

Oracle  
**Textura Payment Management**  
**Subcontractor Work Breakdown Management (Europe)**

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Oracle Textura Payment Management Subcontractor Work Breakdown Management (Europe)

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# Updating a Budget

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Your budget is called your Work Breakdown (WB) on Textura Payment Management and reflects a list of works your organisation will complete for a contract. In instances where the Main Contractor does not use the **Specified WB** setting, you will need to record your own budget.

If your organisation has the ability to edit and itemise your budget, users assigned the Project Manager role will see a **Budget** task on the **Project Home** page after accepting a contract. Selecting the **Edit Budget** task from the **Project Home** page opens the **Edit Work Breakdown** page.

## FAQs

*How should I fill out my Work Breakdown?* (see page 19)

*My Work Breakdown is out of balance. What do I do?* (see page 19)

*Why does my Work Breakdown have multiple tables?* (see page 19)

## Additional Resources

- ▶ **In-App Help:** In the application, select the ? > **Help for this Page** link in the top right corner of your page. The Help topics presented are context sensitive to the page you have open in TPM.
- ▶ **Documentation Library** ([https://docs.oracle.com/cd/E97085\\_01/10313806.htm](https://docs.oracle.com/cd/E97085_01/10313806.htm))
- ▶ **Support** ([https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm))

## In This Section

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## Work Breakdown Management

Modify the budget if the total value of the contract is not changing. The sum of the line items (**Working Totals**) must equal the total contracted value of each component (**Totals**). If you need to change the value of the contract, your Main Contractor will need to create a variation for your organisation.

### Why Modify a Budget Without Changing the Contract Value?

Modify your current Work Breakdown (WB) to:

- ▶ Create, delete, or combine Work Breakdown lines
- ▶ Allocate or reallocate funds in accordance with existing variations.

### Before You Begin

- ▶ You can only edit your work breakdown if your Main Contractor does not use the **Specified WB** contract setting. If your Main Contractor uses the **Specified WB** setting, you cannot access the **Edit Work Breakdown** page, but you can still see your billing information on the **View Work Breakdown** page.
- ▶ Make sure someone in your organisation is assigned the Project Manager project role for the project related to your WB. This is a required role for working on a project on TPM and only Project Managers can edit the WB.
- ▶ Consider whether you need to break out your WB before beginning these steps. If you or your Main Contractor do not need a detailed record of your work and fund allocation, you can leave this page alone.
- ▶ The **Edit Work Breakdown** and **Enter Payment Application** pages and workflows are different. The WB is your budget for the project and reflects your total contract value. You use the **Edit Payment Application** page to record the value of and submit a pay app for the work you performed during a scheduled period.
- ▶ If your assigned budget on the **Edit Work Breakdown** page is too low or too high for the work you will provide on the project, you can ask for your Main Contractor to create a variation to adjust the amount.

### High-Level Overview

This guide directs you through the steps required to itemise your work breakdown.

To edit your work breakdown on a project:

- 1) **Navigate to the Edit Work Breakdown Page** (see page 8).

When you first access this page, you will see a table with a single line item on the **Edit WB** tab. The line item includes a description and the entirety of your budget for the project.

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**Note:** This is the most common experience for Subcontractors on TPM. If your Main Contractor linked your contract to two separate components in their work breakdown, you might see two or more tables on this page.

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- 2) **Manually break out the WB** (see "**Breaking Out the Work Breakdown Manually for Subcontractors**" on page 9) on the **Edit WB** tab to show more details for your budget. Add a new line to the table and edit the following columns for that line: Item Number, Description, and Adjustment Amount.

The total of all lines in your Work Breakdown (**Working Totals**) must equal the original budget amount (**Totals**). If these two numbers do not match, your Work Breakdown will be out of balance and you will not be able to proceed.

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#### Notes:

- The links below open the **Help** documentation in a new browser tab. The current tab will continue to display this guide (**Subcontractor Work Breakdown Management**) and will retain the topic you are currently viewing.
- Your project budget is determined by the Main Contractor organisation. Once you accept the contract, you will need a variation

if you need to increase or decrease the total contract value. You can also request a variation as a part of Your Billing Workflow when entering a progress claim. See the **Subcontractor Payment Application Workflow Guide**  
[https://docs.oracle.com/cd/E97085\\_01/English/workflow\\_guides/sub\\_billing\\_guide\\_eu/index.htm#t10316780](https://docs.oracle.com/cd/E97085_01/English/workflow_guides/sub_billing_guide_eu/index.htm#t10316780) for more information on how to submit payment applications on TPM.

## Optional Steps

**View Work Breakdown:** As a Subcontractor, you can view the current budget on the **View Work Breakdown** page. This page differs slightly from the **Edit Work Breakdown** page because it shows the WB as a single table and reflects the budget after the last claims period.

If your Main Contractor uses the **Specified WB** contract setting, you cannot edit your budget or access the **Edit Work Breakdown** page, but you can still access and view the **View Work Breakdown** page.

See **View Work Breakdown for Subcontractors**  
[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/Europe/10307239.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10307239.htm).

## Working with the Work Breakdown Page as a Subcontractor

Enter your project's budget on the **Edit WB** tab of the **Enter Work Breakdown (WB)** page.

Only users with the Project Manager role can edit a WB.

- 1) **Save Changes** Button: Save changes you made on the page. When you select the **Save Changes** button, you will see a **Status** page, confirming changes were saved.
- 2) **Revert to Saved** Button: Discards changes and returns the WB to the last saved version
- 3) **Period Context:** Shows a message defining when the changes impact the project.
- 4) **Filter Components:** Choose to view:
  - ▶ **All:** Displays all components
  - ▶ **No Variatoin:** Displays only non-variation components
  - ▶ **Only Variatoin:** Displays only variation components

**Note:** Variation components will display as collapsed tables when WBs have more than ten components.

- 5) **Contract Description:** Acts as a label for the WB table.
- 6) **Edit WB** Tab: Use this tab to modify values for the line item.
- 7) **Edit Contract** Tab: View and access subcontracts associated with the project, associate tax rates to a line, and change **Self Performed** status.
- 8) **Edit Billings** Tab: View and edit billed to date amounts.
- 9) **WB Table:** Contract components appear as individual line items. A Main Contractor's line item becomes a contract component in a subcontract. The name of the table matches the name of the component in the Main Contractor's Work Breakdown.

Out of Balance components display with a red outline and always load in an expanded view.

Use the available buttons to manage your project budget.

- ▶ **Add New Line:** Adds a new line to the WB table. Your cursor will be in the new line. The active line displays in yellow.
- ▶ **Copy Selected:** Adds a copy of the active line immediately below the original.
- ▶ **Delete Selected:** Deletes the active line.
- ▶ **Browse:** Displays a dialogue box to select a file from your device.
- ▶ **Upload New from CSV Button:** Upload a file selected from your device into the WB table.
- ▶ **Download Example CSV File Link:** Download a sample Excel file to your device to use as a template if you plan to upload a CSV file to use as your WB.

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### Navigate to the Edit Work Breakdown Page

To make changes to the Work Breakdown after it is created, select **Edit Work Breakdown** from the **My Contract** menu at the top of any project page.

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### Multiple Component Contracts Overview

If your subcontract includes multiple components, the Work Breakdown (WB) will show separate tables for each component in your contract. The first ten display automatically when the page loads. The remaining components are hidden.

See **About Modifying the Work Breakdown for Subcontractors**

[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/Europe/10315865\\_1.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10315865_1.htm) for more information.

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### Enter Work Breakdown for Subcontractors

As a Subcontractor, use the **Edit Work Breakdown** page to enter the budget or **Work Breakdown (WB)**.

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**Caution:** Do not confuse this page with your Billing Workflow. The values entered in this page must add up to the entire contract budget. Subcontractors use the Billing Workflow to enter a payment application during the period process.

See **My Payment Application Submission for Subcontractors** (see My Payment Application Submission for Subcontractors - [https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/Europe/10313243.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10313243.htm)).

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The **Edit Work Breakdown** page shows components of the Main Contractor's budget that are included in your subcontract.



- ▶ If your subcontract includes only one component, the WB will show a single table. The **Work Breakdown Amount** column will display the **Contract Value** entered by the Main Contractor.
- ▶ If your subcontract includes multiple components, the WB will show separate tables for each component in your contract. The first ten display automatically when the page loads. The remaining components are hidden.

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### Breaking Out the Work Breakdown Manually for Subcontractors

To break out the budget on the **Edit WB** tab of the **Edit Work Breakdown** (WB) page:

- 1) **Navigate to the Edit Work Breakdown Page** (see page 8).
- 2) Select the **Edit WB** tab.
- 3) Select the **Add New Line** button.

The new row displays in yellow, and a dashed line borders the active field.

- 4) In the **Item Number** column for the new line, enter a number.  
Lines will display in order by item number on project documents.

When creating an item number:

- ▶ Use numbers and/or letters.
- ▶ Do not use special characters.
- ▶ Make item numbers sequential.

Lines are sorted by the first digit of the item number. If your WB includes more than nine lines, use leading zeroes to sort items correctly. Remember to add an item number to the original line, too.

**For example:** To ensure your line items sort correctly use 001, 010, and 100 for 1, 10, and 100.

If you add Subcontractors and Suppliers, you will link the subcontracts to your WB using item numbers.

- 1) Enter a description to describe the work or expense for the line item. The first line will default to the **Contract Description** entered on the **Project Settings** page.

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**Note:** This is the description that will appear on a payment application for a line item. The character limit is 80 characters.

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- 2) In the **Adjustment Amount** column, enter the amount of money budgeted for the line item.  
Entering amounts in this column will update the amounts in the **Work Breakdown**, **Contract Sum to Date**, and the **Balance to Complete** columns. When adding **Adjustment Amounts** on a new line, remember to subtract an equivalent amount from the original line.
- 3) Confirm your **Working Totals** amounts.  
The **Working Totals** display totals, including adjustments that are not yet saved. This row displays in red until you allocate the entire contract value in the table.
- 4) After you complete your WB, select the **Save Changes** button.  
The **Working Totals** should match the **Totals** when you complete the work breakdown.  
A **Status** page confirms the budget has been saved.

## Reallocating Budget Amounts to a New Line for Subcontractors

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**Not sure whether to break out your WB?** Consult the Main Contractor to determine if the WB needs to show a full breakdown of your work.

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To break out the budget on the **Edit WB** tab of the **Edit Work Breakdown** (WB) page:

1) **Navigate to the Edit Work Breakdown Page** (see page 8).

2) Select the **Add New Line** button.

The new row displays in yellow, and a dashed line borders the active field.

3) In the **Item Number** column for the new line, enter a number.

Lines will display in order by item number on project documents.

When creating an item number:

- ▶ Use numbers and/or letters
- ▶ Do not use special characters
- ▶ Make item numbers sequential.

Lines are sorted by the first digit of the item number. If your WB includes more than nine lines, use leading zeroes to sort items correctly. Remember to add an item number to the original line, too.

**For example:** To ensure your line items sort correctly use 001, 010, and 100 for 1, 10, and 100.

If you add Subcontractors and Suppliers, you will link the subcontracts to your WB using phase codes.

4) Enter a description to describe the work or expense for the line item. The first line will default to the **Contract Description** entered on the **Project Settings** page.

---

**Note:** This is the description that will appear on a payment application for a line item.

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5) In the **Adjustment Amount** column, enter the amount of money budgeted for the line item.

Entering amounts in this column will update the amounts in the **Work Breakdown**, **Contract Sum to Date**, and the **Balance to Complete** columns. When adding **Adjustment Amounts** on a new line, remember to subtract an equivalent amount from the original line.

6) Confirm your **Working Totals** amounts.

The **Working Totals** display totals, including adjustments that are not yet saved. This row displays in red until you allocate the entire contract value in the table.

7) After you complete your WB, select the **Save Changes** button.

The **Working Totals** should match the **Totals** when you complete the work breakdown.

A **Status** page confirms the budget has been saved.

## Reallocating Budget Amounts to an Existing Line for Subcontractors

Use the **Edit WB** tab on the **Edit Work Breakdown** page to adjust the Work Breakdown (WB) amounts in a project's budget. If original contract values (total) are not changed, line item amounts may be reallocated without creating a variation.

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**Note:** Amounts assigned to Subcontractors can only be changed by a variation.

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To reallocate budget amounts to an existing line from the **Edit WB** tab of the **Edit Work Breakdown** page:

- 1) **Navigate to the Edit Work Breakdown Page** (see page 8).
- 2) Select the **Edit WB** tab.
- 3) In the **Adjustment Amount** column for each line to edit, either:
  - ▶ Type a negative number to adjust down, or decrease the amount
  - ▶ Type the same number as a positive number to adjust up, or increase the amount.
- 4) Verify the **Adjustment Amount** column totals remain zero. If totals are not zero, review the amounts in the column for an imbalance.
  - ▶ Amounts cannot be less than the **Billed to Date** amounts. To change the **Billed to Date** amount, change the payment and retention amounts under the **Edit Billings** tab first.
  - ▶ You can make the **Contract Sum to Date** amount less than the amount of the scheduled value.
  - ▶ You can subtract the **Billed To Date** amount from the **Contract Sum To Date** amount to determine the un-billed or **Balance to Complete** amount.
- 5) Select the **Save Changes** button.  
A **Status** page confirms the application saved your changes.
- 6) Optional. From the **Status** page, select the [here](#) link to return to the **Edit Work Breakdown** page so you can review your changes.

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### Uploading a New WB from a CSV File for Subcontractors

You can upload your Work Breakdown (WB) as a CSV file. Consider uploading your WB if you already have it saved in Excel or it has several lines.

When formatting a CSV:

- ▶ Change the column format from **general** to **text** (general column format automatically removes the leading zeros).
- ▶ Do not use commas.
- ▶ Do not use currency symbols.
- ▶ Do not use subtotals.
- ▶ Do not use totals..

To upload a new Work Breakdown on the **Edit Work Breakdown** page:

- 1) **Navigate to the Edit Work Breakdown Page** (see page 8).
- 2) Select the **Download Example CSV** File link to save a properly formatted template.
- 3) Use the sample CSV file as a formatting guide. Either enter budget details directly into the sample file, or modify an existing Excel spreadsheet to match the format of the sample file.

The first row of the spreadsheet shows the heading for each field. Each subsequent row must include values for the following columns:

- ▶ Column A (Phase Code/Item Code): A number used to sort line items in a WB.  
When you download the file, your item codes will automatically populate the first column.
- ▶ Column B (Phase Code/Item Code Description): Text describing the work or expense for the line item. The character limit is 80 characters.
- ▶ Column C (Budget Amount): The amount of money budgeted for the line item.
- ▶ Column D (Billing Adjustment): An amount entered to account for previous, off-system billings for the line item.
- ▶ Column E (Retention Adjustment): An amount entered to account for retention held from previous, off-system billings for the line item.

Projects with special budgets should also include:

- ▶ Column F (Special Budget Amount): An alternative budget tracked on the system.
- ▶ Column G (Special Budget Changes): Changes made to the alternative budget.

Projects with unit billing may also include:

- ▶ Column H (Unit of Measure): The way quantities are measured.
- ▶ Column I (Unit Price): The cost of each unit.
- ▶ Column J (Unit Quantity): The amount of units budgeted for the line item.

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**Note:** Columns H through J only display if a project uses the **Display Units** project setting.

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- 4) Save the file to your computer.
- 5) On the **Edit Work Breakdown** page, select **Browse...**  
A **File Upload** dialogue box appears.
- 6) In the dialogue box, choose your budget CSV file.  
The file name displays next to the **Upload New from CSV** button.
- 7) Select **Upload New from CSV**.  
The spreadsheet lines should display in the **Edit WB** tab.
- 8) Verify the totals are correct and the WB is in balance.  
If your WB is out of balance, check the amounts you entered. Contact **Oracle Support** [https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm) if you need help balancing your WB.
- 9) Select the **Save Changes** button when the WB is complete and your totals are accurate.

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**Note:** The **Working Totals** should match the **Totals**.

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A **Status** page confirms the changes have been saved.

## Editing Subcontractor Contracts

Use the **Edit Contract** tab to view subcontracts associated with line items, access subcontracts, create a contract for a line item, or change self-performed status.

Initially, the **Organisation/Subcontract** column displays:

- ▶ **New:** The line has not been subcontracted
- ▶ An empty cell: Some part of the line item has been subcontracted.

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See **Creating Sub-Tier Subcontracts**

[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/Europe/10315566.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10315566.htm) for information on how to create a contract for an on-system Sub-Tier Subcontractor. Selecting this link will open the topic in a new browser tab.

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## Viewing Subcontracted Lines for Subcontractors

To view lines subcontracted out to other organisations on the **Edit Contract** tab of the **Edit Work Breakdown** page:

- 1) **Navigate to the Edit Work Breakdown Page** (see page 8).
- 2) Select the **Edit Contract** tab.
- 3) In the **Nav** column, select the **+** sign to show line details.  
The expanded line shows subcontracts associated with a line item.  
The Sub-Tier Subcontractor names in the **Organisation/Subcontract** column link to the **Contract Maintenance** page for a subcontract.  
See **Contract Maintenance for Subcontractors**  
[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/Europe/10307260.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10307260.htm) for more information.
- 4) Optional. From the **Organisation/Subcontract** column for a line without a subcontract, select the **New** link to navigate to the **Create Contract** page.  
See **Contract Maintenance for Subcontractors**  
[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/Europe/10307260.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10307260.htm) for more information about creating subcontracts.

## Editing Subcontractor Billings

This tab is also used by Oracle Support to:

- ▶ Account for worked performed before TPM implementation
- ▶ Modify billed to date lines
- ▶ Modify retention to date lines.

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**Note:** Contact **Oracle Support**

[https://docs.oracle.com/cd/E97085\\_01/10313339.htm](https://docs.oracle.com/cd/E97085_01/10313339.htm) for help recording payments made before implementation.

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## Additional Work Breakdown Information

These additional topics list and explain the fields you may see on the **Edit Work Breakdown** page.

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## Edit Work Breakdown Fields Overview for Subcontractors

### Nav

When a line item is subcontracted, the Subcontractor and Self-Performed budget lines are included under the phase code.

Select the **plus sign (+)** to see line item details associated with a phase code. If you select the **plus sign (+)** on one tab, it expands line item details on all tabs.

Select the **minus sign (-)** to hide the line item details. If you select the **minus sign (-)** on one tab, it hides line item details on all tabs.

### Item Number

An **Item Number** identifies the budget line items in a Work Breakdown (WB). Lines are sorted by the first digit of the item number. If your WB includes more than nine lines, use leading zeroes to sort items correctly.

**For example:** To ensure your line items sort correctly, use 001, 010, and 100 for 1, 10, and 100.

### Description

The **Description** defines the line item. This is the description that will appear on a payment application for a line item. The character limit is 80 characters.

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## Edit WB Tab Overview for Subcontractors

Use the **Edit WB** tab to view the budget and adjust un-billed line items.

### Adjustment Amount

Used to change line item amounts.

### Work Breakdown Amount

Current value for the line item, including **Adjustment Amount**.

### Net Change by Variation Amount

Total value of variations (positive or negative) that impact the line item.

### Contract Sum to Date Amount

Value of the line item plus the **Net Change by Variation** amount.

### Billed to Date Amount

Amount invoiced to date (this value changes based on Period Context).

### % Comp

Percentage of the line item completed so far.

### Retention to Date Amount

Amount of retention held back.

### Balance to Complete

Amount left to bill on the contract (the total amount of work outstanding on the contract). This amount equals the **Contract Sum to Date Amount** minus the **Billed to Date** amount.

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### Edit Contract Tab Overview for Subcontractors

The **Edit Contract** tab lists subcontracts for the project. Use this tab to view contracts associated with line items, access Sub-Tier subcontracts, create a contract for a line item, or change self-performed status.

#### Organisation/Subcontract

Lists the organisation contracted for the line and links to the **Contract Maintenance** page for the subcontract. If **New** appears in the column, the line is not linked to a subcontract. Select the **New** link to navigate to the **Contract Maintenance** page to create a new subcontract.

See **Contract Maintenance for Subcontractors**

[https://docs.oracle.com/cd/E97085\\_01/TPMhelp/en/Europe/10307260.htm](https://docs.oracle.com/cd/E97085_01/TPMhelp/en/Europe/10307260.htm) for more information.

#### Work Breakdown Amount

Current value for the line item, including the **Adjustment Amount**.

#### Net Change by Variation Amount

Total value of variations (positive or negative) that impact the line item.

#### Contract Sum to Date Amount

Value of the item plus or minus the **Net Change by Variation** amount.

#### Subcontract Amount

Total value of the contract.

#### Self Performed

Indicates whether the line is self-performed (Yes) or includes subcontracts.

#### Billed to Date Amount

Amount invoiced to date (changes based on Period Context).

#### % Comp

Percentage of the line item completed so far.

#### Retention to Date Amount

Amount of retention held back.

#### Balance to Complete

Amount left to bill on the contract (the total amount of work outstanding on the contract). This amount equals the **Contract Sum to Date Amount** minus the **Billed to Date Amount**.

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### Edit Billings Tab Overview for Subcontractors

The **Edit Billings** tab shows billed line items. Use this tab to view billings. Administrators will also use the **Edit Billings** tab to account for work performed before system implementation.

### Contract Sum to Date Amount

Value of the line item plus or minus the **Net Change by Variation** amount.

### Adjustment Amount

Column used to change the **Billed to Date Amount** for the line item.

### Billed to Date Amount

Amount invoiced to date (changes based on Period Context).

### % Comp

Percentage of the line item completed so far.

### Allow Overbill

Only displays when enabled by Oracle Support on the subcontract. Select individual line items to enable overbilling, or select the tick box at the top of the column to select all line items for overbilling.

### Retention to Date Adjustment

Column used to change the **Retention to Date** amount of the line item.

### Retention to Date Amount

Amount of retention held back.

### Balance to Complete

Amount left to bill on the contract (the total amount of work outstanding on the contract). This amount equals the **Contract Sum to Date Amount** minus the **Billed to Date Amount**.

## Allocate Variations as a Subcontractor

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As a Subcontractor, use the **Variation Allocation** page to adjust your Work Breakdown (WB) with the variation amounts assigned by the Main Contractor.

The page shows:

- ▶ How many variations need to be allocated
- ▶ Which variation is being allocated on the current page
- ▶ The period context (which claims period is impacted by the variation allocation).

It also includes an **Allocate** column with the variation amount.

You can only allocate one variation at a time. If a contract has more than one variation awaiting allocation, the next variation will display on the **Allocate Variation** page after you allocate and save the first one.

After you allocate all outstanding variations, a **Status** page confirms the variations have been allocated.



## Navigate to the Allocate Variation Page

When a Main Contractor creates a variation that needs to be allocated, an **Allocate Variations** message appears on the **Project Home** page for all Subcontractors.

There are three ways to see the **Allocate Variation** page.

- ▶ Use the **Required: Edit Work Breakdown** link in the **Contract** tasks section.
- ▶ From the **Project Home** page, select the **Required: Edit Variations** link.
- ▶ Choose the **Edit Work Breakdown** link under the **My Contract** menu of at the top of any project page.

## Allocating a Variation

The **Allocate Variation** page shows one variation at a time. If a contract has more than one variation, the next variation will display on the **Allocate Variation** page after you save the first one.

To allocate a variation amount on the **Allocate Variation** page:

- 1) **Navigate to the Allocate Variation Page** (see page 17).
- 2) On the **Allocate Variation** page, enter an amount in the **Allocate** column for each line impacted by the variation. When you complete an entry, the amount displays in the **Net Change By Variation** total.
  - ▶ When the **Working Total** in the **Allocate** column equals the **Total**, the allocation is complete.
  - ▶ The **Working Total** amount matches the amount in the **Allocate** column heading.
- 3) Optional. Add an additional line.
  - a. Select the **Add New Line** button to add an additional line to the Work Breakdown for the variation.
  - b. In the **Allocate** column for the new line, enter the variation amount you would like to allocate.

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**Note:** The new line also requires an **Item Number** and **Description**.

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- 4) Select **Save Changes**.  
A **Status** page confirms you allocated the variations.



# Frequently Asked Questions

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## How should I fill out my Work Breakdown?

The system originally displays the Work Breakdown (WB) as one line item on the **Edit Work Breakdown** page. If your Main Contractor does not use **Specified WB** and wants to see a detailed budget, break out your WB.

You will use the **Edit WB** tab to allocate your funds to multiple line items.

See Edit WB Tab of Subcontractor Work Breakdown.

## My Work Breakdown is out of balance. What do I do?

If the Work Breakdown (WB) is out of balance, it means your **Working Totals** and **Totals** values do not match. There are two reasons why an WB may become out of balance.

### There are Budgeting Errors

Navigate to the **Edit Work Breakdown** page. Make corrections to the **red** fields and save the page. When the WB is in balance, the **Working Totals** and **Totals** amounts will both display in black.

If you cannot edit your Work Breakdown, but you do have the Project Manager role, the Main Contractor is using the **Specified WB** contract setting and enters budget information on your behalf. Contact your Main Contractor if you need them to update your budget.

See Edit WB Tab of Subcontractor Work Breakdown.

### Variations Need Allocating

Select the **Required: Edit Variations** link on the **Project Home** page to navigate to the **Allocate Variations** page. Enter the variation value in the **Allocate** column.

Variations must be entered one at a time. You must allocate the first variation and save before the system prompts you with the next one.

See Allocate Variations for Subcontractors.

## Why does my Work Breakdown have multiple tables?

If your subcontract includes multiple components (sections of work), the Work Breakdown (WB) will show separate tables for each component in your contract on the **Edit Work Breakdown** page.

You can edit each table as you would normally edit a line item, but the sum of the lines in each component must always equal the amounts in the **Totals** line.

Most Subcontractors will only see a single table on their **Edit Work Breakdown** page.