



University of Missouri System

eBuilder Training

Cost Module - Supplement

- Important Terms
- Important Concepts
- Project Cost Summary - Layout
 - Budget
 - Commitments
 - Actuals
- Questions

Terms	Descriptions
Account Level Role	Roles, when added to, that will automatically be assumed when added as a participant to a project. Also see Project Level Roles.
Commitment	Refers to money obligated to a consultant or contractor in eBuilder. (i.e.: Agreements, Contracts, POs, etc.)
Controlling Process	The process through which cost has been implemented into the system. This is only displayed for cost-enabled processes.
Cost-enabled Process	A process that integrates with cost items such as the budget, commitments and invoices.
Initiator	A user who can start (initiate) a workflow process instance.
Mail Merge	A step in a process that will merge data with a template to create documents such as agreements, contracts, NTPs, etc.
Project Level Roles	Roles that are configured and managed at the project. Also see Account Level Roles.
Process Instance	This provides insight to the process current state. Accessed by clicking into the process link.
Project Participants	A subcategory of Project Details that allows you to view participants and their roles on the project.
Spawned	A process step that initiates another process.
Take Action	Selecting and using the “Take Action” button in a process instance.

- 95% of the interaction with project(s) will be done through workflow processes
- You can only initiate a processes through a project
- Processes can be initiated and acted on by internal users and external users with the correct permissions
- Processes will automatically place attachments in the correct folder in the Document Module
- Process statuses change throughout the process.
- A SPAWNED process will initiate a new process in draft mode and will require an actor to submit it
- In eBuilder a child projects are not required for multiple construction contracts
- eBuilder uses controls to not allow you to go over budget or over invoice

How to change your Layout in the Project Cost Summary within a project:

1. Select the Layout*
2. Select Group By – “Category” is like the PCS spreadsheet
3. You can export to Excel

Project Cost Summary CP232931 - University Hall Renovate 225 - Crocker, Jessica

Cost Summary | Items Pending Approval | Estimated Budget | Data Entry | Account Level Cost

Financial Summary Expand All | Collapse All Layout: Budget Group By: Category * - Click on the amount to see more details 3

		1	2	C A + B	D	E	F C + D + E	G	H
		Original Budget *	Approved Budget Changes *	Current Budget *	Pending Budget Changes *	Projected Budget Changes *	Projected Budget *	Current Over/(Under)	Projected Over/(Under)
10	Design	29,857.81	11,970.00	41,827.81	0.00	0.00	41,827.81	(18,371.89)	(6,401.89)
796500-0100	Basic Services IAA	18,500.00	11,970.00	30,470.00	0.00	0.00	30,470.00	(11,970.00)	0.00
796500-0200	Additional Services Fee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0300	Reimbursables	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0420	Permit Plan and Review	1,360.00	0.00	1,360.00	0.00	0.00	1,360.00	(1,360.00)	(1,360.00)
796500-0600	Structural Consultant Fee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0610	Code Consultant Fee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0620	Special Consultant	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0630	Site Survey	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0640	Soils Investigation	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0650	Additional Surveying	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0800	Asbestos Testing	1,000.00	0.00	1,000.00	0.00	0.00	1,000.00	(516.47)	(516.47)
796500-0900	Other Design Costs	43.31	0.00	43.31	0.00	0.00	43.31	(43.31)	(43.31)
796500-1100	Additional Site Visits	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-1200	Project Management Fee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-1300	Advertising	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-1400	Reproduction	250.00	0.00	250.00	0.00	0.00	250.00	(166.11)	(166.11)
796500-1410	Technology Fee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-1500	Archiving	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-1600	Design Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

***Note:** The subsequent slides will include more detail on the following Layouts: Budget, Commitments, and Actuals

Line Item	Description	A Original Budget *	B Approved Budget Changes *	C A + B Current Budget *	D Pending Budget Changes *	E Projected Budget Changes *	F C + D + E Projected Budget *	G Current Over/(Under)	H Projected Over/(Under)
600000-6000	In-House Construction	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
742000-6500									
742000-6501			0.00	0.00	0.00	0.00	0.00	0.00	0.00
770000-6230			0.00	0.00	0.00	0.00	0.00	0.00	0.00
777700-6310			0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-0100	Basic Services IAA			470.00	0.00	0.00	30,470.00	(11,970.00)	0.00
796500-0200	Additional Services F			0.00	0.00	0.00	0.00	0.00	0.00
796500-0300	Reimbursables			0.00	0.00	0.00	0.00	0.00	0.00
796500-0420	Permit Plan and Revi			360.00	0.00	0.00	1,360.00	(1,360.00)	(1,360.00)
796500-0600	Structural Consultant Fee				0.00	0.00	0.00	0.00	0.00
796500-0610	Code Consultant Fee				0.00	0.00	0.00	0.00	0.00
796500-0620	Special Consultant				0.00	0.00	0.00	0.00	0.00
796500-0630	Site Survey				0.00	0.00	0.00	0.00	0.00
796500-0640	Soils Investigation	0.00				0.00	0.00	0.00	0.00
796500-0650	Additional Surveying	0.00				0.00	0.00	0.00	0.00
796500-0800	Asbestos Testing	1,000.00				0.00	1,000.00	(516.47)	(516.47)
796500-0900	Other Design Costs	43.31				0.00	43.31	(43.31)	(43.31)
796500-1100	Additional Site Visits	0.00	0.00				0.00	0.00	0.00
796500-1200	Project Management Fee	0.00	0.00				0.00	0.00	0.00
796500-1300	Advertising	0.00	0.00				0.00	0.00	0.00
796500-1400	Reproduction	250.00	0.00				250.00	(166.11)	(166.11)
796500-1410	Technology Fee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-1500	Archiving	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-1600	Design Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals		279,474.00	11,970.00	291,444.00	0.00	0.00	291,444.00	(52,512.57)	(40,542.57)

Original Budget: This the originally approved budget amount. This figure can include budget changes to the original budget amount if the reason code "Original" is used.

Approved Budget Changes: This the amount of approved budget changes

Current Budget: This is the approved original budget and all approved changes.

Pending Budget Changes: The "Pending" usually refers to budget changes pending final approval. In a process, this status might automatically be applied in a specific step.

Projected Budget Changes: The "Projected" usually refers to budget changes that are earlier in the process. In a process, this status might automatically be applied in a specific step.

Projected Budget: This total includes the original budget amount plus all "pending," "projected," and "approved budget changes."

Project Cost Summary - Commitments

Line Item	Description	A Original Commitments	B Approved Commit Changes *	C Non Commitment Costs *	D A + B + C Current Commitments	E Pending Commit Changes *	F Projected Commit Changes *	G Pending Commitments *	H D + E + F + G Projected Commitments	I Remaining Commitment Amounts *	J Current Over/(Under)	K Projected Over/(Under)
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(9,382.82)	(9,382.82)
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(2,720.00)	(2,720.00)
796500-3120	Fire Stop, Special Inspections	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(1,596.00)	(1,596.00)
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(8,101.99)	(8,101.99)
796500-2700	Co	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-3000	HW	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(900.00)	(900.00)
796500-3100	Co	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-3200	Car	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-4000	Keys and Locks	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(180.00)	(180.00)
796500-4100	Interior Signs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-4110	Exterior Signs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-4120	Wayfinding Signs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-4200	Fire Extinguishers	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-4900	Landscaping	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-5000	Telephone	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(5,600.00)	(5,600.00)
796500-5100	Asbestos Removal	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-5110	Air Monitoring	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(1,500.00)	(1,500.00)
796500-5200	Contractor Parking	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(400.00)	(400.00)
796500-5300	Other Costs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-5400	Construction Services	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-6000	Other Contracts	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-6100	Start-up Costs	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-6200	Special Services Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-6400	Moving	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	(3,979.72)	(3,979.72)
796500-6500	Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-6600	Parking	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-6700	Audio Visual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-7000	Utility Infrastructure	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
796500-7100	Chilled Water	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
893800-0400	Legal Fees	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Totals		225,468.07	8,507.44	4,955.92	238,931.43	11,970.00	0.00	0.00	250,901.43	(3,725.50)	(52,512.57)	(40,542.57)

Original Commitment: This is the amount of all approved commitments. This can include commitment changes against the original commitment value.

Approved Commitment Changes: This is the amount of all approved changes to the original commitment.

Non-Commitment Cost: These are general invoices that originate in PeopleSoft.

Current Commitments: This is the amount of all approved commitment changes plus original commitments and approved general invoices.

Pending Commitment Changes: The "Pending" is a status is to refer to commitment changes that are pending a hard signature.

Projected Commitment Changes: The "projected" status is used to account for anticipated commitment changes.

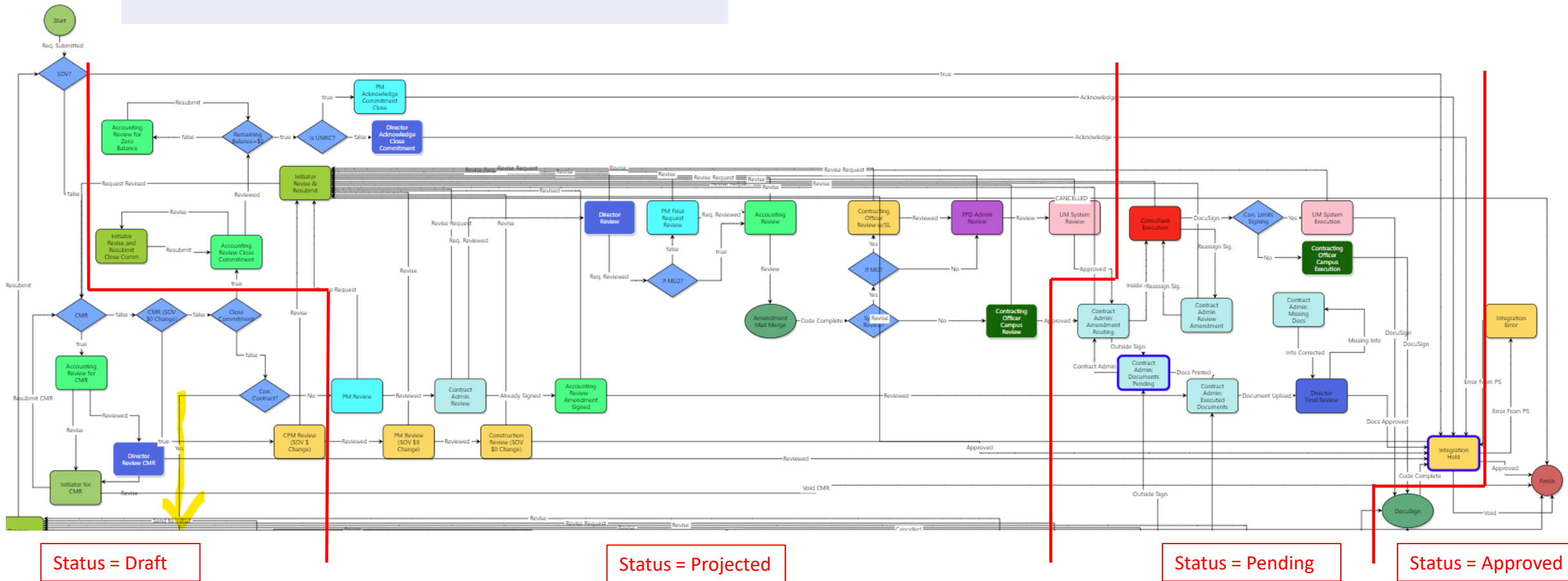
Pending Commitment: The "Pending" is a status that usually refers to commitments that are pending a hard signature.

Projected Commitments: This is the total sum of current commitments, pending, pending changes and project changes to commitments.

All Commitment Amendments and Change Orders

30.14 – Change Order / Amendment Request (COAR)
Standard Consultant Agreement

Note: Projected is an available status for commitment amendments and changes.



The End