



Construction CPM Conference

Change Management with PMWeb

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PROJECT MANAGEMENT SOLUTIONS THAT *SIMPLY WORK* SINCE 1989.

www.drmcnatty.com

Safe Harbor

- The statements made in this technical presentation are based on our current knowledge of the tools.
- Our statements should not be construed to be an official “Vendor perspective”, but are intended to be the sharing of technical and user knowledge gained as we explore new paths and technologies, usually in advance of our clients.
- You need to make your own judgments as to the application of our shared ideas in your own, unique environment.
- The slides contain default data and is not meant to solve user issues or be used for consulting purposes. This software is highly customizable and can be used from different Owner and General Contractor perspectives.

Products and Services



- Authorized Oracle Primavera, Asta Powerproject and PMWeb Software Sales
- Experienced Industry Implementation Specialists & Consultants
 - P6, Contract Management, Unifier, Asta Powerproject, and PMWeb
- Custom Integration, Analytics, Dashboards, Risk and Role-based User Access
- Program and Project System Support Services and Partnering
- Mentored and Supported Project Staffing Resources



- Cloud Based, Global Managed Hosting Services
- P6 and Asta Cloud Team Deployments Reduce the Risk of Critical Data Loss
- **Project Status**, Java-free Risk and Collaboration Using P6 Web Services
- Contract Management Interface (CMI) – Extend Your PCM Deployment

Abstract

Many Primavera Contract Management users are familiar with how Contract Management provide/allows users to organize documents and processes related to changes, including the ability to gather multiple pending changes into a single change document. The Contract Management Change Management process is used by many of our PCM clients and is certainly something that they want to be able to continue to do with whatever tool they may eventually replace PCM with in the future. DRMcNatty has researched the many available software options and has identified PMWeb as the best available solution when a client does not want to switch to Primavera Unifier. In this technical presentation Jon McNatty will demonstrate the use of PMWeb's Visual Workflow process to emulate the PCM Change Management Process.

Agenda

Change Management with PMWeb

- Overview Primavera Contract Management & PMWeb
- The 5 C's of Change Management
- Change Management in Contract Management/PMWeb
 - **Setup Workflow & Settings for Email**
 - **Create RFI**
 - **Create Change Event from RFI**
 - **Collect multiple Change Events into Change Order (Budgeted/Committed)**
 - **Approve Change Orders (Email)**
 - **Applications for Payment**
 - **Review Cost Worksheet**
- Questions

Primavera Contract Management

Overview

- PCM 14.x support ends June 2016
 - Perpetual licenses are forever, but technology is not
- Unifier is Oracle's recommended replacement for PCM
 - Unifier may be more than needed for some environments
 - Oracle has also talked about "Prime" as a migration path for PCM
- Our clients need solutions today
 - We took a good look at the solutions available "today"
 - Requirements based on 30 years experience with PCM as well as 40+ years in the construction industry
- We reviewed all major applications and selected PMWeb

The 5 C's of Change Management

- Contacts
- Cost Codes
- Contracts
- Changes (Change Management)
- Cost Worksheet



Contacts



Contacts

- Identify all companies working on the project
- List all the contacts for each company
- Copy companies & contacts from the Group list for standardization. Import/Export with Excel
- Be careful of company duplications

Cost Codes

Concrete	Cast-In-Place	Sub Costs
03	03300	SC
DIVISION	SPEC	CATEGORY

Cost Codes

- Classify different types of work for the project
- Develop cost codes using a logical system
- CSI, Bid Package, Phase of Work, Funding
- Copy cost codes from master cost code project for company standardization. Import/Export with Excel

Contracts

ACME General Contractors		CONTRACT					
1001 South Street		No. AA450-01000					
Philadelphia, PA 19100		Phone: 215-555-2011 Fax: 215-555-6889					
TO:	Standard Paving, Inc. 7 West Oak Lane 2nd Floor Camden, NJ 08000	DATE:	3/16/2003				
		PROJECT:	School Addition-Automotive Center				
		JOB:	JBAA450				
ATTN:	Jim Wesley	COMPLETED:	10/11/2003				
WORK AT		BILL TO					
ACME General Contractors 1001 South Street Philadelphia, PA 19100		ACME General Contractors 15 Rockhill Road Bala Cynwyd, PA 19004					
TERMS:		SHIP VIA:					
Item	Quantity	Units	Stock Number/Description	Unit Price	Tax Rate	Tax Amount	Net Amount
00001	135.00	Linear	15" RCP Culvert Pipe	\$9.00	0.00%	\$0.00	\$1,215.00
00002	150.00	Linear	18" RCP Culvert Pipe	\$11.00	0.00%	\$0.00	\$1,650.00
00003	216.00	Linear	24" RCP Culvert Pipe	\$14.50	0.00%	\$0.00	\$3,132.00
00004	90.00	Linear	34" X 22" HF-3	\$39.40	0.00%	\$0.00	\$3,546.00
00005	1.00	Unit	Storm Drain Type A	\$1,300.00	0.00%	\$0.00	\$1,300.00
00006	6.00	Unit	Storm Drain Type B	\$800.00	0.00%	\$0.00	\$4,800.00
00007	1.00		Lump Sum	\$507,340.00	0.00%	\$0.00	\$507,340.00
						Unit Cost:	\$522,983.00
						Unit Tax:	\$0.00
						Total:	\$522,983.00
Contracted By: Standard Paving, Inc.				Contracted By: ACME General Contractors			
Signed: _____				Signed: _____			
By: Jim Wesley				By: Steve Johnson			
Date: 2/28/2003				Date: 2/28/2003			

Contracts

- Identify all contracts for the project
- Budgeted Contracts – written to Owner or Client
- Committed Contracts – written to Contractors/Subs
- Contracts can be Lump Sum, Unit Price or both

Changes

ACME General Contractors		CONTRACT CHANGE ORDER					
1001 South Street		No. 00004					
Philadelphia, PA 19100		Phone: 215-555-2011					
		Fax: 215-555-6889					
TITLE:	Glazed Facing Tile	DATE:	11/29/2004				
PROJECT:	School Addition-Automotive Center	JOB:	JBAA450				
TO:	Attn: Jim Wesley Standard Paving, Inc. 7 West Oak Lane 2nd Floor Camden, NJ 08000 Phone: 609-555-5555 Fax: 609-555-5550	CONTRACT NO:	AA450-01000				
RE:	PCO	To:					
		From:					
		Number:	00002				
DESCRIPTION OF CHANGE							
Question : Specified tile is no longer available. please advise how to proceed							
Answer: Due to the unavailability of the Facing Tile manufacturer specified in Section 08800, we recommend "Eligence Brown" as an approved equal.							
Item	Description	Stock#	Quantity Units	Unit Price	Tax Rate	Tax Amount	Net Amount
00001	15" RCP Culvert Pipe		950.000 Linear	\$9.00	0.00%	\$0.00	\$8,550.00
00002	34" X 22" HF-3		500.000 Linear	\$39.40	0.00%	\$0.00	\$19,700.00
00003	Lump Sum		1.000	\$5,000.00	0.00%	\$0.00	\$5,000.00
						Unit Cost:	\$33,250.00
						Unit Tax:	\$0.00
						Total:	\$33,250.00
The Original Contract Sum was							\$522,983.00
Net Change by Previously Authorized Requests and Changes							\$3,000.00
The Contract Sum Prior to This Contract Change Order was							\$525,983.00
The Contract Sum Will be Increased							\$33,250.00
The New Contract Sum Including This Contract Change Order							\$559,233.00
The Contract Time Will be Increased							5 days
The Date of Substantial Completion as of this Contract Change Order Therefore is ...							10/17/2003
ACCEPTED:							
Standard Paving, Inc.				ACME General Contractors			
By:	_____	By:	_____	By:	_____		
	Jim Wesley		Steve Johnson				
Date:	11/29/2004	Date:	11/29/2004				

Changes

- Link a Change Order with a specific contract
- Budgeted changes are with the Owner or Client
- Committed changes are with the Contractors/Subs
- Can copy Committed Costs to Budgeted and apply Markup

Cost Worksheet

PRIMAVERA Expedition

Transmittal Queue | Print | Search

log out | School Addition-Automotive Center (DEMO) | April 23, 2003

Control Center > Cost Worksheet (Displayed in U.S. Dollars) | Layout: by division

Select an action... | [First] << Previous | 1 2 3 [Next >>] [Last] | expand all | collapse all

Cost Code	Title	Original Budget	Projected Budget	Projected Commitment	Original Variance	Projected Variance
01.01100.O	Summary	\$240,000.00	\$240,000.00	\$0.00	\$240,000.00	\$240,000.00
01.01300.D	Administration Requirements	\$274,264.12	\$274,264.12	\$0.00	\$274,264.12	\$274,264.12
01.01300.O	Administration Reqmnts - Schedule	\$244,500.00	\$244,500.00	\$0.00	\$244,500.00	\$244,500.00
01.01400.S	Quality Requirements - Testing	\$65,000.00	\$65,000.00	\$0.00	\$65,000.00	\$65,000.00
01.01400.V	Quality Requirements - Software	\$7,735.88	\$7,735.88	\$7,735.88	\$0.00	\$0.00
01.01500.O	Temporary Facilities and Controls	\$235,000.00	\$235,000.00	\$224,040.00	\$10,960.00	\$10,960.00
01.01500.S	Temporary Facilities and Controls	\$35,000.00	\$35,000.00	\$0.00	\$35,000.00	\$35,000.00
01.01700.D	Execution Safety Requirements	\$150,000.00	\$150,000.00	\$55,000.00	\$95,000.00	\$95,000.00
01.01700.O	Execution - Insurance & Taxes	\$65,000.00	\$65,000.00	\$45,000.00	\$20,000.00	\$20,000.00
01.01740.O	Execution Requirements - Permits	\$100,000.00	\$100,000.00	\$90,000.00	\$10,000.00	\$10,000.00
01.01750.O	Execution Requirements - Legal Fees	\$100,000.00	\$100,000.00	\$90,000.00	\$10,000.00	\$10,000.00
Subtotals:		\$1,516,500.00	\$1,516,500.00	\$511,775.88	\$1,004,724.12	\$1,004,724.12
02 : Sitework						
Cost Code	Title	Original Budget	Projected Budget	Projected Commitment	Original Variance	Projected Variance
02.02050.D	Basic Site Materials	\$121,000.00	\$121,000.00	\$0.00	\$121,000.00	\$121,000.00
02.02100.D	Site Remediation	\$150,000.00	\$150,000.00	\$0.00	\$150,000.00	\$150,000.00
02.02100.S	Excavation	\$75,000.00	\$75,000.00	\$5,500.00	\$75,000.00	\$69,500.00
02.02110.S	Site Remediation Supervision	\$26,000.00	\$26,000.00	\$0.00	\$26,000.00	\$26,000.00
02.02200.S	Site Preparation	\$48,000.00	\$48,000.00	\$0.00	\$48,000.00	\$48,000.00
Log Totals:		\$10,100,000.00	\$10,147,900.00	\$8,212,545.88	\$1,938,314.12	\$1,935,354.12

Cost Worksheet

- Track all costs in one location for entire project
- Compare Budgeted to Committed project costs
- Track all Pending and Approved Changes
- Compare the original project cost to the projected project cost through Variances

The "Five C's" Overview



Contracts

Concrete Cast-In-Place Sub Costs
03 03300 SC
 DIVISION SPEC CATEGORY

Cost Codes

They Are All Related!!!

Contracts

ACME General Contractors		CONTRACT 1 (1/1/2010)	
OFFICE: 1234567890	PHONE: 123-456-7890	DATE: 1/1/2010	NO. AA-000-01000
<p>PROJECT: 1234567890</p> <p>CONTRACT: 1234567890</p> <p>CONTRACT NO.: 1234567890</p> <p>CONTRACT DATE: 1/1/2010</p> <p>CONTRACT VALUE: \$1,000,000.00</p> <p>CONTRACT TYPE: 1234567890</p> <p>CONTRACT STATUS: 1234567890</p> <p>CONTRACT DESCRIPTION: 1234567890</p> <p>CONTRACT LOCATION: 1234567890</p> <p>CONTRACT CONTACT: 1234567890</p> <p>CONTRACT COMMENTS: 1234567890</p>			

ACME General Contractors		CONTRACT 1 (1/1/2010)	
OFFICE: 1234567890	PHONE: 123-456-7890	DATE: 1/1/2010	NO. AA-000-01000
<p>PROJECT: 1234567890</p> <p>CONTRACT: 1234567890</p> <p>CONTRACT NO.: 1234567890</p> <p>CONTRACT DATE: 1/1/2010</p> <p>CONTRACT VALUE: \$1,000,000.00</p> <p>CONTRACT TYPE: 1234567890</p> <p>CONTRACT STATUS: 1234567890</p> <p>CONTRACT DESCRIPTION: 1234567890</p> <p>CONTRACT LOCATION: 1234567890</p> <p>CONTRACT CONTACT: 1234567890</p> <p>CONTRACT COMMENTS: 1234567890</p>			

Changes

Cost Code	Title	Original Budget	Proposed Budget	Projected Commitment	Original Balance	Projected Balance
03.03300.0	Summary	\$240,000.00	\$240,000.00	\$0.00	\$240,000.00	\$240,000.00
03.03300.0	Administration Requirements - Schedule	\$274,264.12	\$274,264.12	\$0.00	\$274,264.12	\$274,264.12
03.03300.0	Administration Requirements - Schedule	\$244,000.00	\$244,000.00	\$0.00	\$244,000.00	\$244,000.00
03.03300.0	Quality Requirements - Testing	\$95,000.00	\$95,000.00	\$0.00	\$95,000.00	\$95,000.00
03.03300.0	Quality Requirements - Schedule	\$7,735.88	\$7,735.88	\$0.00	\$0.00	\$0.00
03.03300.0	Temporary Facilities and Controls	\$236,000.00	\$236,000.00	\$224,400.00	\$18,360.00	\$18,360.00
03.03300.0	Temporary Facilities and Controls	\$95,000.00	\$95,000.00	\$0.00	\$95,000.00	\$95,000.00
03.03300.0	Execution Safety Requirements	\$150,000.00	\$150,000.00	\$95,000.00	\$55,000.00	\$55,000.00
03.03300.0	Execution - Insurance & Taxes	\$85,000.00	\$85,000.00	\$45,000.00	\$40,000.00	\$40,000.00
03.03300.0	Execution Requirements - Permits	\$100,000.00	\$100,000.00	\$90,000.00	\$10,000.00	\$10,000.00
03.03300.0	Execution Requirements - Legal Fees	\$100,000.00	\$100,000.00	\$90,000.00	\$10,000.00	\$10,000.00
Subtotal:		\$1,516,500.00	\$1,516,500.00	\$511,775.88	\$1,004,724.12	\$1,004,724.12

Cost Worksheet

Change Management Needs

- Accurately reflect your companies Change Order process through Project Settings
- Central location for entry of all Change Order documents involved in the Change
- Record Subcontractor Estimates or Proposals and track the Negotiation rounds
- Initiate the Change Management process from a source document such as an RFI



Change Management with Contract Management

Change Management Workflow

▼ Change Management

Budgeted

Estimated
Document Estimate (EST) Estimated

Quoted
Document Proposed Change Order (PCO) Cost Type Pending

Negotiated
Document Proceed Order (PRO) Cost Type Pending

Final
Document Contract Change Order (CCO) Cost Type Pending

Committed

Estimated
Document Request for Proposal (RFP) Cost Type Estimated

Quoted
Document Change Order Request (COR) Cost Type Pending

Negotiated
Document Proposed Change Order (PCO) Cost Type Pending

Final
Document Contract Change Order (CCO) Cost Type Pending

Select where the document displays on the Cost Worksheet

Select the type of change document from a drop down list

Initiate Change Management from an RFI

PRIMAVERA

log out | School Addition-Automotive Center (DEMO)

Control Center > Request for Information Log >

Request for Information

Spelling #Bc
Print Form
Print Preview

Initiate CM Go

[return to log](#)
[return to control center](#)

Type*	Request for Information
To*	Design Group Chris Atkinson
From*	ACME General Contractors Steve Johnson
Number*	00003
Date	Apr 3, 2003
Title	Glazed Facing Tile

▶ Status - Chris Atkinson Closed

▶ Question

▶ Answer

▶ Details

▶ Drawings

▶ Schedule

▶ Issues

▶ Attachments

Save Cancel

Select "Initiate CM"
from the drop down list
and click the "Go"
button

Change Management Document

Control Center > Change Management Log > [Return to Request for Information](#)

Change Management [issues](#) [attachments](#) [contract summary](#)

[expand all](#) [collapse all](#)

[Edit Document](#) [Print Form](#) [Print Preview](#) [Add Document](#)

Select an action...

[return to Request for Information](#)
[return to log](#)
[return to control center](#)

Change Management

Number* 00012
 Dated Mar 5, 2005
 Title Glazed Facing Tile

Phase

Phase	Estimated Cost	Quoted Cost	Negotiated Cost	Final Cost	Projected Cost
Budgeted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Status - Chris Atkinson [New Item](#)

Budget

Commitments

Total Included Commitments: \$0.00

Include	Contract/PO	Estimated (RFP)			Quoted (COR)			Negotiated (PCO)			Final (CCO)		
		Cost	Time	Date	Cost	Time	Date	Cost	Time	Date	Cost	Time	Date

Remarks

Documents by Phase

Details

Issues [top of page](#)

Attachments [top of page](#)

Annotations:
 - A blue box points to the Title field with the text: "Copies the Title over from the RFI document".
 - A blue box points to the "Add Multiple Estimates" button with the text: "Click the 'Add Multiple Estimates' button to create the RFP to the Subcontractors".

Create RFP's to Subcontractors

http://127.0.0.1 - Add Multiple Estimates - Microsoft Internet Explorer

Add Multiple Estimates [help](#)

From * ACME General Contractors
Steve Johnson [select..](#)

Change Date *

Required Date

Title

Remarks
Please provide a proposal for any additional time or schedule impact.
Question : Specified tile is no longer available. please advise how to proceed
Answer : Due to the unavailability of the Facing Tile manufacturer specified in Section 08800, we recommend "Elgiene Brown" as an approved equal.

[Add Companies](#)

Standard Paving, Inc. [unselect](#)

[Finish](#) [Cancel](#)

Primavera Internet

Provide comments to give the Subcontractors direction for the RFP

Change Management copies the Question and Answer from the RFI

Click the "Add Companies" button select Subcontractors to Receive an RFP

RFP - Request for Proposal Document

ACME General Contractors		REQUEST FOR PROPOSAL
1001 South Street		No. 00005
Philadelphia, PA 19100		Phone: 215-555-2011 Fax: 215-555-6889
TITLE:	Glazed Facing Tile	DATE: 3/8/2005
PROJECT:	School Addition-Automotive Center	JOB: JBAA450
TO:	Attn: Jim Wesley Standard Paving, Inc. 7 West Oak Lane 2nd Floor Camden, NJ 08000 Phone: 609-555-5555 Fax: 609-555-5550	CONTRACT NO: AA450-01000
DESCRIPTION OF PROPOSAL		
Please provide pricing and schedule impact.		
Question : Specified tile is no longer available. please advise how to proceed		
Answer : Due to the unavailability of the Facing Tile manufacturer specified in Section 08800, we recommend "Elgiene Brown" as an approved equal.		

Initiate Change Management from an RFI

PRIMAVERA

log out | School Addition-Automotive Center (DEMO)

Control Center > Request for Information Log >

Request for Information

Spelling #BGC
Print Form
Print Preview

Initiate CM [Go]

[return to log](#)
[return to control center](#)

Type*	Request for Information
To*	Design Group Chris Atkinson
From*	ACME General Contractors Steve Johnson
Number*	00003
Date	Apr 3, 2003
Title	Glazed Facing Tile

▶ Status - Chris Atkinson Closed

▶ Question

▶ Answer

▶ Details

▶ Drawings

▶ Schedule

▶ Issues

▶ Attachments

Save Cancel

Select "Initiate CM"
from the drop down list
and click the "Go"
button

Change Management Document

Control Center > Change Management Log > [Return to Request for Information](#)

Change Management [issues](#) [attachments](#) [contract summary](#)

[expand all](#) [collapse all](#)

Change Management

Number* 00012
 Dated Mar 5, 2005
 Title Glazed Facing Tile

Phase

Phase	Estimated Cost	Quoted Cost	Negotiated Cost	Final Cost	Projected Cost
Budgeted	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Committed	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Status - Chris Atkinson ♦ New Item

Budget

Commitments

[Add](#) [Add Multiple Estimates](#) Total Included Commitments: \$0.00 [Copy Commitments to Budget](#)

Include	Contract/PO	Estimated (RFP)			Quoted (COR)			Negotiated (PCO)			Final (CCO)		
		Cost	Time	Date	Cost	Time	Date	Cost	Time	Date	Cost	Time	Date

Remarks

Documents by Phase

Details

Issues [top of page](#)

Attachments [top of page](#)

Annotations:

- Copies the Title over from the RFI document
- Click the "Add Multiple Estimates" button to create the RFP to the Subcontractors

Create RFP's to Subcontractors

The screenshot shows a web browser window titled "Add Multiple Estimates" with the URL "http://127.0.0.1 - Add Multiple Estimates - Microsoft Internet Explorer". The form contains the following fields and elements:

- From ***: ACME General Contractors, Steve Johnson (with a [select..](#) link)
- Change Date ***: Mar 8, 2005 (with a calendar icon)
- Required Date**: Mar 15, 2005 (with a calendar icon)
- Title**: Glazed Facing Tile
- Remarks**: A text area containing the text: "Please provide a proposal for any additional time or schedule impact. Question : Specified tile is no longer available. please advise how to proceed Answer : Due to the unavailability of the Facing Tile manufacturer specified in Section 08800, we recommend 'Elgiene Brown' as an approved equal."
- Add Companies**: A button that, when clicked, reveals a list of subcontractors.
- Subcontractors List**: A list containing "Standard Paving, Inc." with an [unselect](#) link next to it.
- Buttons**: "Finish" and "Cancel" buttons at the bottom of the form.

Three callout boxes provide additional instructions:

- Callout 1 (left): "Provide comments to give the Subcontractors direction for the RFP" points to the Remarks field.
- Callout 2 (right): "Change Management copies the Question and Answer from the RFI" points to the Remarks field.
- Callout 3 (bottom): "Click the 'Add Companies' button select Subcontractors to Receive an RFP" points to the Add Companies button.

RFP - Request for Proposal Document

ACME General Contractors		REQUEST FOR PROPOSAL
1001 South Street		No. 00005
Philadelphia, PA 19100	Phone: 215-555-2011	
	Fax: 215-555-6889	
TITLE: Glazed Facing Tile		DATE: 3/8/2005
PROJECT: School Addition-Automotive Center		JOB: JBAA450
TO: Attn: Jim Wesley		CONTRACT NO: AA450-01000
Standard Paving, Inc.		
7 West Oak Lane		
2nd Floor		
Camden, NJ 08000		
Phone: 609-555-5555 Fax: 609-555-5550		
DESCRIPTION OF PROPOSAL		
Please provide pricing and schedule impact.		
Question : Specified tile is no longer available. please advise how to proceed		
Answer : Due to the unavailability of the Facing Tile manufacturer specified in Section 08800, we recommend "Elgiene Brown" as an approved equal.		

Create the COR document

The screenshot shows a web browser window with the address bar displaying 'http://127.0.0.1 - Commitment - Microsoft Internet Explorer'. The main content area is divided into two sections: 'Estimated (RFP)' and 'Quoted (COR)'. The 'Estimated (RFP)' section contains a table with the following data:

Estimated (RFP)		edit this phase
Cost	0.00	
Time Change (days)	0	
Document Date	Mar 8, 2005	
♦ Glazed Facing Tile (00005, 3/8/05, Standard Paving, Inc.)		

A callout box points to the link in the 'Estimated (RFP)' section with the text: 'Can access the RFP by clicking the "Link"'. Below the 'Estimated (RFP)' section is the 'Quoted (COR)' section, which contains a table with the following data:

Quoted (COR)	
Cost	0.00
Time Change (days)	<input type="button" value="Start Quoted Phase"/>
Document Date	

A callout box points to the 'Start Quoted Phase' button with the text: 'Click the "Start Quoted Phase" button to enter the proposal value from the subcontractor'. A blue arrow also points from the 'Start Quoted Phase' button back to the 'Estimated (RFP)' section.

Create the PCO Document

Number

Estimated (RFP)

Cost	0.00
Time Change (days)	0
Document Date	Mar 8, 2005

• [Glazed Facing Tile \(00006, 3/8/05, Standard Paving, Inc.\)](#)

Quoted (COR) [edit this phase](#) [clear phase](#)

Cost	9600.00
Time Change (days)	0
Document Date	Mar 8, 2005

• [Glazed Facing Tile \(00004, 3/8/05, Standard Paving, Inc.\)](#)

Negotiated (PCO)

Cost	0.00
Time Change (days)	<input type="button" value="Start Negotiated Phase"/>
Document Date	

Click the "Start Quoted Phase" button to enter the final agreed Negotiated \$ value amount

Copy Commitments to Budget

http://127.0.0.1 - Copy Commitments to Budget - Microsoft Internet Explorer

Copy Commitments to Budget

This will start a budgeted phase and copy the line items from included commitments (total value: \$9,300.00) into the new budgeted document. It will not close or modify the commitments.

Select budgeted phase to start:

Estimated (Estimate)
 Quoted (Proposed Change Order)
 Negotiated (Proceed Order)
 Final (Contract Change Order)

Apply markup to the new document

OK Cancel

Primavera Internet

Click and choose the "Quoted" for the PCO to the Owner

Totals the Proposal \$ Values from the Subcontractor

Make sure the "Apply Markup" is checked. By default it is always checked

PCO – Proposed Change Order to the Owner

ACME General Contractors		PROPOSED CHANGE ORDER	
15 Rockhill Road		No. 00009	
Bala Cynwyd, PA 19004		Phone: 610-555-2345 Fax: 610-555-2349	
TITLE:	Glazed Facing Tile	DATE:	3/8/2005
PROJECT:	School Addition-Automotive Center	JOB:	JBAA450
TO:	Attn: Michael Stull Philadelphia County 2400 Chestnut St 12th Floor Philadelphia, PA 19049 Phone: 215-555-3200 Fax: 215-555-5857	CONTRACT NO:	AA450-00012
RE:	To:	From:	Number:
DESCRIPTION OF PROPOSAL			
Question : Mason has requested substituting the required tile. We recommend Elgiane Brown as an approved equal. Please advise as to your decision as soon as possible.			
Answer : Please note our acceptance. However, please be aware that the base must flush with the walls. We will not accept a base that project beyond the face of the wall.			
This will be made at no additional expense to the owner.			
Item	Description	Stock#	Quantity Units
00001	15" RCP Culvert Pipe		500.000 Linear
00002	Lump Sum		1.000
00003	Storm Drain Type A		2.000 Unit
			Subtotal:
			\$9,300.00
Description		Markup Percent	Markup Amount
Overhead		10.000%	\$930.00
Profit		10.000%	\$930.00
Total Cost:			\$11,160.00

Detail of all the Line Items

Display the Markup

Total const of the PCO to the Owner

Approve the Owner Change Order

Contract Change Order	
Type *	Contract Change Order
Contract *	Summary (AA450-00012)
To *	Philadelphia County Michael Stull select...
From *	ACME General Contractors Charlie Jones select...
Number *	00008
Title	<input type="text" value="Glazed Facing Tile"/>
Date	<input type="text" value="Mar 8, 2005"/>
Total Cost	\$11,160.00
Time Change (days)	0
Status - Michael Stull New Item	
Ball in Court	Philadelphia County Michael Stull select...
Priority	<input type="text" value="Normal"/>
Status	<input type="text" value="New Item"/>
Approved?	no approve and save
Approved by	
Company	<input type="text" value="ACME General Contractors"/>
Contact	<input type="text" value="Charlie Jones"/> select...
Approved Date	<input type="text" value="Mar 8, 2005"/>
Approved by	
Company	<input type="text" value="Philadelphia County"/>
Contact	<input type="text" value="Michael Stull"/> select...
Approved Date	<input type="text" value="Mar 7, 2005"/>

Click the "approve and save" to approve the Change Order

Provide the date the General Contractor signed the CO

Provide the date the Owner signed the CO

Documents By Phase

Documents by Phase

Commitments

Display Only Included Commitments

Title	Required Date	Current Status	Include	Cost
Commitments Estimated (RFP)				
◊ Glazed Facing Tile (00006, 3/8/05, Standard Paving, Inc.)	Mar 15, 2005	CLO	✓	\$0.00
Total Included:				\$0.00
Commitments Quoted (COR)				
◊ Glazed Facing Tile (00004, 3/8/05, Standard Paving, Inc.)	Mar 15, 2005	CLO	✓	\$9,600.00
Total Included:				\$9,600.00
Commitments Negotiated (PCO)				
◊ Glazed Facing Tile (00002, 3/8/05, Standard Paving, Inc.)	Mar 15, 2005	CLO	✓	\$9,300.00
Total Included:				\$9,300.00
Commitments Final (CCO)				
◊ Glazed Facing Tile (00004, 3/8/05, Standard Paving, Inc.)	Mar 15, 2005	APP	✓	\$9,300.00
Total Included:				\$9,300.00
Budget				
Title	Required Date	Current Status		Cost
Budget Quoted (PCO)				
◊ Glazed Facing Tile (00009, 3/8/05, ACME General Contractors)	Mar 15, 2005	CLO		\$11,160.00
Total Included:				\$11,160.00
Budget Final (CCO)				
◊ Glazed Facing Tile (00008, 3/8/05, ACME General Contractors)	Mar 15, 2005	APP		\$11,160.00
Total Included:				\$11,160.00

Approved Subcontractor Change Order

Approved Owner Change Order

Cost Worksheet

[First] << Previous] 1 2 3 [Next >>] [Last] Find				Original Commitment	Approved Commitment	Revised Commitment
Cost Code	Title	et				
01 01100 O	Summary	00		\$0.00	\$0.00	\$0.00
01 01300 D	Administration Requirements	2		\$10,000.00	\$0.00	\$10,000.00
01 01300 O	Administration Reqmnts - Schedule	00		\$0.00	\$0.00	\$0.00
01 01400 S	Quality Requirements - Testing	00		\$0.00	\$0.00	\$0.00
01 01400 V	Quality Requirements - Software	88		\$7,735.88	\$0.00	\$7,735.88
01 01500 O	Temporary Facilities and Controls	00		\$224,040.00	\$0.00	\$224,040.00
01 01500 S	Temporary Facilities and Controls	00		\$0.00	\$0.00	\$0.00
01 01700 D	Execution Safety Requirements	00		\$55,000.00	\$0.00	\$55,000.00
01 01700 O	Execution - Insurance & Taxes	00		\$45,000.00	\$0.00	\$45,000.00
01 01740 O	Execution Requirements - Permits	00		\$90,000.00	\$0.00	\$90,000.00
01 01750 O	Execution Requirements -Legal Fees	00		\$90,000.00	\$0.00	\$90,000.00
02 02050 D	Basic Site Materials	00		\$0.00	\$0.00	\$0.00
02 02100 D	Site Remediation	00		\$0.00	\$0.00	\$0.00
02 02100 S	Excavation	00		\$700,000.00	\$2,200.00	\$702,200.00
02 02110 S	Site Remediation Supervision	00		\$0.00	\$0.00	\$0.00
02 02200 S	Site Preparation	00		\$0.00	\$0.00	\$0.00
02 02300 S	Earthwork & Landscaping	00		\$0.00	\$7,100.00	\$7,100.00
02 02500 S	Utility Services	00		\$0.00	\$0.00	\$0.00
02 02700 S	Bases and Paving	00		\$0.00	\$0.00	\$0.00
02 02950 D	Site Restoration & Rehabilitation	00		\$100,000.00	\$0.00	\$100,000.00
03 03300 S	Cast-in-Place Concrete	00		\$1,776,600.00	\$0.00	\$1,776,600.00
03 03400 V	Precast Concrete	00		\$31,500.00	\$0.00	\$31,500.00
04 04200 S	Masonry Units	00		\$813,150.00	\$0.00	\$813,150.00
05 05200 S	Metal Joists	00		\$49,500.00	\$0.00	\$49,500.00
05 05300 S	Metal Deck	00		\$85,500.00	\$0.00	\$85,500.00
Log Totals:			0	\$8,724,685.88	\$24,650.00	\$8,749,335.88

Subcontractor Change Order

\$2,200.00
 + \$7,100.00
\$9,300.00 = Subcontractor

Change Management with PMWeb



Change Management with PMWeb

Overview - Multi-project access

The screenshot displays the PMWeb interface for 'Engineering Forms > RFIs'. The left sidebar shows a navigation menu with categories like Planning, Engineering Forms, Cost Management, Scheduling, Asset Management, and Workflow. The main area contains a table of RFIs with columns for Project #, Record #, Project Name, Description, Workflow Status, To, and From. A red box highlights the 'Project #' column, which contains values such as RVS0104, U-200, MH-955, and U-201. The table also includes a 'From' column with names like Hillcrest General Contractors, Wagner & Williams, and Rockwell Architects.

Project #	Record #	Project Name	Description	Workflow Status	To	From
RVS0104	000002	Boston Medical Center	HSS Location at Window Jam	Approved	Hillcrest General Contractors - Mike M	Best Door and Window - Neil Younger
RVS0104	000003	Boston Medical Center	Questions over document 23	Approved	Wagner & Williams - Karen Watson	A+ Electric, Inc. - Tom Harker
RVS0104	000004	Boston Medical Center	Conflict	Submitted		PMWeb, Inc. - Matt Damon
RVS0104	000005	Boston Medical Center	Drawing A-500 Issues	Approved	Rockwell Architects - Janice Rockwe	Best Door and Window - Neil Younger
RVS0104	000006	Boston Medical Center	Purchase Order	Submitted		
RVS0104	000007	Boston Medical Center	HSS Location at Window Jam	Approved	Hillcrest General Contractors - Mike M	Best Door and Window - Neil Younger
RVS0104	000008	Boston Medical Center		Approved		
RVS0104	000009	Boston Medical Center		Submitted		
RVS0104	001A	Boston Medical Center	Dons RFI	Draft	DRMcNatty & Associates, Inc - Don M	DRMcNatty & Associates, Inc - Don M
RVS0104	000006	Boston Medical Center	Banner Pole Assemblies	Approved	Rockwell Architects - Ann Rockwell	Best Door and Window - Frank Jones
RVS0104	000007	Boston Medical Center	General Requirements for RF	Approved	Rockwell Architects - Cliff Rockwell	A+ Electric, Inc. - Carrol Nash
U-200	000001	HBS Baker Library	Dimensions at Architectural S	Submitted	Wagner & Williams - Karen Watson	Hillcrest General Contractors - Mike M
U-200	000002	HBS Baker Library	Dimensions at Stairs # 5 & #3	Submitted	Wagner & Williams - Karen Watson	Hillcrest General Contractors - Mike M
U-200	000003	HBS Baker Library	Dimensions of window #3	Draft	Wagner & Williams - Karen Watson	A+ Electric, Inc. - Tom Harker
U-200	000004	HBS Baker Library	Drawing Clarification	Submitted		
U-200	000005	HBS Baker Library	Dimensions at Architectural S	Draft	Wagner & Williams - Karen Watson	Hillcrest General Contractors - Mike M
MH-955	000001	Florida Perimeter Highway	Found buried abandoned tank	Submitted	Florida DOT - Michael Ritter	Blue Ridge Highway Contractors - Da
MH-955	000002	Florida Perimeter Highway	Rough Grade stakes are not	Draft	Florida DOT - Michael Ritter	Blue Ridge Highway Contractors - Sc
MH-955	000003	Florida Perimeter Highway	Missing plan details	Draft	Florida DOT - Bryn Fosburgh	Blue Ridge Highway Contractors - Sc
U-201	000001	Harvard Square Station	Bid Inquiry	Draft	Blue Ridge Highway Contractors - Sc	Best Door and Window - Frank Jones

Change Management with PMWeb

Overview - Full Cost Management

Project* Periods from to

Worksheet

Details Notes Attachments

Drag a column header and drop it here to group by that column

+ Add

Cost Code	Cost Code Description	Original Budget	Budget Changes-Pending	Budget Changes-Approved	Revised Budget	Original Commitments
> 02-02100-S	Excavation	\$75,000.00	\$0.00	\$1,000.00	\$76,000.00	\$5,000.00
> 02-02110-S	Site Remediation Supervision	\$26,000.00	\$0.00	\$0.00	\$26,000.00	\$0.00
> 02-02200-S	Site Preperation	\$48,000.00	\$0.00	\$0.00	\$48,000.00	\$0.00
> 02-02300-S	Earhwork & Landscaping	\$250,000.00	\$0.00	\$1,000.00	\$251,000.00	\$5,000.00
> 02-02500-S	Utility Services	\$105,000.00	\$0.00	\$0.00	\$105,000.00	\$0.00
> 02-02700-S	Bases and Paving	\$66,500.00	\$0.00	\$0.00	\$66,500.00	\$0.00
> 02-02950-D	Site Restoration & Rehabilitation	\$20,000.00	\$0.00	\$0.00	\$20,000.00	\$0.00
> 03-03300-S	Cast-in-Place Concrete	\$1,755,000.00	\$0.00	\$0.00	\$1,755,000.00	\$0.00
> 03-03400-V	Precast Concrete	\$35,000.00	\$0.00	\$0.00	\$35,000.00	\$0.00
> 04-04200-S	Masonry Units	\$835,000.00	\$0.00	\$0.00	\$835,000.00	\$0.00
> 05-05200-S	Metal Joists	\$55,000.00	\$0.00	\$0.00	\$55,000.00	\$0.00
> 05-05300-S	Metal Deck	\$95,000.00	\$0.00	\$0.00	\$95,000.00	\$0.00
> 05-05400-S	Cold-Formed Metal Framing	\$90,000.00	\$0.00	\$0.00	\$90,000.00	\$0.00
> 05-05500-S	Metal Fabrications	\$85,000.00	\$0.00	\$0.00	\$85,000.00	\$0.00
> 06-06100-S	Rough Carpentry	\$550,000.00	\$0.00	\$0.00	\$550,000.00	\$0.00
> 06-06400-S	Architectural Woodwork	\$295,000.00	\$0.00	\$0.00	\$295,000.00	\$0.00
> 07-07100-S	Bituminous Dampproofing	\$60,000.00	\$0.00	\$0.00	\$60,000.00	\$0.00
		10,000,000.00	0.00	2,200.00	10,002,200.00	1,830,000.00

Change Management with PMWeb

Overview Security – Standard Group Templates

Group*	Project Managers	Description*	Project Managers		
Menu Item	Full Control	View	Create	Delete	Edit
▶ Planning	<input type="checkbox"/>				
▶ Engineering Forms	<input type="checkbox"/>				
▼ Cost Management	<input type="checkbox"/>				
▶ Contracts	<input checked="" type="checkbox"/>				
▶ Requisitions	<input checked="" type="checkbox"/>				
▶ A/R Payments	<input checked="" type="checkbox"/>				
▶ Online Change Requests	<input checked="" type="checkbox"/>				
▶ A/R Payment Batches	<input type="checkbox"/>				
▶ Master Commitments	<input type="checkbox"/>				
▶ Change Events	<input checked="" type="checkbox"/>				
▶ Header					
▶ Details		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶ Adjustments		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶ Specifications		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶ Notes		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶ Attachments		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶ Notifications		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
▶ Checklists		<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

Change Management with PMWeb

Overview - Dashboard

Controls Dashboard **Project Center** Portfolio View Map View W8 Project Asset Infographic Google Map Harvard Map Subway Ma

Harvard Baker Library Renovations + Create Project + Create From Template Save Print

Program HBS
Project ID* U-202
Name* Harvard Baker Library Renovations
Location DISTRICT 3 - Harvard Business
Project Status In Negotiation
Project Type Renovations
Category -- Select --
Status Draft
Currency Dollar (United States of America)
Target Budget \$1,500,000.00
Target Revenue \$0.00
Target Duration 0 UOM -- Sele
Target Start/Finish
Actual Start/Finish
Percent Complete 0.00%
Scope



Select multiple files to upload

Navigator

- Planning
- Engineering Forms

Record Type	Pending	Approved
Action Items	0	0
Correspondence	2	0
Daily Reports	3	0
Drawing Lists	1	0
Drawing Sets	0	0
Meeting Minutes	1	0
Online Submittals	0	0
Punch Lists	0	0
RFIs	3	0
Safety Forms	0	0
Submittal Sets	1	0
Submittal Items	0	0
Transmittals	5	0
Accident Investigation	0	0
Executive Summary	2	0

- Cost Management

Record Type	Pending	Approved
A/P Payment Batches	0	0
A/P Payments	0	0
A/R Payment Batches	0	0
A/R Payments	0	0
Budget Requests	1	0
Budgets	1	0
Change Events	1	0
Commitment COs	3	0

Schedule

Target: Projected: 3/7/2010 - 6/20/2010

Budget

Target: \$1,500,000.00
 Anticipated Cost: \$493,000.00

Custom Fields

Proj Spec **Regions Fields**

Edit

Spec	UOM	Data
Project time	year	
Client		
Project Manager		
CP Number		
RFC Manager		

Change Management with PMWeb

The 5 C's of Change Management - Contacts

- PORTFOLIO/List/Companies
- Identify all companies working on the project
- List all the contacts & general information for each contact

The screenshot displays the PMWeb interface. On the left, a navigation menu includes 'Lists', 'Companies', 'Pay Types', 'Resources', 'Classifications Matrix', 'Items', 'Adjustments', 'Adjustment Groups', 'Periods', 'Close-Open Periods', 'Planning', 'Engineering Forms', 'Cost Management', 'Scheduling', 'Asset Management', and 'Workflow'. The 'Companies' menu item is highlighted with a red box.

The main window shows a table of companies with columns: Record #, Company Name, Created By, Address 1, Zip, City, State, Phone, and Fax. The row for 'ACME General Contractors' is highlighted with a red box. Below this, a detailed view of the contact is shown, also with a red box. The contact details include:

- Company ID*: ACME
- Name*: ACME General Contractors
- Type: -- Select --
- Abbreviation:
- Reference:
- PMWeb Account ID:
- Account #:
- Federal Tax ID:
- State Tax ID:
- Country: -- Select --
- Billing Terms: -- Select --

Below the contact details, there is a table of contacts with columns: ID, First Name, Last Name, Address, Title, Cell, and Email. The row for 'CJONES' is highlighted with a red box.

ID	First Name	Last Name	Address	Title	Cell	Email
CJONES	Charlie	Jones	OFFICE	Construction Manager	610-555-2345	cjones@acmegc.com
SJOHNSON	Steve	Johnson	FIELD	Project Manager	215-555-6889	sjohnson@acmegc.com

Change Management with PMWeb

The 5 C's of Change Management - Cost Codes

- COST MANAGEMENT/Budgets/Cost Codes
- Customize Cost Code Values
- Use Microsoft Excel to Import/Export

The screenshot displays the PMWeb Cost Management interface. On the left, a navigation pane shows 'Cost Management' with sub-items like 'Budgets', 'Cost Codes', 'Cost Ledgers', etc. The 'Cost Codes' item is highlighted with a red box. The main area shows a table of Cost Codes for 'School Addition Automotive Center'. The first row, '001 CSI Division' with 2 characters, is highlighted with a red box. Below this is a 'Details' section with a table of Cost Codes. An 'Export To Excel' button is visible. A 'Cost Level Values' dialog box is open, showing a list of levels with descriptions. The 'Paste From Excel' and 'Export To Excel' buttons in this dialog are also highlighted with a red box. A red arrow points from the 'Export To Excel' button in the dialog to the 'Export To Excel' button in the main interface.

Level #	Description*	# of Characters	Values
001	CSI Division	2	
002	Specification Section	5	
003	Cost Category	1	

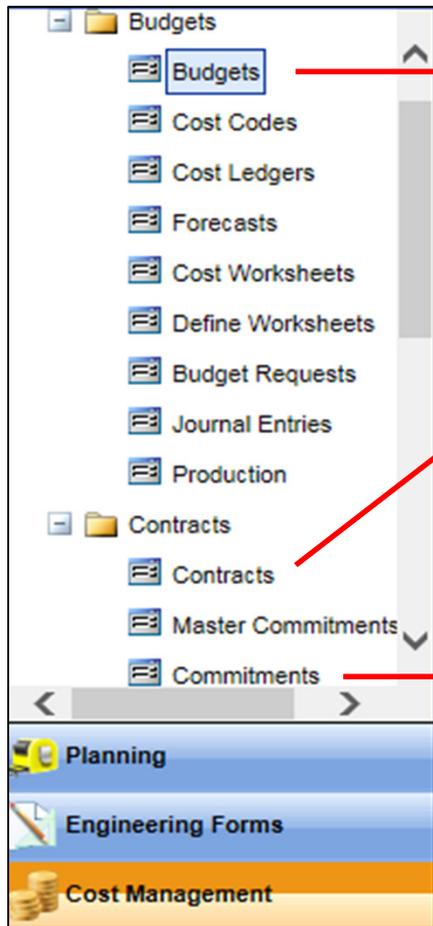
Inactive	Cost Code	Description
<input type="checkbox"/>	00-01100-D	Overhead & Profit
<input type="checkbox"/>	00-01100-O	Contingency
<input type="checkbox"/>	01-01100-O	Summary
<input type="checkbox"/>	01-01300-D	Administration Requirements
<input type="checkbox"/>	01-01300-O	Administration Requirements-Schedule

ID*	Description	Text 1
00	Pre-Construction Requirements	
01	General Construction Requirements	
02	Sitework	
03	Concrete	
04	Masonry	
05	Metals	

Change Management with PMWeb

The 5 C's of Change Management - Contracts

- COST MANAGEMENT/CONTRACTS – General Contractor Perspective

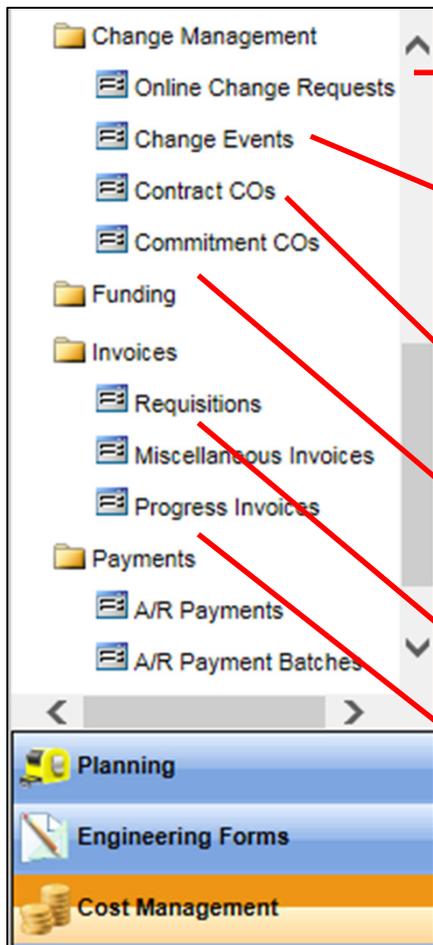


- Overall Project Budget – populates the Original Budget column in the Cost Worksheet
- Contract between the Owner and the General Contractor – populates the Original Income column in the Cost Worksheet
- Contract between the General Contractor and Subcontractors/Vendors – populates the Original Commitments column in the Cost Worksheet

Change Management with PMWeb

The 5 C's of Change Management - Changes (Change Management)

- COST MANAGEMENT/CHANGE MANAGEMENT – General Contractor Perspective



- Change Request against Committed Contract only, can collect multiple OCR into one Change Order
- Create Change Event (Potential Change) from an RFI, can be Budgeted or Committed, can collect multiple CE into one Change Order
- Change order to the Budgeted Contract, can collect OCR and CE into one Change Order
- Change order to the Committed Contract, can collect OCR and CE into one Change Order
- Create Application for Payment for the Budgeted Contract
- Create Application for Payment for the Committed Contract

Change Management with PMWeb

The 5 C's of Change Management - Cost Worksheet

- COST MANAGEMENT/BUDGETS

Project* Periods from to

Worksheet

Details Notes Attachments

Drag a column header and drop it here to group by that column

+ Add

Cost Code	Cost Code Description	Original Budget	Budget Changes-Pending	Budget Changes-Approved	Revised Budget	Original Commitments
02-02100-S	Excavation			\$1,000.00	\$76,000.00	\$5,000.00
02-02110-S	Site Remediation Supervision	\$26,000.00	\$0.00	\$0.00	\$26,000.00	\$0.00
02-02200-S	Site Preperation	\$48,000.00	\$0.00	\$0.00	\$48,000.00	\$0.00
02-02300-S	Earhwork & Landscaping	\$250,000.00	\$0.00	\$1,000.00	\$251,000.00	\$5,000.00
02-02500-S	Utility Services	\$105,000.00	\$0.00	\$0.00	\$105,000.00	\$0.00
02-02700-S	00-01100-D Overhead & Profit		\$0.00	\$0.00	\$200.00	\$0.00
02-02950-D	Site Restoration & Rehabilitation	\$20,000.00	\$0.00	\$0.00	\$20,000.00	\$0.00
03-03300-S	Cast-in-Place Concrete	\$1,755,000.00	\$0.00	\$0.00	\$1,755,000.00	\$0.00
03-03400-V	Precast Concrete	\$35,000.00	\$0.00	\$0.00	\$35,000.00	\$0.00
04-04200-S	Masonry Units	\$835,000.00	\$0.00	\$0.00	\$835,000.00	\$0.00
05-05200-S	Metal Joists	\$55,000.00	\$0.00	\$0.00	\$55,000.00	\$0.00
05-05300-S	Metal Deck	\$95,000.00	\$0.00	\$0.00	\$95,000.00	\$0.00
05-05400-S	Cold-Formed Metal Framing	\$90,000.00	\$0.00	\$0.00	\$90,000.00	\$0.00
05-05500-S	Metal Fabrications	\$85,000.00	\$0.00	\$0.00	\$0.00	\$0.00
06-06100-S	Rough Carpentry	\$550,000.00	\$0.00	\$0.00	\$295,000.00	\$0.00
06-06400-S	Architectural Woodwork			\$0.00	\$60,000.00	\$0.00
07-07100-S	Bituminous Dampproofing	\$60,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Original Budget		10,000,000.00	0.00	2,200.00	10,002,200.00	1,830,000.00

Approved Change Order

Subtotal all Approved Changes

Revised Budget Total

Change Management with PMWeb

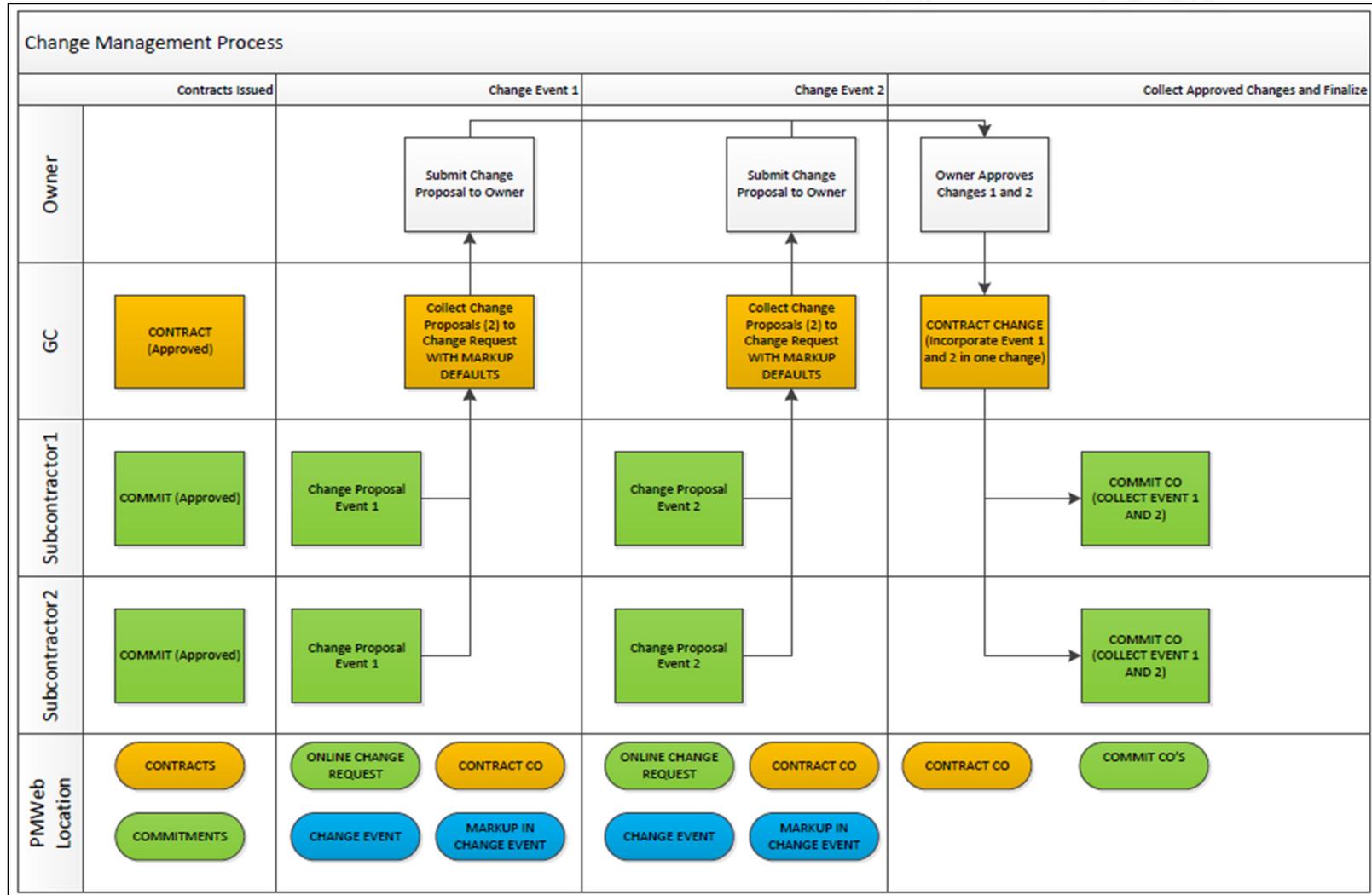
Cost and Change Management Documents

General Contractor Perspective

Default/UD	Document Type	Status	\$ Value Entered	Column in Cost Worksheet	Column in Cost Worksheet
Default	Budgets	Draft	Original Project Budget	Original Owner Budget Pending	Original Project Budget Pending
Default	Budgets	Approved	Original Project Budget	Original Owner Budget Approved	Original Project Budget Approved
Default	Contracts	Draft	Total Cost	Original Income - Pending	
Default	Contracts	Approved	Total Cost	Original Income - Approved	
Default	Commitments	Draft	Adjustment 1/UOM Cost	Original Commitments - Pending	
Default	Commitments	Approved	Adjustment 1/UOM Cost	Original Commitments - Approved	
User Defined	Variance	Auto Calc	Auto Calc	Variance Budgeted - Committed	
Default	Change Event	Draft	Ext. Cost	Commitment Changes - Pending	
Default	Change Event	Approved	Ext. Cost	Commitment Changes - Approved	
Default	Online Change Requests	Draft/Approved	Ext. Cost	None	
Default	Online Change Requests	Draft/Approved	Ext. Cost	None	
Default	Contracts/CO's	Draft	Owner Budget	Income Changes - Pending	
Default	Contracts/CO's	Approval	Owner Budget	Income Changes - Approved	
Default	Commitment CO's	Draft	Amount Requested	Commitment Changes - Pending	
Default	Commitment CO's	Approval	Amount Requested	Commitment Changes - Approved	
Default	Requisitions	Approved	% Complete/Current Invoice	Actual Income - Approved	
Default	Progress Invoices	Approved	% Complete/Current Invoice	Actual Costs - Commitment - Approved	

Change Management with PMWeb

Workflow – Standard Procedures Flow Chart



Change Management with PMWeb

Workflow

- WORKFLOW/Workflow
- Define Roles
- Create Roles and assign to a Users

Select Level: School Addition Automotive Center

Roles | Business Processes (BPM) | Defaults | APM Rules

Save

Options

Allow users in multiple roles

Allow roles to be used more than once in a workflow

Users

Delegate / Replace User

Users

- Adam Baker (ABAKER)
- Admin (admin)
- Dan Beck (DBECK)
- Don McNatty (DMCNATTY)
- John Manning (PMWeb)
- Jonathan McNatty (JMCNATTY)
- Lim Tan (LTAN)
- Pam Powrie (PPOWRIE)
- Rudy Ising (RISING)
- Thomas Wagner (TWAGNER)

Role*	User*	Delegate
Architect	Jonathan McNatty(JMCNATTY)	
Owner	Jonathan McNatty(JMCNATTY)	
Project Manager	Jonathan McNatty(JMCNATTY)	
Subcontractor	Jonathan McNatty(JMCNATTY)	

Document Manager*

User: Admin (admin)

Notify On All:

- Submissions
- Approvals
- Branches
- Returns
- Rejects
- Withdrawals
- Final Approval
- Delegates
- Overdue Steps

Can:

- Edit Records
- Edit Workflow
- Edit Notes
- Edit Attachments

CC: Jonathan McNatty (JMCNATTY)

Change Management with PMWeb

Workflow

- Define Workflow Templates with Visual Workflow Designer

The screenshot displays the 'Visual Workflow Designer' interface for a workflow template named 'Change Order Approval Process'. The interface is divided into several sections:

- Template Information:** Shows the template ID (2), name ('Change Order Approval Process'), and options to recalculate due dates or send a single 'All Must Approve' email. It is associated with 'Commitments'.
- BPM Managers:** A table for managing users, currently empty.
- Overdue Alert:** Configuration for alerts, including 'Alert Active', 'Days (+/-)' (set to 0), 'Role(s)' (set to '-- Overdue Approver --'), 'Email', and 'Onscreen' checkboxes.
- Visual Workflow Designer:** The main design area, split into 'Roles & APM Rules' and 'Steps'.

Roles & APM Rules: A tree view showing roles such as 'Document Manager --', 'Submitter --', 'Architect (JMCNATTY - Jonathan McNatty)', 'Owner (JMCNATTY - Jonathan McNatty)', 'Project Manager (JMCNATTY - Jonathan McNatty)', and 'Subcontractor (JMCNATTY - Jonathan McNatty)'. The 'Roles' tab is selected.

Steps: A table defining the workflow steps:

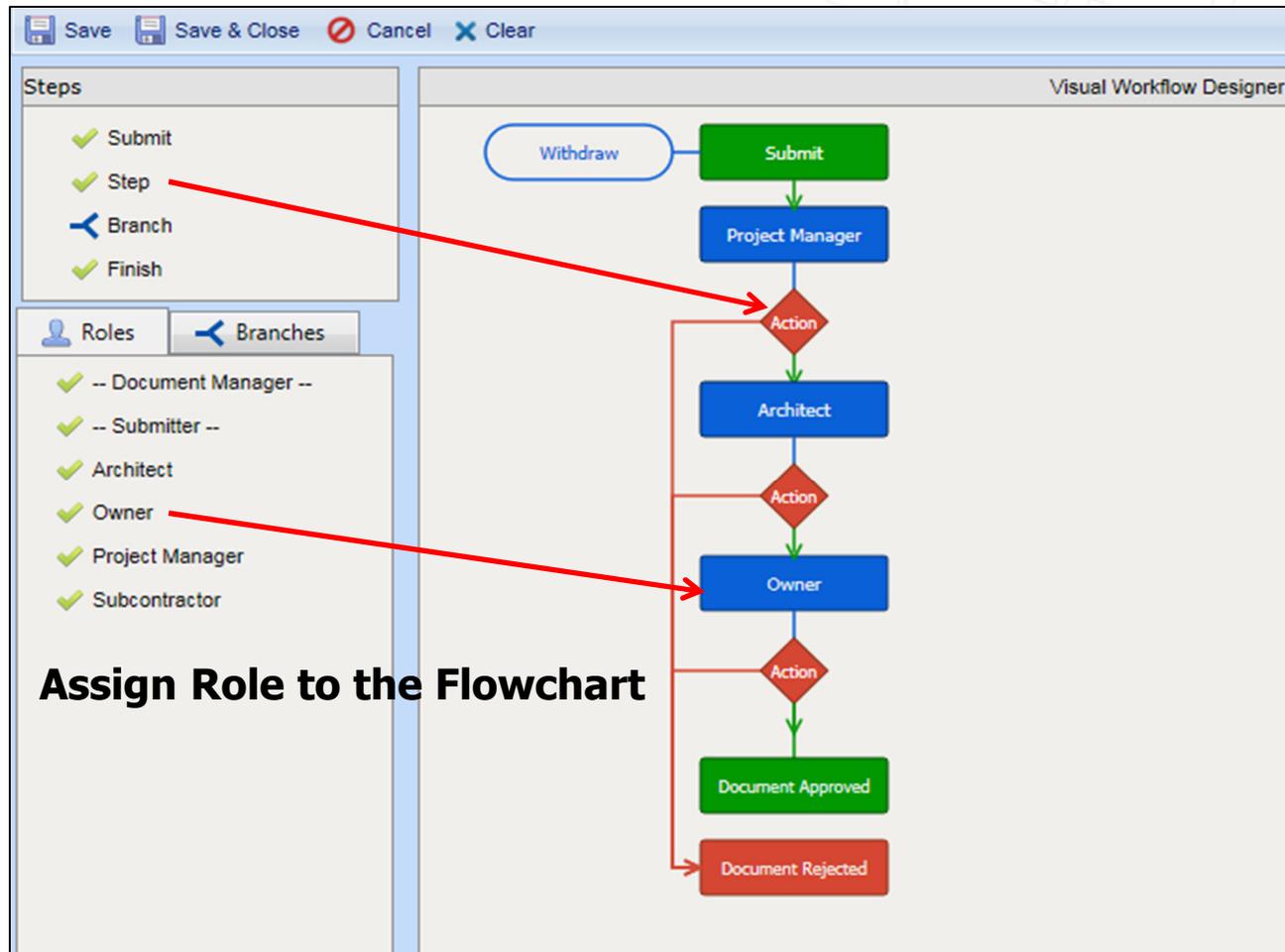
#	Type	Description	Action	Return To	Delegate
1	✓	Project Manager	Next Step	-- Previous Approver --	<input type="checkbox"/>
2	✓	Architect	Next Step	-- Previous Approver --	<input type="checkbox"/>
3	✓	Owner	Final Approve	-- Previous Approver --	<input type="checkbox"/>

Visual Workflow: A flowchart showing the process flow: Submitter (with a 'Withdrawal' path) → Project Manager → Architect → Owner → Final Approve. A 'Rejection' path branches off from the Architect step.

Change Management with PMWeb

Workflow – Visual Workflow Designer

- Drag & Drop



Change Management with PMWeb

Workflow

- Define Email Preferences

The image shows a screenshot of the Visual Workflow Designer interface and a configuration window for defining a role step. The Visual Workflow Designer on the left displays a tree view of roles and a visual workflow diagram with 'Submitter' and 'Project Manager' roles. The 'Define Role Step - Internet Explorer' window on the right is titled 'Define Role Step - Internet Explorer' and shows the configuration for step 1. The configuration includes fields for Step*, Approver(s)* (Project Manager), Review Days* (5), CC, Manual CC, Event Type(s) (Email and Onscreen Message), Return To, Resubmit To, RAM, and Instructions. The Options section includes checkboxes for All Must Approve, Can Edit Record, Can Edit Notes, Can Edit Attachments, Can Final Approve, Require Comments, and Allow Delegating. The Notify On All section includes checkboxes for Submissions, Approvals, Branches, Returns, Rejects, Withdrawals, Final Approval, and Delegates. The Generate Records section includes a table with Action and Generate columns, and a checkbox for Submit if Workflow enabled.

Action	Generate
Approve	-- None --
Return	-- None --
Reject	-- None --
Withdraw	-- None --
Final Approve	-- None --
Delegate	-- None --

Change Management with PMWeb

Create RFI

- ENGINEERING FORMS/RFI's

Engineering Forms

- Safety Forms
- RFIs**
- Online Submittals
- Submittal Items
- Submittal Sets
- Meeting Minutes
- Drawing Lists
- Drawing Sets
- Daily Reports
- Punch Lists
- Transmittals
- Action Items
- Correspondence

Planning

Engineering Forms

Drag a column header and drop it here to group by that column

Programs Projects **+ Add** **X Delete**

Project Name	Project #	Record #	Description	Workflow Status
<input type="text" value=""/>				
School Addition Automotive C	DEMO	000001	Additional Earthwork & Lands	Draft

Page Size 20

Change Management with PMWeb

Create RFI

- Assign RFI to a Project and fill out general information
- Create a Change Event from the RFI

The screenshot displays the PMWeb interface for creating an RFI. The 'Project*' dropdown is highlighted in red, and the 'Change Event' button is also highlighted in red. The 'From' dropdown is set to 'ACME Get'. The 'To' dropdown is set to 'DRMcNatty & Associates, Inc. - Jonathan McI'. The 'Trade' dropdown is set to '-- Select --'. The 'CSI Code' field is empty. The 'Category' dropdown is set to '-- Select --'. The 'Priority' dropdown is set to '-- Select --'. The 'Description' field contains 'Additional Earthwork & Landscaping'. The 'Status' dropdown is set to 'Draft'. The 'Revision' field contains '0' and the 'Date' field contains '9/2/2015'. The 'RFI Date' field is empty. The 'Transmittals' table is empty. The 'Question' field contains 'Additional Earthwork and Landscaping has been added to the contract.' The 'Answer' field contains 'Additional Excavation, Earthwork & Landscaping has been added in Area A. See plan drawing F-01.' The 'Effects' section has checkboxes for 'Scope of Work', 'Cost', and 'Schedule', all of which are checked. The 'CE #' field contains '0'.

Change Management with PMWeb

Create Change Event (Potential Change)

- Change Event can have Budgeted and Committed Line Items
- Assign to Cost Codes in Line Item

1 - School Addition Automotive Center - Owner Request

Project*: School Addition Automotive Center
 Record #: 1
 Description: Owner Request Additional Scope Earthwork & Landscaping
 Source Record: RFI: 002
 Revision: 0 Date: 7/16/2015
 Status: Submitted
 Change Request: 001 - Additional Scope - Earthwork & Landscaping
 Risk Analysis: Select Risk Analysis...
 Effective Date: [Calendar]

Company: Select Company...
 Cause: -- Select --
 Requested: Select Company...
 Category: -- Select --
 Reference: [Text Box]
 Change Request #: 1

Recap
 Project Budget: \$2,000.00
 Owner Budget: \$2,000.00
 Ext. Cost: \$2,000.00
 Days: 10.00

Details Adjustments Specifications Notes (3) Attachments

Budget

Drag a column header and drop it here to group by that column

Edit Selected Lines Add Items Add Delete Refresh Save Layout Load Default Layout Use Units

Line #	Status	Item	Description	UOM	Quantity	Unit Cost	Adjustment 1	Tax	Adjustment 2	Project Budget
001	Pending		Additional Excavation		1.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
002	Pending		Additional Earthwork & Landscaping		1.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
					2.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$2,000.00

Page Size 10

Cost

Drag a column header and drop it here to group by that column

Edit Selected Lines Link Change Request(s) Add Items Add Linked Add Delete Refresh Save Layout Load Default

Line #	Status	Linked Budget Line	Item	Description	Ext. Cost	Commitment	Cost Code
001	Pending			Additional Excavation	\$1,000.00	AA450-01000 - Standard P	02-02100-S
002	Pending			Additional Earthwork & Landscapi	\$1,000.00	AA450-01000 - Standard P	02-02300-S
					\$2,000.00		

Change Management with PMWeb

Collect Multiple Change Events into one Change Order - Budgeted

- Add Markup as a Line Item
- Click the Workflow Tab to start the Workflow Process

The screenshot displays the PMWeb interface for a Change Order. The left sidebar shows a navigation menu with 'Change Management' expanded. The main area shows a form for '001 - School Addition Automotive Center - Additional Sc'. The 'Workflow' tab is selected and highlighted with a red box. Below the form is a table of line items, with the 'Overhead & Profit' row (Line # 003) highlighted in red.

Line #	Item	Description	Owner Budget	Adjustment 1	Adjustment 2	Tax	Total Price	Cost Type	Cost Code
001		Additional Excavation	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00		02-02100-S
002		Additional Earthwork & Landscaping	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00		02-02300-S
003		Overhead & Profit	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00		00-01100-D
			\$2,200.00	\$0.00	\$0.00	\$0.00	\$2,200.00		

Change Management with PMWeb

Workflow

- Select an Action and Save the Change Order
- Change Order will be emailed to next user in the workflow
- Type comments for next user in the workflow

The screenshot displays the PMWeb Workflow Actions interface. The top navigation bar includes tabs for Details, Adjustments, Specifications, Notes, Attachments, and Workflow. The Workflow tab is active. On the left, the 'Workflow Actions' panel is highlighted with a red box, showing a list of actions: Approve (green circle), Return (orange circle), Reject (red circle), Withdraw (grey circle), Final Approve (green circle), and Delegate (blue person icon). Below these actions are 'Save' and 'Cancel' buttons. The main area is titled 'Email Preview' and shows an email subject 'PMWeb Approval Request: Commitment Change Orders 004' and a body starting with 'A document has been Submitted for approval by Admin .'. Below the email body is a 'Workflow Document Information' box containing '- Document type: Commitment Change Orders' and '- Project Name: School Addition Automotive Center'. To the right of the email preview is a 'Comments' text area containing the text 'Please review the change order for approval and forward to the Architect.'

Change Management with PMWeb

Workflow

- Audit trail of the Workflow with Time and Date

The screenshot displays the PMWeb interface for Change Order Approval. It features a workflow table, a workflow log, and a role selection panel.

Business Process

Refresh

#	Type	All Must Approve	Due Date	Role	User	Delegate	Instructions
	✓	<input type="checkbox"/>		-- Submitter --			
1	✓	<input type="checkbox"/>	12/20/2015	Project Manager	Rudy Ising		
2	✓	<input type="checkbox"/>	12/25/2015	Architect	Jonathan McNatty		
3	✓	<input type="checkbox"/>	12/30/2015	Owner	Jonathan McNatty		

Workflow Log

Resend Message(s) Refresh

Email	Generated	Step	Due Date	Role(User)	User	Action Date	Action Time	Action
				-- Submitter --	Admin (admin)	12/15/2015	02:03:18 PM	Submit

Template

Change Order Approval

Roles (selected) / Names

Submitter → Project Manager → Architect → Owner → Final Approve

Withdrawal / Rejection

Change Management with PMWeb

Email Notification

- Users with Final Approval can Approve/Reject from email
- Change Order will follow the rest of the Workflow

A [document](#) has been [Approved](#) by Project Manager.

Workflow Document Information:

- **Document type:** Commitment COs
- **Document Name:** School Addition Automotive Center
- **Document Description:** Additional Scope Earthwork & Landscaping
- **Action Date:** 12/14/2015
- **Due Date:** 12/19/2015
- **Database Name:** [PMWebDemo](#)
- **Comments:** Please review and Approve/Reject the Change Order

Click the Document hyperlink to open it for review.

Approve

Reject

PMWeb Workflow Administrator

Note: This email message was automatically generated. Please do not reply to this message.

Change Management with PMWeb

Change Order Approval – Budgeted/Committed Change Order

- Change Orders can be Approved manually in the Change Order document

The screenshot displays the PMWeb interface for a Change Order document. The top section contains a 'Recap' table, which is highlighted with a red box. Below this, there is a table of change order items. The 'Status' dropdown menu is open, showing options like Submitted, Draft, Rejected, and Approved, with 'Approved' highlighted in red.

Recap

		Days
Original Contract Amount	\$10,000,000.00	0.00
Prior Approved Changes	\$0.00	0.00
Prior Revised Contract	\$10,000,000.00	0.00
Total of This Change	\$2,200.00	0.00
Contract to This Change	\$10,002,200.00	0.00

Change Order Details:

- Project*: School Addition Automotive Center
- Contract*: School Addition Automotive Center - Philadelp
- Company: Philadelphia County
- Record #*: 001
- Change Order Date: [Calendar Icon]
- Description: Additional Scope Excavation & Earthwork
- Reference: [Text Field]
- Category: -- Select --
- Revision: 0 Date: 7/16/2015
- Status: Submitted (Dropdown menu open)
- Days +/-: [Text Field]
- Effective Date: [Text Field]

Change Order Items Table:

Line #	Item	Description	Owner Budget	Adjustment 1	Adjustment 2	Tax	Total Price	Cost Type	Cost Code
001		Additional Excavation	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00		02-02100-S
002		Additional Earthwork & Landscaping	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00		02-02300-S
003		Overhead & Profit	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00		00-01100-D
			\$2,200.00	\$0.00	\$0.00	\$0.00	\$2,200.00		

Change Management with PMWeb

Requisitions

- Create a Payment Application for the Budget Contract

Drag a column header and drop it here to group by that column

Programs *All* Projects *All* **+ Add** X Delete Refresh Layouts

Project Name	Project #	Record #	Workflow Status	Contract	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
School Addition Automotive	DEMO	000001	Approved	AA450-00012 - Summary	Application for Payment with

Page Size 20

Change Management with PMWeb

Requisitions

- Payment Application shows Contract Snapshot

Project*	School Addition Automotive Center	Invoice Date	
Contract*	AA450-00012 - Philadelphia County - Summar	Billing Terms	-- Select --
Company	Philadelphia County	Invoice Due	
Description	Application for Payment with Philadelphia County		
Invoice #	1		Create Next
Record #*	001		
Reference			
Category	-- Select --		
Revision	0	Date	7/16/2015
Status	Approved		
Cost Period	-- Select --		
Paid In Full	<input type="checkbox"/>		

Contract Snapshot	
Original Contract	\$10,000,000.00
Approved Change Orders	\$2,200.00
Revised Contract	\$10,002,200.00
Total Invoiced	\$106,870.00
Total Retained	\$0.00
Earned Less Retainage	\$106,870.00
Less Prior Invoices	\$0.00
Current Payment Due	\$106,870.00
Unapplied Payments Available	\$0.00
Payments Applied	\$0.00
Open Balance	\$106,870.00
Balance To Invoice	\$9,895,330.00

Change Management with PMWeb

Requisitions

- Change Orders can be brought in by Link Change Orders to include in payment

Details Adjustments Specifications Payments Notes Attachments											
Drag a column header and drop it here to group by that column											
+ Add Edit X Delete Delete Actual Costs Refresh Save Layout Load Default Layout Link Change Orders Production Add Actual Costs											
Line #	Description	Cost Code	Adjustment 1	Tax	Adjustment 2	Scheduled Value	Prior Stored Material	Current Stored Material	Total Stored Material	Prior Invoices	Current Invoice
041		09-09680-S	\$0.00	\$0.00	\$0.00	\$55,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
042		09-09900-S	\$0.00	\$0.00	\$0.00	\$155,700.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
043		10-10100-V	\$0.00	\$0.00	\$0.00	\$67,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
044		10-10400-V	\$0.00	\$0.00	\$0.00	\$39,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
045		10-10500-V	\$0.00	\$0.00	\$0.00	\$69,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
046		10-10520-V	\$0.00	\$0.00	\$0.00	\$32,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
047		15-15100-S	\$0.00	\$0.00	\$0.00	\$240,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
048		15-15300-S	\$0.00	\$0.00	\$0.00	\$220,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
049		15-15400-S	\$0.00	\$0.00	\$0.00	\$640,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
050		15-15700-S	\$0.00	\$0.00	\$0.00	\$808,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
051		16-16100-S	\$0.00	\$0.00	\$0.00	\$143,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
052		16-16700-S	\$0.00	\$0.00	\$0.00	\$89,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
053		20-01100-O	\$0.00	\$0.00	\$0.00	\$202,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
054		00-01100-D	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
055	Additional Excavation	02-02100-S	\$0.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00
056	Additional Earthwork & Landsc	02-02300-S	\$0.00	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00
057	Overhead & Profit	00-01100-D	\$0.00	\$0.00	\$0.00	\$200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00
			\$0.00	\$0.00	\$0.00	\$10,002,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$106,870.00

Change Management with PMWeb

Cost Worksheet

- Budgeted/Committed Costs
- Approved/Pending Change Orders
- Payment Applications Budgeted/Committed

Original Commitments	Commitment Changes-Pending	Commitment Changes-Approved	Revised Commitments	Project Variance	Actual Income - Approved	Actual Costs - Commitment - Approved
\$0.00	\$0.00	\$0.00	\$0.00	\$240,000.00	\$24,000.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$274,264.12	\$27,426.41	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$244,500.00	\$24,450.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$65,000.00	\$6,500.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$7,735.88	\$773.59	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$235,000.00	\$23,500.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$35,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$150,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$65,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$100,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$100,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$121,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$150,000.00	\$0.00	\$0.00
\$5,000.00	\$1,000.00	\$0.00	\$5,000.00	\$72,000.00	\$100.00	\$2,500.00
\$0.00	\$0.00	\$0.00	\$0.00	\$26,000.00	\$0.00	\$0.00
\$0.00	\$0.00	\$0.00	\$0.00	\$48,000.00	\$0.00	\$0.00
\$5,000.00	\$1,000.00	\$0.00	\$5,000.00	\$247,000.00	\$100.00	\$1,000.00

Change Management with PMWeb

Cost Worksheet

- Can be exported to Excel

<u>Cost Code</u>	<u>Cost Code Description</u>	<u>Original Budget</u>	<u>Budget Changes-Pending</u>	<u>Budget Changes-Approved</u>	<u>Revised Budget</u>	<u>Original Commitments</u>
01-01100-C	Summary	240000.00	0.00	0.00	240000.00	0.00
01-01300-D	Administration Requirements	274264.12	0.00	0.00	274264.12	0.00
01-01300-O	Schedule	244500.00	0.00	0.00	244500.00	0.00
01-01400-S	Quality Requirements-Testing	65000.00	0.00	0.00	65000.00	0.00
01-01400-V	Quality Requirements-Software	7735.88	0.00	0.00	7735.88	0.00
01-01500-O	Temporary Facilities and Controls	235000.00	0.00	0.00	235000.00	0.00
01-01500-S	Temporary Facilities and Controls	35000.00	0.00	0.00	35000.00	0.00
01-01700-D	Execution Safety Requirements	150000.00	0.00	0.00	150000.00	0.00
01-01700-O	Execution-Insurance & Taxes	65000.00	0.00	0.00	65000.00	0.00
01-01740-O	Execution Requirements-Permits	100000.00	0.00	0.00	100000.00	0.00
01-01750-O	Execution Requirements-Legal Fees	100000.00	0.00	0.00	100000.00	0.00
02-02050-D	Basic Site Materials	121000.00	0.00	0.00	121000.00	0.00
02-02100-D	Site Remediation	150000.00	0.00	0.00	150000.00	0.00
02-02100-S	Excavation	75000.00	0.00	1000.00	76000.00	5000.00
02-02110-S	Site Remediation Supervision	26000.00	0.00	0.00	26000.00	0.00
02-02200-S	Site Preparation	48000.00	0.00	0.00	48000.00	0.00
02-02300-S	Earthwork & Landscaping	250000.00	0.00	1000.00	251000.00	5000.00

Change Management with PMWeb

Cost Worksheet

- Multi Project Reporting using Custom Tabs

The screenshot shows the PMWeb interface with a navigation bar at the top containing tabs: Controls, Dashboard, Project Center, Portfolio View, Map View, W8 Project, Asset, Infographic, Google Map, Harvard Map, Subway Map, Work Orders, Stacking, and Multi Project. Below the navigation bar is a browser-like interface with a search bar and a 'Find | Next' button. The main content area displays the 'Budget Multiple Projects Details Worksheet' with the DR McNatty logo on the left. The table below provides a detailed breakdown of budget data for multiple projects.

	A	B	C	D=B+C	E	F=E/D	G=D-E	H=A-D	I	J	K=D+J	L=A-K
Project	Current Budget	Base Contract Amount	Approved Changes	Total Commitments	Approved Payments	% Paid	Unpaid Balance	Current Budget Variance	Pending Commitments	Forecast Commitments	Anticipated Cost	Project Budget Variance
ADMI	\$260,000.00	\$92,000.00	\$5,000.00	\$97,000.00	\$8,000.00	8.25%	\$89,000.00	\$163,000.00	\$10,000.00	\$0.00	\$97,000.00	\$163,000.00
02 - Soft Costs	\$120,000.00	\$92,000.00	\$5,000.00	\$97,000.00	\$8,000.00	8.25%	\$89,000.00	\$23,000.00	\$10,000.00	\$0.00	\$97,000.00	\$23,000.00
03 - Hard Costs	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$40,000.00	\$0.00	\$0.00	\$0.00	\$40,000.00
04 - FF & E	\$40,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$40,000.00	\$0.00	\$0.00	\$0.00	\$40,000.00
06 - Contingency	\$60,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$60,000.00	\$0.00	\$0.00	\$0.00	\$60,000.00
Atlanta Bank Branch	\$1,450,010.00	\$123,000.00	\$12,000.00	\$135,000.00	\$22,500.00	16.67%	\$112,500.00	\$1,315,010.00	\$0.00	\$0.00	\$135,000.00	\$1,315,010.00
01 - LAND	\$930,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$930,000.00	\$0.00	\$0.00	\$0.00	\$930,000.00
02 - BUILDING COSTS	\$200,000.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$200,000.00	\$0.00	\$0.00	\$0.00	\$200,000.00
03 - ARCH & ENGINEERING	\$320,000.00	\$60,000.00	\$7,000.00	\$67,000.00	\$22,500.00	33.58%	\$44,500.00	\$253,000.00	\$0.00	\$0.00	\$67,000.00	\$253,000.00
04 - BANK EQUIPMENT	\$10.00	\$63,000.00	\$5,000.00	\$68,000.00	\$0.00	0.00%	\$68,000.00	-\$67,990.00	\$0.00	\$0.00	\$68,000.00	-\$67,990.00
Birmingham Bank	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
01 - LAND	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
02 - BUILDING COSTS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
03 - ARCH & ENGINEERING	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
04 - BANK EQUIPMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
05 - FURNITURE	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
06 - MERCHANDISING	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
07 - SIGNAGE	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Questions & Comments



Thank you for attending

Contact - jmcnatty@drmcnatty.com

Upcoming Events



Save the Date



AACE 3rd Annual Northeast
Total Cost Management Symposium
March 24 - March 25, 2016
DoubleTree Hotel Valley Forge, PA



Call for Abstracts

Seeking 45-Minute
Technical Presentations
Abstracts due December 31, 2015



Submit your abstracts to:
Jon McNatty-Symposium Committee Chair
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