

# What's new

**Axtension® Project Management &  
Axtension® Project Controlling**

2024 H2



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## Axtension® Project Management

### Calculate "Progress" based on "Effort" or on "Performance"

The “Activity planning method” calculates the “Task effort to complete” and the “Task effort at complete” values on a task. For the “Activity planning method” two configuration options are available:

- Effort based
- Performance based

#### Calculate based on Effort

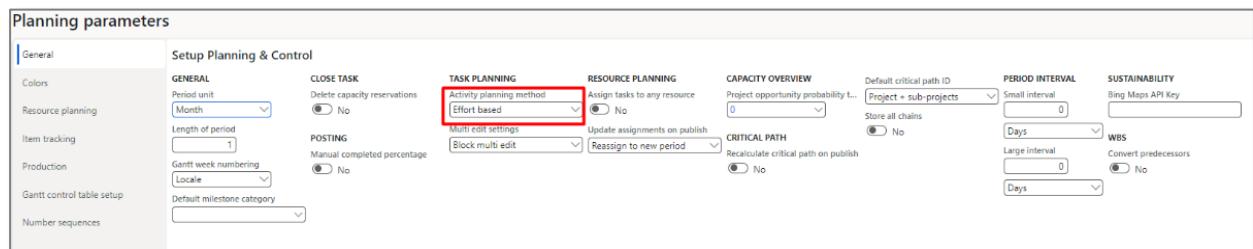
This method calculates the progress based on effort. This can be the preferred method for organizations that want to know what the impact is going to be on the “Task effort at complete” based on the “Task effort to complete” in combination with the “Posted hours”.

#### Calculate based on Performance

This method calculates the progress based on performance. This can be the preferred method for organizations that want to know what the impact is going to be on the “Task effort at complete” based on the “Reported progress” in combination with the “Posted hours”.

#### Configuration of the “Activity planning method”

The “Activity planning method” can be configured per legal entity in the module **Project management and accounting -> Setup -> Planning & Control -> Planning parameters**.



## Introduction to the “Activity planning method”

When creating the task planning for a project the following fields are available on a task from a scheduling perspective.

Schedule			
Task start date 9/4/2024	Effort in hours 40.00	Task effort to complete 20.00	Posted hours 20.00
Task end date 9/17/2024	Number of resources 1.00	Task effort at complete 40.00	Staffing status Not staffed
Duration 10.00	Completed hours 20.00	Progress 50.00	Estimated planning status On scheduled effort

In the table below a description for each of the fields is added:

Field Name	Description
Effort in hours	Scheduled hours
Progress	Progress percentage on the task
Posted hours	Posted hours via an hour journal
Completed hours	Completed hours based on the progress and effort
Task effort to complete	Remaining hours to complete the task
Task effort at complete	Total hours based at completion of the task

In the table below the formula's for the “Activity planning method” are described:

Field Name	Formula (Effort based)	Formula (Performance based)
Effort in hours	The configured effort in hours on the task	The configured effort in hours on the task
Posted hours	Posted hours on the task	Posted hours on the task
Progress (%)	$(\text{Posted hours} / \text{Effort in hours}) * 100$ *Can be adjusted manually	$(\text{Posted hours} / \text{Effort in hours}) * 100$ *Can be adjusted manually
Completed hours	$(\text{Effort in hours} * \text{Progress}) / 100$	$(\text{Effort in hours} * \text{Progress}) / 100$
Task effort to complete	Effort in hours – Completed hours *Can be adjusted manually	Task effort at complete – Posted hours *Can be adjusted manually
Task effort at complete	Posted hours + Task effort to complete	$(\text{Posted hours} / \text{Progress})$

## Scenario: Effort based

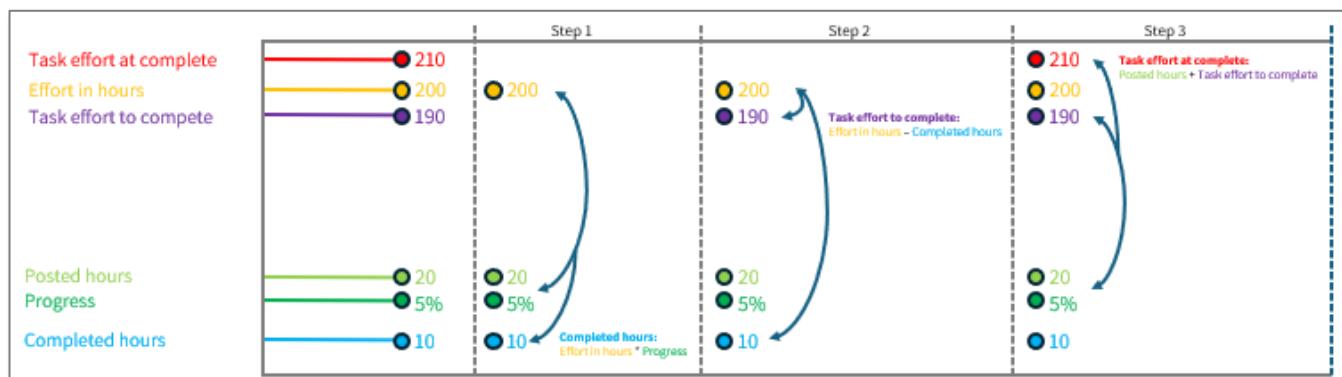
### Scenario 1:

Field Name	Numbers	Formula (Effort based)	Formula (Effort based)
Effort in hours	200		
Posted hours	20		
Progress	5%		
Completed hours	10	Progress * Effort in hours	5% * 200
Task effort to complete	190	Effort in hours – Completed hours	200 – 10
Task effort at complete	210	Task effort to complete + Posted hours	190 + 20

### Scenario 2

Field Name	Numbers	Formula (Effort based)	Formula (Effort based)
Effort in hours	150		
Posted hours	30		
Progress	50%		
Completed hours	75	Progress * Effort in hours	50% * 150
Task effort to complete	75	Effort in hours – Completed hours	150 – 75
Task effort at complete	105	Task effort to complete + Posted hours	75 + 30

Below a visualization that shows what is calculated when “Effort based” is used as the “Activity planning method”. Per step is shown what is calculated and what values are used.



## Scenario: Performance based

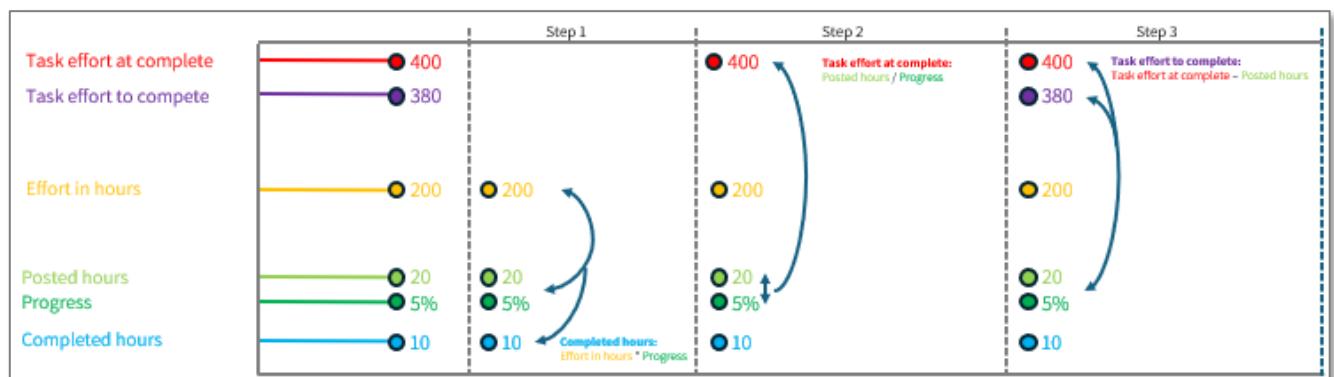
### Scenario1:

Field Name	Numbers	Formula (Performance Based)	Formula (Performance Based)
Effort in hours	200		
Posted hours	20		
Progress	5%		
Completed hours	10	Progress * Effort in hours	10% * 200
Task effort to complete	380	Task effort at complete – Posted hours	400 - 20
Task effort at complete	400	Posted hours / Progress	20 / 5%

### Scenario 2:

Field Name	Numbers	Formula (Performance Based)	Formula (Performance Based)
Effort in hours	150		
Posted hours	30		
Progress	50%		
Completed hours	75	Progress * Effort in hours	50% * 150
Task effort to complete	30	Task effort at complete – Posted hours	60 - 30
Task effort at complete	60	Posted hours / Progress	30 / 50%

Below a visualization that shows what is calculated when “Performance based” is used as the “Activity planning method”. Per step is shown what is calculated and what values are used.



**Note:**

If a task has multiple estimated cost lines of the type “hour”:

- Progress and Task effort to complete are kept in sync, changes on either field will recalculate the other
- Changed “Progress” on the activity is copied over to the individual estimated lines
- Changed “Task effort to complete” is calculated per individual estimated lines to ratio of each line
- Changed “Progress” on an individual estimated line will be rolled up to the activity
- Changed “Task effort to complete” on an individual estimated line will be rolled up to the activity
- Hours posted on a different category than estimated on an activity will only update the Posted hours value of the activity and not affect the Posted hours of individual estimated lines
- Changes in “Posted hours” and reported “Progress” on a published plan are kept in sync with any existing drafts on the project plan.

## Comparing the “Activity planning methods”:

Scenario 1:

When using “Effort based” for the “Activity planning method”, the “Task effort at complete” value is calculated based on the “Effort in hours” and “Completed hours”. Based on the “Effort in hours” minus the “Completed hours”, the “Task effort to complete” is calculated. Where the “Task effort at complete” is calculated based on the “Posted hours” plus the “Task effort to complete”.

When using “Performance based” for the “Activity planning method”, the “Task effort at complete” value is calculated based on the “Posted hours” and “Progress”. In other words, in 20 hours, 5% of the work is completed. If this progress trend continues the task will need 400 hours to be completed. The “Task effort to complete” is calculated based on the “Task effort at complete” minus the “Posted hours”.

Field Name	Numbers (Effort based)	Numbers (Performance based)
Effort in hours	200	200
Posted hours	20	20
Progress	5%	5%
Completed hours	10	10
Task effort to complete	190	380
Task effort at complete	210	400

Scenario 2:

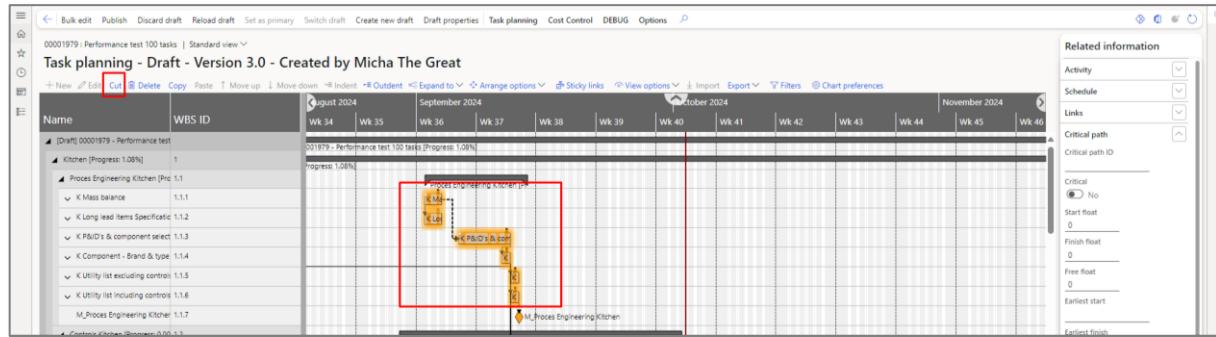
When using “Effort based” for the “Activity planning method”, the “Task effort at complete” value is calculated based on the “Effort in hours” and “Completed hours”. Based on the “Effort in hours” minus the “Completed hours”, the “Task effort to complete” is calculated. Where the “Task effort at complete” is calculated based on the “Posted hours” plus the “Task effort to complete”.

When using “Performance based” for the “Activity planning method”, the “Task effort at complete” value is calculated based on the “Posted hours” and “Progress”. In other words, in 30 hours, 50% of the work is completed. If this progress trend continues the task will need 60 hours to be completed. The “Task effort to complete” is calculated based on the “Task effort at complete” minus the “Posted hours”.

Field Name	Numbers (Effort based)	Numbers (Performance based)
Effort in hours	150	150
Posted hours	30	30
Progress	50%	50%
Completed hours	75	75
Task effort to complete	75	30
Task effort at complete	105	60

## Use “Cut” to split activities

Hours, items and expenses can be deducted from one or multiple selected tasks and pasted into another task by using the “Cut” and “Paste” actions.



After selecting one or more multiple tasks the “Cut” option will show the “Reduce quantities” form with the estimated cost lines per WBS ID (task). In this form it is possible to reduce the amounts of hours and items, but also to reduce the costs e.g. for expenses by entering the amount or quantity in the “Reduced quantity” column.

Standard view ▾										
Reduce quantities										
<input checked="" type="checkbox"/>	<input type="checkbox"/>	WBS ID	Task name	Estimate	Category	Transaction type	Quantity	Reduced quantity	Total costs	Reduced costs
	<input checked="" type="checkbox"/>	1.1.1	K Mass balance	Application Development	Eng-P	Hour	16.00	8.00	2,880.000	1,440.000
	<input checked="" type="checkbox"/>	1.1.2	K Long lead items Specifi...	Application Development	Eng-P	Hour	12.00		2,160.000	
	<input checked="" type="checkbox"/>	1.1.2	K Long lead items Specifi...	Hardware: Tablet	ProjItem	Item	20.00	10.00	10,180.00...	5,090.000
	<input checked="" type="checkbox"/>	1.1.3	K P&ID's & component s...	Application Development	Eng-P	Hour	28.00		5,040.0000	
	<input checked="" type="checkbox"/>	1.1.3	K P&ID's & component s...	Other travel costs	Travel	Expense	1.00	0.50	10,000.00...	5,000.0000
	<input checked="" type="checkbox"/>	1.1.4	K Component - Brand & t...	Application Development	Eng-P	Hour	4.00		720.0000	
	<input checked="" type="checkbox"/>	1.1.5	K Utility list excluding co...	Application Development	Eng-P	Hour	8.00		1,440.0000	
	<input checked="" type="checkbox"/>	1.1.6	K Utility list including co...	Application Development	Eng-P	Hour	4.00		720.0000	

After confirming the reduced quantities by using the “OK” action, the estimated cost lines are directly reduced accordingly to the entered values in the “Reduce quantities” form.

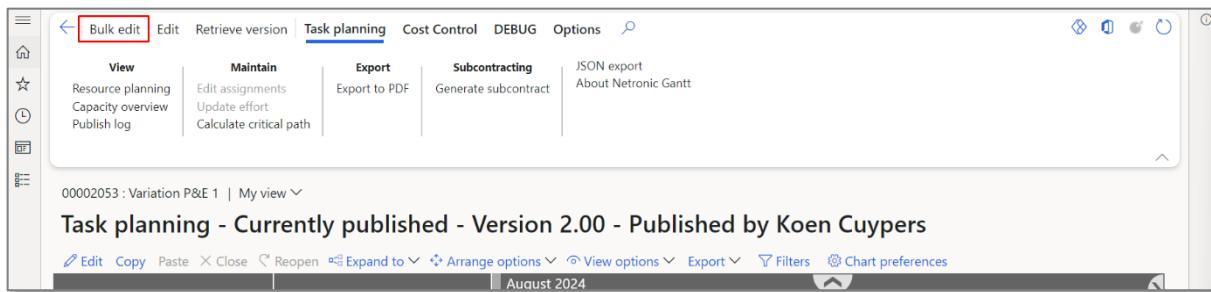
It is possible to use the “Paste” action to create new activities in the current project or any other project with the reduced quantities from the “Reduce quantities” form.

The pasted activities will have:

- Same name
- Same duration
- Same role
- Estimated cost lines with the reduced amounts.
- Same resource assignment
- Same CBS ID (as longs as that the CBS exists in either the Cost Control Budget or CBS Template of the target project).

## Bulk edit Progress and Estimated hours remain

A “Bulk edit” action is available for published project plans, to update the “Progress” and “Estimated hours remain” for activities in the progress and estimate data set.



The screenshot shows the 'Task planning' tab selected in the top navigation bar. The 'Bulk edit' button is highlighted with a red box. Below the navigation, there are several tabs: View, Maintain, Export, Subcontracting, and JSON export. Under the View tab, there are links for Resource planning, Capacity overview, and Publish log. Under the Maintain tab, there are links for Edit assignments, Update effort, and Calculate critical path. Under the Export tab, there are links for Export to PDF and Generate subcontract. Under the Subcontracting tab, there are links for JSON export and About Netronic Gantt. The main content area shows a project plan with tasks like 'Engineering', 'Engineering Task 1', 'Engineering Task 2', and 'Engineering Task 1'. The bottom of the screen shows a toolbar with various icons and the date 'August 2024'.

In the Bulk edit form the following columns can be adjusted:

- Estimated hours remain
- Progress.

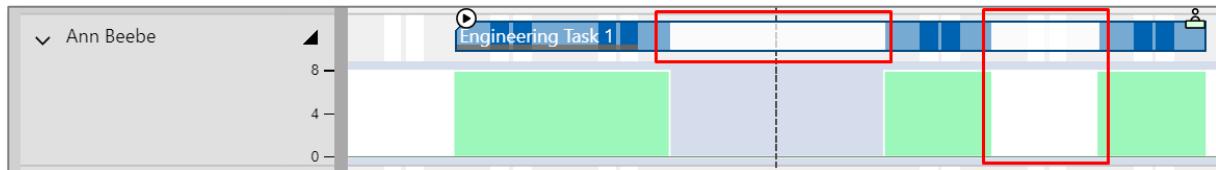
Bulk edit										
	WBS ID	Task name	Category	Effort in h...	Posted ho...	Completed...	Estimated ...	Estimated ...	Progress	Closed
	1	Engineering		180.00	15.00	21.00	159.00	159.00	11.67	
	1.1	Engineering Task 1	Design	40.00	10.00	16.00	24.00	24.00	40.00	
		Software Design	Design	40.00		16.00	24.00	24.00	40.00	<input type="checkbox"/>
	1.2	Engineering Task 2		110.00		0.00	110.00	110.00		
	1.2.1	Engineering		110.00		0.00	110.00	110.00		
	1.2.1.1	Engineering Task 1	Design	40.00		0.00	40.00	40.00		

This allows project members to easily update activities based on insights and progress.

## Show allocated effort on assignments in resource planning

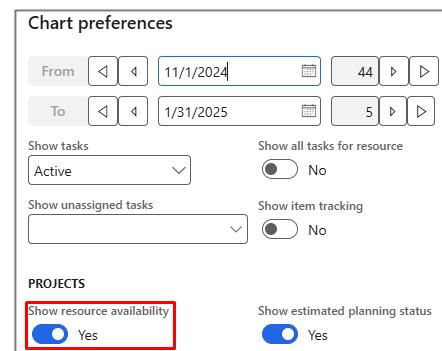
In the resource planning it's easy to see if a resource is assigned within the duration of an assignment.

Days on which a resource is not assigned are shown in white. If a task is assigned, these days are shown with a green or red color depending on the resource utilization.



As seen in the above example the non-working days of the resource are shown as white, but also the day on which the resource is not scheduled for the assignment.

This visualization can be used by enabling the “Show resource availability” in the chart preferences.



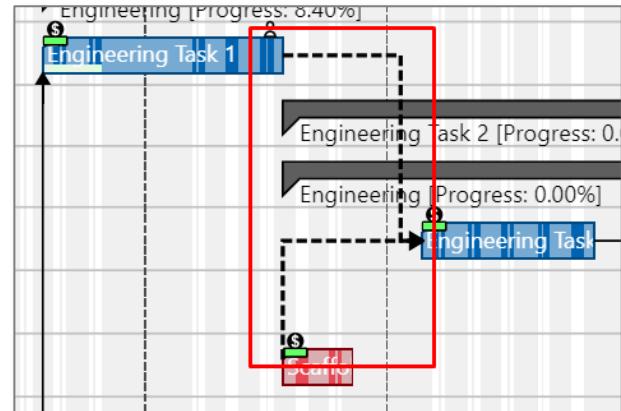
## Sticky links

With the “Sticky links” activities will stick to each other based on the links when one of the activities is being rescheduled.



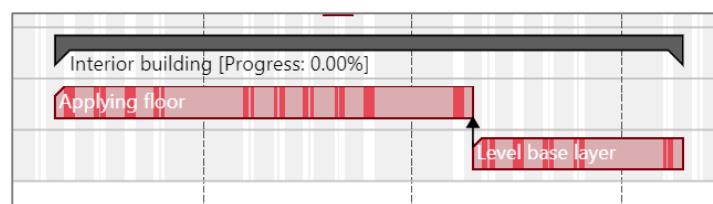
When the action “Sticky links” is enabled, moving an activity either to an earlier or later moment, will also move any of the linked activities throughout the project. When sticky links is enabled, the other activities (predecessors and successors) will be rescheduled in relation to the rescheduled activity, while reapplying all the links and respecting the delay configured on the links.

If the “Sticky links” action is not enabled, moving an activity to a later moment will not reschedule any of the predecessors with it. Links which have a longer duration than is configured as the delay will show as a dotted line in the task planning. This dotted line can be used to identify links which have a longer duration than might be needed.



## Start to Finish links

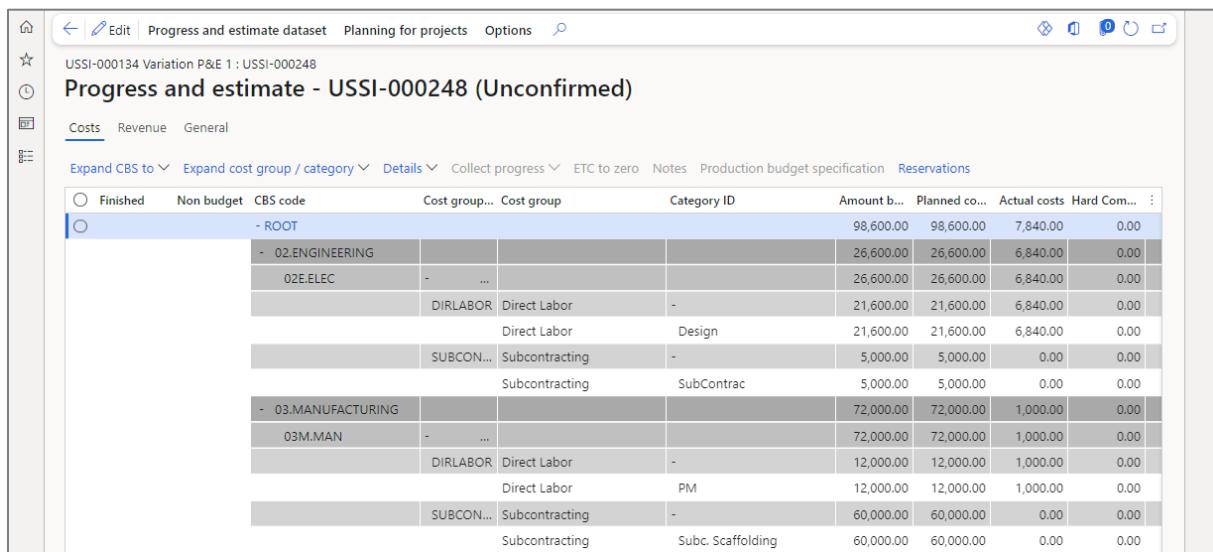
A start to finish link can be created between activities. The start date of the predecessor is driving the finish date of the successor as shown in the image below.



## Axtension® Project Controlling

### Simplified progress and estimate dataset

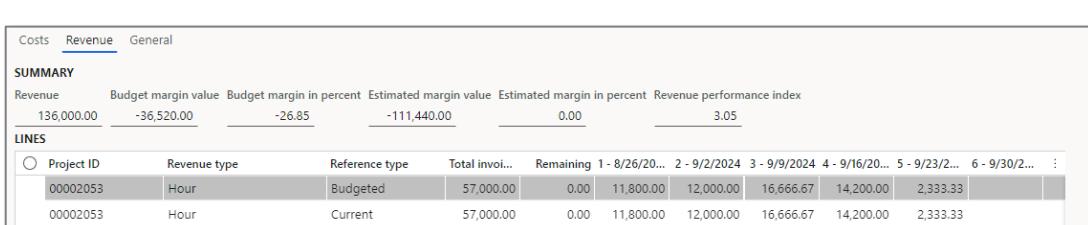
This version of Axtension® Project Controlling introduces a simplified progress and estimate dataset. The simplified progress and estimate dataset will show the CBS codes with budget lines in one overview. This is similar to the “Reporting data” view.



The screenshot shows the 'Progress and estimate' dataset for project USSI-000248. The interface includes a navigation bar with 'Edit', 'Progress and estimate dataset', 'Planning for projects', 'Options', and a search bar. The main area shows a tree view of CBS codes under the 'Costs' tab, with a detailed table below showing cost breakdowns for engineering and manufacturing.

Category ID	Amount b...	Planned co...	Actual costs	Hard Com...
- ROOT	98,600.00	98,600.00	7,840.00	0.00
- 02.ENGINEERING	26,600.00	26,600.00	6,840.00	0.00
02E.ELEC	26,600.00	26,600.00	6,840.00	0.00
DIRLABOR	21,600.00	21,600.00	6,840.00	0.00
Direct Labor	21,600.00	21,600.00	6,840.00	0.00
Subcontracting	5,000.00	5,000.00	0.00	0.00
SUBCON...	5,000.00	5,000.00	0.00	0.00
Subcontracting	5,000.00	5,000.00	0.00	0.00
- 03.MANUFACTURING	72,000.00	72,000.00	1,000.00	0.00
03M.MAN	72,000.00	72,000.00	1,000.00	0.00
DIRLABOR	12,000.00	12,000.00	1,000.00	0.00
Subcontracting	60,000.00	60,000.00	0.00	0.00
Subcontracting	60,000.00	60,000.00	0.00	0.00

The simplified progress and estimate dataset contains three tabs:

Tab Name	Description												
Costs	Overview of the CBS codes, cost groups, and categories												
Revenue	<p>Revenue information, including total revenue, margin and revenue period split broken down into revenue types of hour, expense and item.</p>  <table border="1"> <thead> <tr> <th>Revenue</th> <th>Budget margin value</th> <th>Budget margin in percent</th> <th>Estimated margin value</th> <th>Estimated margin in percent</th> <th>Revenue performance index</th> </tr> </thead> <tbody> <tr> <td>136,000.00</td> <td>-36,520.00</td> <td>-26.85</td> <td>-111,440.00</td> <td>0.00</td> <td>3.05</td> </tr> </tbody> </table> <p>The revenue of the reference type current can be adjusted. Note the values entered in here will not be written back in to the Cost Control budget and can only be used for reporting purposes.</p>	Revenue	Budget margin value	Budget margin in percent	Estimated margin value	Estimated margin in percent	Revenue performance index	136,000.00	-36,520.00	-26.85	-111,440.00	0.00	3.05
Revenue	Budget margin value	Budget margin in percent	Estimated margin value	Estimated margin in percent	Revenue performance index								
136,000.00	-36,520.00	-26.85	-111,440.00	0.00	3.05								
General	General information about the progress and estimate dataset.												

Using the new simplified progress and estimate dataset or the normal progress and estimate dataset, can be set per legal entity in the Cost Control parameters with the parameter **Progress and estimate dataset**.

My view ▾

## Cost Control parameters

General

Cost groups

Indirect cost template

Default category unit

### Set up Cost Control parameters

General parameters

Enable budget mutations  Yes

Allow transactions with descend...  No

Budgeting method

Cost Control

## Adjust column visibility

For simplified progress and estimate datasets, it is now possible to adjust which columns are being shown and in which order. This can be done in the “Cost Control parameters” in the section “Progress and estimates”.

My view ▾

## Cost Control parameters

General

Cost groups

Indirect cost template

Default category unit

### Setup progress and estimate column visibility

Simplified progress and estimate column setup

CURRENT DATASET

Move up ▾ Move down ▾ Reset display order

Display or...	Progress field	Visible
○	CBS description	<input type="checkbox"/>
○	Category name	<input type="checkbox"/>
1	Number budgeted	<input type="checkbox"/>
2	Amount budget	<input checked="" type="checkbox"/>
3	Planned costs	<input checked="" type="checkbox"/>
4	Actual planned value	<input type="checkbox"/>
5	Actual costs	<input checked="" type="checkbox"/>
6	Hard Committed	<input type="checkbox"/>

PREVIOUS DATASET

Move up ▾ Move down ▾ Reset display order

Display or...	Progress field	Visible
○	1 Number budgeted	<input type="checkbox"/>
○	2 Amount budget	<input type="checkbox"/>
○	3 Planned costs	<input type="checkbox"/>
○	4 Actual planned value	<input type="checkbox"/>
○	5 Actual costs	<input type="checkbox"/>
○	6 Hard Committed	<input type="checkbox"/>
○	7 AC+HC	<input type="checkbox"/>
○	8 Compl. QTY	<input type="checkbox"/>

Adjusting which columns should be visible and in which order is not only possible for the actual data in the progress and estimate dataset, but also for the previous dataset should be shown. This allows user to compare the current data with a previous dataset. Data from previous datasets will be shown as white columns.

Progress and estimate dataset Planning for projects Options

USS-000158 2024-01-10 Test Project - USS-000247

Progress and estimate - USS-000247 (Unconfirmed)

Costs Revenue General

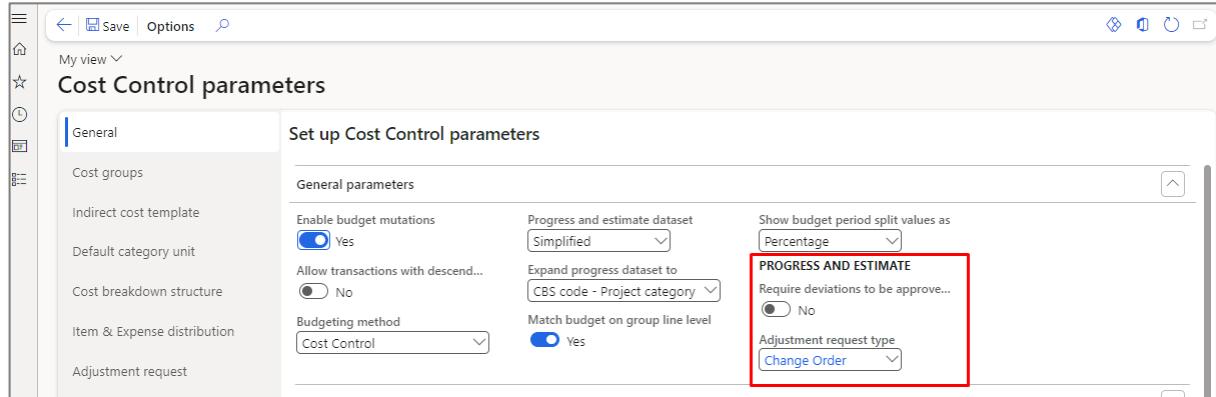
Expand CBS to ▾	Expand cost group / category ▾	Details ▾	Collect progress ▾	ETC to zero	Notes	Production budget specification	Reservations											
CPI	SPI	ETC QTY	ETC value	Soft Com.	Non Com.	Reserved	ETC value	Estimated variance	Calculated POC (%)	ETC calculation method	Progress calculation method	Previous copied	PoC (%)	Reserved	Estimated	Calculated	ETC calculation method	Progress calculation method
0.00	0.00	0.00000	35.370.00	8.250.00	27.120.00	0.00	45.900.00	-100.00	14 <multiple>			15	0.00	-190.00	14 <multiple>			
0.00	0.00	0.00000	4.320.00	0.00	4.320.00	0.00	7.200.00	0.00	40 Budgeted rate			45	0.00	340.00	40 Budgeted rate			
0.00	0.00	0.00000	4.320.00	0.00	4.320.00	0.00	7.200.00	0.00	40 Budgeted rate			45	0.00	350.00	40 Budgeted rate			
0.00	0.00	0.00000	4.320.00	0.00	4.320.00	0.00	7.200.00	0.00	40 Budgeted rate			45	0.00	360.00	40 Budgeted rate			
1.00	1.00	24.00000	40.00000	4.320.00	0.00	4.320.00	0.00	7.200.00	0.00	40 Budgeted rate	Copy WBS progress		45	0.00	360.00	40 Budgeted rate	Copy WBS progress	
0.00	0.00	0.00000	19.400.00	5.000.00	14.400.00	0.00	19.400.00	0.00	0 Budgeted rate			0	0.00	0.00	0 Budgeted rate			
0.00	0.00	0.00000	19.400.00	5.000.00	14.400.00	0.00	19.400.00	0.00	0 Budgeted rate			0	0.00	0.00	0 Budgeted rate			

What's new

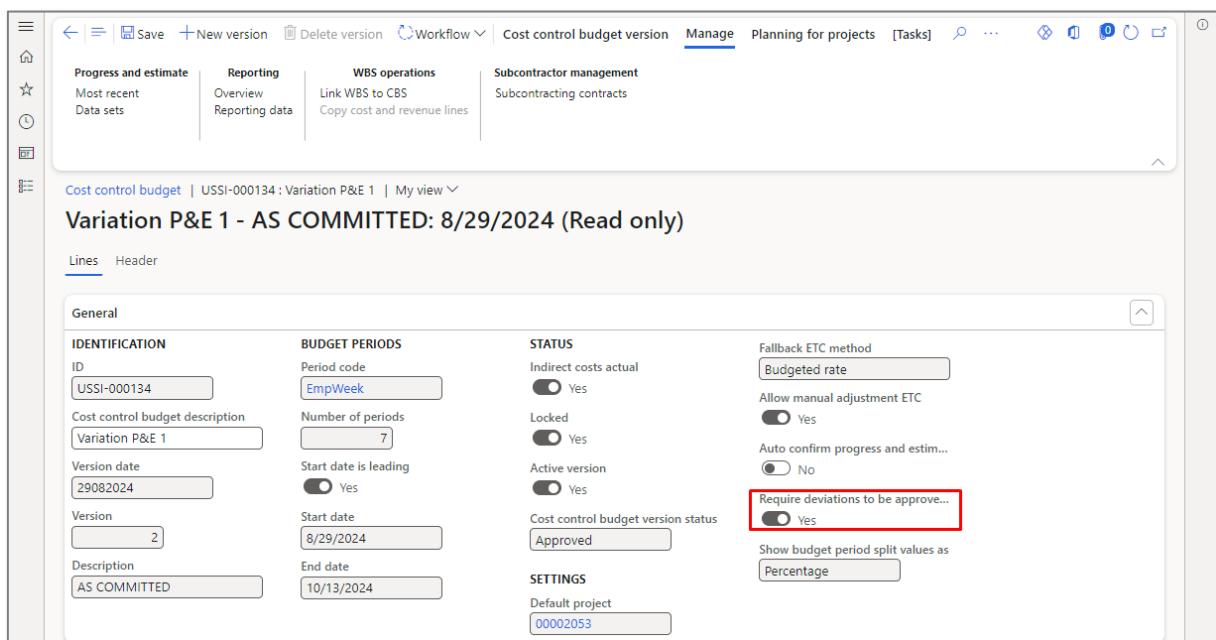
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## Adjustment requests for progress and estimate deviations.

Organizations can automatically create an adjustment request when estimated variations exists on a progress and estimate dataset and the dataset is being confirmed. This feature can be enabled in the “Cost Control parameters” with the ability to select the “Adjustment request type”.



The “Adjustment request type” can also be configured per Cost Control budget.



The created adjustment request type will contain new budget lines with amounts corresponding to the variances in the progress and estimate dataset. The budget lines will copy the budget period split from the originating budget line.

When an adjustment request is created for variations on a confirmed progress and estimate dataset, a new progress and estimate dataset can only be created when the adjustment request is approved or declined.

## Automatically create and confirm progress and estimate datasets

Progress and estimate datasets can be created and confirmed automatically by using a period task.

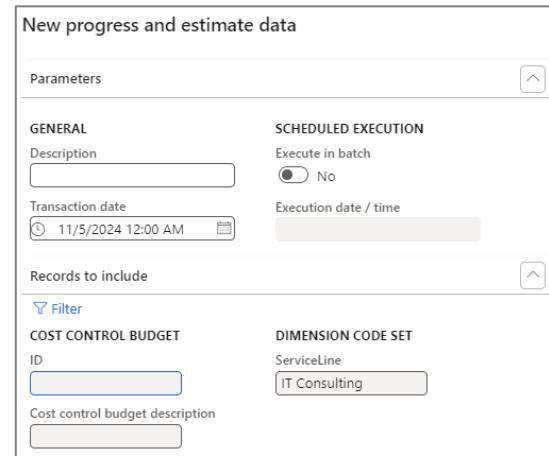
### Create progress and estimate datasets

A periodic task is available which can be scheduled to run at predefined dates. The periodic task can be found via *Project management and accounting* → *Periodic* → *Cost Control* → *New progress and estimate data*.

The periodic task can be created on request, but also be scheduled at a specific moment.

Note: if progress and estimate datasets need to be created at months end, make sure to schedule one periodic task per month and select the last date of the month as the transaction date.

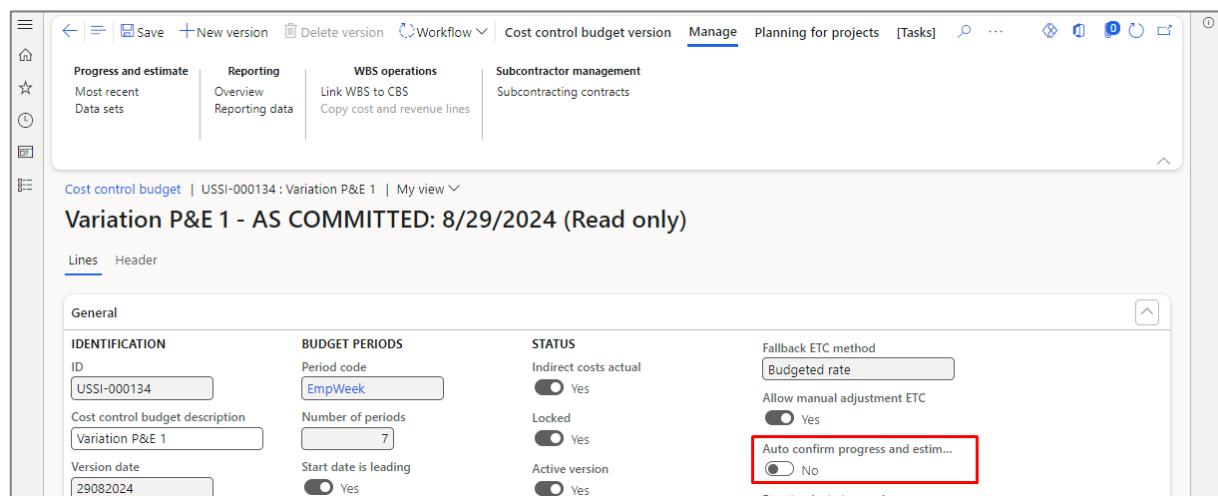
In addition, filters can be used to select Cost Control budgets based on e.g. project financial dimension as Service Line.



### Confirm progress and estimate datasets

Next to the automatic creation of a progress and estimate dataset, it is also possible to define if a generated progress and estimate dataset should be confirmed automatically per cost control budget.

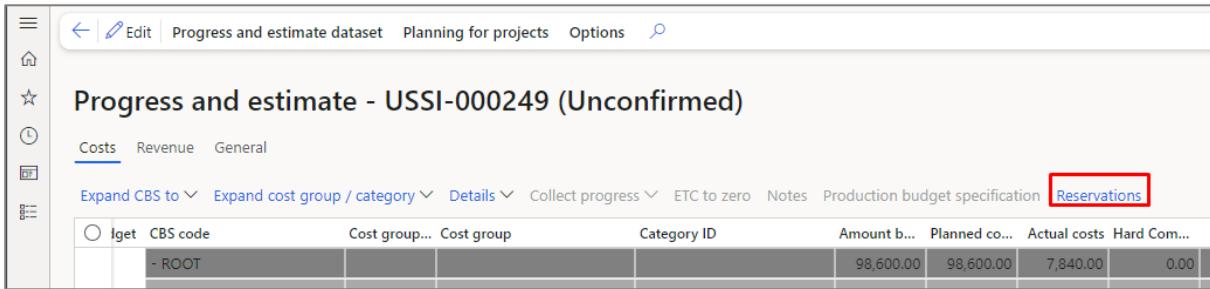
This can be done by setting the “Auto confirm progress and estimated dataset” toggle to yes.



## Reserve amounts

It is possible to manually reserve budget amounts in a “Progress and estimate dataset”.

This reserved amount can be used to deduct the non-committed cost amount and shown in reporting that a part of the budget is reserved for a specific purpose.



The screenshot shows the 'Progress and estimate dataset' interface. The 'Reservations' tab is highlighted with a red box. The table below shows a single reservation entry:

Costs	CBS code	Cost group...	Cost group	Category ID	Amount b...	Planned co...	Actual costs	Hard Com...
	- ROOT				98,600.00	98,600.00	7,840.00	0.00

Reservations can be created from the progress and estimate dataset by using the **Reservations** action. In the reservations form existing reservations can be shown, but new ones can be created as well.



The screenshot shows the 'Budget reservations' form. It displays a single reservation entry:

Cost control budget version	CBS code	Category	Cost group	Description	Amount	From date	To date	Created by	Created date and time
AS COMMITTED	02E.ELEC	SubContrac	SUBCONTR	Pre-agreement	2,500.00	11/5/2024	12/31/2154	Marco.Janssen	11/5/2024 12:39:59 PM

Reservations will be shown in the progress and estimate dataset related to the CBS code and category selected on the reservation.



The screenshot shows the 'Progress and estimate dataset' interface. A reservation entry is highlighted with a red box, showing the 'Reserved' status in the 'Non Com...' column.

CBS code	Cost group...	Cost group	Category ID	Amount b...	Planned co...	Actual costs	Hard Com...	Compl. QTY	Earned value	PoC (%)	CPI	SPI	ETC QTY	EAC QTY	ETC value	Soft Com...	Non Com...	Reserved	EAC value
- ROOT				58,000.00	98,600.00	7,840.00	0.00	0.00000	8,920.00	9	0.00	0.00	0.00000	28,600.00	0.00	27,180.00	2,500.00	37,320.00	
- 02.ENGINEERING				28,600.00	28,600.00	6,840.00	0.00	0.00000	7,920.00	30	0.00	0.00	0.00000	18,680.00	0.00	16,180.00	2,500.00	25,520.00	
- 02E.ELEC	DIRLABOR	Direct Labor	-	26,600.00	26,600.00	6,840.00	0.00	0.00000	7,920.00	30	0.00	0.00	0.00000	18,680.00	0.00	16,180.00	2,500.00	25,520.00	
	Direct Labor	Design	-	21,600.00	21,600.00	6,840.00	0.00	44.00000	7,920.00	37	1.16	0.37	76.00000	120,00000	13,680.00	0.00	13,680.00	0.00	20,520.00
	SUBCON...	Subcontracting	-	5,000.00	5,000.00	0.00	0.00	0.00000	0.00	0	0.00	0.00	0.00000	5,000.00	0.00	2,300.00	2,500.00	3,000.00	
	Subcontracting	SubContrac	-	5,000.00	5,000.00	0.00	0.00	0.00000	0.00	0	0.00	0.00	0.00000	100,00000	100,00000	5,000.00	0.00	2,500.00	5,000.00
+ 03.MANUFACTURING				72,000.00	72,000.00	1,000.00	0.00	0.00000	0.00	0	0.00	0.00	0.00000	0.00	0.00	0.00	0.00	0.00	

There is no option to link a reservation with e.g. a purchase order. If an amount is reserved for a purchase order, the reservation needs to be updated manually after the creation of the purchase order to avoid data duplicates. Adjusting a reservation can be done in the reservation form. Deleting a reservation will mark the reservation as “Ended”. The reservation will be cleared if a new budget version is created but can be copied over if needed.

The ability to create reservations can be enabled in the Cost Control parameters.



The screenshot shows the 'Cost Control parameters' interface. The 'Manual budget reservations' option is highlighted with a red box.

Committed Costs	REVENUE RECOGNITION	HARD COMMITTED COSTS	SOFT COMMITTED COSTS	Production order estimated cost ...	Manual budget reservations
Committed costs enabled <input checked="" type="radio"/> Yes	Consider hard committed as actu... <input checked="" type="radio"/> No	Purchase order received not invo... <input checked="" type="radio"/> Yes	Purchase order confirmed not re... <input checked="" type="radio"/> Yes	Production order estimated cost ... <input checked="" type="radio"/> Yes	Manual budget reservations <input checked="" type="radio"/> Yes
		Invoice contract invoice not post... <input checked="" type="radio"/> Yes			Invoice contract remaining amou... <input checked="" type="radio"/> Yes

## New ETC calculation method: Remaining Commitment

A new ETC calculation method, Remaining Commitment is introduced with this version of Axtension® Project Controlling.

ETC method Remaining Commitment is useful for categories, cost groups and CBS codes related to purchase orders or production orders. With ETC calculation Remaining Commitment method the ETC will be calculated from the sum of the soft committed amount and reserved amount.

Calculation of the EAC and variance is not changed with this new ETC calculation method.

The Fallback ETC method can be configured per legal entity in the “Cost control parameters or per Cost control budget.

**Cost Control parameters**

General	<b>Set up Cost Control parameters</b> <b>General parameters</b> <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="checkbox"/> Enable budget mutations           <input type="checkbox"/> Cost Control           <input type="checkbox"/> CBS code - Project category           <input type="checkbox"/> Show budget period split values as Percentage         </div> <div> <input type="checkbox"/> Allow transactions with descendants           <input type="checkbox"/> Progress and estimate dataset Simplified           <input checked="" type="checkbox"/> Match budget on group line level           <input type="checkbox"/> Yes         </div> <div> <b>PROGRESS AND ESTIMATE</b>   <input type="checkbox"/> Require deviations to be approved via ...           <input checked="" type="checkbox"/> No                       Adjustment request type: Change Order         </div> </div> <b>ETC calculation</b> <div style="display: flex; justify-content: space-between;"> <div> <input checked="" type="checkbox"/> Fallback ETC method: Remaining commitments             <input checked="" type="checkbox"/> Allow manual adjustment ETC         </div> <div> <input type="checkbox"/> Yes         </div> </div>		
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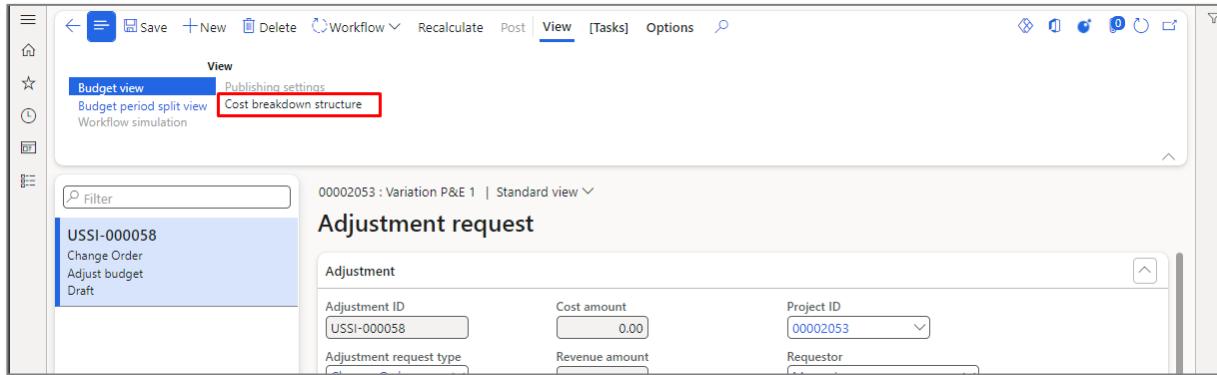
**Cost control budget** | USI-000156 : Demo Project | Standard view ▾

**Demo Project - Version 1 - 11/6/2024: 11/6/2024 (Editable)**

Lines	Header																									
<b>General</b> <table border="1"> <tr> <td><b>IDENTIFICATION</b></td> <td><b>VERSION</b></td> <td><b>NUMBER OF PERIODS</b></td> <td><b>STATUS</b></td> <td><b>SETTINGS</b></td> </tr> <tr> <td>ID: USI-000156</td> <td>Version: 1</td> <td>Number of periods: 1</td> <td>Indirect costs actual: Yes</td> <td>Default project: 00002328</td> </tr> <tr> <td>Cost control budget description: Demo Project</td> <td>Description: Version 1 - 11/6/2024</td> <td>Start date is leading: Yes</td> <td>Locked: No</td> <td>Require deviations to be approved via ...: No</td> </tr> <tr> <td>Version date: 06112024</td> <td>Period code: EstMonth</td> <td>Start date: 11/6/2024</td> <td>Active version: No</td> <td>Show budget period split values as Percentage</td> </tr> <tr> <td></td> <td></td> <td>End date: 11/6/2024</td> <td>Cost control budget version status: Draft</td> <td>Allow manual adjustment ETC: Yes</td> </tr> </table>		<b>IDENTIFICATION</b>	<b>VERSION</b>	<b>NUMBER OF PERIODS</b>	<b>STATUS</b>	<b>SETTINGS</b>	ID: USI-000156	Version: 1	Number of periods: 1	Indirect costs actual: Yes	Default project: 00002328	Cost control budget description: Demo Project	Description: Version 1 - 11/6/2024	Start date is leading: Yes	Locked: No	Require deviations to be approved via ...: No	Version date: 06112024	Period code: EstMonth	Start date: 11/6/2024	Active version: No	Show budget period split values as Percentage			End date: 11/6/2024	Cost control budget version status: Draft	Allow manual adjustment ETC: Yes
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ID: USI-000156	Version: 1	Number of periods: 1	Indirect costs actual: Yes	Default project: 00002328																						
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		End date: 11/6/2024	Cost control budget version status: Draft	Allow manual adjustment ETC: Yes																						

## Change Cost Breakdown Structure via an adjustment request

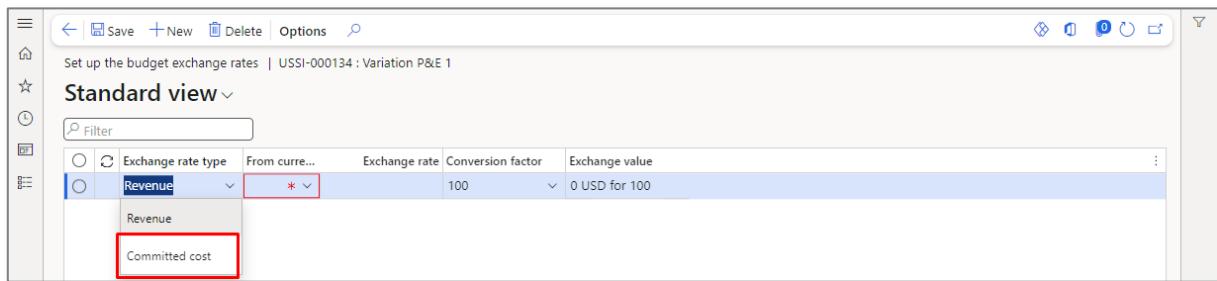
It is now possible to adjust the Cost Breakdown Structure of a Cost Control budget via an adjustment request, without creating a new budget version. In the “Adjustment request” form the Cost Breakdown structure can be viewed or edited.



Changes on the Cost Breakdown Structure will be applied after the approval of the adjustment request.

## Conversion rates for committed costs

Exchange rates can be set for committed costs. In the “Set up the budget exchange rates” form, the “Committed cost” is available as the “Exchange rate type” for exchange rates destined to be used for committed costs.



If an exchange rate is set for committed costs, any cost committed value is shown based on the exchange rate instead of the price of the purchase order and/or production order.

The exchange rate is not date controlled. When updated, all converted values for the budget will be calculated accordingly.

## Distribute budget period split based on amounts

The budget period split can be based on percentages and amounts. The “Show budget period split values as” parameter can be configured in the Cost Control budget.

Cost control budget | USSI-000134 : Variation P&E 1 | My view ▾

### Variation P&E 1 - Version 3 - 11/5/2024: 11/5/2024 (Editable)

Lines Header

General

<b>IDENTIFICATION</b>	<b>BUDGET PERIODS</b>	<b>STATUS</b>	<b>Fallback ETC method</b>
ID USSI-000134	Period code EmpWeek	Indirect costs actual <input checked="" type="radio"/> Yes	Budgeted rate
Cost control budget description Variation P&E 1	Number of periods 7	Locked <input checked="" type="radio"/> No	Allow manual adjustment ETC <input checked="" type="radio"/> Yes
Version date 05112024	Start date is leading <input checked="" type="radio"/> Yes	Active version <input checked="" type="radio"/> No	Auto confirm progress and estim... <input checked="" type="radio"/> No
Version 3	Start date 8/29/2024	Cost control budget version status Draft	Require deviations to be approve... <input checked="" type="radio"/> Yes
Description Version 3 - 11/5/2024	End date 10/13/2024	SETTINGS	Show budget period split values as <input checked="" type="radio"/> Percentage <input type="radio"/> Percentage <input type="radio"/> Amount
		Default project 00002053	

When the parameter is set to “Amount”, amounts can be used instead of percentages in the budget period split grid.

Budget period split

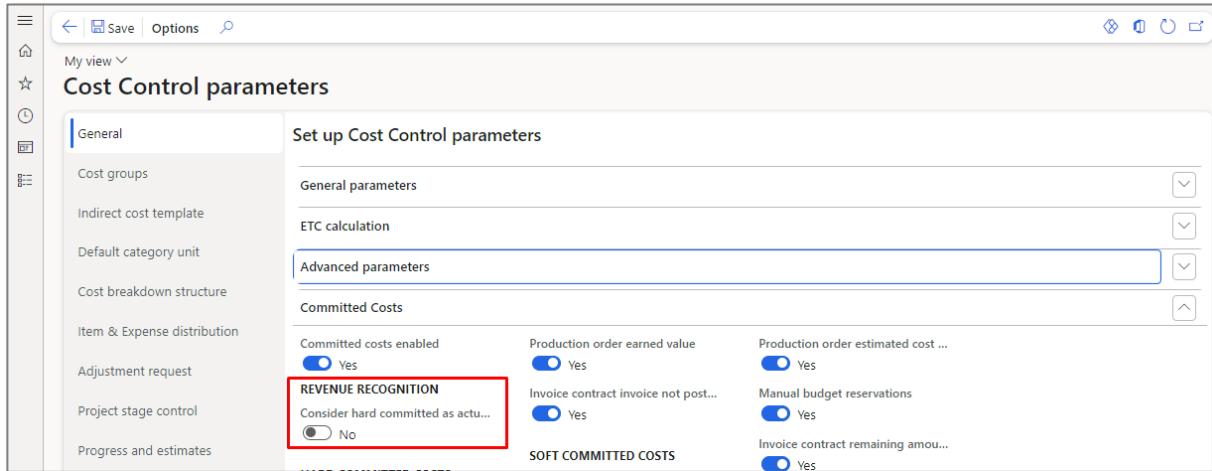
-D Distribute equally -D Distribute from WBS

		Description	Amount	Remaining	1 - 8/26/2024	2 - 9/2/2024	3 - 9/9/2024	4 - 9/16/2024	5 - 9/23/2024	6 - 9/30/2024	7 - 10/7/2024	
<input type="radio"/>	<input checked="" type="radio"/>	Group										
<input checked="" type="radio"/>	<input type="radio"/>	Labor	Project Management	4,000.00	0.00	1,333.60		888.80	1,333.20	444.40		
	<input type="radio"/>	Subcontracting	Subcontracting Scaffolding	10,000.00	0.00	10,000.00						
	<input type="radio"/>	Labor	Software Design	7,200.00	0.00	959.76	2,400.48	2,399.76	1,440.00			
	<input type="radio"/>	Labor	Software Design	7,200.00	0.00	959.76	2,400.48	2,399.76	1,440.00			
	<input type="radio"/>	Subcontracting	Subcontracting Scaffolding	10,000.00	0.00	10,000.00						

Changing the parameter to “Percentage”, will calculate the values in the budget period split grid as percentages based on the entered amounts. The same will happen when percentages are entered, and the parameter is changed to “Amount”.

## Use hard committed costs as actual costs in revenue recognition

With the parameter “Consider hard committed as actuals” in the “Cost Control parameters”, hard committed costs will be used as actual costs instead of being used to calculate the “Cost to complete” in revenue recognition.



Enabling the parameter “Consider hard committed as actuals” will use hard committed costs on a confirmed progress and estimate dataset as actual cost in revenue recognition and will calculate the percentage of completion in revenue recognition by including the hard committed costs.

### Note:

Caution is advised when enabling this parameter. Organizations that want to calculate the revenue by including hard committed costs will have to correct ledger transactions manually to avoid balance issues.