
User Reference

General Conditions Monitor v10x (ADF)

By CMiC

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Computer Methods International Corp.

4850 Keele Street

Toronto, Ontario M3J 3K1

Canada

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General Conditions Monitor – ADF

Overview – GC Monitor

The screenshot displays the GC Monitor application interface. At the top, there is a title bar with standard window controls. Below it, the 'SELECTION CRITERIA' section includes dropdown menus for Company (CCC), Contract (J448957), and various date fields for Contract Start (03/01/2017), Contract End (12/31/2018), and Cost Cutoff Date (10/31/2016). A 'Show Completed Staffing' checkbox is also present. Below these are several action buttons: Display Forecast, Refresh From Previous, Re-calculate All Rates, Update Forecast Summary, Update Contract Date, Refresh Forecast, and Import/Export Resource Plan Data.

The main data area is titled 'Labor' and contains a table with the following columns: Trade, Employee, Employee Name, Union, Pay Type, * Bill Code, * Job, * Cost Code, Cost Code Description, * Category, Cost Cutoff Date, and * Start Date. The table contains three rows of data:

Trade	Employee	Employee Name	Union	Pay Type	* Bill Code	* Job	* Cost Code	Cost Code Description	* Category	Cost Cutoff Date	* Start Date
1412	ZZ-765467	Denzel Washington		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight Structural Concrete	L	10/31/2016	03/01/2017
6510	ZZ-OLSEN	Ole Olsen		NWHR	J448957.03-200.L	J448957	03-200	Architectural Concrete	L	10/31/2016	03/01/2017
326	ZZ-COLLINS	Sharon Collins		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight Structural Concrete	L	10/31/2016	03/01/2017

Below the table, there are input fields for Trade (Accountant), Union, Bill Code (Heavy Weight Structural Concrete - L), Job (Freshmart Office Building - Chicago II), and Category (L). At the bottom, there are buttons for Period Details, Default Missing Bill Codes, and Push Update To Resource Plan.

General Conditions Monitor (GC Monitor) is used to project a Job's cost, as a stand-alone application, by using Bill Codes contained in the Job's JB Contract to create Forecast Lines. Additionally, it can be used with the PMJSP Contract Forecasting with PCI Projections application to help forecast labor Forecast Lines more accurately.

GC Monitor is also integrated with the Resource Planning application to allow the importing of Need Lines from Resource Planning into GC Monitor as Forecast Lines, and to allow the exporting of Forecast Lines from GC Monitor in Resource Planning as Need Lines.

Integration with PMJSP Contract Forecasting

Bill Code	Contract Code	Job	Phase	Name	Category	Projected Cost Budget	Spent/Committ. (Pending CO)	Cost To Complete	Projected Cost Forecast	Cost Variance	Cost To Complete (Pending CO)	Proj Cost Forecast (Incl. Pending CO)
12345.01.03A.03	12345	12345	01.03A.030000 F	Area 1.03A.Fndt.	L	0.00	0.00	277,106.66	352,181.66	-352,181.66	0.00	352,181.66
12345.02-100.1000	12345	12345	02-100	Structural Demolit.	1000	113,480.00	0.00	10,480.00	2,303,691.00	-2,191,361.00	1,150.00	2,303,691.00
12345.02-100.2000	12345	12345	02-100	Structural Demolit.	2000	282,500.00	0.00	0.00	15,760,769.59	-15,560,769.59	82,500.00	15,753,269.59
12345.02-100.3000	12345	12345	02-100	Structural Demolit.	3000	250,000.00	0.00	0.00	42,213.45	207,786.55	0.00	42,213.45
12345.02-100.4000	12345	12345	02-100	Structural Demolit.	4000	560,000.00	0.00	0.00	689,179.00	-494,179.00	365,000.00	-6,631,586.00
12345.02-100.5000	12345	12345	02-100	Structural Demolit.	5000	483,333.00	0.00	0.00	785,254.18	-710,254.18	408,333.00	567,353.00
12345.02-100.CFB	12345	12345	02-100	Structural Demolit.	CFB	100,000.00	0.00	1,318,273.20	1,326,667.70	-1,226,667.70	0.00	1,326,667.70
12345.02-100.NB	12345	12345	02-100	Structural Demolit.	NB	7,500.00	0.00	0.00	7,500.00	-7,500.00	7,500.00	7,500.00
12345.02-200.1000	12345	12345	02-200	Utility Removal	1000	9,999.00	0.00	9,999.00	11,049.00	-11,049.00	9,999.00	21,048.00
12345.02-200.8100	12345	12345	02-200	Utility Removal	8100 A	75,000.00	75,000.00	0.00	100,248.75	-100,248.75	0.00	175,248.75
12345.02-200.CFB	12345	12345	02-200	Utility Removal	CFB	66,000.00	0.00	66,000.00	66,000.00	-66,000.00	66,000.00	132,000.00
12345.02-500.L	12345	12345	02-500	Demolition-Electr.	L	0.00	0.00	0.00	44.00	-44.00	0.00	44.00
12345.02-500.ND...	12345	12345	02-500	Demolition-Electr.	NDPO1	0.00	0.00	231,289.00	462,578.00	-462,578.00	0.00	432,887.00

For current and future periods, PMJSP Contract Forecasting allows users to add and edit labor forecasting details via the GC Monitor screen, which is launched for a labor Forecast Line via its **Cost To Complete** field.

A labor line in Contract Forecasting will only have one related bill code, not many. For a labor line in Contract Forecasting, GC Monitor's **Labor** tab is used to detail and forecast for the related bill code, and details from GC Monitor roll up to the labor line in Contract Forecasting (the other tabs are not used).

Integration with Resource Planning

SELECTION CRITERIA

- Company: CCC (CMIC Test Construction Company) Contract Start: 03/01/2017
- Contract: J448957 (Freshmart Office Building - Chicago II) Contract End: 12/31/2018
- Year: 2016 Per: 10 From: 10/01/2016 To: 10/31/2016 Cost Cutoff Date: 10/26/2016

Buttons: Display Forecast, Refresh From Previous, Re-calculate All Rates, Update Forecast Summary, Update Contract Date, Refresh Forecast, **Import/Export Resource Plan Data**

Trade	Employee	Employee Name	Union	Pay Type	* Bill Code	* Job	* Cost Code	Cost Code Description	* Category	Cost Cutoff Date
GLAB	MR	Mike Rock		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight Structural Ci	L	10/26/2016
B315	ZZ-251	Bruce Alexandrov		NWHR	J448957.08-200.L	J448957	08-200	Adjustment - Contract	L	10/26/2016

Buttons: Period Details, Default Missing Bill Codes, **Push Update to Resource Plan**

sample of GC Monitor screen, with buttons to import and export data to and from Resource Planning framed in red.

All importing and exporting of data between Resource Planning and GC Monitor is done through GC Monitor, using its **[Import/Export Resource Plan Data]** and **[Push Update to Resource Plan]** buttons (framed in above screenshot).

GC Monitor – Screen

Selection Criteria – Section

SELECTION CRITERIA

* Company: CCC | CMIC Test Construction Company | Contract Start: 03/01/2017 | Show Completed Staffing

* Contract: J448957 | Freshmart Office Building - Chicago II | Contract End: 12/31/2018

Year: 2016 | Per: 10 | From: 10/01/2016 | To: 10/31/2016 | Cost Cutoff Date: 10/31/2016

Buttons: Display Forecast, Refresh From Previous, Re-calculate All Rates, Update Forecast Summary, Update Contract Date, Refresh Forecast, Import/Export Resource Plan Data

Trade	Employee	Employee Name	Union	Pay Type	* Bill Code	* Job	* Cost Code	Cost Code Description	* Category	Cost Cutoff Date	* Start D
1412	ZZ-765467	Denzel Washingt		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight Structural Ci	L	10/31/2016	03/01/2017
6510	ZZ-OLSEN	Ole Olsen		NWHR	J448957.03-200.L	J448957	03-200	Architectural Concrete	L	10/31/2016	03/01/2017
326	ZZ-COLLINS	Sharon Collins		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight Structural Ci	L	10/31/2016	03/01/2017

Summary Fields: Trade: Accountant, Union: , Bill Code: Heavy Weight Structural Concrete - L, Job: Freshmart Office Building - Chicago II, Category: L

Buttons: Period Details, Default Missing Bill Codes, Push Update To Resource Plan

Company

Select the Company under which the Job Billing Contract is defined.

Contract

Select the Job Billing Contract being forecasted.

Contract Start

Contract's start date; display-only field.

Contract End

Contract's end date; display-only field.

Show Completed Staffing – Checkbox

If unchecked, labor forecast lines that have an end date before the current Period's start date will be filtered out of the **Labor** tab.

Year, Per

Year and GL Period for which forecast is being created (forecasts are created and saved for each GL Period).

From, To

Display-only fields, displaying the start and end dates for the selected period.

Cost Cutoff Date

Display-only field, displaying the Company Level cutoff date for labor costs posted via timesheets to the JC Transaction table.

How this field's Company Level cutoff date defaults into each new Forecast Line's **Cost Cutoff Date** depends on the **GC Monitor Cost Cutoff Option** on the **Forecasting** tab of the JC Control File (framed in red below):

The screenshot shows the 'JOB COST CONTROL FILE' interface with the 'Forecasting' tab selected. The 'SELECTION CRITERIA' section shows 'Company' as 'CCC' (CMIC Test Construction Company). The 'Forecasting' section includes fields for 'Forecasting Method' (ETC), 'Contract Forecast Year' (2016), and 'Contract Forecast Period' (1). There are several checkboxes for forecasting options, with 'Allow Forecast For Future Periods', 'Copy Last Stored Forecast', 'Notes To Be Carried Forward Through Periods', and 'Nested Groups Use Savings From Lower Levels' checked. The 'GC Monitor Cost Cutoff Option' dropdown at the bottom is highlighted with a red box and set to 'Company Level'.

For both of these options in the JC Control File, “**Company Level**” and “**Resource Level**”, this **Cost Cutoff Date** in the **Selection Criteria** section is the Company Level cutoff date, and it is set to the most recent cutoff date from the Labor Cut-Off Date Maintenance screen (shown below) that is on or before the end date of the GL Period for which the forecast is being created.

The screenshot shows the 'LABOR CUT-OFF DATE MAINTENANCE' interface. The 'SELECTION CRITERIA' section shows 'Company' as '10' (CMiC Construction Inc.). The 'LABOR CUT-OFF DATES' section shows a list of dates: 31-Dec-2015, 30-Nov-2015, 31-Oct-2015, 30-Sep-2015, 31-Aug-2015, and 31-Jul-2015. The date 31-Dec-2015 is selected and highlighted.

Sample of Labor Cut-Off Date Maintenance screen; standard path: JC > Setup > Local Tables > Contract Forecasting > Labor Cut-Off Date Maintenance

Regardless of the option selected in the JC Control File, GC Monitor calculations remain the same. The option selected simply determines the dates for which the calculations occur:

- If “**Company Level**” is selected, each new Forecast Line’s **Cost Cutoff Date** defaults to the Company Level **Cost Cutoff Date** from the **Selection Criteria** section.
- If “**Resource Level**” is selected, each new Forecast Line’s **Cost Cutoff Date** defaults to the Employee Level **Cost Cutoff Date**, which is the reference date of the most recently posted timesheet for the employee that is on or before the end date of the current forecasted period. However, if no posted timesheets are found for the employee, the system will attempt to look up the **Cost Cutoff Date** that is set up at the Company Level. If no **Cost Cutoff Date** is set up at the Company Level, then the **Start Date** will be used for the beginning of the projection.

[Display Forecast] – Button

When the screen is initially loaded, or when a selection criteria field is changed, click this button to display the forecast according to the selection criteria.

[Refresh From Previous] – Button

Deletes the current forecast for the period, including new lines that start in the current period, and regenerates it from the previous period.

[Re-calculate All Rates] – Button

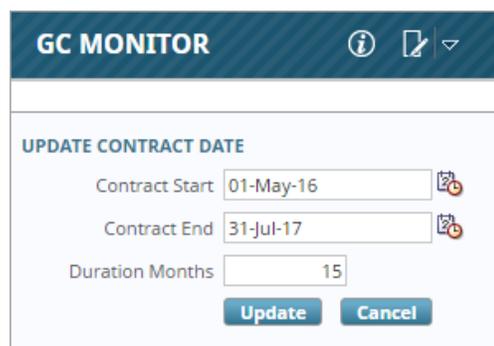
If changes have been made to the JB Billing Rate Table or to Payroll Rates, click this button to re-calculate the **Default Hourly Cost Rate** and **Default Hourly Billing Rate** fields, and all calculations based on these rates.

As per this guide’s [System Options – Screen](#) section, this button’s functionality is impacted by the **Auto Refresh Employee Trade Code on GC Monitor** checkbox on the **Forecast** tab of the System Options screen.

[Update Forecast Summary] – Button

Click to update Contract’s summary on **Summary** tab.

[Update Contract Date] – Button



The screenshot shows a dialog box titled "GC MONITOR" with a dark blue header. Below the header, the text "UPDATE CONTRACT DATE" is displayed in blue. The dialog contains three input fields: "Contract Start" with the value "01-May-16", "Contract End" with the value "31-Jul-17", and "Duration Months" with the value "15". Each date field has a calendar icon to its right. At the bottom of the dialog, there are two buttons: "Update" and "Cancel".

NOTE: Since preliminary and finishing work is required to complete a contract, labor resources can have start and end dates that lie outside of a contract's start and end dates.

This button's popup is used to change the JB Contract's start and end dates. Also, this popup is the only way to change a JB Contract's start and end dates, if a JB Contract has an associated forecast in GC Monitor, with at least 1 entered forecast line. This is to keep the start and end dates for forecast lines in sync with the Contract's start and end dates.

When a Contract's start and/or end dates are changed using this popup, the start and end dates for all forecast lines are updated as follows:

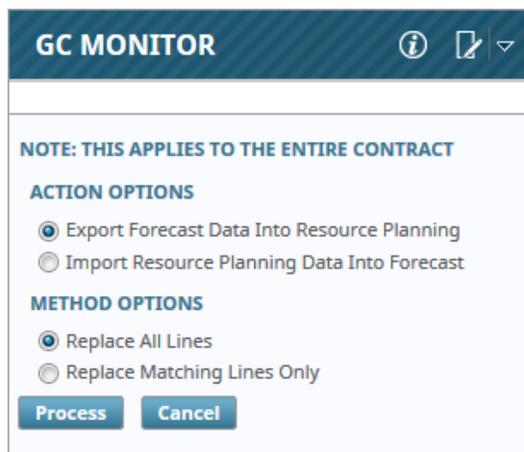
1. If the Contract's Start Date is set to a later date, all forecast lines with a Start Date before the Contract's new Start Date will have their Start Date set to the Contract's new Start Date.
2. If a Contract's End Date is set to an earlier date, all forecast lines with an End Date after the Contract's new End Date will have their End Date set to the Contract's new End Date.
3. If a Contract's End Date is set to a later date, all forecast lines with an End Date before the Contract's new End Date will have their End Date set to the Contract's new End Date.
4. If a Contract's Start Date and End Date are set to later dates, all forecast lines with a Start Date before the Contract's new Start Date will have their Start Date set to the Contract's new Start Date, and all forecast lines with an End Date before the Contract's new End Date will have their End Date set to the Contract's new End Date.

[Refresh Forecast] – Button

Refresh the forecast based on any changes that would affect the forecast, such as adding a Cost Cutoff Date to the Labor Cut-Off Date Maintenance screen that falls within the forecast period range.

As per this guide's [System Options – Screen](#) section, this button's functionality is impacted by the **Auto Refresh Employee Trade Code on GC Monitor** checkbox on the **Forecast** tab of the System Options screen.

[Import/Export Resource Plan Data] – Button



The screenshot shows a popup window titled "GC MONITOR" with a dark blue header. Below the header, there is a note: "NOTE: THIS APPLIES TO THE ENTIRE CONTRACT". Underneath, there are two sections: "ACTION OPTIONS" and "METHOD OPTIONS". In the "ACTION OPTIONS" section, there are two radio buttons: "Export Forecast Data Into Resource Planning" (which is selected) and "Import Resource Planning Data Into Forecast". In the "METHOD OPTIONS" section, there are two radio buttons: "Replace All Lines" (which is selected) and "Replace Matching Lines Only". At the bottom of the popup, there are two buttons: "Process" and "Cancel".

This button's popup is used to import Need Lines from Resource Planning into GC Monitor as Forecast Lines, and to export Forecast Lines from GC Monitor into Resource Planning as Need Lines.

Action Options

Export Forecast Data Into Resource Planning

This option is used to export all Forecast Lines from GC Monitor into Resource Planning as Need Lines. If a corresponding Resource Planning record does not exist for Job's corresponding Project, one will be created to contain the imported Need Lines.

Calculating Need Line's *Assignment %* Field

If the **Synchronize RP Allocation Percent When Import/Export From Forecast** checkbox is unchecked on the **Forecast** tab of the System Options screen, the exported Need Line's **Assignment %** value is set to "100".

If this checkbox is checked, the Need Line's **Assignment %** value is calculated as follows, using the corresponding Forecast Line's **ETC Projected Cost Hours** field:

$$\text{Assignment \%} = \text{Total Estimated Work Hours} / \text{ETC Projected Cost Hours}$$

Where:

$$\text{Total Estimated Work Hours} = \text{Total Work Days For Forecast Line} \times 8 \text{ hours}$$

$$\emptyset \text{ Total Work Days For Forecast Line} = \text{number of } \textit{work} \text{ days between line's } \text{Cost Cutoff Date} \text{ or its } \text{Start Date} \text{ (whichever is later) and its } \text{End Date}$$

Import Resource Planning Data Into Forecast

This option is used to import Need Lines from Resource Planning into GC Monitor as Forecast Lines.

Calculating Forecast Line's *Default Weekly Cost Hours* & *Default Weekly Billing Hours* Fields

If the **Synchronize RP Allocation Percent When Import/Export From Forecast** checkbox is unchecked on the **Forecast** tab of the System Options screen, the imported Forecast Line's **Default Weekly Cost Hours** and **Default Weekly Billing Hours** fields are set to "40".

If this checkbox is checked, the Forecast Line's **Default Weekly Cost Hours** and **Default Weekly Billing Hours** values are set to the following:

$$\text{corresponding Need Line's } \text{Assignment \%} \text{ value} \times 40 \text{ hours}$$

Method Options

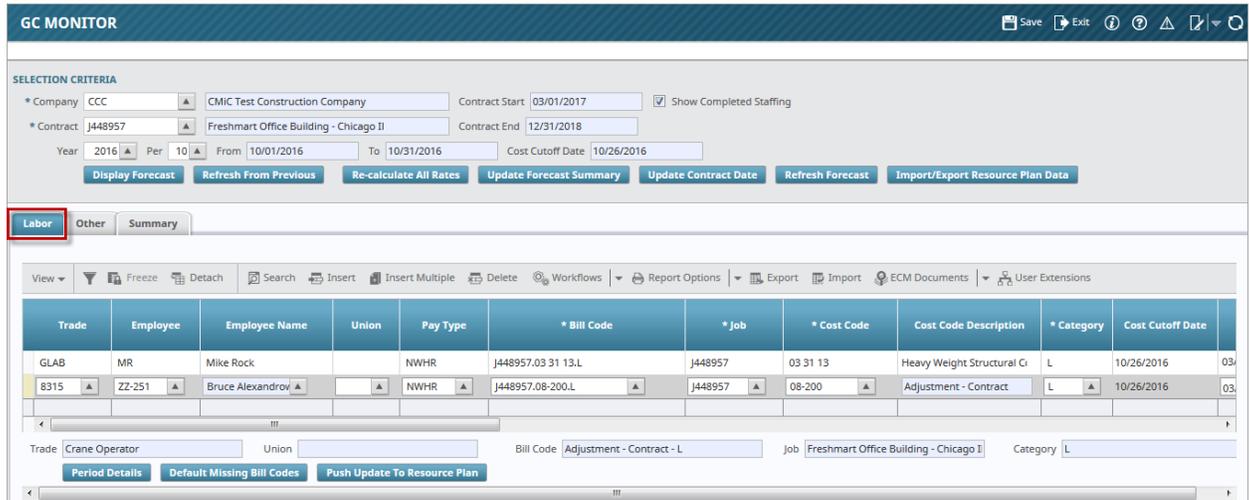
Replace All Lines

Replace all lines, regardless, with imported/exported lines.

Replace Matching Lines Only

Replace matching lines, matched by Trade and Bill Code.

Labor – Tab



Sample of Labor tab, framed in red.

This tab is used to project labor costs, including labor burden costs.

NOTE: Only Bill Codes with Categories that have their **Cost Type** field set to “**Labour**” are available in **Bill Code** LOVs on this tab. For details, please refer to the [Maintain Cost Categories – Screen](#) section in this guide.

Labor & Labor Burden Forecast Lines

Two types of costs can be forecast on this tab to project total labor costs for an Employee:

1. **Labor**

Create Forecast Line to project labor cost based on Employee’s Charge Rate, which defaults into line’s **Default Hourly Cost Rate** field, and based on Employee’s Billing Rate, which defaults into line’s **Default Hourly Billing Rate** field.

2. **Labor Burden** (Benefits, Deductions, Workers Compensation, Pubic Liability, Taxes)

Create Forecast Lines for each labor burden for the Employee.

NOTE: Labor burdens must have been set up to be charged against the Job, so that their costs are posted to the JC Transaction table.

Also, multiple lines can be entered against an Employee and Bill Code, as long as the Pay Type is different. As shown below, the two lines with the same **Employee** and **Bill Code** fields are not duplicates since the **Pay Type** fields are different:

lines are not duplicates since Pay Type fields are different

Trade	Employee	Employee Name	Union	Pay Type	* Bill Code	* Job	* Cost Code	Cost Code Description	* Category	Cost Cutoff Date
TRUC	1001	Peterson Gerald	1000	OVHR	J448957.03-100.L	J448957	03-100	Structural Concrete	L	21/Jul/2016
TRUC	1001	Peterson Gerald	1000	NWHR	J448957.03-100.L	J448957	03-100	Structural Concrete	L	21/Jul/2016
1634	CCC-WK-HR20	Martin Varys		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight Structural Coi	L	16/Oct/2017

Labor Forecast Table

The following provides details about the columns of this tab's table:

Trade

Trade of Employee for the forecast line; Employee's trade is set via **Trade** field on **Company** tab of Employee Profile.

Employee, Employee Name

Employee belonging to the selected **Trade** doing the work specified by the Bill Code.

If "TBD" is selected, the **Default Hourly Cost Rate** (Charge Rate) field and **Default Hourly Billing Rate** (Bill Rate) field is determined using the selected **Trade** and the TBD Trade Rate Maintenance screen's table (standard Treeview path: *JC > Setup > Local Tables > Contract Forecasting > TBD Trade Rate Maintenance*).

If selecting Employees by their names via the **Employee Name** field is preferable to selected them by their codes via the **Employee** field, use the Lite Editor to make the **Employee** field invisible, and to make the **Employee Name** field enabled.

Union

Employee's union, as set via **Union** field on **Personal** tab of Employee Profile.

If the **Employee** field is set to "TBD", the **Job**, **Trade** and **Union** fields are used instead to determine the values for the **Default Hourly Cost Rate** (Charge Rate) and **Default Hourly Billing Rate** (Bill Rate) fields, as set via the following pay rates maintenance screens and hierarchy (first rate found using following hierarch is rate used):

1. Job Pay Rates Maintenance (standard path: *Payroll > Setup > Pay Rates > Job*)
2. TBD Trade Rate Maintenance (standard path: *JC > Setup > Local Tables > Contract Forecasting > TBD Trade Rate Maintenance*).
3. Union Pay Rates (standard path: *Payroll > Setup > Pay Rates > Union*)
4. Payroll Trade Rates (standard path: *Payroll > Setup > Pay Rates > Trade*)

If this field is set to "ALL", the Job and Trade values are used to find the pay rates, and the Union value to search for is treated like a wildcard.

If this field is set to "NONE", the Job and Trade values are used to find the pay rates, and the Union Pay Rates table is not searched.

If this field is left blank, the Job and Trade values are used to find the pay rates, and the Union value is treated like a wildcard.

FLSA Exemption

If the **Apply FLSA Exemption Rule to GC Monitor** box is checked on the **Forecast** tab of the System options screen (standard path: *System > Setup > System Options*), and the **Unionized** checkbox on the **Personal** tab of the Employee Profile is unchecked, this field is set to NULL and disabled.

NOTE: Escalators can be set for Unions via the [Escalator Maintenance screen](#).

Pay Type

Select the Hours Type to use for the **Default Hourly Cost Rate** (Charge Rate) and **Default Hourly Billing Rate** (Bill Rate) fields.

FLSA Exemption

If the **Apply FLSA Exemption Rule to GC Monitor** box is checked on the **Forecast** tab of the System options screen, and the **FLSA Type** field on the **Personal** tab of the Employee Profile is set to “**Exempt**”, this field is set and locked to “**NWHR**”. Also, the maximum number of hours that can be entered in the **Default Weekly Cost Hours** field becomes 40.

Bill Code

Select the Bill Code to use for this forecasting line. Refer to the [Maintain Cost Categories – Screen](#) subsection in this guide for details about what Bill Codes appear on what tab.

Job

Job to which this line’s costs are charged; LOV limited to Jobs associated to JB Contract.

Cost Code, Cost Code Description

Cost Code for the forecast line. Only Cost Codes associated to Categories set to appear on the **Labor** tab will be available. Refer to the [Maintain Cost Categories – Screen](#) subsection in this guide for details about what Categories appear on what tab.

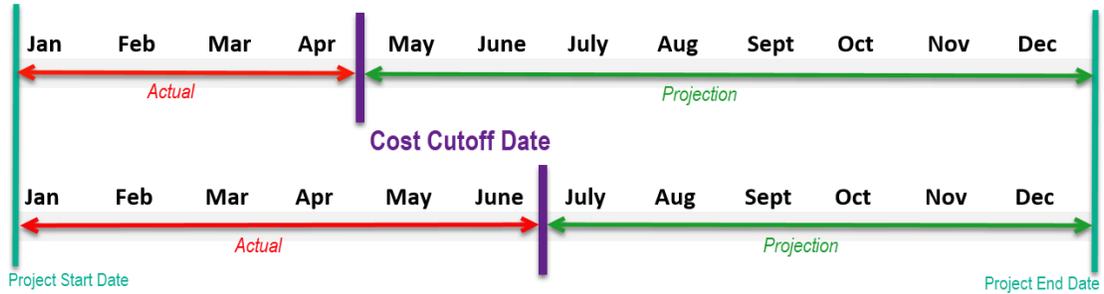
Category

Category for the forecast line. Refer to the [Maintain Cost Categories – Screen](#) subsection in this guide for details about what Categories appear on what tab.

Cost Cutoff Date

This date will be used as the last day to calculate actual costs, and the day following this date will be used to calculate the projection moving forward. If no date is entered in the **Cost Cutoff Date** field, there will be no actual costs.

The following graphic illustrates how projected cost becomes actual cost when the cost cutoff date is updated.



For details about what Cost Cutoff Date will default into this field, please refer to the following subsection in this guide: *GC Monitor – Screen* > [Selection Criteria – Section](#) > *Cost Cutoff Date*.

Start Date, End Date

Employee’s start and end date; these dates default in from the Contract’s **Contract Start** and **Contract End** fields.

NOTE: Since preliminary and finishing work is required to complete a JB Contract, labor resources can have start and end dates that lie outside of a Contract’s start and end dates.

Default Weekly Cost Hours

This field’s value defaults to “40”, and it is editable. The field’s value defaults to the **Weekly Cost Hours** and **Weekly Billing Hours** fields for each Period of the forecast line’s Period Details (viewed in Period Details popup launched by the [Period Details] button on the Labor tab).

FLSA Exemption

If the **Apply FLSA Exemption Rule to GC Monitor** box is checked on the **Forecast** tab of the System options screen, and the **FLSA Type** field on the **Personal** tab of the Employee Profile is set to “**Exempt**”, this field’s maximum is set to 40.

Default Hourly Cost Rate

This rate is the Charge Rate that would be used for the Employee’s Timesheet.

For details, about how the system determines an Employee’s Charge Rate, please refer to this guide’s [Pay Rates Setup – Quick Guide](#) section.

NOTE: Even if the **Use Pay Rate for Charging Job Timesheets** checkbox is checked for this Job’s Company in the PY Control File, the Charge Rate (not the Pay Rate) is used in GC Monitor.

Always Restrict To Current Rate in GC Monitor

If the **Always Restrict To Current Rate in GC Monitor** checkbox is checked on the **Forecast** tab of the System options screen, regardless of what period is being forecasted, the Cost Rate used is the one set up for your current system date, not the Cost Rate set up for the period being forecasted.

Hourly Cost Rate Override

Use this field to override the default value in the **Default Hourly Cost Rate** field.

Default Weekly Billing Hours

This editable default value is calculated using the **Hours/Year** field and on the **Personal** tab of the Employee's Profile; if no entries for these fields are found in the Employee's Profile, this value default to 40.

Default Hourly Billing Rate

This rate is the Bill Rate that would be used for the Employee's Timesheet.

For details, about how the system determines an Employee's Bill Rate, please refer to this guide's [Pay Rates Setup – Quick Guide](#) section.

Always Restrict To Current Rate in GC Monitor

If the **Always Restrict To Current Rate in GC Monitor** checkbox is checked on the **Forecast** tab of the System options screen, regardless of what period is being forecasted, the Billing Rate used is the one set up for your current system date, not the Billing Rate set up for the period being forecasted.

Hourly Billing Rate Override

Use this field to override the default value in the **Default Hourly Billing Rate** field.

Actual Hours To Date

Actual hours posted via Timesheets for Employee, Bill Code and Job combination.

Actual Cost To Date

Actual amounts posted to JC Transaction table for Employee, Bill Code and Job combination, up to the date specified by this line's **Cost Cutoff Date** field.

NOTE: Whether the Bill Code is for labor (based only on Charge Rate and Billing Rate) or a labor burden (i.e., benefit, deduction, workers compensation, public liability, tax), the Bill Code must have been set up to be charged against the Job.

Actual Billed To Date

Actual billing amounts posted via Timesheets for Employee, Bill Code and Job combination, up to the date specified by this line's **Cost Cutoff Date** field.

ETC Projected Cost Hours

Total number of Cost Hours required to complete work from this line's **Cost Cutoff Date** to this line's **End Date**, as calculated in the Period Details popup. This field's total is the sum of all the hours under the **Projected Cost Hours** column of the Period Details popup, and this column also displays this total at the bottom of it.

ETC Projected Cost Amount

= ETC Projected Cost Hours x Default Hourly Cost Rate

Total Cost Amount required to complete work from this line's **Cost Cutoff Date** to this line's **End Date**.

ETC Projected Billing Hours

Total number of Billing Hours required to complete work from this line's **Cost Cutoff Date** to this line's **End Date**, based on this line's **Default Weekly Billing Hours**.

ETC Projected Billing Amount

= ETC Projected Billing Hours x Default Hourly Billing Rate

Total Billing Amount required to complete work, from this line's **Cost Cutoff Date** to this line's **End Date**.

Total Projected Cost Hours

= Actual Hours To Date + ETC Projected Cost Hours

Total Projected Cost Amount

= Actual Cost To Date + ETC Projected Cost Amount

Total Projected Billing Amount

= Actual Cost To Date + ETC Projected Billing Amount

[Period Details] – Button

GC MONITOR													
SELECTION CRITERIA													
Resource	Mike Rock			Resource Type	General Laborer			Job	J448957		Cost Code	03 31 13	
Cost Cutoff Date	04/15/2017			Start Date	03/01/2017			Category	L		End Date	12/31/2018	
<input type="checkbox"/> View History													
PERIOD DETAILS													
View <input type="button" value="Freeze"/> <input type="button" value="Detach"/> <input type="button" value="Search"/> <input type="button" value="Workflows"/> <input type="button" value="Report Options"/> <input type="button" value="Export"/> <input type="button" value="ECM Documents"/> <input type="button" value="User Extensions"/>													
Current Year	Period	Weekly Cost Hours	Weekly Billing Hours	Working Days Per Period	Projected Cost Hours	Hourly Cost Rate	Hourly Cost Rate Override	Hourly Billing Rate	Hourly Billing Rate Override	Projected Cost Amount	Projected Billing Amount		
2017	4	35.00	35.00	10	70.00	45.0000		50.0000		3,150.00	3,500.00		
2017	5	35.00	35.00	23	161.00	45.0000		50.0000		7,245.00	8,050.00		
2017	6	35.00	35.00	22	154.00	45.0000		50.0000		6,930.00	7,700.00		
2017	7	35.00	35.00	21	147.00	45.0000		50.0000		6,615.00	7,350.00		
2017	8	35.00	35.00	23	161.00	45.0000		50.0000		7,245.00	8,050.00		
2017	9	35.00	35.00	21	147.00	45.0000		50.0000		6,615.00	7,350.00		
2017	10	35.00	35.00	22	154.00	45.0000		50.0000		6,930.00	7,700.00		
2017	11	35.00	35.00	22	154.00	45.0000		50.0000		6,930.00	7,700.00		
2017	12	35.00	35.00	21	147.00	45.0000		50.0000		6,615.00	7,350.00		
2018	1	35.00	35.00	23	161.00	45.0000		50.0000		7,245.00	8,050.00		
2018	2	35.00	35.00	20	140.00	45.0000		50.0000		6,300.00	7,000.00		
2018	3	35.00	35.00	22	154.00	45.0000		50.0000		6,930.00	7,700.00		
					3,122.00					140,490.00	156,100.00		

Sample of Period Details popup for Labor tab.

When a Labor Forecast Line is created, the component forecast lines for each GL Period after the current forecast period, which make up the main forecast line's Period Details, are set to the defaults entered for the main forecast line. For instance, in the Period Details popup, each period's **Hourly Cost Rate** value is set to the main forecast line's **Default Hourly Cost Rate** value.

NOTE: Only future periods are forecasted in a forecast's Period Details.

The Period Details popup is used to change these defaulted values for the future periods in order to update and enhance the forecast's accuracy. Additionally, it displays a breakdown of the **Projected Cost Amount** and **Projected Billing Amount** for each future period. The total at the bottom of the **Projected Cost Amount** column is displayed by the **ETC Projected Cost Amount** field of the main forecast line, and the total at the bottom of the **Projected Billing Amount** column is displayed by the **ETC Projected Billing Amount** field of the main forecast line.

If a default value in a future period's forecast line is changed, its background in the Period Details popup becomes yellow, and so does the main Forecast Line's background, as shown below:

yellow background indicates default value in Period Details was changed

Trade	Employee	Employee Name	Union	Pay Type	* Bill Code	* Job	* Cost Code	Cost Code Description	* Category	Cost Cutoff Date	* Start Date
1412	ZZ-76546789	Denzel Washington		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight Structural Cr	L	10/31/2016	03/01/2017
326	ZZ-COLLIN	Sharon Collins		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight Structural C	L	10/31/2016	03/01/2017
6510	ZZ-OLSEN	Ole Olsen		NWHR	J448957.03-200.L	J448957	03-200	Architectural Concrete	L	10/31/2016	03/01/2017

Trade: Photographers Union: Bill Code: Heavy Weight Structural Concrete - L Job: Freshmart Office Building - Chicago I Category: L

Buttons: Period Details, Default Missing Bill Codes, Push Update To Resource Plan

Fields

View History – Checkbox

If checked, the **Previous Period Forecast Cost**, **Previous Period Forecast Billing**, **Actual Cost Amount**, and **Actual Billed Amount** columns are visible.

Working Days Per Period

This field displays the number of calculated working days for the period. If the first period in this popup has the **Cost Cutoff Date** within its range, its number of working days is calculated from the **Cost Cutoff Date** onwards.

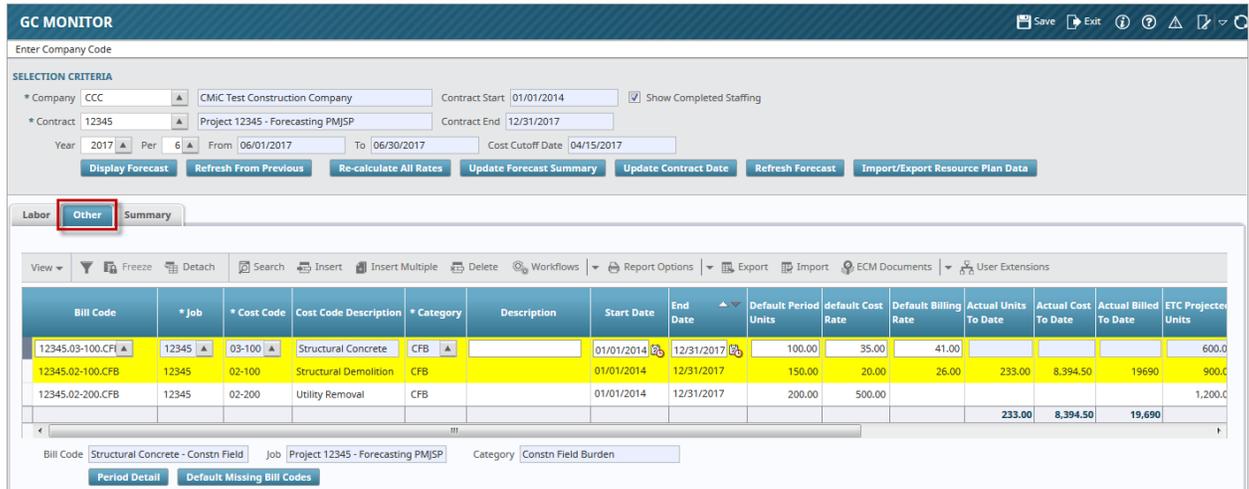
[Default Missing Bill Codes] – Button

This button's functionality will look at the JB Contract to look for Bill Codes set to appear on this **Labor** tab (Bill Codes with Categories having their **Cost Type** field set to "**Labor**") that have yet to be added as forecast lines. If missing Bill Codes are found, forecast lines for them will be added to this tab.

[Push Update to Resource Plan] – Button

Clicking this button exports the selected Forecast Line to the corresponding record in Resource Planning as a Need Line.

Other – Tab



Sample of Other tab, framed in red.

This tab is used to account for non-labor costs, such as costs for materials and rentals.

The Bill Codes must have been set up to be charged against the Job so that costs against them are posted to the JC Transaction table, and their Categories must have been set up to appear on this tab (refer to [Maintain Cost Categories – Screen](#) subsection for details).

There are two ways in which a forecast line can be entered on the **Other** tab:

1. Enter Default Rate(s)

Use the **Default Period Units**, **Default Cost Rate** and/or **Default Billing Rate** fields to enter the default amounts required to calculate costs for a period, which default to all the other periods being forecasted (default value for each period can be overwritten in Period Details popup).

2. Enter ETC Projected Amount

Use the **ETC Projected Cost Amount** and/or **ETC Projected Billing Amount** fields to enter the projected lump sum of the cost for all periods of the forecast line, which auto-populates the **Default Cost Rate** and/or **Default Billing Rate** fields respectively.

Other Forecast Table

The following provides details about the columns of this tab's table:

Bill Code

Select the Bill Code for the cost being forecasted. Refer to the [Maintain Cost Categories – Screen](#) subsection in this guide for details about what Bill Codes appear on what tab.

Job

Job to which this line's costs are charged; LOV limited to Jobs associated to JB Contract.

Cost Code, Cost Code Description

Cost Code for the forecast line. Only Cost Codes associated to Categories set to appear on the **Other** tab will be available. Refer to the [Maintain Cost Categories – Screen](#) subsection in this guide for details about what Categories appear on what tab.

Category, Description

Category and its description for the cost being forecasted. Refer to the [Maintain Cost Categories – Screen](#) subsection in this guide for details about what Categories appear on what tab.

Start Date, End Date

Start and end date of cost being forecasted; these dates default in from the Contract's **Contract Start** and **Contract End** fields.

NOTE: Since preliminary and finishing work is required to complete a JB Contract, forecast lines can have start and end dates that lie outside of a Contract's start and end dates.

Default Period Units

Default amount of required units per period; amount entered here defaults into the **Projected Unit** field for each period of this forecast line's Period Details.

Default Cost Rate

Default cost rate per unit; amount entered here defaults into the **Projected Cost Rate** field for each period of the forecast line's Period Details. For each period, the **Projected Unit** value is multiplied by the **Projected Cost Rate** value to calculate the period's **Projected Cost Amount** value.

Default Billing Rate

Default billing rate per unit; amount entered here defaults into the **Projected Billing Rate** field for each period of the forecast line's Period Details. For each period, the **Projected Unit** value is multiplied by the **Projected Billing Rate** value to calculate the period's **Projected Billing Amount** value.

Actual Units to Date

Actual number of units posted to the JC Transaction table for this Bill Code up to the date specified by the **Cost Cutoff Date** field.

Actual Cost to Date

Actual cost amount, based on a cost rate, posted to the JC Transaction table for this Bill Code up to the date specified by the **Cost Cutoff Date** field.

Actual Billed to Date

Actual billing amount, based on a billing rate, posted to the JC Transaction table for this Bill Code up to the date specified by the **Cost Cutoff Date** field.

ETC Projected Units

Estimated number of units still required for the remaining periods, from the **Cost Cutoff Date** to this forecast line's **End Date**.

This amount is the total displayed at the bottom of the **Projected Unit** column of the Period Detail popup.

ETC Projected Cost Amount

Total projected cost for the remaining periods:

As displayed in the Period Detail popup, each remaining period has an editable **Projected Unit** and **Projected Cost Rate** value to calculate its **Projected Cost Amount** value. The total of each period's **Projected Cost Amount** is displayed at the bottom of the **Projected Cost Amount** column, and this is the value displayed by this field (**ETC Projected Cost Amount**).

ETC Projected Billing Amount

Total projected billing amount for the remaining periods:

As displayed in the Period Detail popup, each remaining period has an editable **Projected Unit** and **Projected Billing Rate** value to calculate its **Projected Billing Amount** value. The total of each period's **Projected Billing Amount** is displayed at the bottom of the **Projected Billing Amount** column, and this is the value displayed by this field (**ETC Projected Billing Amount**).

Total Projected Cost Units

= Actual Units To Date + ETC Projected Units

Total projected number of units required for this forecast line, which equals the number of units posted to the JC Transaction table for this Bill Code plus the number of projected units still required.

Total Projected Cost Amount

= Actual Cost To Date + ETC Projected Cost Amount

Total Projected Billing Amount

= Actual Billed To Date + ETC Projected Billing Amount

[Period Details] – Button

Year	Period	Projected Unit	Projected Cost Rate	Projected Cost Amount	Projected Billing Rate	Projected Billing Amount
2017	7	110.00	20.00	2,200.00	25.00	2,750.00
2017	8	100.00	20.00	2,000.00	25.00	2,500.00
2017	9	150.00	20.00	3,000.00	25.00	3,750.00
2017	10	150.00	20.00	3,000.00	25.00	3,750.00
2017	11	200.00	20.00	4,000.00	25.00	5,000.00
2017	12	150.00	21.50	3,225.00	27.50	4,125.00
		860.00		17,425.00		21,875.00

Sample of Period Details popup for Other tab.

When a main forecast line is created, the component forecast lines for each GL Period after the current forecast period, which make up the main forecast line's Period Details, are set to the defaults entered for the main forecast line. For instance, in the Period Details popup, each period's **Projected Unit** value is set to the main forecast line's **Default Period Units** value.

NOTE: Only future periods are forecasted in a forecast's Period Details.

The Period Details popup is used to change these defaulted values for the future periods in order to update and enhance the forecast's accuracy. Additionally, it displays a breakdown of the **Projected Cost Amount** and the **Projected Billing Amount** for each future period. The total at the bottom of the **Projected Cost Amount** column is displayed by the **ETC Projected Cost Amount** field of the main forecast line, and the total at the bottom of the **Projected Billing Amount** column is displayed by the **ETC Projected Billing Amount** field of the main forecast line.

If a default value in a future period's forecast line is changed, its background in the Period Details popup becomes yellow, and so does the main Forecast Line's background, as shown below:

Bill Code	* Job	* Cost Code	Cost Code Description	* Category	Description	Start Date	End Date	Default Period Units	default Cost Rate	Default Billing Rate	Actual Units To Date	Actual Cost To Date	Actual Billed To Date	ETC Projected Units	ETC Projected Cost Amount	ETC Projected Billing Amount
12345.02-100.CFB	12345	02-100	Structural Demolition	CFB		01/01/2014	12/31/2017	100.00	20.00	26	233.00	8,394.50	19690	860.00	17,425.00	
12345.02-200.CFB	12345	02-200	Utility Removal	CFB		01/01/2014	12/31/2017	200.00	500.00					1,200.00	600,000.00	
12345.03-100.CFB	12345	03-100	Structural Concrete	CFB		01/01/2014	12/31/2017	100.00	35					600.00	9,500.00	
											233.00	8,394.50	19,690		626,925.00	

Fields

View History – Checkbox

If checked, the **Previous Period Forecast Cost**, **Previous Period Forecast Billing**, **Actual Cost Amount**, and **Actual Billed Amount** columns are visible.

Working Days Per Period

This field displays the number of calculated working days for the period. If the first period in this popup has the **Cost Cutoff Date** within its range, its number of working days is calculated from the **Cost Cutoff Date** onwards.

[Default Missing Bill Codes] – Button

This button's functionality will look at the JB Contract to look for Bill Codes set to appear on this **Other** tab that have yet to be added as forecast lines. If missing Bill Codes are found, forecast lines for them will be added to this tab.

For details about what Bill Codes appear on what tab, please refer to this guide's the [Maintain Cost Categories – Screen](#) subsection.

Summary – Tab

* Bill Code	Bill Code Name	Bill Job Code	Bill Cost Code	Bill Cat Code	Type	Meth	Original Cost Budget	Approved OCO	Current Cost Budget	Out of Scope Changes in Process	Projected Cost Budget	Actual Cost to Date	Open Commitment	Spent & committed
12345.01.03A.030000.F.CF	Area 1.03A.Fndtns - Concrete - Constrn	12345	01.03A.030000	CFB	COST	A	0.00	0.00	0.00	76,500.00	76,500.00	29,565.50	433,630.57	463,196.07
12345.01.03A.030000.F.L	Area 1.03A.Fndtns - Concrete - L	12345	01.03A.030000	L	COST	A	0.00	0.00	0.00	0.00	0.00	75.00	75,000.00	75,075.00
12345.02-100.CFB	Structural Demolition - Constrn Field B	12345	02-100	CFB	COST	A	100,000.00	0.00	100,000.00	0.00	100,000.00	8,394.50	0.00	8,394.50
12345.02-200.CFB	Utility Removal - Constrn Field Burden	12345	02-200	CFB	COST	A	0.00	0.00	0.00	66,000.00	66,000.00	0.00	0.00	0.00
12345.02-200.L	Utility Removal - L	12345	02-200	L	COST	A	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
12345.02-500.CFB	Demolition-Electrical System - Constrn	12345	02-500	CFB	UPHS	A	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
12345.02-500.L	Demolition-Electrical System - L	12345	02-500	L	COST	A	0.00	0.00	0.00	0.00	0.00	44.00	0.00	44.00
12345.03-100.CFB	Structural Concrete - Constrn Field Bur	12345	03-100	CFB	COST	A	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
							100,000.00	0.00	100,000.00	142,500.00	242,500.00	38,079.00	508,630.57	546,709.57

Sample of Summary tab, framed in red.

The **Summary** tab displays a single summary line for each Bill Code used in the forecast lines of the **Labor** and **Other** tabs. So, if a Bill Code was used in 15 different forecast lines, the **Summary** tab will have a single summary line for that Bill Code with the following notable fields:

- **Actual Cost to Date:** total posted costs for every forecast line with the Bill Code
- **Projected Cost to Complete:** total projected costs for every forecast line with the Bill Code
- **Original Cost Budget, Current Cost Budget, Projected Cost Budget:** original, current and projected budget for the Bill Code

If any changes are made on either of the other tabs, click the **[Update Forecast Summary]** button to refresh this tab's summary.

NOTE: The summary lines for Bill Codes on this tab contain many of the same columns as the forecast lines in the PMJSP Contract Forecasting with PCI Projections application of xProjects.

Summary Forecast Table

The following provides details about the columns on the **Summary** tab:

Bill Code, Bill Code Name

Bill Code being summarized by the summary line.

Bill Job Code

Job to which this Bill Code's costs are charged.

Bill Cost Code

Cost Code component of the Bill Code.

Bill Cat Code

Category component of the Bill Code

Type

Billing Type: **Cost, Unit, UPHS, NR...**

Meth

Forecasting Method: **A** = Amounts, **P** = Productivity, **U** = Units.

Original Cost Budget

Original Cost Budget for the Bill Code as of the start of the Contract.

Approved OCO (Owner Change Orders)

Total cost amount of all posted Changes Orders of the Internal, External and Transfer types where the Post Date is on or before the end of the current forecast period. The Internal Change Order Amount will be included only when CM Control > **Internal Change Orders Update Budget** checkbox is checked.

Current Cost Budget

= Original Cost Budget + Approved OCO Cost Amounts, up to end of current forecast period.

Out of Scope Changes in Process

Total cost amount of all unposted Changes Orders of all types that have the following PCI Status attributes:

- **Pending Type** is “**Approved**” or “**Pending**”
- **Forecast** checkbox is checked to include changes in forecast

Shown below, the PCI Status Codes screen is used to maintain the PCI Statuses:

Code	Name	* Pending Type	Name	Proceeding	Forecast	Include In Below The Line
APPROVED	Approved	A	Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CANCELLED	Cancelled	C	Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PENDING	Pending	P	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PRE-PENDIN	Pre-pending	N	Pre-Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REJECTED	Rejected	R	Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sample of PCI Status Codes screen; standard Treeview path: *CM > Local Tables > PCI Status Codes.*

Projected Cost Budget

= **Current Cost Budget** + Pending Change Orders

Actual Cost to Date

Actual cost amount, posted to the JC Transaction table for this Bill Code up to the end of the current forecast period.

Open Commitment

(sum of all 'O' type transactions posted on or before end of current forecast period) - (sum of all Job Cost 'Cost' type transactions posted on or before end of current forecast period against Commitment)

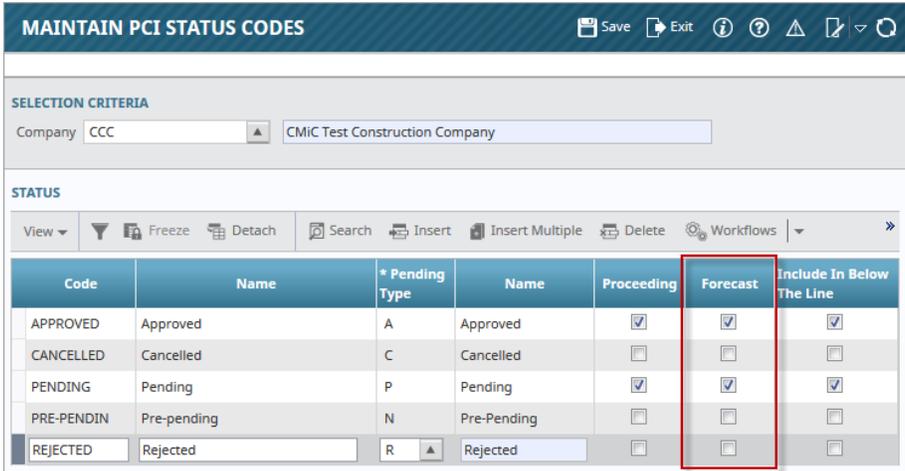
Spent & Committed

(sum of all 'O' type transactions posted on or before the Period End Date) + (sum of all Job Cost 'Cost' type transactions where the post date is on or before the Period End Date not posted against Commitment)

In Scope Changes

Total cost amount of all unposted Changes Orders of the "Internal" type with PCI Statuses as Pending or Pre-Pending and have their **Forecast** checkbox checked to include the changes in the forecast.

Shown below, the PCI Status Codes screen is used to maintain the PCI Statuses:



The screenshot displays the 'MAINTAIN PCI STATUS CODES' interface. At the top, there are icons for Save, Exit, Help, and other functions. Below this is a 'SELECTION CRITERIA' section with a 'Company' dropdown set to 'CCC' and a text field containing 'CMIC Test Construction Company'. The main area is titled 'STATUS' and features a toolbar with options like View, Freeze, Detach, Search, Insert, Insert Multiple, Delete, and Workflows. The central table lists various PCI status codes with their corresponding names, pending types, and checkboxes for 'Proceeding', 'Forecast', and 'Include In Below The Line'. The 'Forecast' column is highlighted with a red box.

Code	Name	* Pending Type	Name	Proceeding	Forecast	Include In Below The Line
APPROVED	Approved	A	Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CANCELLED	Cancelled	C	Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PENDING	Pending	P	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PRE-PENDIN	Pre-pending	N	Pre-Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REJECTED	Rejected	R	Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sample of PCI Status Codes screen; standard Treeview path: CM > Local Tables > PCI Status Codes.

Out of Scope Changes

Total cost amount of all unposted Changes Orders of “**Transfer**” type that have the following PCI Status attributes:

- **Pending Type** is “**Pending**”, “**Approved**” or “**Rejected**”
- **Forecast** checkbox is checked to include changes in forecast

Shown below, the PCI Status Codes screen is used to maintain the PCI Statuses:

Code	Name	* Pending Type	Name	Proceeding	Forecast	Include In Below The Line
APPROVED	Approved	A	Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CANCELLED	Cancelled	C	Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PENDING	Pending	P	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PRE-PENDIN	Pre-pending	N	Pre-Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REJECTED	Rejected	R ▲	Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sample of PCI Status Codes screen; standard Treeview path: CM > Local Tables > PCI Status Codes

Resource ETC

Sum of ‘Projected Cost Amount’ for all labor resources assigned to the Job/Cost Code/Category on the **Labor** tab.

Others ETC

Sum of ‘Projected Cost Amount’ of all forecast lines assigned to the Job/Cost Code/Category on the **Other** tab.

Total ETC

= Resource ETC + Others ETC

Projected Cost to Complete

= Projected Cost Amount – Spent & Committed (In Scope)

Forecasted Cost

= Actual Cost To Date + Open Commitments + In Scope Changes + Out Of Scope Changes + Total ETC

Cost Variance

= Projected Cost Budget - Forecasted Cost

Potential Owner Changes

Total cost amount of all unposted Changes Orders of the “**External**” and “**Transfer**” type that have the following PCI Status attributes:

- **Pending Type** is “**Pre-Pending**”
- **Forecast** checkbox is checked to include changes in forecast

Shown below, the PCI Status Codes screen is used to maintain the PCI Statuses:

The screenshot shows the 'MAINTAIN PCI STATUS CODES' interface. Under 'SELECTION CRITERIA', the 'Company' is set to 'CMIC Test Construction Company'. The 'STATUS' section contains a table with the following data:

Code	Name	* Pending Type	Name	Proceeding	Forecast	Include In Below The Line
APPROVED	Approved	A	Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CANCELLED	Cancelled	C	Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PENDING	Pending	P	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PRE-PENDIN	Pre-pending	N	Pre-Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REJECTED	Rejected	R	Rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sample of PCI Status Codes screen; standard Treeview path: CM > Local Tables > PCI Status Codes

Potential Forecasted Cost

= Forecasted Cost + Potential Owner Changes

Set Up

Job Costing

Enter Job – Screen

The screenshot shows the 'JOB SETUP' screen with the following details:

- SELECTION CRITERIA:** Company: CCC (CMIC Test Construction Company). A 'Duplicate Job' button is present.
- JOB DETAIL:** A series of tabs: Job Detail, Settings, Accounts, AP Taxes, Job Billing, WIP, Payroll (selected), Bank, Security, Equipment Locations, Compliance, PO / WO.
- Navigation:** Search, Insert, Delete, Previous, Next, Workflows, Report Options, Attachments, Notes, ECM Documents, User Extensions.
- Fields:**
 - Work Location: PHX (Phoenix, AZ)
 - Prevailing Job Sector Code: CIVIL (Civil)
 - Prevailing Job Payrate Schedule Code: TEST1 (test1)
 - Prevailing Wage Rate Code: PW1 (PW1)
 - Prevailing Wage Override Rate: (empty)
 - Default Payroll Overhead Group: PYOHGRPI (Payroll Overhead Group I)
 - Workers Compensation Policy: (empty)
 - Public Liability Policy: (empty)
- Checkboxes:**
 - Use Payroll Bill Rates (highlighted with a red box)
 - Use Calculated Salary Charge Rates
 - Use Job Company To Pay Employee In Payroll
 - Use Job For Prevailing Wage
 - Use Default Davis Bacon Rule
- Buttons:** A 'Generate Rates' button is located on the right side of the form.

Pgm: JCJOBFM; Enter Job screen; standard Treeview path: JC > Job > Enter Job

If the **Use Payroll Bill Rates** checkbox is checked for the Job on the **Payroll** tab of the **Enter Job** screen, the Charge Rates and Bill Rates for the **Default Hourly Cost Rate** and **Default Hourly Billing Rate** fields, respectively, come from the Payroll setups; otherwise the rates come from the Job Billing Rates Table (standard Treeview path: JB > Setup > Local Tables > Billing Rates).

For details about the Maintain Bill Rates table, refer to the *Billing Rate Maintenance* section of the Job Billing reference guide.

Maintain Cost Categories – Screen

MAINTAIN COST CATEGORIES												
SELECTION CRITERIA												
* Company <input type="text" value="CCC"/> CMIC Test Construction Company												
CATEGORIES												
Code	* Description	Billing Group	O/H Forward Loss %	Non Recoverable	Available On SC/AP	Available In Procurement	* Active	* Incl In Forecast	Exclude Cost Budget From WIP	Exclude Costs From WIP	Available On GC Monitor	Cost Type
1000	Labour			<input type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Labour
2000	Subcontract			<input type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Subcontract
3000	Equipment			<input type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Equipment
4000	Material			<input type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Material
5000	Sundry			<input type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Burden

Pgm: JCCATFM; Maintain Cost Categories screen; standard Treeview path: JC > Setup > Local Tables > Enter Category

The following provides details about setting up Categories for Bill Codes that are to be used in GC Monitor.

Note, these settings are defaults that will be used when creating new Jobs. To set up an existing Job to work with GC Monitor, please refer to the [Set Up Existing Jobs](#) subsection.

NOTE: If the Job Billing Mapping screen is to be used to map JC Cost Codes and Categories to JB Bill Codes, there must be a 1-1 mapping between them.

Fields Relevant to GC Monitor

Available On GC Monitor – Checkbox

If checked, and this Category’s **Default Forecast Method** field is set to “**Amounts**”, Bill Codes with this Category will be available in Bill Code LOVs in GC Monitor.

Cost Type

The **Cost Type** field is used to specify on which tab of GC Monitor the Bill Code with the Category will be available. If **Cost Type** is set to “**Labor**”, the Bill Code will be available on the **Labor** tab. If it is to anything else, including being left blank, the Bill Code will be available on the **Other** tab.

NOTE: Categories for labor burden Bill Codes must have their **Cost Type** field set to “**Labor**”, so that their costs can be projected on the **Labor** tab.

Escalator Maintenance – Screen

ESCALATORS MAINTENANCE
Save Exit ? ? ? ? ? ? ? ? ? ?

SELECTION CRITERIA

Company ZZ

Job ALL

ESCALATORS

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

* Union	Union Name	* Year	Period	Cost %	Billing %
1000	Int Brotherhood of Elec Wrkrs	2016	1	2.500	5.000
CARP	Carpenters Union	2016	1	3.100	5.200
L416	Local 416	2016	1	2.300	4.800

Pgm: JCESCALATORMNT – Escalator Maintenance screen

The Escalator Maintenance screen is used to enter Escalators for Unions in the system, which are used to account for job cost increases due to union cost increases.

Under the **Selection Criteria** section, select the **Company** and **Job** for which the Escalators are to be created.

Under the **Escalators** section, insert Escalator entries by specifying the **Union**, **Year** and **Period** they are to be applied, and their **Cost %** and **Billing %** increases for the Pay Rates.

Job Billing

Contract Entry – Screen

CREATE CONTRACT

* Company: CCC CMIC Test Construction Company

* Contract: J448957 Freshmart Office Building - Chicago II

* Customer: FRSHMART Freshmart Groceries Inc.

Budg. Billing Amt: 2,500,000.00

Contract Currency: US Dollars

Contract Date: 03/16/2017

Start Date: 03/01/2017

End Date: 12/31/2018

Rate Code: ONERATE

Billing Code	* Type	Description	Budg. Billing Amt	Curr \$	Budg. Qty.	WM	Billing Rate	Max Billing Amt	Max Qty	% of Constr.	Construction Value
J448957 03 31	COST	Heavy Weight Structura		US	0.000	HR					
J448957 03 31 13	COST	Heavy Weight Structura		US	0.000	CY					
J448957 03 31 13	COST	Heavy Weight Structura		US	0.000	DY					
J448957 03 31 13	COST	Heavy Weight Structura		US	0.000	LS					
J448957 03 31 13	COST	Heavy Weight Structura		US	0.000	LS					
			593,000.00								

Pgm: JBCONT; Contract Entry screen; standard Treeview path: JB > Contracts > Enter Contract

For all the Bill Codes to use in GC Monitor for a Job, they must have been added to the Job's Job Billing Contract via the Contract Entry screen.

The Categories for Cost Codes used to create the Bill Codes must have been set up to be available in GC Monitor, as described in the following subsection of this guide: [Setup > Job Costing > Maintain Cost Categories – Screen.](#)

NOTE: If the Job Billing Mapping screen is to be used to map JC Cost Codes and Categories to JB Bill Codes, there must be a 1-1 mapping between them.

System Data

System Options – Screen

The screenshot shows the 'SYSTEM OPTIONS' window with the 'Forecast' tab selected. The window title is 'SYSTEM OPTIONS' and it includes a 'Table Mode' button and icons for Save, Exit, Help, and Refresh. A status bar at the top indicates 'Checked: GC Monitor Assignment Is Not Date Sensitive'. Below the title bar are tabs for General, Licenses, Reports, Global, Financials, Projects, Forecast, Assets, Payroll, Human Resource, E-TimeSheet, Help, and Logo Path. The 'Forecast' tab is active, displaying a list of checkboxes. A red rectangular box highlights the following options: 'Synchronize RP Allocation Percent When Import/Export From Forecast' (unchecked), 'Automatically Add Cost on GC Monitor' (unchecked), 'Apply FLSA exemption rule to GC Monitor' (checked), 'Always Restrict To Current Rate in GC Monitor' (checked), 'Auto Refresh Employee Trade Code on GC Monitor' (unchecked), and 'GC Monitor Assignment Is Not Date Sensitive' (unchecked). At the bottom left, the 'WIP Method' is set to 'WIP Based on Cost' with a dropdown arrow.

Pgm: SYSOPT; System Options screen; standard Treeview path: System > Setup > System Options

Fields Relevant to GC Monitor

Synchronize RP Allocation Percent When Import/Export From Forecast – Checkbox

This checkbox controls how a Need Line's **Assignment %** field is set when the line is exported from GC Monitor into Resource Planning. And conversely, it controls how a Forecast Line's **Default Weekly Cost Hours** and **Default Weekly Billing Hours** fields are set when the line is imported into GC Monitor from Resource Planning.

For further details, please refer to the [\[Import/Export Resource Plan Data\] – Button](#) section in this guide.

Automatically Add Cost on GC Monitor – Checkbox

When a Timesheet is posted for an Employee, Bill Code (set up to appear in GC Monitor) and Job, if a forecast line exists in GC Monitor for that combination, that line in GC Monitor will be updated with the posted Timesheet details. If a forecast line does not exist in GC Monitor for that combination, a new forecast line for that combination will be automatically created in GC Monitor if, and only if, the **Automatically Add Cost on GC Monitor** checkbox on the **Forecast** tab of the System Options screen is checked.

Apply FLSA Exemption Rule to GC Monitor – Checkbox

NOTE: By default, this flag is unchecked, as this is not a standard feature meant for most of our clients.

Trade	Employee	Employee Name	Union	Pay Type	* Bill Code	* Job	* Cost Code	Cost Code Description	* Category	Cost Cutoff Date	* Start Date	* End Date	Default Weekly Cost Hours
TRUC	1001	Peterson Gerald	1000	OVHR	J448957.03-100.L	J448957	03-100	Structural Cor	L	16/Oct/2017	01/Mar/	31/Dec	48.00
1634	CCC-WKHF	Martin Varys		NWHR	J448957.03 31 13.L	J448957	03 31 13	Heavy Weight	L	16/Oct/2017	01/Mar/	31/Dec	30.00
6432	TBD	TBD	1000	NWHR	J448957.26 0500.	J448957	26 0500	Electrical	1000	16/Oct/2017	01/Mar/	31/Dec	40.00

If checked, the following fields (framed above) for Employees on the **Labor** tab are affected as follows:

Field	Effect
Union	If Unionized checkbox on Personal tab of Employee Profile is <u>unchecked</u> , this field is set to NULL (blank) and disabled.
Pay Type	If FLSA Type field on Personal tab of Employee Profile is set to “ Exempt ”, this field is set and locked to “ NWHR ”.
Default Weekly Cost Hours	If FLSA Type field on Personal tab of Employee Profile is set to “ Exempt ”, the maximum number of hours that can be entered in this field is set to 40.

Always Restrict To Current Rate in GC Monitor – Checkbox

NOTE: By default, this flag is unchecked, as this is not a standard feature meant for most of our clients.

Trade	Employee	Employee Name	Union	Pay Type	* Bill Code	* Job	* Cost Code	Cost Code Description	* Category	Cost Cutoff Date	* Start Date	* End Date	Default Weekly Cost Hours	Default Hourly Cost Rate	Hourly Cost Rate Override	Default Weekly Billing Hours	Default Hourly Billing Rate
TRUC	1001	Peterson Gerald	1000	OVHR	J448957.	J448957	03-100	Structural Co	L	16/Oct/2017	01/1	31/	48.00	79.6900		48.00	112.7500
1634	CCC-WK-	Martin Va		NWHR	J448957.	J448957	03 31 13	Heavy Weigh	L	16/Oct/2017	01/1	31/	30.00	65.0000		30.00	65.0000
6	TBD	TBD	1000	NWHR	J4489	J4489	26 05	Electrical	1000	16/Oct/2017	01/1	31/1	40.00	50.0000		40.00	87.0000

If checked, the following fields (framed above) for Employees on the **Labor** tab are affected as follows:

Field	Effect
Default Hourly Cost Rate	Regardless of what period is being forecasted, the Cost Rates used for Employees are the ones set up for them for your current system date, not the Cost Rates set up for them for the period being forecasted.
Default Hourly Billing Rate	Regardless of what period is being forecasted, the Billing Rates used for Employees are the ones set up for them for your current system date, not the Billing Rates set up for them for the period being forecasted.

Auto Refresh Employee Trade Code on GC Monitor – Checkbox

NOTE: By default, this flag is unchecked, as this is not a standard feature meant for most of our clients. For historical purposes, when an employee changes their Trade, it is recommended that the forecast line created for their old Trade is left with their old Trade Code, and a new forecast line is created for their new Trade.

When Employee Profiles are updated with new Trades, those employees will still be associated to their old Trade in GC Monitor, causing the Charge Rate determined for them to be incorrect.

In order for the [\[Refresh Forecast\]](#) and [\[Re-calculate All Rates\]](#) functionality to use Charge Rates based on updated employee trades, this checkbox must be checked.

GC Monitor Assignment Is Not Date Sensitive – Checkbox

If checked, prevents the ability to have multiple resource assignments for each employee on a single bill code and pay type using different date ranges.

With this functionality enabled, an error message will be issued if an attempt is made to create a new resource assignment for an employee/bill code/pay type combination that already exists in the forecast period.

If the ‘Automatically Add Cost on GC Monitor’ box on this tab is also checked, then GC Monitor assignment date ranges will be updated by any cost transaction that has a reference date that falls outside of the date range. After importing/exporting data between GC Monitor and Resource Planning, any breakdown in the resource schedule for the same bill code in Resource Planning will be reduced to one line with calculated start and end dates.

Security Access to GC Monitor

ASSIGN ROLES TO PROGRAMS

Save Exit ? ? ? ? ? ? ? ?

SELECTION CRITERIA

Application Code: JC Job Costing

PROGRAMS

View Freeze Detach Search Workflows Report Options Export ECM Documents User Extensions

%monitor%

* File Name	* Description
RPFCAST	GC Monitor

ROLES

View Freeze Detach Search Insert Insert Multiple Delete Workflows Report Options Export

* Role	* Name	* Insert	* Update	* Delete	Block Level Security
FORECAST	Contract Forecasting Role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Block Level Security

PGM: FORMROLE - Assign Roles To Programs screen.

Security access to GC Monitor is granted to Security Roles via the Assign Roles To Programs screen (standard path: *System > Roles > Assign Role to Programs*).

To grant members of a Security Role access to GC Monitor, select “JC” for the **Application Code** field in the upper section, then search for and select “RPFCAST” in the **File Name** column in the **Programs** section. Finally, insert the Security Role to be granted access in the lower, **Roles** section.

Set Up Existing Jobs

The following are the steps required to set up an existing Job to work with GC Monitor.

Step 1: Assign Cost Code (Job Costing Screen)

SELECTION CRITERIA

* Company: CCC (CMIC Test Construction Company)
 Job: J448957 (Freshmart Office Building - Chicago II)
 Budget Effective Date:
 Use Cost Code Template: Use Existing Job:
 Copy Cost Code WC Codes Use Existing Bill Codes Retain Budget Retain Bill Rate Tables

COST CODE DETAIL

* Cost Code	Description	renue	Projection Threshold %	Billing	* Active	* Factorable	Name	Add/Remove Categories	Category Detail	Alternate Codes
04 0000	MASONRY			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="Add/Remove Categories"/>	<input type="button" value="Category Detail"/>	<input type="button" value="Alternate Codes"/>
04 0500	Masonry			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="Add/Remove Categories"/>	<input type="button" value="Category Detail"/>	<input type="button" value="Alternate Codes"/>
04 0510	Masonry - Mortar & Grout			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="Add/Remove Categories"/>	<input type="button" value="Category Detail"/>	<input type="button" value="Alternate Codes"/>
04 4000	Masonry - Stone			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="Add/Remove Categories"/>	<input type="button" value="Category Detail"/>	<input type="button" value="Alternate Codes"/>

CATEGORY DETAIL

Category	Name	Bill Code	Billing Type	* Ctrl.	WM	Budget Method	* Active	* Labor Forecast	Exclude Cost Budget	Exclude Costs	Budget Quantity	Budget Unit Rate	Budget Amount	Budget Rate
09-995	1000 Labour	J448957.04 0510.100		ALL	HR	Amounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			1,000.00	
26 000	2000 Subcontract	J448957.04 0510.200		ALL	CY	Units	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			2,000.00	
26 050	3000 Equipment	J448957.04 0510.300		ALL	HR	Amounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			3,000.00	
Valid	4000 Material	J448957.04 0510.400		ALL	CY	Amounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			4,000.00	
	5000 Sundry	J448957.04 0510.500		ALL	CY	Amounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			5,000.00	
	CC Construction Contingen	J448957.04 0510.CC		ALL	\$	Amounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	CFB Constn Field Burden	J448957.04 0510.CFB		ALL	\$	Amounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	CFBNR NR Constn Field Burden	J448957.04 0510.CFB		ALL	\$	Amounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	OA Owner Allowance	J448957.04 0510.		ALL	N	Amounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

For a Job's Bill Code to be used for labor forecast lines in PM JSP Contract Forecasting and GC Monitor, the Bill Code's **Labor Forecast** box (shown above) must be checked in the Category Detail popup of the Assign Cost Codes screen (standard path *JC > Job > Assign Cost Codes*). In PM JSP Contract Forecasting, once the checkbox is checked for the Bill Code, labor forecast lines with the Bill Code will be green to indicate that the lines can be drill-downed using GC Monitor.

Step 2: JB Contract Entry (Job Billing Screen)

For a Bill Code to be available in GC Monitor, its **Labor Forecast** checkbox must be checked in the Job's JB Contract. By default, the **Labor Forecast** checkbox in the JB Contract Entry screen (standard path: *JB > Contracts > Enter Contract*) is not visible, so it must first be made visible using the Lite Editor, as per the following instructions.

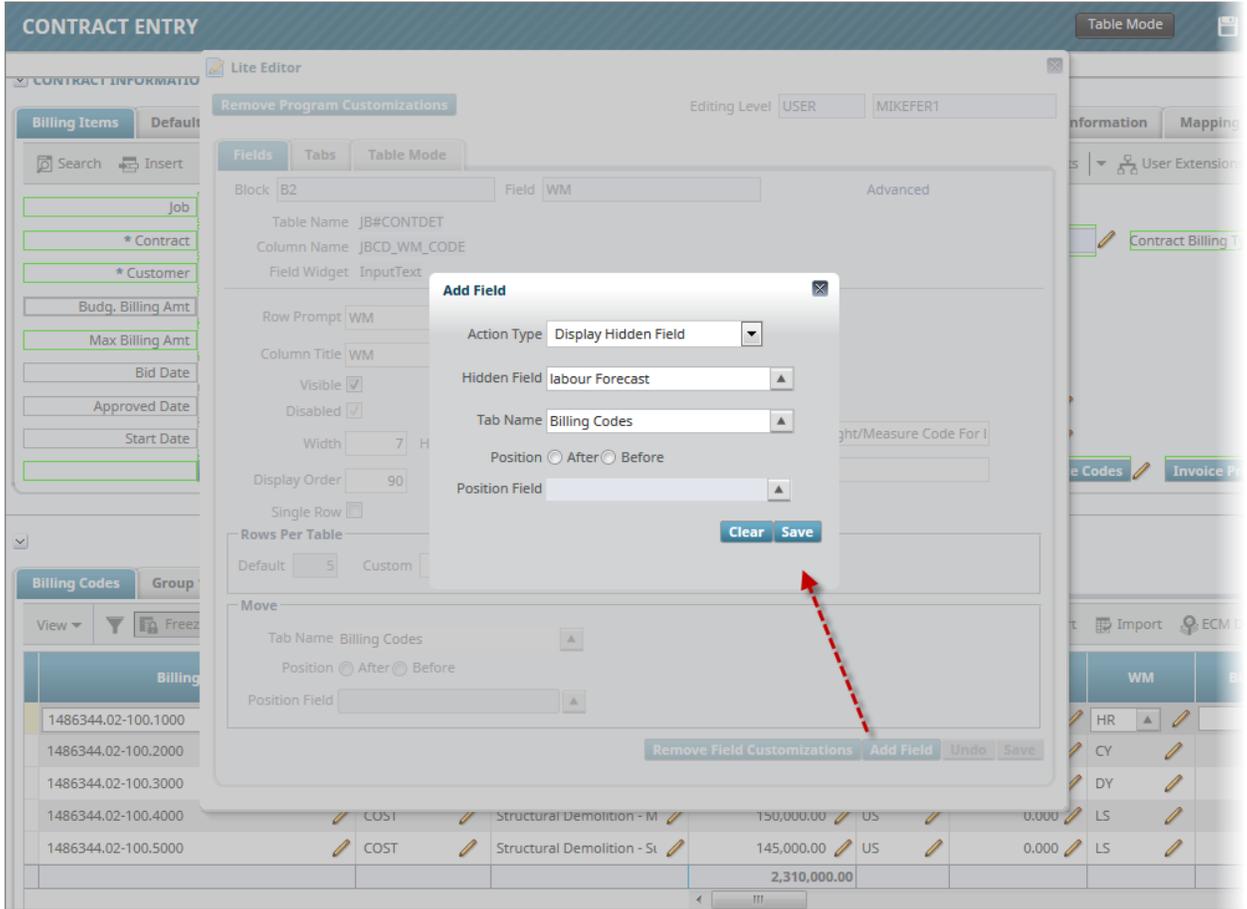
To make the **Labor Forecast** checkbox visible, load the relevant JB Contract, click the Lite Editor icon to launch the Lite Editor, then click an Edit (Pencil) icon on the **Billing Codes** tab of the lower section:

The screenshot displays the 'CONTRACT ENTRY' application interface. A 'Lite Editor' dialog box is open, allowing for the configuration of a field. The dialog is titled 'Lite Editor' and includes a 'Remove Program Customizations' button. It shows the following configuration details:

- Block: B2
- Field: Budg. Qty.
- Table Name: JB#CONDET
- Column Name: JBCD_BUDG_BILLING_QTY
- Field Widget: InputText
- Row Prompt: Budg. Qty.
- Column Title: Budg. Qty.
- Visible:
- Disabled:
- Width: 11, Height: 1
- Display Order: 80
- Single Row:
- Rows Per Table: Default 5, Custom (empty)
- Move: Tab Name Billing Codes, Position After (selected), Position Field (empty)

At the bottom of the dialog, there are buttons for 'Remove Field Customizations', 'Add Field', 'Undo', and 'Save'. A red arrow points from the 'Add Field' button in the dialog to the 'Add Field' button in the 'Billing Codes' table below. The table has columns for Qty., WM, Billing Rate, and Max Billing Ad. The 'Add Field' button in the table is also highlighted with a red box.

In the Add Field popup (shown below), select the values displayed below to make the **Labor Forecast** checkbox visible on the **Billing Codes** tab:



After saving the change in the Lite Editor and refreshing the JB Contract Entry screen, the **Labor Forecast** checkboxes will be visible for Bill Codes, in order to check the ones that need to be available in GC Monitor:

Billing Code	* Type	Description	Billing	Burden Level	Jbcd Bur Stored Material Flag	* Shared Savings	Shared Savings Pct	* Filter	Labor Forecast
J448957.03-100.CC	COST	Structural Concrete - Cor	Cost Plus Markup		<input type="checkbox"/>	<input type="checkbox"/>	*		<input type="checkbox"/>
J448957.03-100.CFB	COST	Structural Concrete - Cor	Cost Plus Markup		<input type="checkbox"/>	<input type="checkbox"/>	*		<input checked="" type="checkbox"/>
J448957.03-100.L	COST	Structural Concrete - L	Cost Plus Markup		<input type="checkbox"/>	<input type="checkbox"/>	*		<input checked="" type="checkbox"/>
J448957.03-100.OA	COST	Structural Concrete - Ow	Cost Plus Markup		<input type="checkbox"/>	<input type="checkbox"/>	*		<input type="checkbox"/>
J448957.03-200.CC	COST	Architectural Concrete - i	Cost Plus Markup		<input type="checkbox"/>	<input type="checkbox"/>	*		<input type="checkbox"/>

Bill Code Details Total Budg. Billing Amount 3,194,500.00

Pay Rates Setup – Quick Guide

Overview – Pay Rates

Group Pay Rates – Pay Rate Tables

Pay Rates can be set for groups of Employees via the Trade, Customer, Job, and Union Pay Rates tables, and exceptions to these groups can be set at lower levels, and by using the **Preferred Pay Rate**, **Preferred Charge Out Rate**, and **Preferred Bill Rate** fields of Employee Profile records.

Individual Pay Rates – Employee Profile & Employee Pay Rate Table

For each Employee, there are 3 Pay Rate Types: **Pay Rate**, **Charge Rate**, and **Bill Rate**. The Pay Rates for each of these types can be set for individual Employees via Employee Profiles and the Employee Pay Rates table (Pay Rates with respect to dates),

Pay Rate Preferences

Pay Rate Preferences, on the **Rates/Salary** tab of Employee Profiles, are used to set where Pay Rates are to come from, which would be from the Employee Profile or from Pay Rate Tables (Alternative Pay Rates).

If Pay Rates are set for groups of Employees, such as Employees of a particular trade, and if some Employees in the group are exceptions, Pay Rate Preferences are used to specify where their Pay Rates are to come from.

Example: If a **Charge Out Rate** is set up for a particular trade (ex. Carpenter Apprentice), in the Trade Pay Rates table, and you want the **Charge Out Rate** for an Employee of that trade to come from that table, set the **Preferred Charge Out Rate** field to **Trade**. If you want the rate to come from the Employee Profile's **Charge Out Rate** field, set the **Preferred Charge Out Rate** field to **Employee**.

Pay Rate Multipliers

Pay Rate Multipliers can be set for each Pay Rate Type and overtime and double overtime Hour Type combinations.

Non Factor Pay Rate Multipliers

Exceptions to Pay Rate Multipliers for overtime and double overtime Hour Types can be set via the Non Factor functionality.

Pay Rates – Employee Profile

For every Employee, Pay Rates can be set for each of the following 3 Pay Rate Types, on the **Rates/Salary** tab of Employee Profiles.

Pay Rate

Amount per hour that is charged for the Employee's time.

Charge Rate

Amount per hour that is charged for the Employee's time against a Job.

Bill Rate

Amount per hour that is charged to a client for the Employee's time.

For salaried Employees, their time can also be charged against Jobs, and their Charge Rates and Bill Rates can be different than their salaries.

PY Control – Pay Rate for Charging Job Timesheets

The screenshot shows the 'PY CONTROL' software interface. At the top, there is a 'SELECTION CRITERIA' section with a dropdown for '* Company' set to 'CCC' and a 'Copy Control File' button. Below this are tabs for 'General', 'Rate Codes', 'Accounts', 'Direct Deposit', 'Rules', 'E-Timesheet', and 'Reports'. The 'Rules' tab is active, showing a list of checkboxes for various settings. The checkbox for 'Use Pay Rate for Charging Job Timesheets' is highlighted with a red box. Other visible settings include 'SSN unique by' set to 'None', 'Allow Negative Expense Claims' set to 'Warning', 'Salaried Pay Rate' set to 'Variable (Based On Period Working Days)', 'More Than Eligible Hours' set to 'No', and 'Overtime Rule Method' set to '1. Original Method: either daily or weekly overtime rule but not both'. The 'Salary Charge Rate Calc Method' is set to '1. Original Method: Prorates full salary wage across all hours'.

If the **Use Pay Rate for Charging Job Timesheets** checkbox is checked for a Company, the Employee's Pay Rate is used when posting Job Timesheets, otherwise, the Employee's Charge Rate is used.

Alternative Pay Rates – Pay Rate Tables

On the **Rates/Salary** tab of an Employee Profile, the rates for each of the 3 Pay Rate Types can be set to come from a Pay Rate Table instead of using the rates specified by the **Hourly Rate**, **Charge Out Rate**, **Filling Rate** fields on this tab. Alternative Pay Rates are set via the **Preferred Pay Rate**, **Preferred Charge Out Rate**, and **Preferred Bill Rate** fields. The following provides details about the options available by these fields:

Trade

Trade indicates that the employee's trade code is used to determine the rates. If this option is selected you must define the rates by trade.

Customer

Customer indicates that the customer code is used to determine the default rate based on the job code entered on the timesheet. This option uses the customer field on the Job Maintenance screen (within the Job Cost application) to determine the customer assigned to the job specified on the timesheet. If this option is selected you must define the rates by customer within the Customer Pay Rates form.

Employee

Employee indicates that rates are to come from the Employee Pay Rates table, or the Employee Profile. The Employee Pay Rates table is used to enter date sensitive rates. The system will first look to the Employee Pay Rates table to determine if an Employee's Pay Rate is defined for the period specified by the timesheet. If it is not found in the table, the system will use the rate set on the **Rates/Salary** tab of the Employee Profile (**Hourly Rate, Charge Out Rate, Billing Rate** fields).

Job

Job indicates that the job code is used to determine the rates based on the job code entered on the timesheet. If this option is selected you must define the rates by job.

Union

Union indicates that the employee's union code is used to determine the rates. If this option is selected you must define the rates by union within the Union Pay Rates form.

Job/Trade

Job/Trade indicates that rates should come directly from the Job Rates if setup, and then Trade Rates if no Job Rate exists. This is a hierarchical search starting with Job, then Trade, and if both are missing the standard search of Employee Rates, then Employee Profile rate.

Job/Union

Job/Union indicates that rates should come directly from the Job Rates if they exist, but if they don't exist then Union Rates will be used. This is a hierarchical search for rate selection starting with Job, then Union. If both are missing the standard search of Employee Rate Table, then Employee Profile rate applies.

Pay Rate Hierarchy

If for some reason a specified rate cannot be found in the system, it will default to the rate from the Employee Pay Rate table. If an appropriate rate cannot be found within the Employee pay rate table, it will use the static information from the Employee Profile.

When you set a Pay Rate preference for an Employee to Trade, Customer, Job, Union, or Employee, the system will look to the appropriate Pay Rate table for the rate. If a rate cannot be found for the Employee within that table, the system will look to the Employee Pay Rate table for the rate. If no rate is found there, the system will then look to the Employee Profile for the rate. If no rate is found in the Employee Profile, then the Timesheet Entry program will return an error stating that no rate could be found.

The exception to this rule is when an Employee is working on a prevailing wage job that has the rate by job flag turned on. Please refer to the section on Job Work Locations Maintenance within the Company Setup for further details. In this case, the system will automatically take the Job Pay Rate regardless of the preference Pay Rate setting within the Employee Profile.

NOTE: During the calculation of a charge-out or billing rate for a standard overtime or double overtime hour, the system takes the overtime or double overtime hours and multiplies it by the 'multiplier' value defined by the rate code. Please refer to the Rate Code Maintenance screen for these values. Once this has been done, the system multiplies that number by the charge-out or billing rate. In this way, the charge out rate and the billing rate become factors of the standard rate.

The Trade Pay Rate and the Job Pay Rate tables allow for the assigning of actual overtime and double overtime charge-out and billing rates.

Trade Pay Rates – Table

Pgm: PYTRDRAT – Trade Pay Rates

The Trade Pay Rates screen is used to define the pay rates, charge out rates and billing rates for the employees within your company based on their trade. Pay rates are given effective dates so that you have the ability to enter future as well as current pay rates; rates are then only calculated from the date specified.

If you have selected the trade option within the Employee Profile – pay rate, charge out and billing rate fields, the system will default the rates indicated by the appropriate trade. If the system does not find a rate set up at this level it will look to the Employee Pay Rates and then to the Employee Profile for the appropriate rate.

Company/Trade

Enter or select the company and trade for which to define pay rates.

Effective Date

Enter the Effective Date for the pay rate you are assigning to the company specified in the first section. The system will begin calculating this pay rate from the date specified within this field.

Pay Rate

Enter the default pay rate for employees whose pay rates are set up to default from the trade you are defining on this line.

Charge Out Rate

Enter the default charge out rate for employees whose charge out rates are set up to default from the trade you are defining on this line.

Non Factor box

Check the Non Factor box if you want the overtime and double time charge out rate to be an actual charge out rate rather than a factor of the normal hours rate. With this box checked, you will be required to select the **[Non-Factor OT Rates]** button and enter the actual overtime and double overtime rates.

Leave this box blank if you want the overtime and double overtime rates to be a factor of the standard rate. When this box is blank, the system will take the overtime or double overtime hours and multiply it by the 'multiplier' value defined by the rate code. Please refer to the Rate Code Maintenance screen for these values. Once this has been done, the system multiplies that number by the standard charge-out rate to get the overtime charge-out rate.

Billing Rate

Enter the default billing rate for employees whose billing rates are set up to default from the trade you are defining on this line.

Non Factor box

Check the Non Factor box if you want the overtime and double time billing rate to be an actual charge out rate rather than a factor of the normal hours rate. With this box checked you will be required to select the **[Non-Factor OT Rates]** button and enter the actual overtime and double overtime rates.

Leave this box blank if you want the overtime and double overtime rates to be a factor of the standard rate. When this box is blank, the system will take the overtime or double overtime hours and multiply it by the 'multiplier' value defined by the rate code. Please refer to the Rate Code Maintenance screen for these values. Once this has been done, the system multiplies that number by the standard billing rate to get the overtime billing rate.

[Non – Factor OT Rates] – Button

The screenshot shows the 'TRADE PAY RATES MAINTENANCE' window. Under 'SELECTION CRITERIA', the company is 'RV123456' and 'R.V.Head Quarters Company, LLC'. The 'Non-Factor OT Rates' section is active, showing input fields for: Overtime Pay Rate, Double Overtime Pay Rate, Overtime Charge Rate, Double Overtime Charge Rate, Overtime Bill Rate, and Double Overtime Bill Rate.

Pgm: PYTRDRAT – Non-Factor OT Rates

If you have checked the Non Factor box beside the charge out rate or the billing rate fields, you are required to enter the actual charge-out and/or billing rates that apply to overtime or double overtime hours.

Customer Pay Rates – Table

The screenshot shows the 'CUSTOMER PAY RATES' window. Under 'SELECTION CRITERIA', the company is 'CCC' and 'CMIC Test Construction Co', and the customer is 'ACCESSEN' and 'Access Engineering'. The 'RATE DETAILS' section shows a table with the following data:

* Trade	* Effective Date	Pay Rate	Charge Out Rate	Billing Rate
1628	01-01-2013	57,000	57,000	57,000

Description: Civil Engineer

Pgm: PYCUSRAT – Customer Pay Rates

The Customer Pay Rates screen is used to define the pay rates, charge out rates and billing rates for the employees within your company based on the Customer for whom they are working. Pay rates are given effective dates so that you have the ability to enter future as well as current pay rates; rates are then only calculated from the date specified.

If you have selected the customer option within the Employee Profile – pay rate, charge out and billing rate field, the system will default the rates indicated by the appropriate customer / trade combination. If the system does not find a rate set up at this level it will look to the Employee Pay Rates and then to the Employee Profile for the appropriate rate.

Customer

Enter/Select the Customer whose pay rates will be defined.

Trade Code

Enter/Select the trade code to set rates for this customer related to a specific trade.

If you wish to define the pay rates for all trades working on this customer's job, enter the code "ALL" within this field.

Effective Date

Enter the Effective Date for the pay rate. The system will begin calculating this pay rate from the date specified within this field.

Pay Rate

Enter the default pay rate for employees whose pay rates are set up to default from the Customer and Trade you are defining on this line.

Charge Out Rate

Enter the default charge out rate for employees whose charge out rates are set up to default from the Customer and Trade you are defining on this line.

Billing Rate

Enter the default billing rate for employees whose billing rates are set up to default from the Customer and Trade you are defining on this line.

Job Pay Rates – Table

Employee	Trade	Shift	Effective Date	Pay Rate	Non Factor	Charge Out Rate	Non Factor	Billing Rate	Non Factor
CCC-WK-HR1	142	All Shifts	10-12-2014	78		78.000		78.000	

Pgm: PYJOBRAAT – Job Pay Rates Maintenance

The Job Pay Rates screen is used to define the pay rates, charge out rates and billing rates for the employees within your company based on the Jobs on which they are working. Pay rates are given effective dates so that you have the ability to enter future as well as current pay rates; rates are then only calculated from the date specified.

If you have selected the job option within the Employee Profile - pay rate, charge out and billing rate fields, the system will default to the rates indicated by the appropriate job / trade combination. If the system does not find a rate set up at this level, it will look to the Employee Pay Rates and then to the Employee Profile for the appropriate rate.

Job Code

Enter/Select the Job for which to define the pay rates.

Cost Code

Enter/Select the specific Cost Code on this job. To define the pay rates for all Cost Codes on this job, enter the code "ALL" within this field.

Category Code

Enter / Select the Category Code for the specific Cost Code on this job. To define the pay rates for all categories on this job, enter the code “**ALL**” within this field.

[Copy Rates to other Job] – Button

Press the [**Copy Rates to other Job**] button to copy the rates defined by this job to another job. When this button is pressed, a pop-up will appear asking to specify the 'Target Job'. Enter the job to which the rates will be copied. This button will appear after filling the parameters in this section.

Employee Code

Enter/Select the employee code for the employee whose pay rate will be defined on the job specified within the first section.

To define the pay rates for all employees working on this job, enter the code “**ALL**” within this field.

Trade Code

Enter/Select the trade code to specify a pay rate applicable to that trade on the job specified within the first section.

To define the pay rates for all trades working on this job, enter the code “**ALL**” within this field.

Shift

Select the shift type to specify a pay rate applicable to that shift on the job specified in the first section. Shifts that are checked on the E-Timesheet tab of the Company Control will be allowed in this screen. Timesheets from Crew or Mechanic Time that are posted against the specified shift type for the job will use the rates defined here.

Effective Date

Enter the Effective Date for the pay rate being assigned. The system will begin calculating this pay rate from the date specified within this field.

Pay Rate

Enter the default pay rate for employees whose pay rates are set up to default from the Job and Trade defined on this line.

Charge Out Rate

Enter the default charge out rate for employees whose charge out rates are set up to default from the Job and Trade you are defining on this line.

Non Factor box

Check the Non Factor box if you want the overtime and double time charge out rate to be an actual charge out rate rather than a factor of the normal hours rate. With this box checked you will be required to select the [**Non-Factor OT Rates**] button and enter the actual overtime and double overtime rates.

Leave this box blank if you want the overtime and double overtime rates to be a factor of the standard rate. When this box is blank, the system will take the overtime or double overtime hours and multiply it by the 'multiplier' value defined by the rate code. Please refer to the Rate Code Maintenance screen for these values. Once this has been done, the system multiplies that number by the standard charge-out rate to get the overtime charge-out rate.

Billing Rate

Enter the default billing rate for employees whose billing rates are set up to default from the Job and Trade you are defining on this line.

Non Factor box

Check the Non Factor box to have the overtime and double-time billing rates be an actual charge-out rate rather than a factor of the normal hour's rate. With this box checked you will be required to select the **[Non-Factor OT Rates]** button and enter the actual overtime and double overtime rates.

Leave this box blank if you want the overtime and double overtime rates to be a factor of the standard rate. When this box is blank, the system will take the overtime or double-overtime hours and multiply it by the 'multiplier' value defined by the rate code. Please refer to the Rate Code Maintenance screen for these values. Once this has been done, the system multiplies that number by the standard billing rate to get the overtime billing rate.

[Non – Factor OT Rates] – Button

If using the Non Factor box beside the charge out rate or the billing rate fields, entry of the actual charge-out and/or billing rates that apply to overtime or double-overtime hours must be defined here.

The screenshot shows the 'JOB PAY RATES MAINTENANCE' interface. At the top, it says 'Overtime Non Factor Pay Rate'. Under 'SELECTION CRITERIA', there are dropdown menus for Company (HC), Cost Code (ALL), Hikuu Construction Ltd, All Categories, Job (13-1000), Cat (ALL), Peller Campus Parking Lot, and ALL CATEGORIES. A 'Copy Rates to other Job' button is present. Below this, there are two tabs: 'Pay Rate Details' and 'Non-Factor OT Rates'. The 'Non-Factor OT Rates' tab is active, showing input fields for Overtime Pay Rate (29.5000), Double Overtime Pay Rate, Overtime Charge Rate, Double Overtime Charge Rate, Overtime Bill Rate, and Double Overtime Bill Rate.

Pgm: PYTRDRAT – Non-Factor OT Rates

Union Pay Rates – Table

The screenshot shows the 'UNION PAY RATES' interface. It includes a header with 'UNION PAY RATES' and a toolbar with icons for Save, Exit, Help, and other functions. Below the header, there is a prompt: 'Enter Work Location Code Or Enter *** For All Work Locations'. Under 'SELECTION CRITERIA', there are dropdown menus for Company (CCC), Union (1000), Job (*), Sector (*), Schedule (*), and Work Location (*). A 'Copy' button is also present. Below this, there are two tabs: 'Pay Rate Details' and 'Non Factor OT Rates'. The 'Pay Rate Details' tab is active, showing a table of pay rates. The table has columns for Trade, Shift, Effective Date, Pay Rate, Non Factor, Charge Out Rate, Non Factor, Billing Rate, Non Factor, and Prevailing Wage Rate. There are two rows of data: one for Trade 6432 and another for Trade 6433. Below the table, there is a 'Trade Description' field with the value 'Electrician'.

* Trade	* Shift	* Effective Date	Pay Rate	Non Factor	Charge Out Rate	Non Factor	Billing Rate	Non Factor	Prevailing Wage Rate
6432	Day Shift	01-01-2012	25,000	<input type="checkbox"/>	25,000	<input type="checkbox"/>	25,000	<input type="checkbox"/>	27,000
6433	Day Shift	01-01-2012	28,000	<input type="checkbox"/>	28,000	<input type="checkbox"/>	28,000	<input type="checkbox"/>	30,000

Pgm: PYUNIRAT – Union Pay Rates Maintenance

The Union Pay Rates screen is used to define the pay rates, charge out rates and billing rates for the employees within your company based on the unions on which they are working. Pay rates are given effective dates so that

you have the ability to enter future as well as current pay rates; rates are then only calculated from the date specified.

If you have selected the union option within the Employee Profile pay rate field, the system will default the rates indicated by the appropriate union/trade combination. If the system does not find a rate set up at this level it will look to the Employee Pay Rates and then to the Employee Profile for the appropriate rate.

Union

Enter/Select the Union for which the pay rates will be defined.

Job

Job for which rates are being specified.

Sector

Job Sector for which rates are being specified.

Schedule

Job Rate Schedule for which rates are being specified.

Work Location

Work Location for which rates are being specified.

Pay Rate Details – Tab

Trade

Enter/Select the trade code to set rates by Trade.

To define the pay rates for all trades working on this union, enter the code “**ALL**” within this field.

Shift

Shift for which rates are being set.

Effective Date

Enter the Effective Date for the pay rates being defined. The system will begin calculating this pay rate from the date specified within this field.

Pay Rate

Enter the default pay rate for employees whose pay rates are set up to default from the Union and Trade being defined.

Non Factor – Checkboxes

Check a rate’s corresponding **Non Factor** checkbox to have the overtime and double-time rates be an actual charge-out rate rather than a factor of the normal hour’s rate. With this box checked you will be required to use the **Non-Factor OT Rates** tab to enter the actual overtime and double overtime rates.

Leave this box unchecked if you want the overtime and double overtime rates to be a factor of the standard rate. When this box is unchecked, the system will take the overtime or double-overtime hours and multiply it by the multiplier value defined by the rate code. Please refer to the Rate Code Maintenance screen for these values. Once this has been done, the system multiplies that number by the standard billing rate to get the overtime billing rate.

Charge Out Rate

Enter the default charge out rate for employees whose charge out rates is set up to default from the Union and Trade being defined.

Billing Rate

Enter the default billing rate for employees whose billing rates are set up to default from the Union and Trade being defined.

Prevailing Wage Rate

The Prevailing Wage Pay Rate allows for the entry of Prevailing Wage rates by trade within a union. If the Prevailing Wage flag and the Davis Beacon flag are both checked on the timesheet job, the higher rate between the Prevailing Wage Pay Rate and the standard Union Rate if the employee's Pay Rate is Union will be used. If the Davis Beacon flag is unchecked then the system will pick up the pay rate as per the setting of the employees Preferred Pay Rate.

Non – Factor OT Rates – Tab

If using the Non Factor box beside the **Charge Out Rate** or the **Billing Rate** fields, entry of the actual charge-out and/or billing rates that apply to overtime or double-overtime hours must be defined here.

Employee Pay Rates – Table

* Trade Code	Trade Name	* Effective Date	Pay Rate	Non Factor	Charge Out Rate	Non Factor	Billing Rate	Non Factor	Non Factor OT Pay Rate	Non Factor DOT Pay Rate	Non Factor OT Charge Rate	Non Factor DOT Charge Rate	Non Factor OT Bill Rate	Non Factor DOT Bill Rate
ALL	ALL Trades	01-01-2006	25,000	<input type="checkbox"/>	37,500	<input type="checkbox"/>	37,500	<input type="checkbox"/>						
ALL	ALL Trades	01-10-2011	28,000	<input type="checkbox"/>	28,000	<input type="checkbox"/>	28,000	<input type="checkbox"/>						
ALL	ALL Trades	10-05-2012	30,000	<input type="checkbox"/>	30,000	<input type="checkbox"/>	30,000	<input type="checkbox"/>						
ALL	ALL Trades	01-02-2013	35,000	<input type="checkbox"/>	35,000	<input type="checkbox"/>	35,000	<input type="checkbox"/>						
ALL	ALL Trades	01-01-2015	47,250	<input type="checkbox"/>	99,990	<input type="checkbox"/>	57,850	<input type="checkbox"/>						

Pgm: PYEMPRAT – Employee Pay Rates Maintenance

The Employee Pay Rates screen is used to define the pay rates, charge out rates and billing rates for the employees within your company. Pay rates are given effective dates so that you have the ability to enter future as well as current pay rates; rates are then only calculated from the date specified.

If you have selected the employee option within the Employee Profile / pay rates, charge out and billing rate fields, the system will default to the rates indicated by the employee pay rates. If the system does not find a rate set up at this level it will look to the Employee Profile for the appropriate rate.

Trade

Enter/Select the trade code to define rates by trade for the employee. If you wish to define the pay rates for all trades in which this employee works, enter the code “**ALL**” within this field.

Effective Date

Enter the Effective Date for the pay rate you are assigning to the employee specified in the first section. The system will begin calculating this pay rate from the date specified within this field.

Pay Rate

Enter the default pay rate for this employee when pay rates are set up to default from the employee.

Charge Out Rate

Enter the default charge out rate for employees whose charge out rates are set up to default from the employee.

Billing Rate

Enter the default-billing rate for employees whose billing rates are set up to default from the employee.

Payroll Control – Rate Codes Tab

Normal Hours	Overtime Hours	Double Overtime Hours	Other Hours
REG	OT	DOT	OTHR
Regular	Overtime	Double Overtime	Other

Pgm: PYCOMPRO – Company Control File – Rate Codes Tab; standard Treeview path: Payroll > Setup > Company > Control

The Rate Codes entered here will determine the default codes used for each of the four types of standard Hours. These values are used to identify hour types in various timesheet forms. The 'Other' Hours type is also used when recording Leave time.

Normal Hours

Enter a default code for Normal Hours.

Overtime Hours

Enter the default Overtime Hours Rate Code.

Double Overtime Hours

Enter a default Double Overtime Hours Rate Code.

Other Hours

Enter the default Other Hours Rate Code.

Code Values from Rate Code Maintenance are used to define the type of hours in timesheet entry.

Pay Rate Multipliers (Rate Codes Maintenance)

RATE CODES				
RATE CODES MAINTENANCE				
* Code	Description	Short Description	Multiplier	Premium Per Hour Amt
REG	Regular	Regular	1.000	0.00
OT	Overtime	Overtime	1.500	0.00
DOT	Double Overtime	Double Overtime	2.000	0.00
Z100	Regular	Regular	1.000	0.00
Z200	Overtime	Overtime	1.500	0.00
Z300	Double Time	Double Time	2.000	0.00
Z400	Other	Other	1.000	0.00
OTHR	Other	Other	1.000	0.00
OT2	Guaranteed 50	1	1.000	0.00
ZT10	regular	regular	1.000	0.00

Pgm: PYRATCOD – Rate Codes Maintenance

Use this screen to define the Rates Codes (Pay Rate Multipliers) that will be used to calculate the pay rates associated with different types of hours within timesheet entry. Rate Codes determine the premiums for each type of hour: regular, overtime, double time or other.

As you define these codes, keep in mind that you will need to define (at minimum) the pay rates for the following class of hours; NH- Normal Hours, OT – Overtime, DOT – Double Overtime and Other. These Hour Types will appear as column headers within timesheet entry. The Rate Codes will default beside each of these types of hours in order to calculate the premium for the pay rate.

Rate Codes are defined at the Company and the Employee level. Note however, the system will use the rates for each class of hour based on the Employee Profile setting. The Company setting is only used as the default for new Employees.

Code

Enter a unique Rate Code. This code can be up to four (4) characters in length.

Description

Enter the description for this rate code. This code can be up to thirty (30) characters in length.

Short Description

Enter short name for use where space is limited. This can be up to sixteen (16) characters in length.

Multiplier

Enter the multiplier for the rate code you are defining. The multiplier is the number that will be multiplied against the base pay rate to determine the appropriate pay rate for the hours entered against this rate code.

For example, if you want normal hours to be calculated at the base rate, you would enter a multiplier factor of 1 in this field. If you want overtime to be calculated at time and a half, you would enter a multiplier factor of 1.5 in this field.

Premium Per Hour Amount

Enter the premium per hour that will be added to each hour of the rate code that is being defined to determine the appropriate pay rate.

For example, if you wish to add a \$0.10 premium to each overtime hour, enter an adjustment of .10 into this field.

Non Factor Pay Rate Multipliers

Non Factor Pay Rate Multipliers are used to set exceptions for Pay Rate Multipliers for Overtime and Double Overtime Hour Types. They can be set for Trade, Job, Union, and Employee Pay Rates, as detailed by the previous section, *Alternative Pay Rates – Pay Rate Tables*.

Employee Profile – Rates/Salary Tab

The screenshot displays the 'EMPLOYEE PROFILE' window with the 'Rates/Salary' tab selected. The 'EMPLOYEE DETAIL' section shows the employee name as 'Lincoln Isabella' and ID as 'CCC-WK-HR1'. The 'Rates/Salary' tab contains the following fields and values:

- Annual Salary: 47,250
- Hourly Rate: 47.250
- Charge Out Rate: 99.990
- Billing Rate: 57.850
- NWHR Rate: REG (Regular)
- OT Rate: OT (Overtime)
- DOT Rate: DOT (Double Overtime)
- OTH Rate: OTHR (Other)
- Preferred Pay Rate: Job
- Preferred Bill Rate: Job
- Preferred Charge Out Rate: Job
- Preferred Method for Direct Deposit Stub: Mail
- Entered Over Time:
- Entered Double Over Time:

Below these fields are dropdown menus for Company (CCC), Job, Cost Code, Category, Equipment, and Tran Code.

Pgm: PYEMPLOY – Employee Profile – Rates/Salary tab

Annual Salary

Enter the annual salary for the employee that is being defined. This field is required for the calculation of salaried wages. The system will always use the annual salary as defined by this field to calculate the wages for the period by taking the number specified within this field and dividing it by the total number of pay periods within the pay run specified.

Please note that the salary amount entered within this field is not date sensitive.

Hourly Rate (Pay Rate)

Enter the hourly rate for the employee that is being defined.

The hourly rate entered within this field is not a date sensitive rate. For date sensitive rates enter the employee pay rates within the Customer, Job, Trade, Union or Employee Pay Rate screens. The Preferred Pay Rate selection on this screen will determine the place from which the pay rates will default to the timesheet entry.

For salaried employees that require the entry of timesheets, the system will use the annual salary divided by the total standard hours (defined on the company profile) in determining the pay rate for normal hours regardless of the timesheet entry.

The hourly rate indicated within this field is only used as the 'base' hourly rate that is used against timesheet hours other than 'normal hours'. When determining overtime, double overtime and other hour types, the system will use the rate entered within this field multiplied by the factor set by the pay rate associated with these hours.

Charge Out Rate

Enter the Charge Out Rate for the employee that is being defined. The system will default the hourly rate into this field, but you can modify it as required. Charge out rates are the rates used to post costs against jobs for the hours worked on those jobs.

The hourly charge out rate entered within this field is not a date sensitive rate. For date sensitive rates enter the employee charge out rates within the Customer, Job, Trade, Union or Employee Pay Rate screens. The Preferred Charge Out Pay Rate selection on this screen will determine the place from which the charge out rates will default to the timesheet entry.

The determination of an employee's charge out rate is the same for hourly as well as salaried employees.

Billing Rate

Enter the Billing Rate for the employee that is being defined. The system will default the hourly rate into this field, but you can modify it as required. Billing rates are the rates used to post billing amounts against jobs for the hours worked on those jobs.

The hourly-billing rate entered within this field is not a date sensitive rate. For date sensitive rates enter the employee billing rates within the Customer, Job, Trade, Union or Employee Pay Rate screens. The Pref. Billing Rate selection on this screen will determine the place from which the billing rates will default to the timesheet entry.

The determination of an employee's billing rate is the same for hourly as well as salaried employees.

NWHR Rate Code (Normal Hours)

Verify / Modify the default Normal Working Hours Rate Code for the company that is being defined. This code will default from the Company Control Profile screen.

OT Rate Code (Overtime Hours)

Enter the default Overtime Rate Code for the company that is being defined. This code will default from the Company Control Profile screen.

DOT Rate Code (Double Overtime Hours)

Enter the default Double Overtime Rate Code for the company that is being defined. This code will default from the Company Control Profile screen.

OTHR Rate Code (Other Hours)

Verify / Modify the default Other Hours Rate Code for the company that is being defined. This code will default from the Company Control Profile screen.

Preferred Pay/Charge Out/Bill Rates

Enter / Select the place from which to employee pay/charge/bill rates will default within timesheet entry.

- **Pay Rate** is the rate per hour that the employee is paid for the timesheet entered.

- **Charge Out** rates are the rates used to post costs to Jobs.
- **Billing Rates** are the rate per hour on the Job timesheets that will be eventually billed to the Customer.

The system provides for the following options: Customer, Employee, Job, Trade, Union and Job/Trade.

If you select Customer, Job, Trade, Union or Job/Trade and the system cannot find the required pay rate associated with the information specified on the timesheet line, it will then try and default the rate from the Employee pay rate table. If an appropriate pay rate cannot be found within the Employee pay rate table, it will use the static information from the Employee Profile.

- Select **Customer** if the customer code is used to determine the default timesheet pay rates based on the job codes entered on the timesheet. This option is used in conjunction with the customer field on the Job Maintenance screen (within the Job Cost application) to determine the customer assigned to the job specified on the timesheet. If this option is selected you must define the pay rates by customer within the Customer Pay Rates screen.
- Select **Employee** if the default timesheet pay rates should come directly from the employee himself. If this option is selected you must define the pay rates by employee within the Employee Pay Rates screen. The Employee Pay Rates selection is an historical date sensitive way in which to outline an employee's pay rates. If date sensitive pay rates are not required, you can simply enter the desired employee pay rate within the hourly rate field specified on this screen. The system will first look to the Employee Pay Rates to determine whether a rate is defined for the period specified by the payroll run. If no rates are found for this employee within the rate table, the system will take the hourly rate from the Employee Profile for hourly employees.
- Select **Job** if the job code is used to determine the default timesheet pay rates based on the job codes entered on the timesheet. If this option is selected you must define the pay rates by job within the Job Pay Rates screen.
- Select **Trade** if the employee's trade code is used to determine the default timesheet pay rates. Trade codes that default to the timesheet comes from the trade code specified on the employee profile but can be changed on a line-by-line basis during timesheet entry. If this option is selected you must define the pay rates by trade within the Trade Pay Rates screen.
- Select **Union** if the employee's union code is used to determine the default timesheet pay rates. The union codes that defaults to the timesheet come from the union code specified on the employee profile, but can be changed on a line-by-line basis during timesheet entry. If this option is selected you must define the pay rates by union within the Union Pay Rates screen.
- Select **Job/Trade** if the default timesheet pay rates should come directly from the Job Rates if setup, and then Trade Rates if no Job Rate existed. This is a hierarchical search for rate selection starting with Job, then Trade, then if both are missing the standard search of Employee Rates, then Employee Profile rate.
- Select **Job/Union** if the default timesheet pay rates should come directly from the Job Rates if setup, and then Union Rates if no Job Rate existed. This is a hierarchical search for rate selection starting with Job, then Union, then if both are missing the standard search of Employee Rate Table, then Employee Profile rate.
- Select **Job/Union/Employee** if the default timesheet pay rates should come directly from the Job Rates if setup, then Union Rates if no Job Rate existed, then Employee Rates if neither Job nor Union rates existed. This is a hierarchical search for rate selection starting with Job, then Union, then Employee. If the Davis Beacon flag is checked on the job, the pay rate on the timesheet will be the highest of all three rates.

Preferred Method For Direct Deposit Stubs

Select the preferred by employee method for sending Direct Deposit stubs: Email, Mail or None.

Direct Deposit Email

Enter a valid e-mail address when the preferred method for Direct Deposit stubs is Email.

Minimum Hour Code

- Enter the Minimum Hour Code for the employee which is defined in the Minimum Hour Codes screen in E-time. This would be used for salaried employees. The system uses the Working Hours/Year and the Working Days/Year to calculate the number of working hours per day. This is multiplied by the number of normal working days in the E-time period (e.g. Monday to Friday). This is then multiplied by the minimum code percentage to get the minimum hours required for the individual employee for that period. The minimum hours required is truncated to a whole number and is applied in E-time timesheet entry.

Entered Overtime

If you are using E-Time and employees enter their own time, do you allow this employee to enter his/her own Overtime?

Entered Double Overtime

If you are using E-Time and employees enter their own time, do you allow this employee to enter his/her own Double Overtime?

Job / Cost Code / Category

Optionally specify any of the Job, Cost Code or Category values to default into the Timesheets for this employee. These values can be changed in the Timesheet Entry screen as required.

Equipment Number /Job Cost Code/Equipment Category /Equipment Transaction Code

Optionally specify any Equipment values to default into the Additional Values – Equipment section of the standard Timesheet entry screen for this employee. These values can be changed in the Timesheet Entry – Additional Values (Equipment tab) screen as required.

Time for Equipment will be automatically inherited from the hours recorded in the Timesheet for this equipment, but this can be modified through the Additional Values option.

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