



PROJECT EXECUTIVE TRAINING

CMiC features and functions for the PX/VP



Why Now?

- **No Choice:** Current systems and bridges are no longer viable and have become increasingly difficult to manage and upgrade
- **Inconsistent view of financial status across systems**
- **Other industry leading GC's are upgrading to ERP's**



What is CMiC?

- Web-based ERP System (Integrated software package)
- One integrated database
- Replaces Multiple Databases & Bridges (Timberline, Prolog, and SalesLogix)



Expectations

Benefits

- Real-time accurate data
- Increased automation and efficiency
- Better remote connectivity

What it is not

- Magic Bullet
- Designed to be fewer clicks
- Completely customized system and reporting



What's Been Done To Make it Work as Well as Possible for Us

Improving Business Processes

- Adjusting each process to how the new system works
- Analyzing/Improving areas of inefficiency

Standardization of Business Processes/Reports

Full System Testing

- Full project life cycle testing
- Testing as many different scenarios as possible

Converted Data Mapping & Validation

- Converting Apples to Oranges
- Validating the converted data to ensure accuracy

Intranet infrastructure rebuilt to point to CMiC



Overall Course Objectives

The objective of this training is to provide participants with a *foundational* ability to perform the tasks in CMiC that are required for the Project Executive role.



Covered Topics

- Overview of Cost Mapping
- Internal Budgets
- Overview of Change Orders
- Forecasting



Topics Already Covered

- E-Learn Modules should have already been taken. You are responsible for this content.
- These will not be covered today, but may be included in the exercises.
- If you have not already done so, review them as soon as possible.



Student Expectations

- Phones on silent or off
- Keep an open mind
- Be Punctual
- Wait until breaks to step out
- Stay attentive and participate
- Parking lot
- Take Notes in your Student Guide
- Close laptops in between exercises



How the Training is Structured

We will use the following format to cover each topic:

- Context
 - Demonstration
 - Application Exercise
 - Learning Summary
-
- Role of Support Person



Student Guides

The Student Guides are meant to provide:

- Context
- Step by Step instructions
- Ability to add notes and questions
- Be a reference after the class



Overview of Budgets

- Moving from a one budget structure to a two budget structure
- Two budgets are Cost Budget and Billing Budget
- These will be revisited in more detail later in the course



How do I Work with Internal Budgets?

- Internal Budget becomes the final cost and revenue/billing budget for the project.
- This is the baseline and benchmark for managing all financial aspects of the job.
- The PMs own the first estimate to complete (ETC) as their benchmark.



Review new Job/Phase/Category Structure

Today

L – Labor

M – Material

S – Subcontract

H – Hold

E – Allocations

I – Subguard

G – Profit

CMiC

L00 Through L16

M00 Through M03

S

H

MU00 Through MU22

I00 Through I02

F – Fee



Review new Job/Phase/Category Structure

CMiC

- A - Allowances
- BAC,BAD,BAG – Bid Day Adjustments
- W01 Through W03 – Warranty Costs
- T - Taxes



How do I Work with Internal Budgets?

Why do I need to know this?

- Important to PXs to understand how the budgets are created for new projects.
- Work with Group Finance to break out Holds and Allowances
- PMs own the first estimate to complete (ETC) as their benchmark.

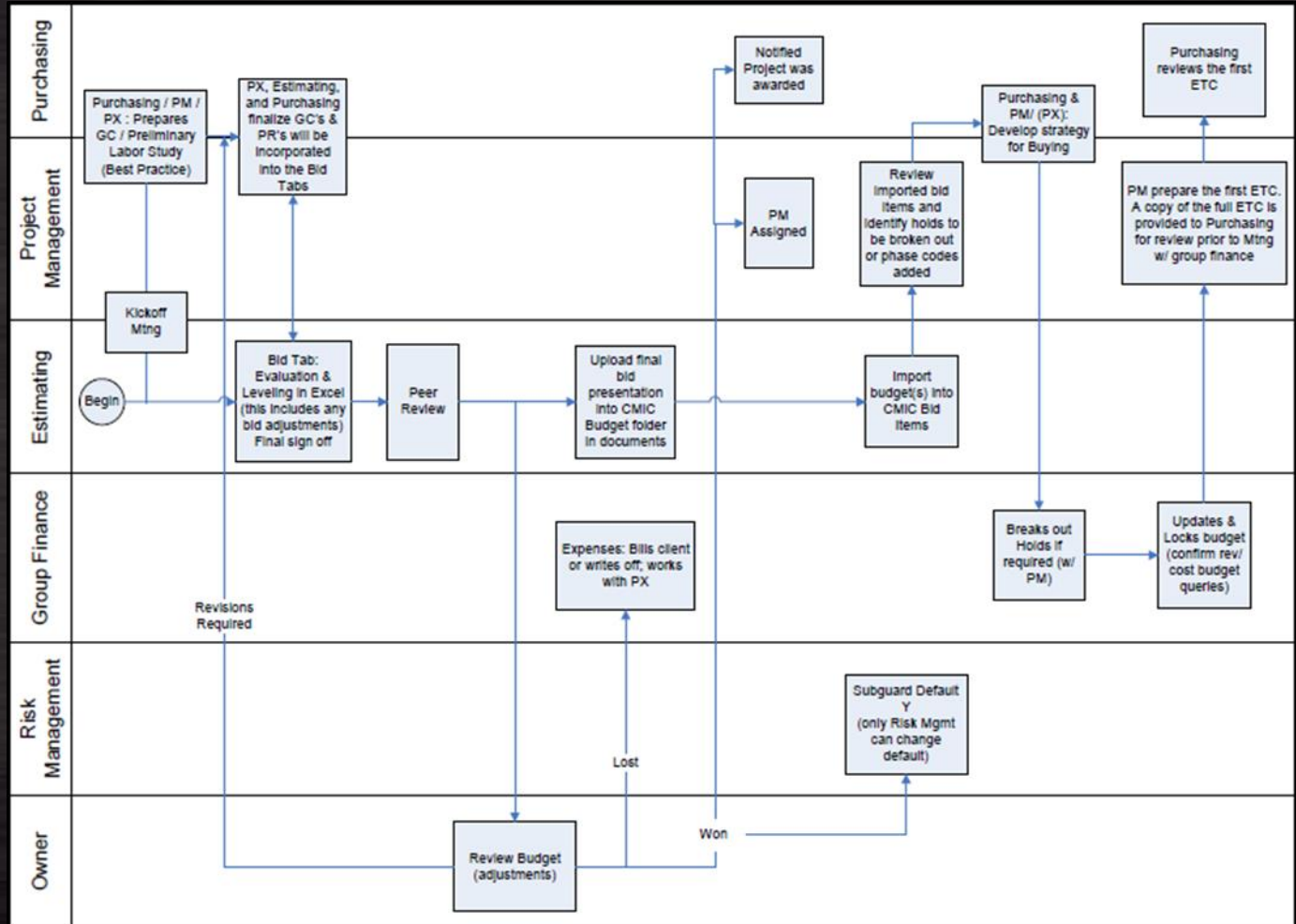
How do I Work with Internal Budgets?

Process Steps:

- Completing and reviewing the Bid Evaluation Presentation with Purchasing, Estimating and Project Management,
- Uploading and importing bid documents into CMiC documents for record,
- Breaking out holds/allowances
- Locking the internal budget.



How do I Work with Internal Budgets?



GC Labor Study Example



SHAWMUT DESIGN AND CONSTRUCTION COST BUDGET 2013

JOB #: 130001BD
 JOB NAME: CMIC GC & Labor Study
 ADDRESS: 560 Harrison Ave.
 Austin, TX
 JOB START: 12/12/2012
 JOB END: 1/31/2013
 PROJ. MGR:

CONTRACT TYPE: Lump Sum
 ALLOCATION RATE PER \$1000: \$39.31
 BUSINESS: Retail and Gaming
 Current Date: 12/20/2012
 SF: 12,600
 TYPE: Renovation
 Duration(Wks): 7.4
 Estimated CV: \$500,000

Phase	Description	# MAN DAYS	LABOR COST RATE	LABOR COST TOTAL	MATERIALS & EQUIPMENT	SUBS	SUB NAME & COMMENTS	HOLDS	ESTIMATED COSTS	BILLING LABOR RATE	BILLING LABOR TOTAL	BURDEN PER MAN-DAY	BURDEN	BURDENED COSTS	TOTAL BID ADJUSTMENTS	TOTAL REVENUE
GENERAL CONDITIONS																
GC	010040	Permit Expeditor \$1/1000	0.5	\$315	\$160		SDC STAFF		\$160	\$985	\$500	\$670	\$340	\$500		\$500
GC	010080	Gen Super \$9/\$1000	3.3	\$750	\$2,500				\$2,500	\$1,350	\$4,500	\$600	\$2,000	\$4,500		\$4,500
GC	010090	Group Financial Director	0.0	\$398	\$0				\$0	\$765	\$0	\$367	\$0	\$0		\$0
GC	010100	Project Acctg \$5/\$1000	4.0	\$309	\$1,244				\$1,244	\$620	\$2,500	\$311	\$1,256	\$2,500		\$2,500
GC	010110	Coop / Intern	0.0	\$175	\$0				\$0	\$310	\$0	\$135	\$0	\$0		\$0
GC	010140	Exec Asst \$0/\$1000	0.0	\$316	\$0				\$0	\$515	\$0	\$199	\$0	\$0		\$0
GC	010150	Project Coord \$4.25/\$1000	4.9	\$251	\$1,226				\$1,226	\$435	\$2,125	\$184	\$899	\$2,125		\$2,125
GC	010200	Central Purchasing \$4.25/\$1000	1.7	\$1,225	\$2,125				\$2,125	\$1,225	\$2,125	\$0	\$0	\$2,125		\$2,125
GC	010310	Project Exec/Gen Sup	10.0	\$791	\$7,910				\$7,910	\$1,225	\$12,250	\$434	\$4,340	\$12,250		\$12,250
GC	010380	Senior Project Manager	0.0	\$643	\$0				\$0	\$1,130	\$0	\$487	\$0	\$0		\$0
GC	010390	Asst. Project Manager	0.0	\$293	\$0				\$0	\$620	\$0	\$327	\$0	\$0		\$0
GC	010400	Project Manager	15.0	\$448	\$6,713				\$6,713	\$900	\$13,500	\$452	\$6,787	\$13,500		\$13,500
GC	010410	Site Supervisor	50.0	\$587	\$29,363				\$29,363	\$900	\$45,000	\$313	\$15,637	\$45,000		\$45,000
GC	010420	Sr. Site Supervisor	0.0	\$753	\$0				\$0	\$1,130	\$0	\$377	\$0	\$0		\$0
GC	010500	Asst Superintendent	0.0	\$319	\$0				\$0	\$620	\$0	\$301	\$0	\$0		\$0
GC	011010	Planning/Dev	0.0	\$407	\$0	\$0			\$0	\$900	\$0	\$493	\$0	\$0		\$0
GC	011020	Planning/Dev-Junior Est.	0.0	\$287	\$0	\$0			\$0	\$620	\$0	\$333	\$0	\$0		\$0
GC	011030	Senior Estimator	0.0	\$669	\$0				\$0	\$1,040	\$0	\$371	\$0	\$0		\$0
GC	011050	MEP Coordinator \$0/\$1000	0.0	\$593	\$0				\$0	\$1,140	\$0	\$547	\$0	\$0		\$0
GC	011070	Safety Officer \$2.75/\$1000	1.4	\$498	\$695				\$695	\$985	\$1,375	\$487	\$680	\$1,375		\$1,375
GC	013200	Reprographic Costs \$1/\$1,000	1.0	\$500	\$0	\$500			\$500	\$500	\$0	\$0	\$0	\$500		\$500
GC	013233	Project Photos	0.0	\$0	\$0				\$0	\$0	\$0	\$0	\$0	\$0		\$0
GC	013323	Postage and Shipping	0.0	\$0	\$0				\$0	\$0	\$0	\$0	\$0	\$0		\$0
GC	014119	Legal Costs	0.5	\$985	\$493				\$493	\$985	\$493	\$0	\$493	\$493		\$493
GC	014339	Mock Ups	0.0	\$850	\$0				\$0	\$850	\$0	\$0	\$0	\$0		\$0
GC	014523	Testing & Inspection Services	0.0	\$0	\$0				\$0	\$0	\$0	\$0	\$0	\$0		\$0
GC	015090	Mobile Communications \$1/Hr	1.0	\$731	\$0	\$731			\$731	\$731	\$0	\$0	\$0	\$731		\$731
GC	015113	Temp. Electrical	0.0	\$0	\$0				\$0	\$0	\$0	\$0	\$0	\$0		\$0
GC	015123	Temp. Heating, Cooling and Ventilation	0.0	\$695	\$0				\$0	\$695	\$0	\$0	\$0	\$0		\$0
GC	015133	Temporary Telecommunications	0.0	\$0	\$0				\$0	\$0	\$0	\$0	\$0	\$0		\$0
GC	015136	Temporary Water	0.0	\$0	\$0				\$0	\$0	\$0	\$0	\$0	\$0		\$0
GC	015180	Office Project Expenses \$1.75/\$1000	1.0	\$875	\$875				\$875	\$875	\$875	\$0	\$0	\$875		\$875
GC	015213	Field Offices and Trailers	0.0	\$695	\$0	\$0			\$0	\$695	\$0	\$0	\$0	\$0		\$0
GC	015216	First Aid Facilities	0.0	\$695	\$0	\$0			\$0	\$695	\$0	\$0	\$0	\$0		\$0
GC	015219	Sanitary Facilities	0.0	\$0	\$0	\$0			\$0	\$0	\$0	\$0	\$0	\$0		\$0
GC TOTAL		91.4		\$53,303	\$1,231	\$0		\$0	\$54,535		\$85,243		\$31,939	\$86,474	\$0	\$86,474
PROJECT REQUIREMENTS (TO BE CARRIED IN THE TRADES)															Totals	
PR	015300	Temp. Construction	0.0	\$850	\$0	\$0		\$0	\$850	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	015409	Site Safety	0.0	\$850	\$0	\$0		\$0	\$850	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	015416	Temp. Hoisting	0.0	\$695	\$0	\$0		\$0	\$695	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	015423	Scaffolding & Staging	0.0	\$695	\$0	\$0		\$0	\$695	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	015510	Temp. Parking Areas	0.0	\$695	\$0	\$0		\$0	\$695	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	015600	Temporary Barriers and Enclosures	0.0	\$850	\$0	\$0		\$0	\$850	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	015626	Temp. Fencing	0.0	\$695	\$0	\$0		\$0	\$695	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	017413	Progress Cleaning - Bos/RI	0.0	\$516	\$0	\$0		\$0	\$695	\$0	\$179	\$0	\$0	\$0	\$0	\$0
PR	017413	Progress Cleaning - NYC	0.0	\$579	\$0	\$0		\$0	\$750	\$0	\$171	\$0	\$0	\$0	\$0	\$0
PR	017413	Progress Cleaning - National (Non SDC)	0.0	\$200	\$0	\$0		\$0	\$200	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	017416	Delivery & Trucking - Boston/RI	0.0	\$346	\$0	\$0		\$0	\$985	\$0	\$639	\$0	\$0	\$0	\$0	\$0
PR	017419	Waste Management & Disposal	0.0	\$650	\$0	\$0		\$0	\$650	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PR	017423	Final Cleaning	12500.0	\$0.00	\$0	\$0		\$0	\$0.00	\$0	\$0	\$0	\$0	\$0	\$0	\$0
PROJECT REQ. TOTAL		0		\$0	\$0	\$0		\$0	\$0		\$0		\$0	\$0	\$0	\$0
BELOW THE LINE																
PFI	500001	Design Fees			\$0				\$0					\$0	\$0	\$0
PFI	500005	General Liability \$10.31/\$1,000	1.0%	\$5,155	\$5,155				\$5,155	\$5,000	\$5,000	(\$155)	(\$155)	\$5,000	\$0	\$5,000

Bid Items



<input type="checkbox"/>	Name	Phase	Category	WM	Target			Quantity
					Quantity	Price	Amount	
<input type="checkbox"/>	Project Coord \$5.5/\$1...	010150.01	MU06	HR	1.000	.00	.000	.000
<input type="checkbox"/>	Group Financial Director	010090.01	MU05	HR	1.000	.00	.000	.000
<input type="checkbox"/>	Project Acctg \$5/\$1000	010100.01	MU05	HR	1.000	.00	.000	.000
<input type="checkbox"/>	Permit Expeditor \$1.5/...	010040.01	MU04	HR	1.000	.00	.000	.000
<input type="checkbox"/>	MEP Coordinator \$5.2...	011050.01	MU03	HR	1.000	.00	.000	.000
<input type="checkbox"/>	Safety Officer \$3.75/...	011070.01	MU02	HR	1.000	.00	.000	.000
<input type="checkbox"/>	Gen Super \$6/\$1000	010080.01	MU01	HR	1.000	.00	.000	.000
<input type="checkbox"/>	Travel & Parking	015505.01	M02	EA	1.000	.00	.000	1.000
<input type="checkbox"/>	Mobile Communications	015090.01	M01	EA	1.000	2,099.67	2,099.670	1.000
<input type="checkbox"/>	Documents/Reproduc...	003200.01	M	EA	1.000	113.00	113.000	1.000

PX CMIC Training Completed!

