

Budget Screen Cheat Sheet

The Budget screen can be used to produce a “cost estimate” or “cost opinion” for your specific budget. The more data you have reviewed, verified, or entered in the Libris Design database, the more accurate your project budget will be. Do not change the numbers in a field unless you have accurate information.

Black Figures in White Boxes. The black figures in white boxes are the figures used in the project budget calculations. These figures are either percentages of the construction contract total, dollar per square foot figures (\$/SF) or lump sum figures derived from a budget calculation. Libris Design comes with default numbers in these boxes. To change any of these figures, click on the gray button which describes the line item; e.g., “New Construction” to build what will be known as a “User Value”. User values are the figures, which will define the specific costs for your project. (If you enter a number directly into a white box, it will be used in the calculation, but will be lost if you “restore the defaults” and then “apply user values.”)

Purple Figures. The purple figures are view only figures. They represent the figures generated in the user model which you created, but are not being used in calculations until you transfer them to the white boxes. Selecting “Apply User Values” at the bottom left hand corner of the screen will transfer the purple figures to the white boxes, making them the figures used in calculations. Create “user values” in gray pop up boxes.

Buttons. Buttons activate a pop-up box for a specific line item. Buttons with a question mark open a Help Box describing the specific line item and explaining options for changing the defaults for that line item.

Pop-Up Box Help. Help is available for each budget category on the screen by selecting the gray button with the question mark. These boxes provide a description of the category, explanation of the default, and instructions on changing the default or building a detailed cost figure.

Naming Your Budget

1. Name the budget with enough definition to distinguish budgets from one another since you are likely to create many budgets for your project.
2. Include information in the description box that will help you later on; e.g., “This one assumes we are reusing all of the existing furniture.”

Square Footage Number used for Budget Calculations

By default, the Budget screen uses a pre-set number that comes from the expert model you started with. To use the sq. ft. number from the customization you have done to that model, click on “Apply User Values”. (You only have to do this once.) When the square footage numbers don’t match you’ll see a does not equal sign in red near the boxes.

Recalculate Cost Basis Button. The initial default settings for costs are for Moderate Statewide cost levels. You may change these based on your specific project:

1. Click on the downward pointing arrow to the right of the white box to open a pull-down list. Highlighting and clicking on it will select an option and change the cost basis for all calculations.
2. To activate changes, select the gray “Apply Cost/Area Changes” button.
3. The area or cost recalculations will replace user values (purple numbers) in the active calculation boxes (white boxes) with default numbers at the new cost basis. To replace the purple numbers, select “Apply User Values” at the bottom left hand corner of the screen.
4. The cost level may be changed from moderate to high or low. New default numbers (\$/SF) will appear in the white boxes.
5. The Statewide area may be changed to Metropolitan or Rural to adjust the cost figures accordingly. New default numbers (\$/SF) will appear in the white boxes. These have been adjusted for regional variation in construction costs.

Default Numbers. The default figures are based on moderate statewide costs for public library construction based on recently constructed public library facilities in California.

Changing Default Figures

1. Change per sq. ft figures, percentages, or lump sum total figures by entering a different figure in the white box or by building a “user value” by clicking the gray box with the field name. Click in the box you want to change, type in a new number and hit enter. Only numbers in purple will be retained as user values. Numbers entered in the white boxes will be lost when the user clicks restore defaults and will not reappear when “Apply User Values” is clicked.
2. Changing the lump sum figure will automatically recalculate the \$/SF figure or percentage to the left. Changing the \$/SF figure or percentage will automatically recalculate the lump sum figure to the right.

Restore Default Numbers. Click on the Restore Defaults button at the bottom of the screen to restore all of the numbers you have changed in the white boxes in the main section back to their original defaults.

\$/SF & Lump Sum Figures. Many of the fields in the budget screen have both a “\$/SF” and “Lump Sum” component. Both of these appear in a white box with the lump sum in the right hand white box and the \$/SF or percentage used for calculation in the left hand white box. Calculations are based by applying the cost per square foot to the square footage in the “Building SqFT Used for Calculation” box in the upper right hand corner of the screen, or the percentage (%) figure against the Construction Contract Total near the top of the screen.

Pop-Up Boxes

1. Pop-up boxes allow you to build detail into the cost estimate by entering lump sum figures for individual line items in a specific category to build “purple” numbers for that category.
2. New line items may be added by clicking in the first blank row (with an asterisk showing on the left hand side) and typing in the name of the line item. After entering a cost figure, pressing the Enter key will save the line item.
3. The Total cost of the line items appears automatically in the lower right hand corner of the pop-up box. Transfer this detail to the active box by clicking on “Apply User Values”.
4. N.B. for New Construction Cost, if you chose not to use the construction components, change the first line item in the pop up box menu to New Construction Cost and this will become your “user value.”

Furniture and Equipment Cost. You can use the F & E cost derived from the customization you’ve done in the Libris Design model or accept the default. To use the customized number, click “Apply User Values.”

Expansion and Remodeling. Budgets for Expansion and Remodeling projects require you to enter the separate sq. ft. amounts for the new construction and the remodeling.

Project Cost Estimate Total. The cost per square foot and total project cost based on all of the budget calculations in the Budget Screen appear in red on the lower right hand corner in red.

“Navigation buttons.” Navigate between various budgets for the same model using the navigation buttons on the bottom left hand corner of the screen.

Multiple Budgets. Multiple budgets can be created from the Project Cost Estimate (Budget) screen. Select “Copy Budget” to create a duplicate budget. Multiple copies of the same budget may be created. Each new budget must be named before it can be opened.

“Delete Button.” Selecting Delete will delete the budget shown on the screen. There is no undo for this action.

TEST THE FUNCTIONALITY OF EACH LINE ITEM TO MAKE SURE YOU UNDERSTAND HOW EACH ONE WORKS! LOOK AT THE RESULTS OF THE CALCULATIONS AND RECHECK AFTER YOU HAVE SELECTED “REAPPLY DEFAULTS” OR “APPLY USER VALUES.”