |               | NA           |                  |               | 10,000.00    | 15,000.00      |                    |           | PENDING |
|        |             |         |             |            |    |               |             |               |              |                  |               | 0.00         | 0.00           |                    |           |         |

Vendor Name: A1ELECTRIC Company Cost Code Desc: Electrical

**transfer Cost & Budget amounts from one Bill Code to another**

## Main Change Order Parameters

On the **Detail** tab, click the **[Insert]** button (framed above) and enter details for the following fields:

### 1. Vendor

Used if Cost Code & Category are handled by a Subcontract.

### 2. Contract (Subcontract)

Used if Cost Code & Category are handled by a Subcontract.

### 3. Job

Auto-populated with Project's associated Job.

#### 4. Cost Code

Cost Code from which the transfer amount is either being taken or added.

#### 5. Category

Category from which the transfer amount is either being taken or added.

#### 6. Final Amount

Cost Code & Category's JC Cost Budget Amount. If the transfer amount is being taken from this Cost Code & Category, enter the negative amount, otherwise, enter the positive amount.

#### 7. Billing Amount

Cost Code & Category's JB Revenue Budget Amount. If the transfer amount is being taken from this Cost Code & Category, enter the negative amount; otherwise, enter the positive amount.

### Applying PCI Line to Subcontract

---

If the Change Order is related to a Subcontract, there are 3 different ways to apply the PCI Line to it:

1. Apply line to existing unposted Subcontract Change Order by selecting it from **Subcontract Change** field and entering a Task ID in the **Task ID** field.
2. Apply line to new Subcontract Change Order by manually entering Change Order Number. The Task ID will be automatically generated for you. The system will then prompt you to decide if you want to create the Change Order now or when the PCI is posted. To keep the manually entered number, you must select create now option. If you opt for when it is posted, the system will convert your manual numbering to "**TBD**".
3. Apply the line to next available Subcontract Change Order by entering the code "**TBD**" (To be determined) in the **Subcontract Change** field and the Task ID in the **Task ID** field. The system will ask you if you want to create the Change Order now or when the PCI is posted.

# Records & Fields Affected

## Job Costing Budget

JC ENTER BUDGET

Save

Exit

SELECTION CRITERIA

Company

CCC

CMIC Test Construction Company

Job

J448957

Freshmart Office Building - Chicago II

Create Contract

Assign Overhead Cost Rates

BUDGET DETAIL

View

Freeze

Detach

Search

Workflows

Report Options

Export

Import

ECM Documents

User Extensions

| * Cost Code | Cost Code Name | * Category | Meth | Budgeted Amount | Budgeted Quantity | WM | Budgeted Unit Rate | Budgeted Revenue Amount | Budgeted Revenue Rate | P | Projected Final | Freeze Proj Amt Flag                | Time Phased              |
|-------------|----------------|------------|------|-----------------|-------------------|----|--------------------|-------------------------|-----------------------|---|-----------------|-------------------------------------|--------------------------|
| 26 0500     | Electrical     | 1000       | A    | 90,000.00       | 0.000             | HR |                    | 145,000.00              |                       | L | 90,000.00       | <input type="checkbox"/>            | <input type="checkbox"/> |
| 26 0500     | Electrical     | 2000       | A    | 15,000.00       | 0.000             | CY |                    | 20,000.00               |                       | L | 15,000.00       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 26 0500     | Electrical     | 3000       | A    |                 |                   | HR |                    |                         |                       | L |                 | <input type="checkbox"/>            | <input type="checkbox"/> |
| 26 0500     | Electrical     | 4000       | A    |                 |                   | CY |                    |                         |                       | L |                 | <input type="checkbox"/>            | <input type="checkbox"/> |
| 26 0500     | Electrical     | 5000       | A    |                 |                   | CY |                    |                         |                       | L |                 | <input type="checkbox"/>            | <input type="checkbox"/> |
| 26 0500     | Electrical     | CC         | A    |                 |                   | \$ |                    |                         |                       | L |                 | <input type="checkbox"/>            | <input type="checkbox"/> |
| 26 0500     | Electrical     | CFB        | A    |                 |                   | \$ |                    |                         |                       | L |                 | <input type="checkbox"/>            | <input type="checkbox"/> |

If the Transfer Change Order included changes for the JC Cost Budget Amount for the Cost Codes & Category, the **Budgeted Amount** and **Projected Final** fields are changed accordingly.

If the Transfer Change Order included changes for the JB Original Budgeted Revenue Amount, the **Budgeted Revenue Amount** field is changed accordingly.

# Job Billing Contract

CONTRACT ENTRY

Table Mode

Save Exit

CREATE CONTRACT

\* Company

CCC

CMIC Test Construction Company

JB - Assign Billing Codes to a Contract

JB - Assign Billing Codes to Cost Phase/Categories

JB - Billing Rates

☐ Use Sub-Contract Vendor on New Bill Lines

☐ Show Closed Contracts

☐ Show NR Bill Codes

CONTRACT INFORMATION

Billing Items

Defaults

Rounding Methods

Address

Description

Officials

Surcharges

Risk Management

Separate Billing Information

Mapping Groups

Search

Insert

Delete

Previous

Next

Workflows

Report Options

Attachments

Notes

ECM Documents

User Extensions

Job

J448957

Freshmart Office Building - Chicago II

\* Contract

J448957

\* Contract Currency

US Dollars

Contract Billing Type

\* Customer

FRSHMART

Freshmart Groceries Inc.

Budg. Billing Amt

2,500,000.00

☐ \* Time Phased

☐ Exclude Non-Inv Receipts

Max Billing Amt

Bid Date

\* Contract Date

16/Mar/2017

Approved Date

16/Mar/2017

Closed Date

Spread Rule

Start Date

01/Mar/2017

End Date

31/Dec/2018

Rate Code

ONERATE

Create Contract Details

Bill Rates

Add New Bill Codes

Reset All Bill Code Budgets

Default Compliance Codes

Invoice Preview

Billing Codes

Group 1

Group 2

Group 3

Group 4

Group 5

View

Freeze

Detach

Search

Insert

Insert Multiple

Delete

Workflows

Report Options

Export

Import

ECM Documents

User Extensions

Mass Update

| Billing Code         | * Type | Description              | Budg. Billing Amt | Curr \$ | Budg. Qty. | WM | Billing Rate | Max Billing Amt | Max Qty | % of Constr. | Construction Value |
|----------------------|--------|--------------------------|-------------------|---------|------------|----|--------------|-----------------|---------|--------------|--------------------|
| J448957.26 0500.1000 | COST   | Electrical - Labour      | 145,000.00        | US      | 0.000      | HR |              |                 |         |              |                    |
| J448957.26 0500.2000 | COST   | Electrical - Subcontract | 20,000.00         | US      | 0.000      | CY |              |                 |         |              |                    |
| J448957.26 0500.3000 | COST   | Electrical - Equipment   |                   | US      |            | HR |              |                 |         |              |                    |

The **Budg. Billing Amt** fields are changed by the transfer amounts for the Cost Codes & Categories.

22 • Transfer

PCI Basics (ADF) - Quick Guide

## Subcontract

**SUBCONTRACT MAINTENANCE**Table ModeSaveExit??????

**SELECTION CRITERIA**

CompanyCCC▲CMiC Test Construction CompanyShow SubcontractsOpen▼  
ProjectP448957▲Freshmart Office Building - Chicago IILJob CodeJ448957Back

**SUBCONTRACT INFORMATION**

SearchInsertPreviousNextWorkflowsReport OptionsAttachmentsNotesECM DocumentsUser Extensions

PostOriginal ParticipationOverall ParticipationComplianceJoint CheckCopy From Contract

\* VendorA1ELEC▲Vendor NameA1ELECTRIC Company  
ContractA1ELEC-0005\* DescriptionInterior Electrical Work

SummaryGeneralSchedule of ValuesChange OrdersDatesText CodesFree FormAttachmentSpecial PricingInclusionsExclusions

|                 | Original  | Changes To Date | Revised   |
|-----------------|-----------|-----------------|-----------|
| Contract Value  | 25,000.00 | -10,000.00      | 15,000.00 |
| Completion Date |           | 0 Days          |           |

Contract Type▲Default Retainage %10Do Not Exceed  
\* StatusPOSTED▼☐ \* Self Billed☐ Override Do Not Exceed Amount

If the Transfer Change Order was related to a Subcontract, and it included a change for the JC Cost Budget Amount for the Cost Code & Category being handled by the Subcontract, the Subcontract's **Changes To Date** and **Revised** fields will be updated accordingly.

**NOTE:** A Subcontract's **Contract Value** is the JC Cost Budget Amount (not JB Revenue Budget Amount) for the Subcontract's SOV Lines.

# Contract Forecasting – JSP

## Cost Status Query (Category) – xProjects Screens

| Cost Status Query (Category) |         |            |               |                 |                          |             |                |            |               |                  |       |           |                     |                 |                    |                       |                      |                   |                    |           |                      |                      |
|------------------------------|---------|------------|---------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|-------|-----------|---------------------|-----------------|--------------------|-----------------------|----------------------|-------------------|--------------------|-----------|----------------------|----------------------|
| Job Code                     | Phase   | Phase Name | Category Code | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent | Committed | Committed Remaining | Spent/Committed | Amount To Complete | Calculated Projection | Proceeding Projected | Non-Proceeding CO | Pending Projection | Forecast  | Projected Over/Under | Projected ETC Budget |
| J448957                      | 26 0500 | Electrical | 1000          | 80,000.00       | 10,000.00                | 0.00        | 90,000.00      | 0.00       | 0.00          | 90,000.00        | 0.00  | 0.00      | 0.00                | 0.00            | 90,000.00          | 90,000.00             | 0.00                 | 0.00              | 90,000.00          | 90,000.00 | 0.00                 | 90,000.00            |
| J448957                      | 26 0500 | Electrical | 2000          | 25,000.00       | -10,000.00               | 0.00        | 15,000.00      | 0.00       | 0.00          | 15,000.00        | 0.00  | 15,000.00 | 15,000.00           | 15,000.00       | 0.00               | 15,000.00             | 0.00                 | 0.00              | 15,000.00          | 15,000.00 | 0.00                 | 15,000.00            |
| J448957                      | 26 0500 | Electrical | 3000          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 26 0500 | Electrical | 4000          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 26 0500 | Electrical | 5000          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 26 0500 | Electrical | CC            | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 26 0500 | Electrical | CFB           | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |
| J448957                      | 26 0500 | Electrical | CFBNR         | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00      | 0.00                 | 0.00                 |

If the Transfer Change Order included a change for the JC Cost Budget Amount for the Cost Codes & Categories, the **Internal And Transfer CO** fields and the other highlighted fields are changed accordingly.

## Budget Status Query (Category) – xProjects Screens

| Budget Status Query (Category) |         |            |               |                         |                          |             |                        |            |               |                          |
|--------------------------------|---------|------------|---------------|-------------------------|--------------------------|-------------|------------------------|------------|---------------|--------------------------|
| Job Code                       | Phase   | Phase Name | Category Code | Original Revenue Budget | Internal And Transfer CO | External CO | Current Revenue Budget | Pending CO | Prepending CO | Projected Revenue Budget |
| J448957                        | 26 0500 | Electrical | 1000          | 130,000.00              | 15,000.00                | 0.00        | 145,000.00             | 0.00       | 0.00          | 145,000.00               |
| J448957                        | 26 0500 | Electrical | 2000          | 35,000.00               | -15,000.00               | 0.00        | 20,000.00              | 0.00       | 0.00          | 20,000.00                |
| J448957                        | 26 0500 | Electrical | 3000          | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957                        | 26 0500 | Electrical | 4000          | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957                        | 26 0500 | Electrical | 5000          | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957                        | 26 0500 | Electrical | CC            | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |

If the Transfer Change Order included a change for the JC Cost Budget Amount for the Cost Codes & Categories, the **Internal And Transfer CO** fields and the other highlighted fields are changed accordingly.

# Original Budget

## Overview – Original Budget PCIs

PCIs of the Original Budget type are used to change a Cost Code and Category's JC Original Cost Budget Amount and/or JB Original Revenue Amount, if the Job has been started using the Start Job screen (program: JCJOB DAT; standard path: **JC** > **Job** > **Start Job**):

### 1. JC Original Cost Budget Amount

| Cost Status Query (Category) |         |            |               |                 |                          |             |                |            |               |                  |       |           |                     |              |
|------------------------------|---------|------------|---------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|-------|-----------|---------------------|--------------|
| Job Code                     | Phase   | Phase Name | Category Code | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent | Committed | Committed Remaining | Spent/Commit |
| J448957                      | 26 0500 | Electrical | 1000          | 80,000.00       | 10,000.00                | 0.00        | 90,000.00      | 0.00       | 0.00          | 90,000.00        | 0.00  | 0.00      | 0.00                | 0            |
| J448957                      | 26 0500 | Electrical | 2000          | 25,000.00       | -10,000.00               | 0.00        | 15,000.00      | 0.00       | 0.00          | 15,000.00        | 0.00  | 15,000.00 | 15,000.00           | 15,000       |
| J448957                      | 26 0500 | Electrical | 3000          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0            |

Sample of Cost Status Query (Category) screen; standard path: xProjects > Budget & Cost Management > Cost Status Query (Category)

As shown above, a Cost Code and Category's JC Original Cost Budget Amount is displayed by the Cost Status Query screen.

### 2. JB Original Revenue Budget Amount

| Budget Status Query (Category) |         |            |               |                         |                          |          |
|--------------------------------|---------|------------|---------------|-------------------------|--------------------------|----------|
| Job Code                       | Phase   | Phase Name | Category Code | Original Revenue Budget | Internal And Transfer CO | External |
| J448957                        | 26 0500 | Electrical | 1000          | 130,000.00              | 15,000.00                |          |
| J448957                        | 26 0500 | Electrical | 2000          | 35,000.00               | -15,000.00               |          |
| J448957                        | 26 0500 | Electrical | 3000          | 0.00                    | 0.00                     |          |

Sample of Budget Status Query (Category) screen; standard path: xProjects > Budget & Cost Management > Budget Status Query (Category)

As shown above, a Cost Code and Category's JB Original Revenue Budget Amount is displayed by the Budget Status Query screen:

# Enter PCI – Screen

## General – Tab

POTENTIAL CHANGE ITEMS

Table Mode

Save Exit Print Info Help Undo Redo

Enter Change Order Description

SELECTION CRITERIA

CompanyCCC▲CMIC Test Construction Company

ProjectP448957▲Freshmart Office Building - Chicago II

ContractJ448957

Change Item Markup Rules

PCI INFORMATION

SearchInsertDeletePreviousNextWorkflowsReport OptionsAttachmentsNotesECM DocumentsUser Extensions

PostOwner COCopyModify Type

\* TypeOBC▲Original Budget Change Orders

\* StatusPENDING▲Pending

\* PCI NO.COB0000003

26 0500 - Cost Increase \$20K Rev. Inc & Rev. Increase \$30K

Total Budgeted0.00

Total Billing0.00

GeneralDetailSummaryRFQApprovalNotesAttachmentHistory

AllowanceNeither▲

Owner Allowance Amt

Due to Owner13/Nov/2017

\* Date13/Nov/2017

Start Date

End Date

Proceed

Forecast

Post Vendor Contracts with PCI

Update Projected Amount during Posting

Recalculate Projected Amount

On the **General** tab of the Enter PCI screen, select “OBC” via the **Type** field (Original Budget PCI type) and select its Approval Status via the **Status** field.

26 • Original Budget

PCI Basics (ADF) - Quick Guide

## Detail – Tab (Parameters for PCI)

**POTENTIAL CHANGE ITEMS**

Table ModeSaveExitPrintHelpInfoWarningUndoRedo

SELECTION CRITERIA

CompanyCCC▼CMIC Test Construction Company  
ProjectP448957▼Freshmart Office Building - Chicago IIContractJ448957Change Item Markup Rules

PCI INFORMATION

SearchInsertDeletePreviousNextWorkflowsReport OptionsAttachmentsNotesECM DocumentsUser Extensions

PostOwner COCopyModify Type

\* TypeOBC▼Original Budget Change Orders\* StatusPENDING▼Pending  
\* PCI NO.COB000000326 0500 - Cost Increase \$20K Rev. Inc & Rev. Increase \$30KTotal Budgeted0.00Total Billing0.00

GeneralDetailSummaryRFQApprovalNotesAttachmentHistory

Show RatesHide RatesCalc.MarkupsAllowance TrackingPCI ParticipationSCOLine Notes

View▼FreezeDetachSearchInsertInsert MultipleDeleteWorkflowsReport OptionsExportAttachmentsNotesECM DocumentsUser Extensions

| Vendor | Contract | * Job   | * Cost Code | * Category | WM | Billing Code  | Days Impact | Cost Code Qty | Cost Code WM | Estimated Amount | > Quoted Amount | > Final Amount | Billing Amount | Subcontract Change | Task ID | Status Code |
|--------|----------|---------|-------------|------------|----|---------------|-------------|---------------|--------------|------------------|-----------------|----------------|----------------|--------------------|---------|-------------|
|        |          | J448957 | 26 0500     | 1000       | HR | J448957.26 05 | 0           |               |              |                  | >               | 20,000.00      | 30,000.00      |                    |         | PENDING     |
|        |          |         |             |            |    |               |             |               |              |                  |                 | 20,000.00      | 30,000.00      |                    |         |             |

Vendor NameCost Code Desc. Electrical

## Main Change Order Parameters

On the **Detail** tab, click the **[Insert]** button (framed above) and enter details for the following fields:

### 1. Job

Auto-populated with Project's associated Job.

### 2. Cost Code

Cost Code being updated.

### 3. Category

Category of the Cost Code being updated.

#### 4. Final Amount

If the Cost Code & Category's JC Original Cost Budget Amount (displayed by Cost Status Query screen, as shown below) is to be changed, enter the amount in this field.

| Cost Status Query (Category) |         |            |               |                 |                          |             |                |            |               |                  |       |           |                     |                 |
|------------------------------|---------|------------|---------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|-------|-----------|---------------------|-----------------|
| Job Code                     | Phase   | Phase Name | Category Code | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent | Committed | Committed Remaining | Spent/Committed |
| J448957                      | 26 0500 | Electrical | 1000          | 80,000.00       | 10,000.00                | 0.00        | 90,000.00      | 0.00       | 0.00          | 90,000.00        | 0.00  | 0.00      | 0.00                | 0.00            |
| J448957                      | 26 0500 | Electrical | 2000          | 25,000.00       | -10,000.00               | 0.00        | 15,000.00      | 0.00       | 0.00          | 15,000.00        | 0.00  | 15,000.00 | 15,000.00           | 15,000.00       |
| J448957                      | 26 0500 | Electrical | 3000          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            |

#### 5. Billing Amount

If the Cost Code & Category's JB Original Revenue Budget Amount (displayed by Budget Status Query screen, as shown below) is to be changed, enter the amount in this field.

| Budget Status Query (Category) |         |            |               |                         |                          |          |
|--------------------------------|---------|------------|---------------|-------------------------|--------------------------|----------|
| Job Code                       | Phase   | Phase Name | Category Code | Original Revenue Budget | Internal And Transfer CO | External |
| J448957                        | 26 0500 | Electrical | 1000          | 130,000.00              | 15,000.00                |          |
| J448957                        | 26 0500 | Electrical | 2000          | 35,000.00               | -15,000.00               |          |
| J448957                        | 26 0500 | Electrical | 3000          | 0.00                    | 0.00                     |          |

# Records & Fields Affected

## Job Costing Budget

JC ENTER BUDGET

Save

Exit

SELECTION CRITERIA

Company

CCC

CMIC Test Construction Company

Job

J448957

Freshmart Office Building - Chicago II

Create Contract

Assign Overhead Cost Rates

BUDGET DETAIL

View

Freeze

Detach

Search

Workflows

Report Options

Export

Import

ECM Documents

User Extensions

| * Cost Code | Cost Code Name               | * Category | Meth | Budgeted Amount | Budgeted Quantity | WM | Budgeted Unit Rate | Budgeted Revenue Amount | Budgeted Revenue Rate | P | Projected Final | Freeze Proj Amt Flag                | Time Phased              | Spread Rule |
|-------------|------------------------------|------------|------|-----------------|-------------------|----|--------------------|-------------------------|-----------------------|---|-----------------|-------------------------------------|--------------------------|-------------|
| 09-999      | Contractor Default Insurance | CFBNR      | A    |                 |                   | \$ |                    |                         |                       | L |                 | <input type="checkbox"/>            | <input type="checkbox"/> |             |
| 26 0500     | Electrical                   | 1000       | A    | 110,000.00      | 0.000             | HR |                    | 175,000.00              |                       | L | 110,000.00      | <input type="checkbox"/>            | <input type="checkbox"/> |             |
| 26 0500     | Electrical                   | 2000       | A    | 15,000.00       | 0.000             | CY |                    | 20,000.00               |                       | L | 15,000.00       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |             |
| 26 0500     | Electrical                   | 3000       | A    |                 |                   | HR |                    |                         |                       | L |                 | <input type="checkbox"/>            | <input type="checkbox"/> |             |
| 26 0500     | Electrical                   | 4000       | A    |                 |                   | CY |                    |                         |                       | L |                 | <input type="checkbox"/>            | <input type="checkbox"/> |             |

If a change for the JC Original Cost Budget was made, the **Budgeted Amount** and **Projected Final** fields for the Cost Code & Category are changed accordingly.

If a change for the JB Original Budgeted Revenue was made, the **Budgeted Revenue Amount** field is changed accordingly.

## Job Billing Contract

**CONTRACT ENTRY**

Table ModeSaveExitPrintHelpInfoWarningUndo

CREATE CONTRACT

\* Company CCCCMiC Test Construction CompanyJB - Assign Billing Codes to a ContractJB - Assign Billing Codes to Cost Phase/CategoriesJB - Billing Rates

☐ Use Sub-Contract Vendor on New Bill Lines☐ Show Closed Contracts☐ Show NR Bill Codes

CONTRACT INFORMATION

Billing ItemsDefaultsRounding MethodsAddressDescriptionOfficialsSurchargesRisk ManagementSeparate Billing InformationMapping Groups

SearchInsertDeletePreviousNextWorkflowsReport OptionsAttachmentsNotesECM DocumentsUser Extensions

JobJ448957Freshmart Office Building - Chicago II

\* ContractJ448957\* Contract CurrencyUS DollarsContract Billing Type

\* CustomerFRSHMARTFreshmart Groceries Inc.

Budg. Billing Amt2,500,000.00\* Time PhasedExclude Non-Inv Receipts

Max Billing Amt

Bid Date\* Contract Date16/Mar/2017

Approved Date16/Mar/2017Closed DateSpread Rule

Start Date01/Mar/2017End Date31/Dec/2018Rate CodeONERATE

Create Contract DetailsBill RatesAdd New Bill CodesReset All Bill Code BudgetsDefault Compliance CodesInvoice Preview

Billing CodesGroup 1Group 2Group 3Group 4Group 5

ViewFreezeDetachSearchInsertInsert MultipleDeleteWorkflowsReport OptionsExportImportECM DocumentsUser ExtensionsMass Update

| Billing Code         | * Type | Description              | Budg. Billing Amt | Curr \$ | Budg. Qty. | WM | Billing Rate | Max Billing Amt | Max Qty | % of Constr. | Construction Value |
|----------------------|--------|--------------------------|-------------------|---------|------------|----|--------------|-----------------|---------|--------------|--------------------|
| J448957.26 0500.1000 | COST   | Electrical - Labour      | 175,000.00        | US      | 0.000      | HR |              |                 |         |              | J448957            |
| J448957.26 0500.2000 | COST   | Electrical - Subcontract | 20,000.00         | US      | 0.000      | CY |              |                 |         |              | J448957            |
| J448957.26 0500.3000 | COST   | Electrical - Equipment   |                   | US      |            | HR |              |                 |         |              | J448957            |
| J448957.26 0500.4000 | COST   | Electrical - Material    |                   | US      |            | CY |              |                 |         |              | J448957            |

If a change for the JB Original Revenue Budgeted was made, the **Budg. Billing Amt** field is changed by the change amount for the Cost Code & Category.

## Subcontract

Subcontracts are not changed by Original Budget PCIs.

# Contract Forecasting – JSP

## Cost Status Query – xProjects Screens

### Cost Status Query

| Cost Status Query |         |                                         |                 |                          |             |                |            |               |                  |       |                     |           |                 |                    |                       |                      |                   |                    |            |                      |                      |
|-------------------|---------|-----------------------------------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|-------|---------------------|-----------|-----------------|--------------------|-----------------------|----------------------|-------------------|--------------------|------------|----------------------|----------------------|
| Job Code          | Phase   | Phase Name                              | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent | Committed Remaining | Committed | Spent/Committed | Amount To Complete | Calculated Projection | Proceeding Projected | Non-Proceeding CO | Pending Projection | Forecast   | Projected Over/Under | Projected ETC Budget |
| J448957           | 09-999  | Contractor Default Insurance            | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00                | 0.00      | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00       | 0.00                 | 0.00                 |
| J448957           | 26 0500 | Electrical                              | 125,000.00      | 0.00                     | 0.00        | 125,000.00     | 0.00       | 0.00          | 125,000.00       | 0.00  | 15,000.00           | 15,000.00 | 15,000.00       | 110,000.00         | 125,000.00            | 0.00                 | 0.00              | 125,000.00         | 125,000.00 | 0.00                 | 125,000.00           |
| J448957           | 26 0900 | Electrical - Instrumentation & Controls | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00                | 0.00      | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00       | 0.00                 | 0.00                 |

If a change for the JC Original Cost Budget was made for the Cost Code, its **Original Budget** field (only changeable via Original Budget PCIs) and the other highlighted fields are changed accordingly.

### Cost Status Query (Category)

| Cost Status Query (Category) |         |                              |               |                 |                          |             |                |            |               |                  |       |           |                     |                 |                    |                       |                      |                   |                    |            |                      |                      |
|------------------------------|---------|------------------------------|---------------|-----------------|--------------------------|-------------|----------------|------------|---------------|------------------|-------|-----------|---------------------|-----------------|--------------------|-----------------------|----------------------|-------------------|--------------------|------------|----------------------|----------------------|
| Job Code                     | Phase   | Phase Name                   | Category Code | Original Budget | Internal And Transfer CO | External CO | Current Budget | Pending CO | Prepending CO | Projected Budget | Spent | Committed | Committed Remaining | Spent/Committed | Amount To Complete | Calculated Projection | Proceeding Projected | Non-Proceeding CO | Pending Projection | Forecast   | Projected Over/Under | Projected ETC Budget |
| J448957                      | 09-999  | Contractor Default Insurance | CFBNR         | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00       | 0.00                 | 0.00                 |
| J448957                      | 26 0500 | Electrical                   | 1000          | 100,000.00      | 10,000.00                | 0.00        | 110,000.00     | 0.00       | 0.00          | 110,000.00       | 0.00  | 0.00      | 0.00                | 0.00            | 110,000.00         | 110,000.00            | 0.00                 | 0.00              | 110,000.00         | 110,000.00 | 0.00                 | 110,000.00           |
| J448957                      | 26 0500 | Electrical                   | 2000          | 25,000.00       | -10,000.00               | 0.00        | 15,000.00      | 0.00       | 0.00          | 15,000.00        | 0.00  | 15,000.00 | 15,000.00           | 15,000.00       | 0.00               | 15,000.00             | 0.00                 | 0.00              | 15,000.00          | 15,000.00  | 0.00                 | 15,000.00            |
| J448957                      | 26 0500 | Electrical                   | 3000          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00       | 0.00                 | 0.00                 |
| J448957                      | 26 0500 | Electrical                   | 4000          | 0.00            | 0.00                     | 0.00        | 0.00           | 0.00       | 0.00          | 0.00             | 0.00  | 0.00      | 0.00                | 0.00            | 0.00               | 0.00                  | 0.00                 | 0.00              | 0.00               | 0.00       | 0.00                 | 0.00                 |

If a change for the JC Original Cost Budget was made for the Cost Code & Category, its **Original Budget** field (only changeable via Original Budget PCIs) and the other highlighted fields are changed accordingly.

## Budget Status Query – xProjects Screens

### Budget Status Query

| Budget Status Query |         |                                         |                         |                          |             |                        |            |               |                          |
|---------------------|---------|-----------------------------------------|-------------------------|--------------------------|-------------|------------------------|------------|---------------|--------------------------|
| Job Code            | Phase   | Phase Name                              | Original Revenue Budget | Internal And Transfer CO | External CO | Current Revenue Budget | Pending CO | Prepending CO | Projected Revenue Budget |
| J448957             | 09-999  | Contractor Default Insurance            | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957             | 26 0500 | Electrical                              | 195,000.00              | 0.00                     | 0.00        | 195,000.00             | 0.00       | 0.00          | 195,000.00               |
| J448957             | 26 0900 | Electrical - Instrumentation & Controls | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957             | 26 1000 | Electrical - Power Distribution         | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |

If a change for the JB Original Revenue Budget was made for the Cost Code & Category, its **Original Revenue Budget** field (only changeable via Original Budget PCIs) and the other highlighted fields are changed accordingly.

### Budget Status Query (Category)

| Budget Status Query (Category) |         |                              |               |                         |                          |             |                        |            |               |                          |
|--------------------------------|---------|------------------------------|---------------|-------------------------|--------------------------|-------------|------------------------|------------|---------------|--------------------------|
| Job Code                       | Phase   | Phase Name                   | Category Code | Original Revenue Budget | Internal And Transfer CO | External CO | Current Revenue Budget | Pending CO | Prepending CO | Projected Revenue Budget |
| J448957                        | 09-999  | Contractor Default Insurance | CFBNR         | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |
| J448957                        | 26 0500 | Electrical                   | 1000          | 160,000.00              | 15,000.00                | 0.00        | 175,000.00             | 0.00       | 0.00          | 175,000.00               |
| J448957                        | 26 0500 | Electrical                   | 2000          | 35,000.00               | -15,000.00               | 0.00        | 20,000.00              | 0.00       | 0.00          | 20,000.00                |
| J448957                        | 26 0500 | Electrical                   | 3000          | 0.00                    | 0.00                     | 0.00        | 0.00                   | 0.00       | 0.00          | 0.00                     |

If a change for the JB Original Revenue Budget was made for the Cost Code & Category, its **Original Revenue Budget** field (only changeable via Original Budget PCIs) and the other highlighted fields are changed accordingly.