INEIGHT

CONTROL USER GUIDE

CONTROL

Release 25.7
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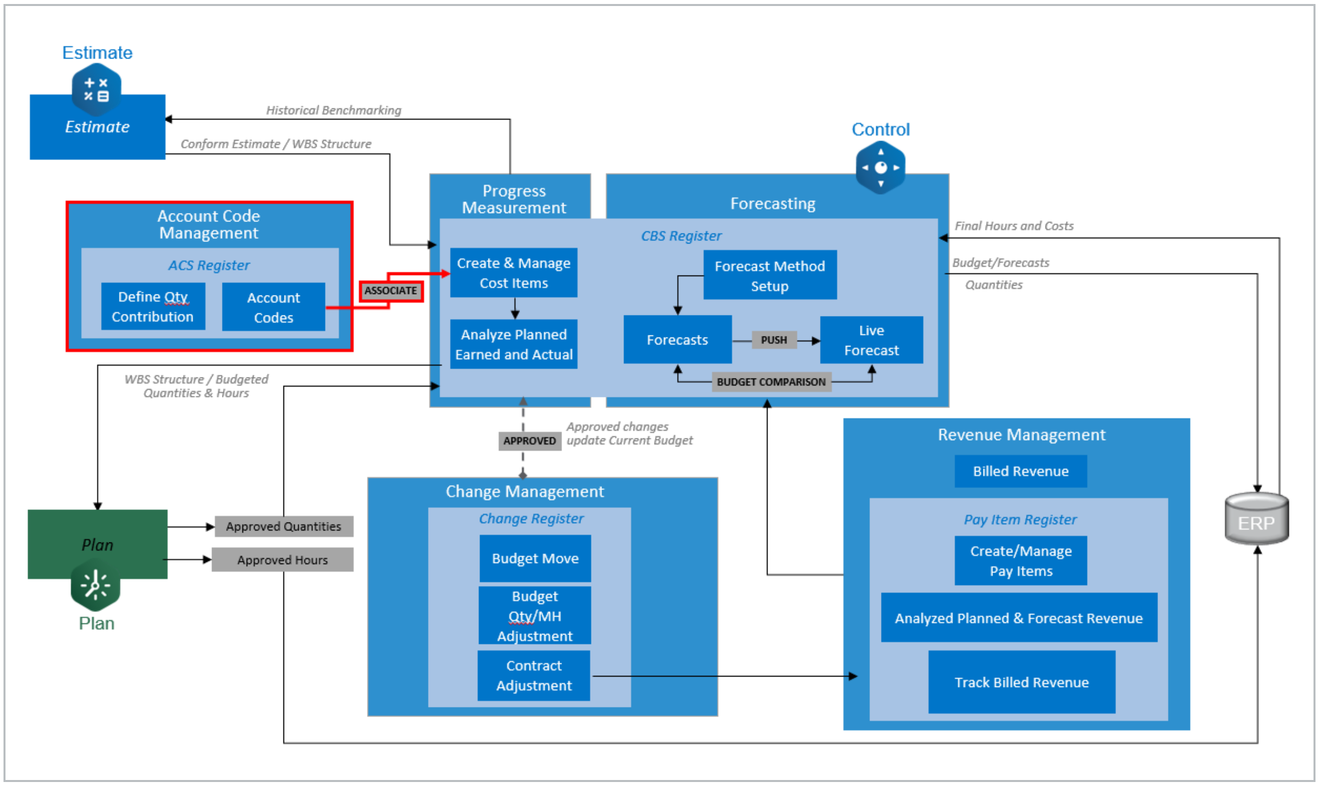
CONTENTS

STEP BY STEP PROCEDURES

CHAPTER 1 – ACCOUNT CODE STRUCTURE (ACS)

1.1 INEIGHT CONTROL WORKFLOW - ACCOUNT CODE STRUCTURE



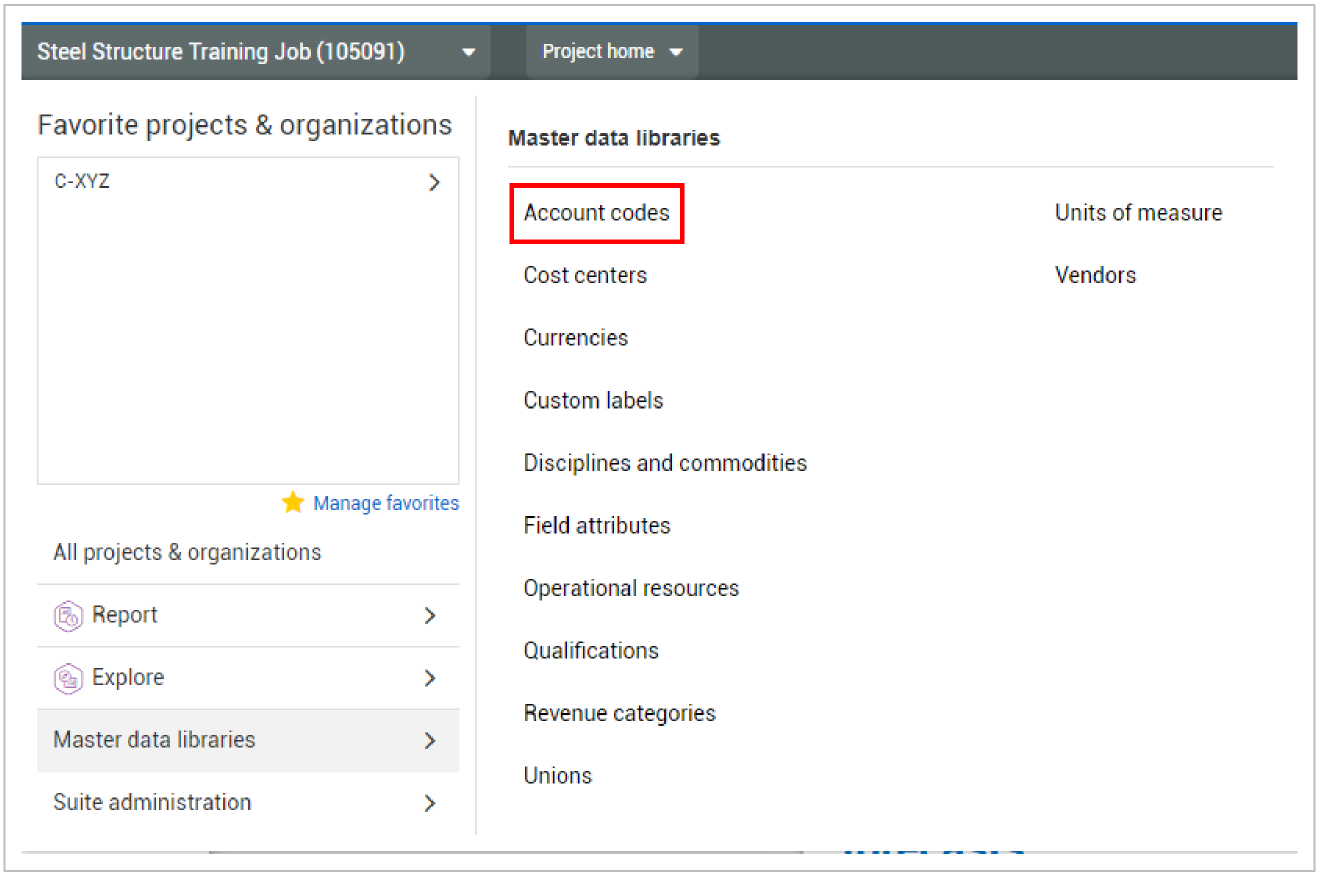
1.2 WHAT IS AN ACCOUNT CODE?

Account Codes serve as a standardized coding system to track like operations across a company, for the purpose of global reporting and benchmarking. Account Codes typically follow a hierarchical structure which allows for summary level reporting rolled up to company standards, but can also be a flat list.

Account Codes are assigned to cost items similar to a tag on a cost item. Once an account code has been assigned to all terminal cost items you can view many project and organization reports organized by the account code structure, rather than individual project cost break down structure which often differs from project to project. Account Codes can also tie back to InEight Estimate where estimators can assign the same standard set of account codes to estimate items, and compare them to active or completed projects for historical benchmarking.

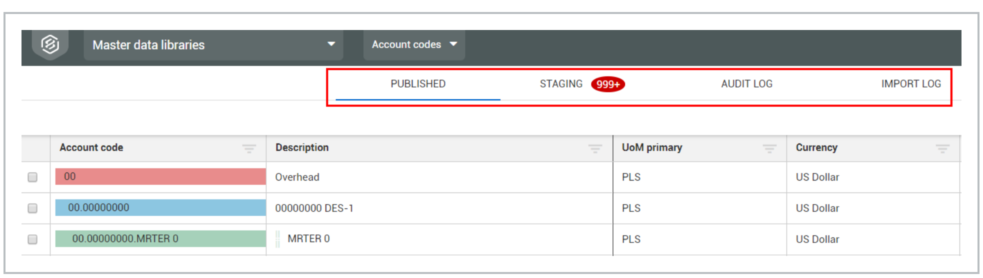
1.3 ACCOUNT CODE SETUP

The master set of account codes is created and stored under Master data libraries > Account Codes.

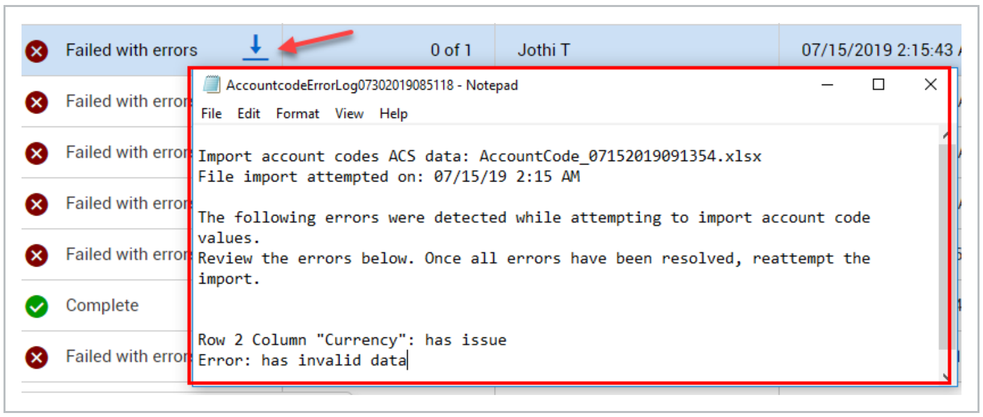


1.3.1 Staging vs. Published Account Codes

The Account Codes master data library contains four tabs: Published, Staging, Audit Log, and Import Log.



- The **Published** tab lists all account codes that have been created and published under the Staging tab.
- Under the **Staging** tab, you create and edit account codes, and then publish them for use. Account codes are not available for use in projects until they are published
- The **Audit Log** tracks changes made to the Account Code Structure, including the value before and after, the changed date, and who made the change
- Under the **Import Log** tab, you can track the status of all the account code import processes.
    - When you hover over the **Failed with errors** imports, a pop-up will provide a brief import status, along with next steps
    - Under the pop-up, there is a down facing blue arrow where you can download a detailed error log



Account codes are typically maintained at an organization administration level to ensure that categories and codes remain consistent with company standards.

The account codes within the Account Code Structure are arranged into a hierarchy of parent-child relationships that can contain varying levels of detail, indicated by color, for each level of the hierarchy. You can assign account codes to cost items anywhere, from the highest level to the lowest level. The lower the level assigned, the higher the level of detail associated to the account code.

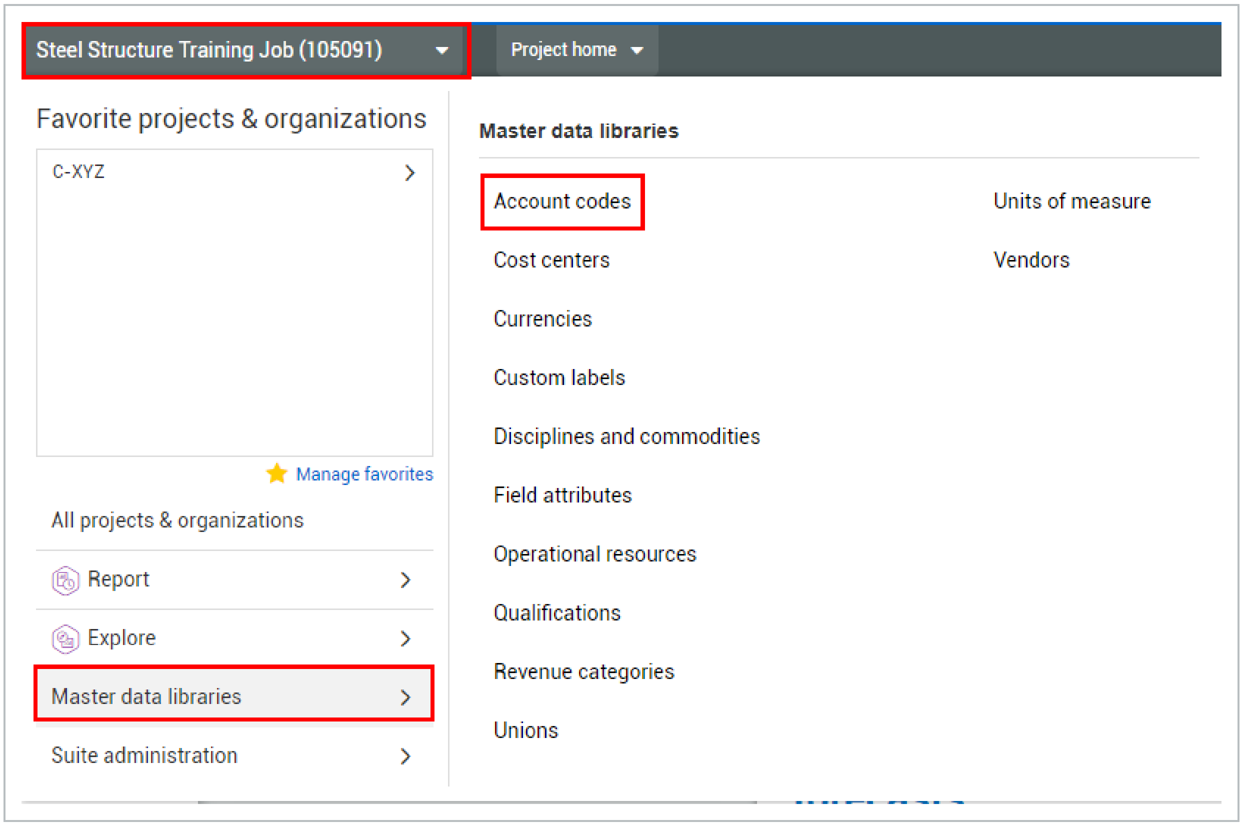
The example below shows a level 3 account code (50.03.04) acting as a parent to two subordinate account codes (50.03.04.002 and 50.03.04.004).

Account code	Description
50.03.02.004.02	Break - Concrete Paving Removal
50.03.02.004.04	Load out - Concrete Paving Removal
50.03.04	Paving Milling and Scarification
50.03.04.002	Paving Milling and Scarification - Asphalt
50.03.04.004	Paving Milling and Scarification - Concrete
50.03.06	Utility Line Removals - Underground
50.03.06.002	Utility Line Removals - Underground (<4' Depth)
50.03.06.002.02	Utility Line Removal (<4' Depth)
50.03.06.002.04	Storm Sewer Removal (<4' Depth)

The following Step by Step walks you through how to create a new account code.

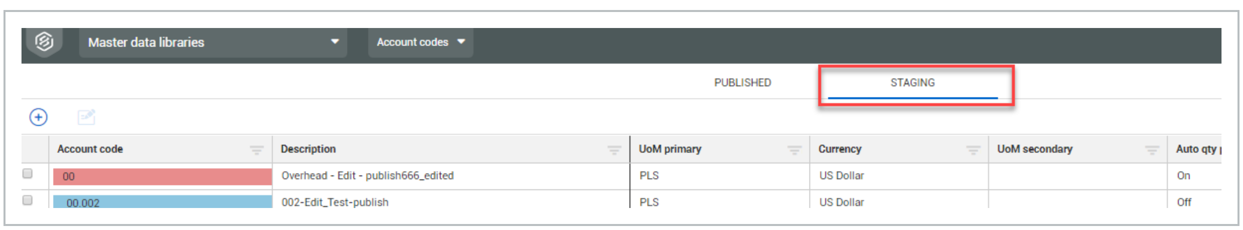
Create an Account Code

1. From the Project home page, select the **1st Level drop-down menu.**
2. Select **Master Data Libraries**.
3. Select **Account Codes.**

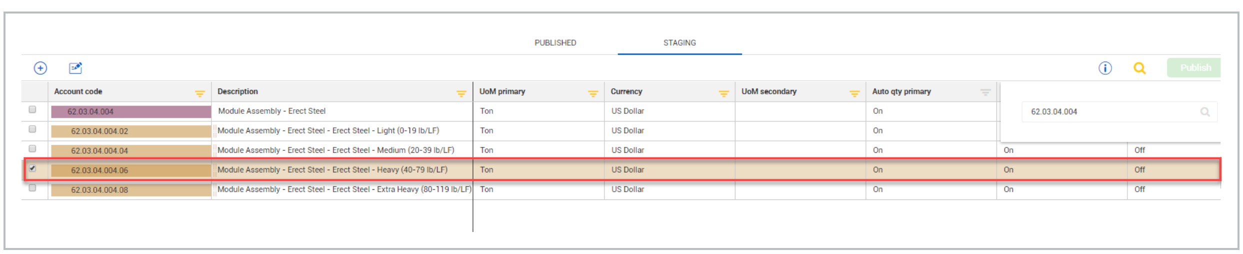


- All the account codes appear on your screen in a hierarchy format

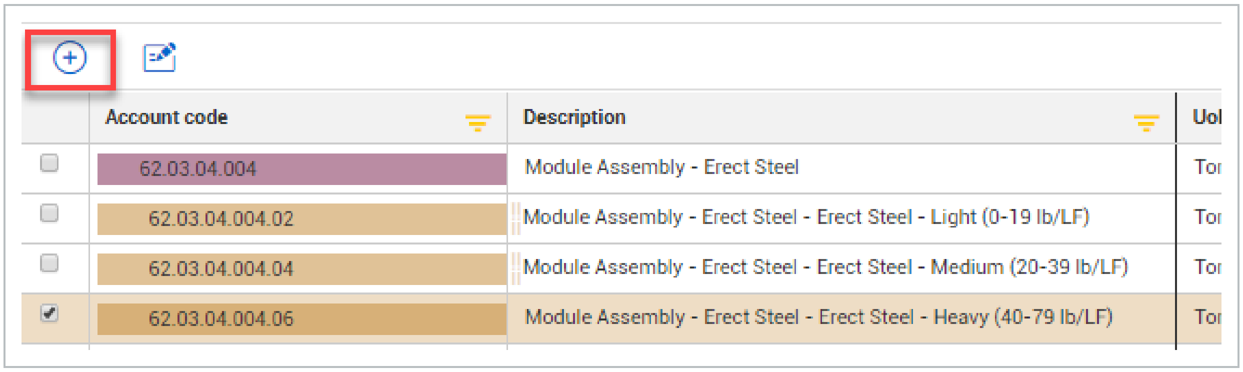
4. Select the **Staging** tab.



5. Click the **check box** next to any of the existing account codes.



6. Click the **Add Account Code** button.

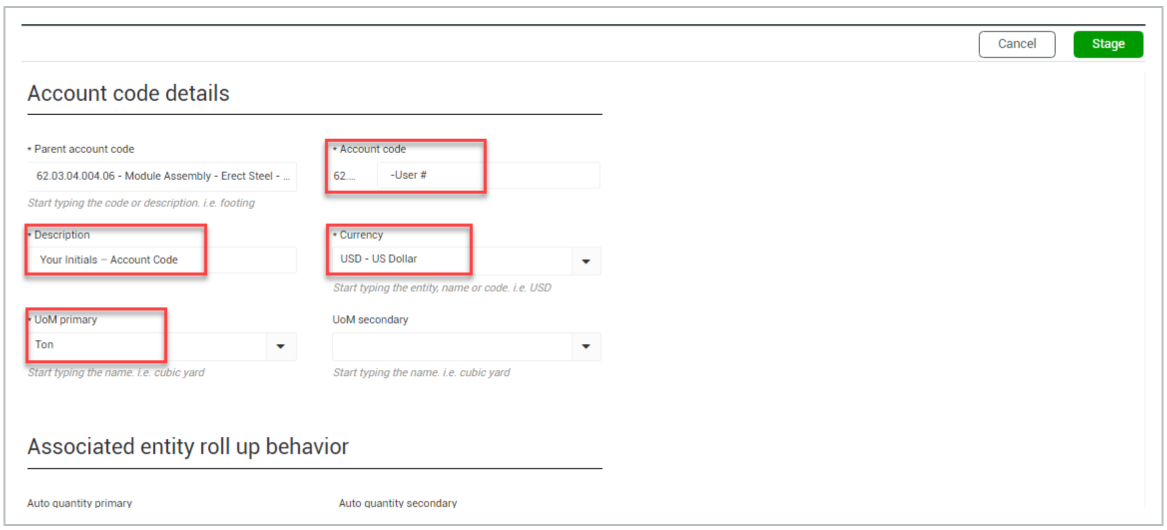


- This creates a new account code with the code you selected as the parent
- In the Account code details slide out panel, the following can be assigned:

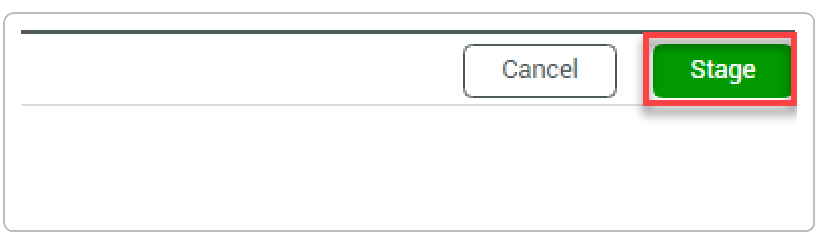
Item	Function
Parent Account Code	Account Code with lower level “child” account codes below it.
Account Code	The alpha numeric sequence assigned as the code.
Description	Description detailing the account code’s scope.
Currency	The currency assigned to the account code.
UoM Primary	The primary unit of measure for the account code.
UoM Secondary	The secondary unit of measure for the account code.
Auto Quantity Primary/Secondary	Automatically roll up cost item quantities if the cost items and this account code have the same primary/secondary UoMs. It can also be set on a project specific basis.
Parent Roll Up Behavior	Controls whether primary or secondary quantities of account code roll up to the parent account code’s primary or secondary quantity.
Account Code Tag 1-20	Tags that can be associated to account codes to enable them to be categorized.
User Defined Field 1-10	Optional open-text fields you can use to add information related to the account code.

> The asterisk (*) at the beginning of a tile indicates it is a required field and it must be populated before the code will be created.

7. Fill in the information below:
   - Account code: **Your Initials** (Since a parent was selected when creating this new account code, numbering prior to ‘–*Your Initials*’ will be the parent’s)
   - Description: **Your Initials – Account Code**
   - Currency: **US Dollar**
   - UoM primary: **Ton**
   - Leave all other defaults/blanks



8. When you have filled out all the information, click **Stage** to send the new account code to staging area.



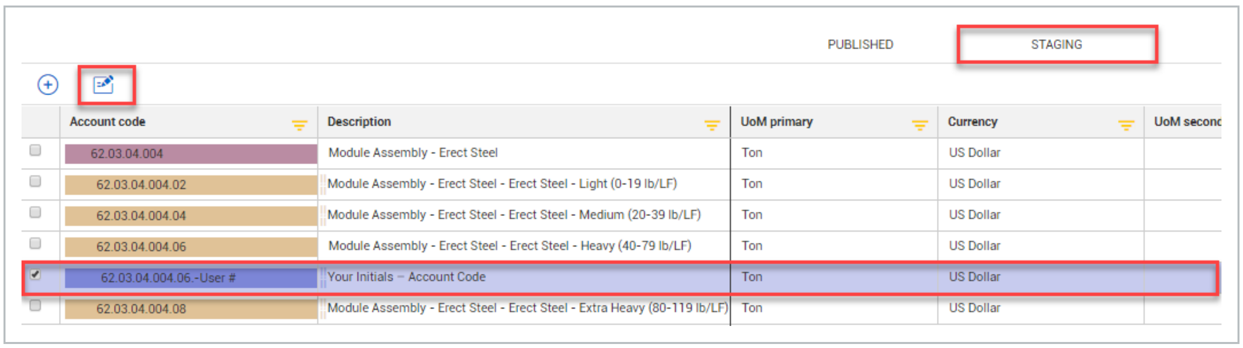
   - The new account code now exists in the Account Code Structure on the Staging tab
   - The new account code will not be available for use within projects until it is published

9. If you have the permissions to publish account codes, check the box for the account code you created..
10. Click the **Publish** button in the top-right corner of the page.

You can also edit existing account codes within the Account Code Structure, as indicted in the steps below.

Edit Account Code Details

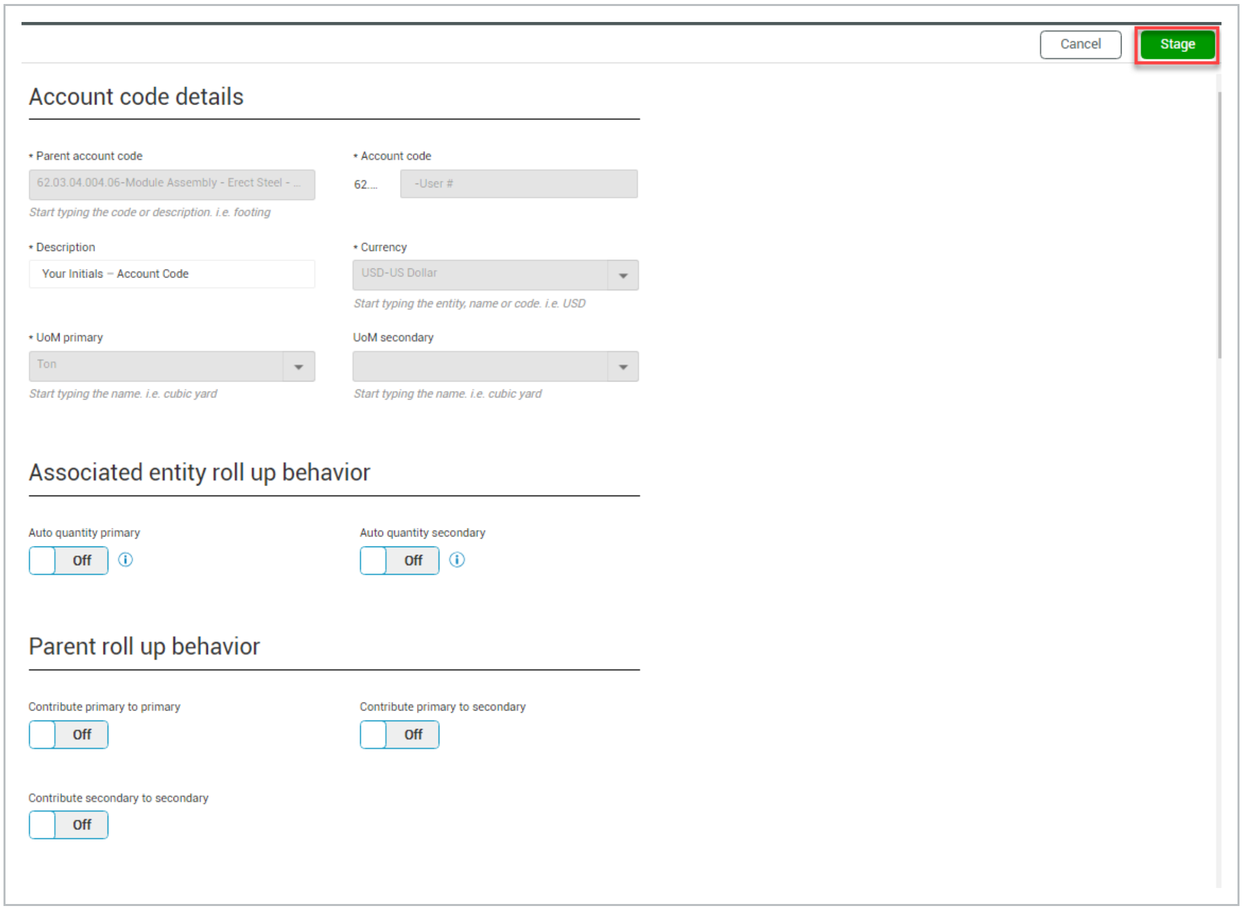
1. From the Account Code – **Staging** tab, select the account code you created.
2. Click the **Edit Account Code** button.



- The edit account code page opens where changes can be made

> Note that only the description, auto quantity primary, auto quantity secondary, parent roll up behavior, and account code tags can be edited after an account code has been created. All other items are greyed out and read only.

3. Once you are done editing the account code, click **Stage** to update the account code.



1.3.2 Account code permissions

If you have the required permissions, you can delete, replace, or rename account codes.

> The account administrator does not have permissions automatically assigned to approve account codes. Your account administrator must add the permission to approve account codes in the Master data libraries to the administrative account.

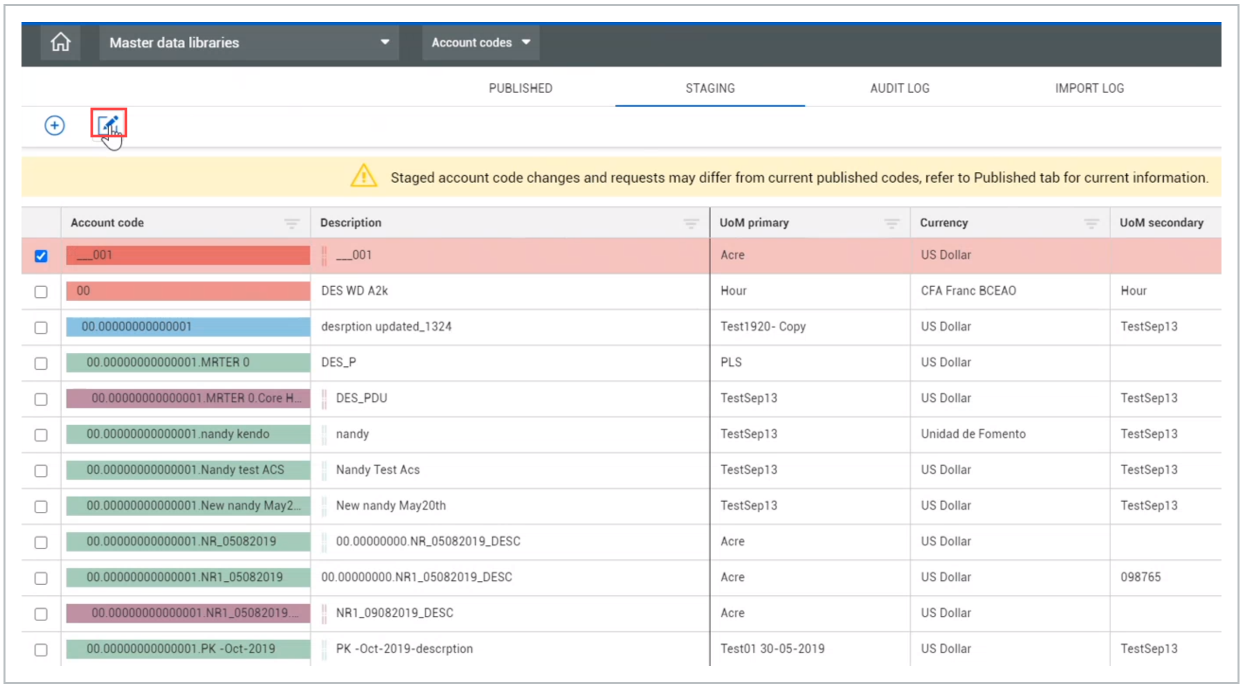
1.3.2.1 Deleting account codes

Follow the step-by-step to delete an account code.

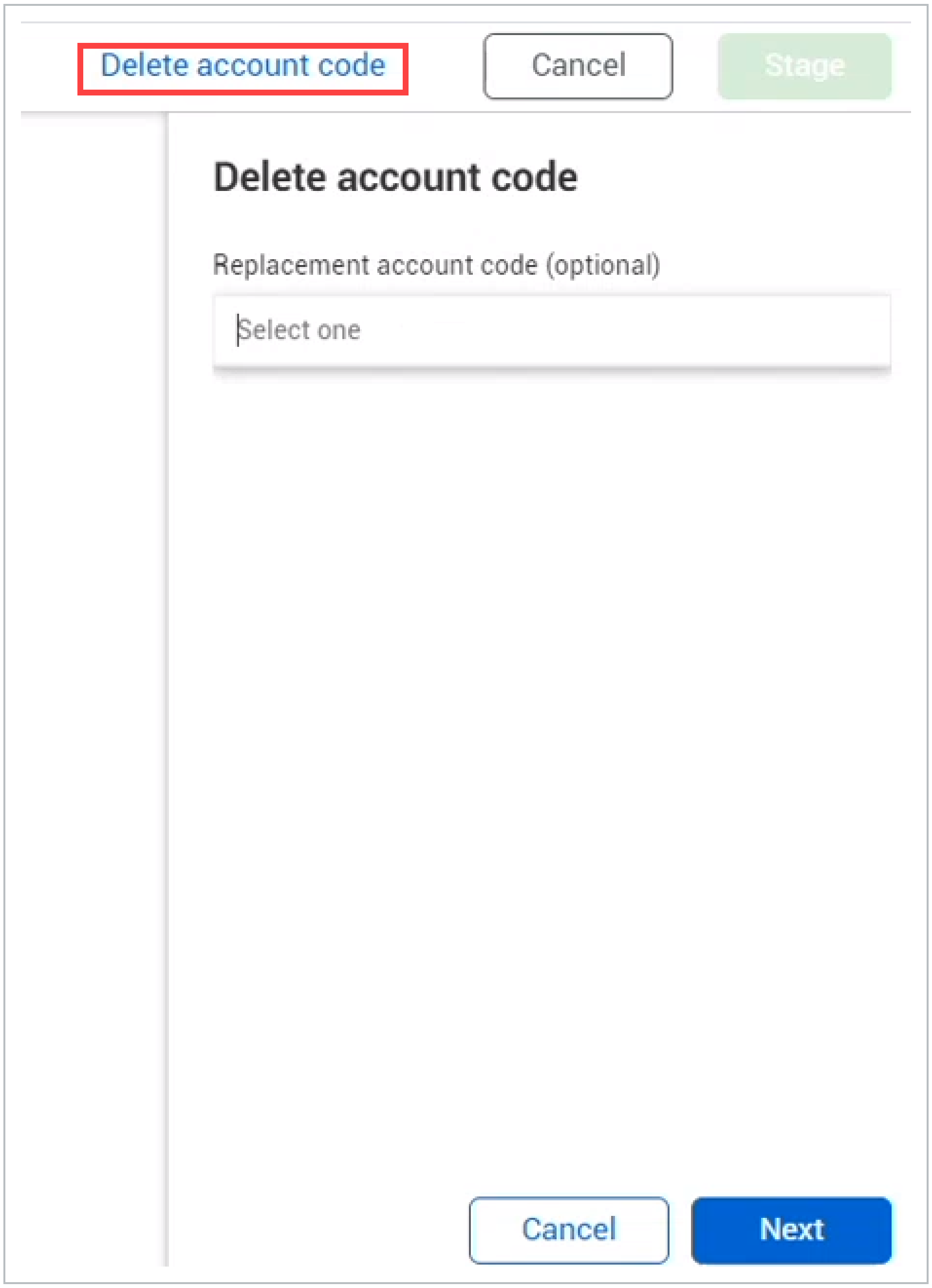
> If you are deleting a parent account code, all children under the parent are also deleted.

Deleting account codes

1. Go to the Master data libraries and then select **Account codes**.
2. From the Staging tab, select an account code you want to delete.
3. Select the **Edit** icon in the upper-left corner.

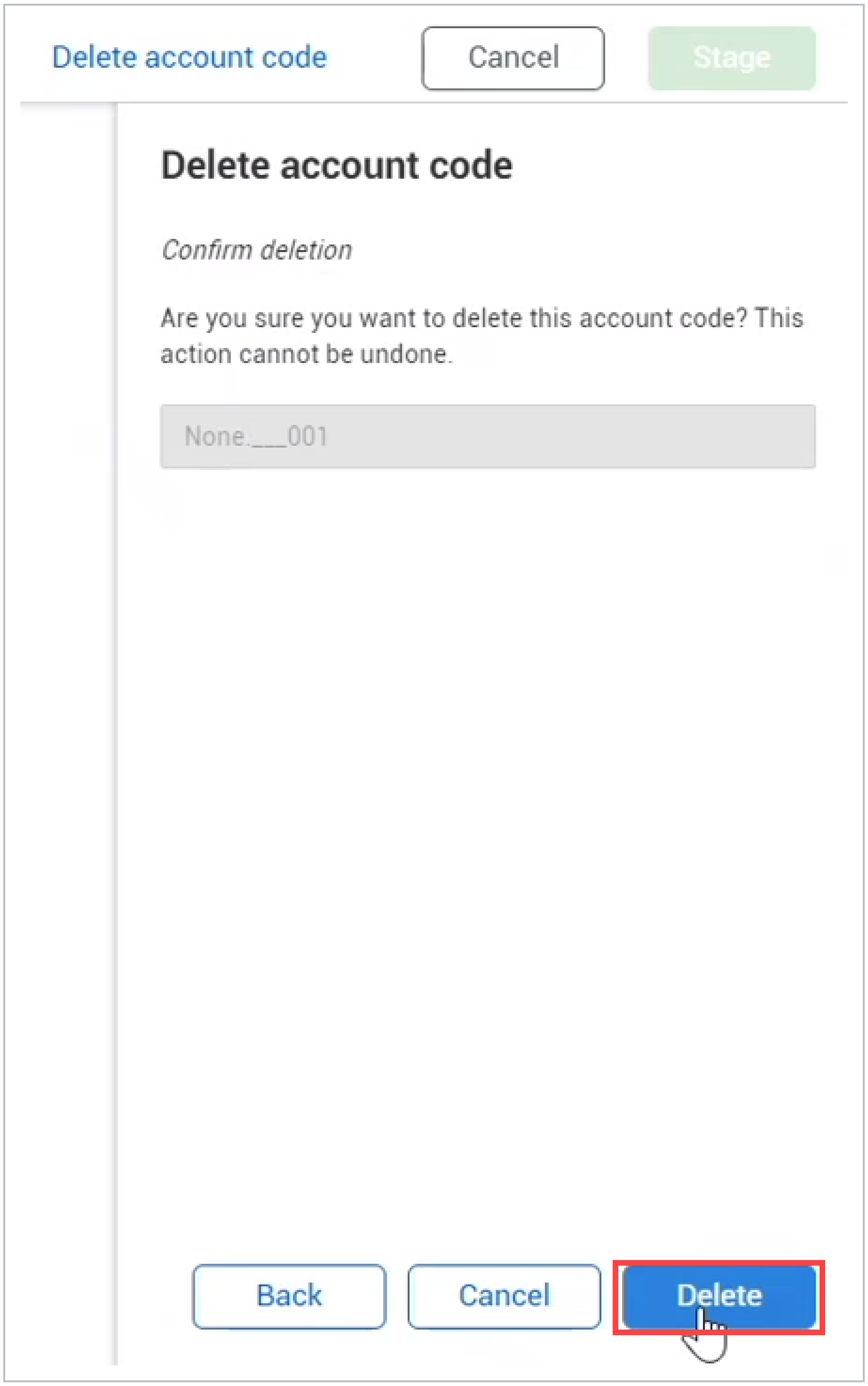


4. On the Edit account code page, select **Delete account code**, and then click **Next**.

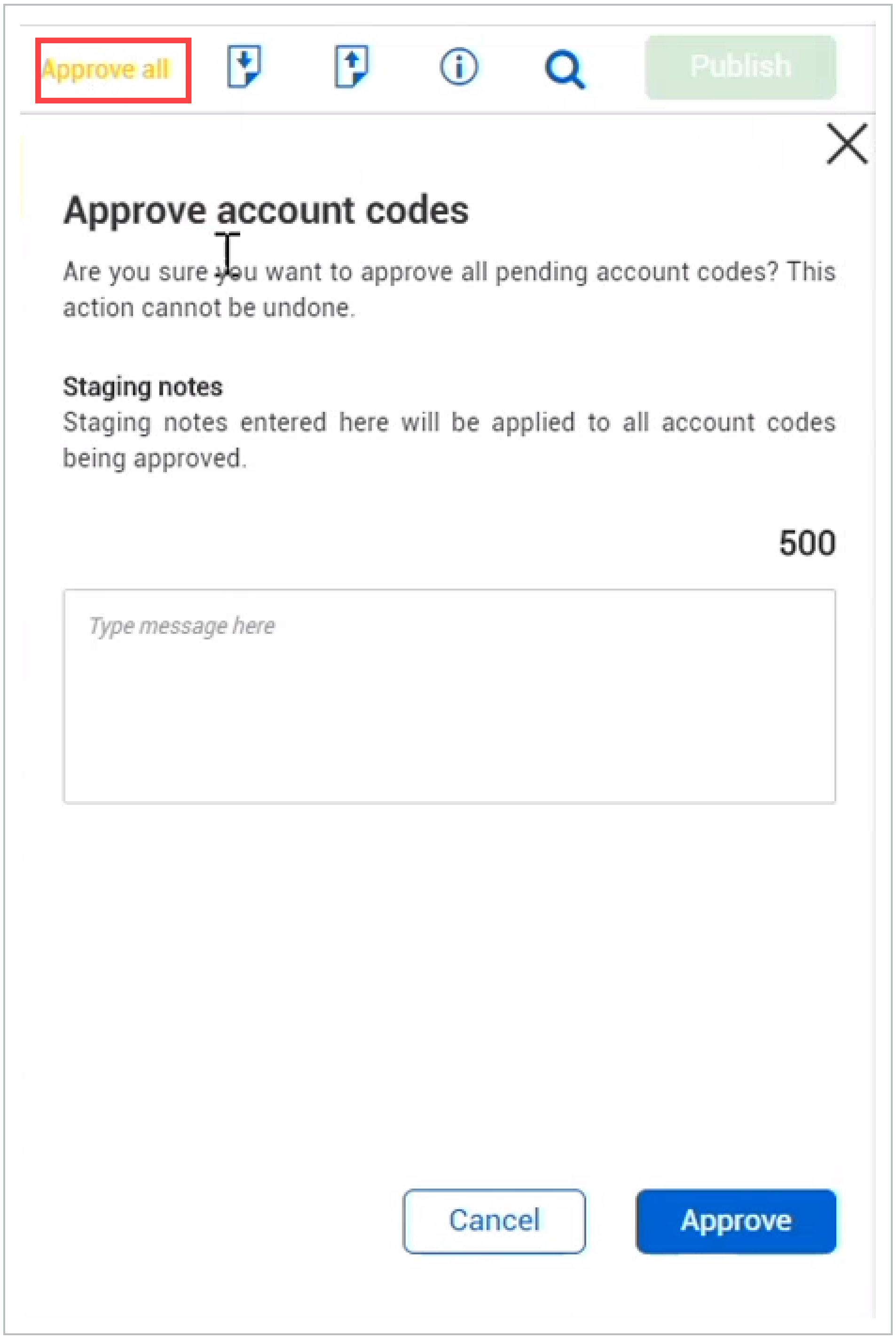


> In the Replacement account code optional text box, you can enter in an existing account code to replace the account code you are deleting.

5. On the Delete account code confirmation page, select **Delete** in the lower-right corner.

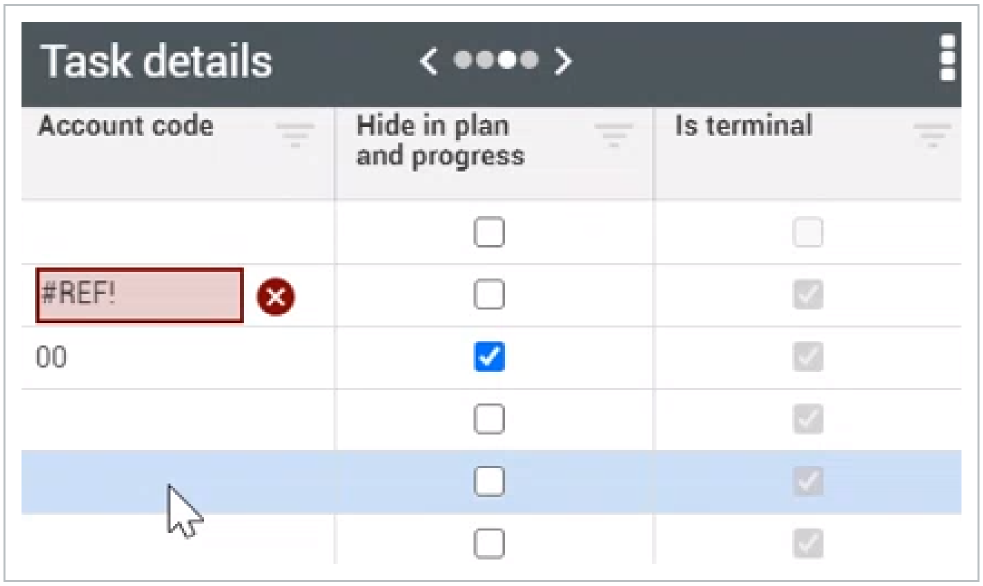


6. Click the **Stage** button.
   - This takes you back to the Staging page.



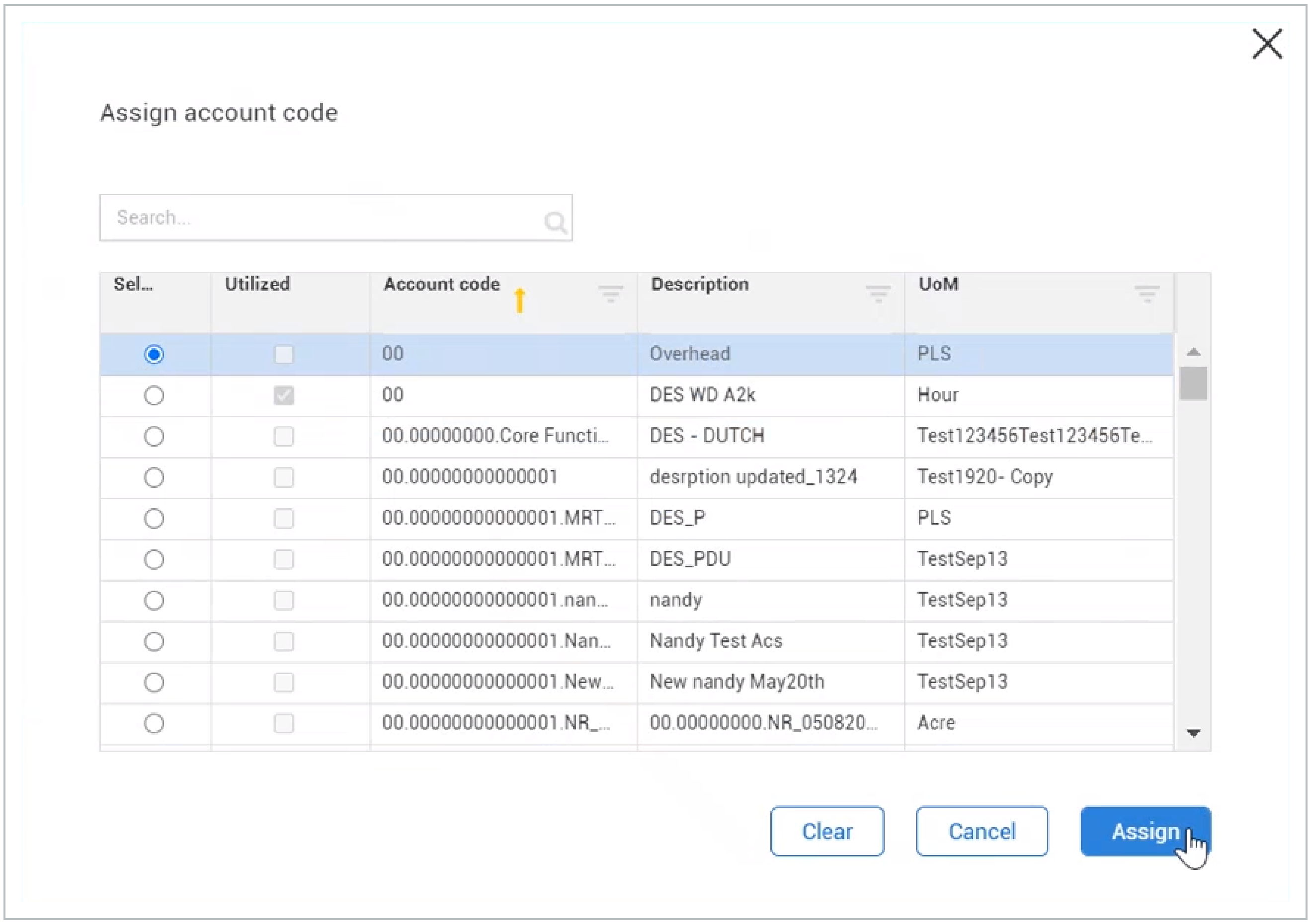
7. From the Staging page, select **Approve all**, and then select **Approve**.
    - You can view your current items and deleted items in the Published tab.

The deleted account code shows the following error code in the Cost Item Details and in the CBS tab.



1.3.2.2 Replacing deleted account codes

To remove the **#REF!** error in the cost item details slide-out panel and grid, select the error to open the Assign Account Code dialog box. Select another account code from the list, and then click **Assign**. The error on both the CBS tab and the Cost Item Details slide-out panel is replaced with the account code you selected.

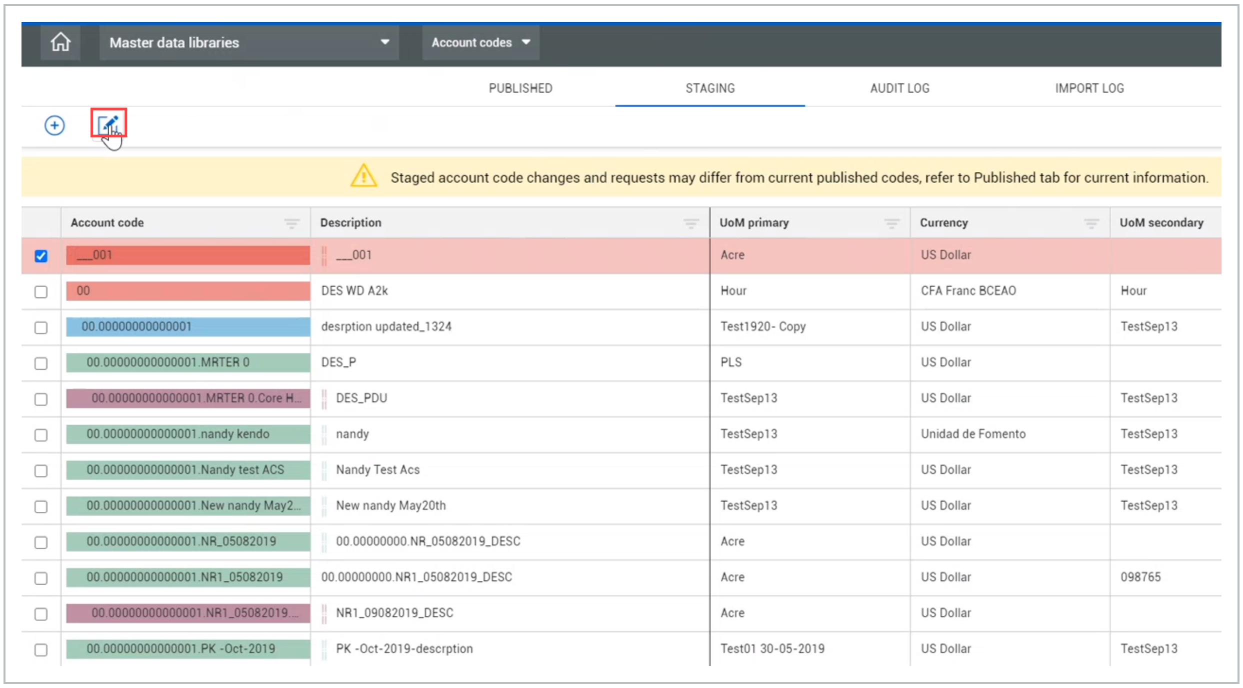


1.3.2.3 Renaming account codes

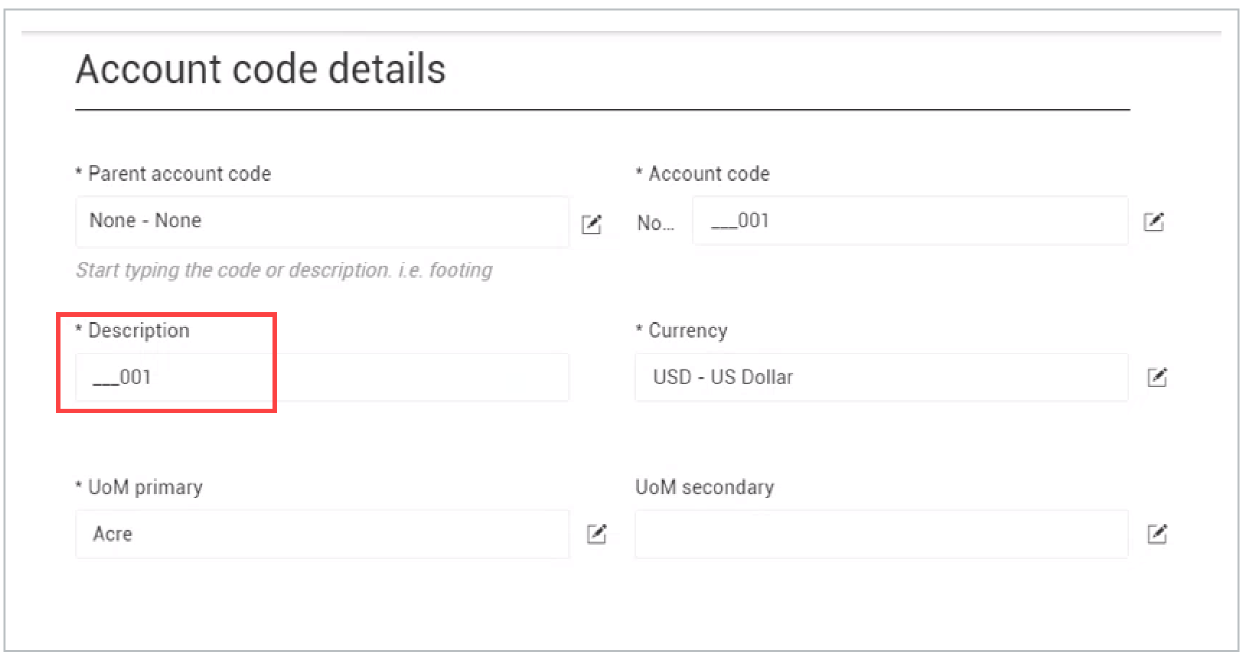
If you have the required permissions, you can rename account codes. Follow the step by step to rename an account code.

Renaming account codes

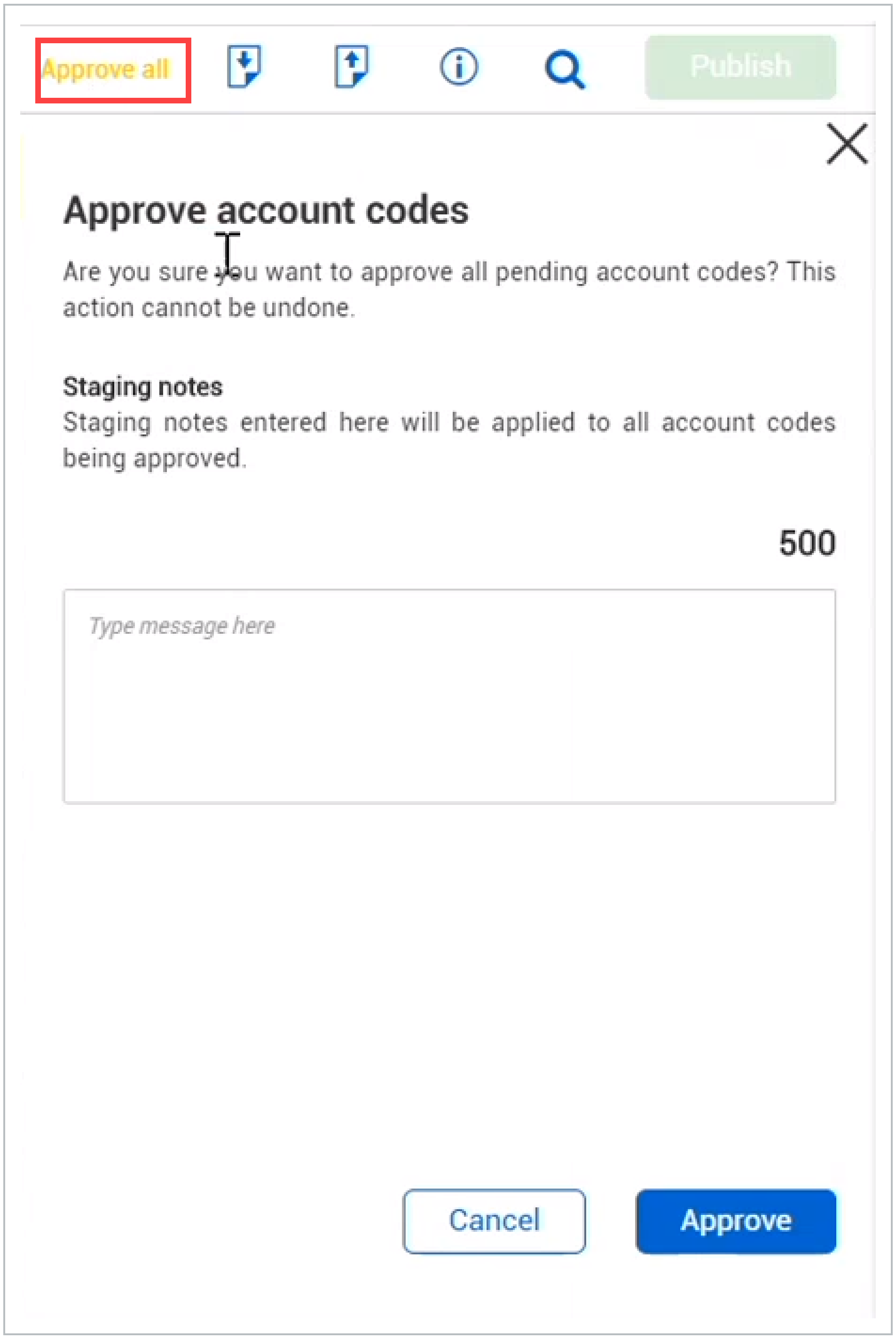
1. Go to the Master data libraries, and then select **Account codes**.
2. From the Staging tab, select an account code you want to rename.
3. Select the **Edit** icon in the upper-left corner.



4. On the Edit account code page, enter a new name for your selected account code in the **Description** text box. Then enter a new name for your selected account code.



5. Click the **Stage** button.
   - This takes you back to the Staging page.



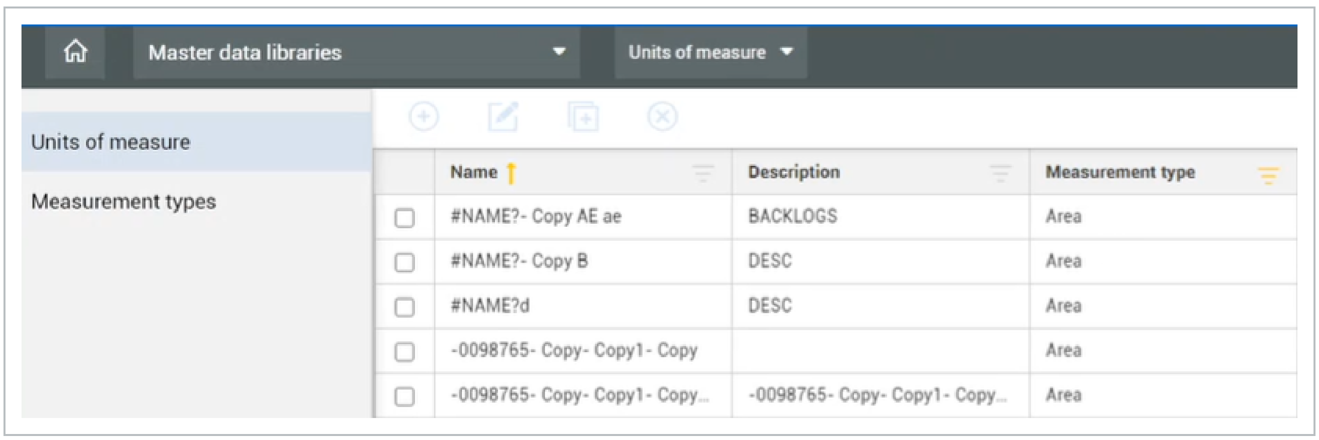
6. From the Staging page, select **Approve all**, and then select **Approve**.
   - You can view your current items and renamed items in the Published tab.

> Your renamed account code is viewable through the Account code column, Cost Item Detail tab, and the ACS tab.

1.4 MEASUREMENT TYPES

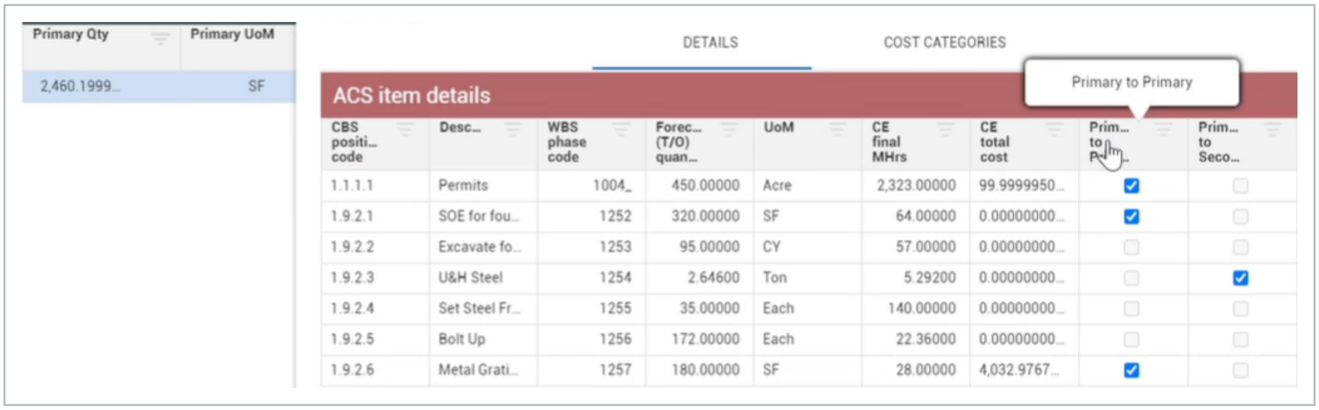
In master data libraries units of measure, there are two sections. The sections are Units of measure, and Measurement types. Using any two Units of measure that share the same Measurement type (such as area), you are able to do a measurement type conversion in the ACS.

If you have a cost item with a different unit of measure assigned to an account code, but with the same measurement type, that cost item can contribute to the same account code.



You can have a cost item with a measurement type of acre contribute its values to its assigned account code if the account code has a measurement type of square foot. This is Because acre and square foot are both a measurement type of Area.

The column Primary to Primary lets you choose the cost item that contributes quantities of the account code.



CBS positi... code	Desc...	WBS phase code	Forec... (T/O) quan...	UoM	CE final MHrs	CE total cost	Prim... to P...	Prim... to Seco...
1.1.1.1	Permits	1004_	450.00000	Acre	2,323.00000	99.9999950...	☑	☐
1.9.2.1	SOE for fou...	1252	320.00000	SF	64.00000	0.00000000...	☑	☐
1.9.2.2	Excavate fo...	1253	95.00000	CY	57.00000	0.00000000...	☐	☐
1.9.2.3	U&H Steel	1254	2.64600	Ton	5.29200	0.00000000...	☐	☑
1.9.2.4	Set Steel Fr...	1255	35.00000	Each	140.00000	0.00000000...	☐	☐
1.9.2.5	Bolt Up	1256	172.00000	Each	22.36000	0.00000000...	☐	☐
1.9.2.6	Metal Grati...	1257	180.00000	SF	28.00000	4,032.9767...	☑	☐

The items without a check mark, such as Cubic Yards, have a measurement type that is not considered an area, so you cannot select Primary to Primary for Cubic Yards, Ton, and Each.

1.5 COST CATEGORY LABEL CUSTOMIZATIONS

In Master data libraries > Cost categories, there is a **Enable custom labels** toggle. If this toggle is turned on, all of your cost category field names come from the custom columns depending on your language preference in Control. Language preference is located in user settings.

You can overwrite the custom labels if you have the applicable permissions. Depending on where you have cost categories shown in the product, the overwritten labels show with the new custom labels.

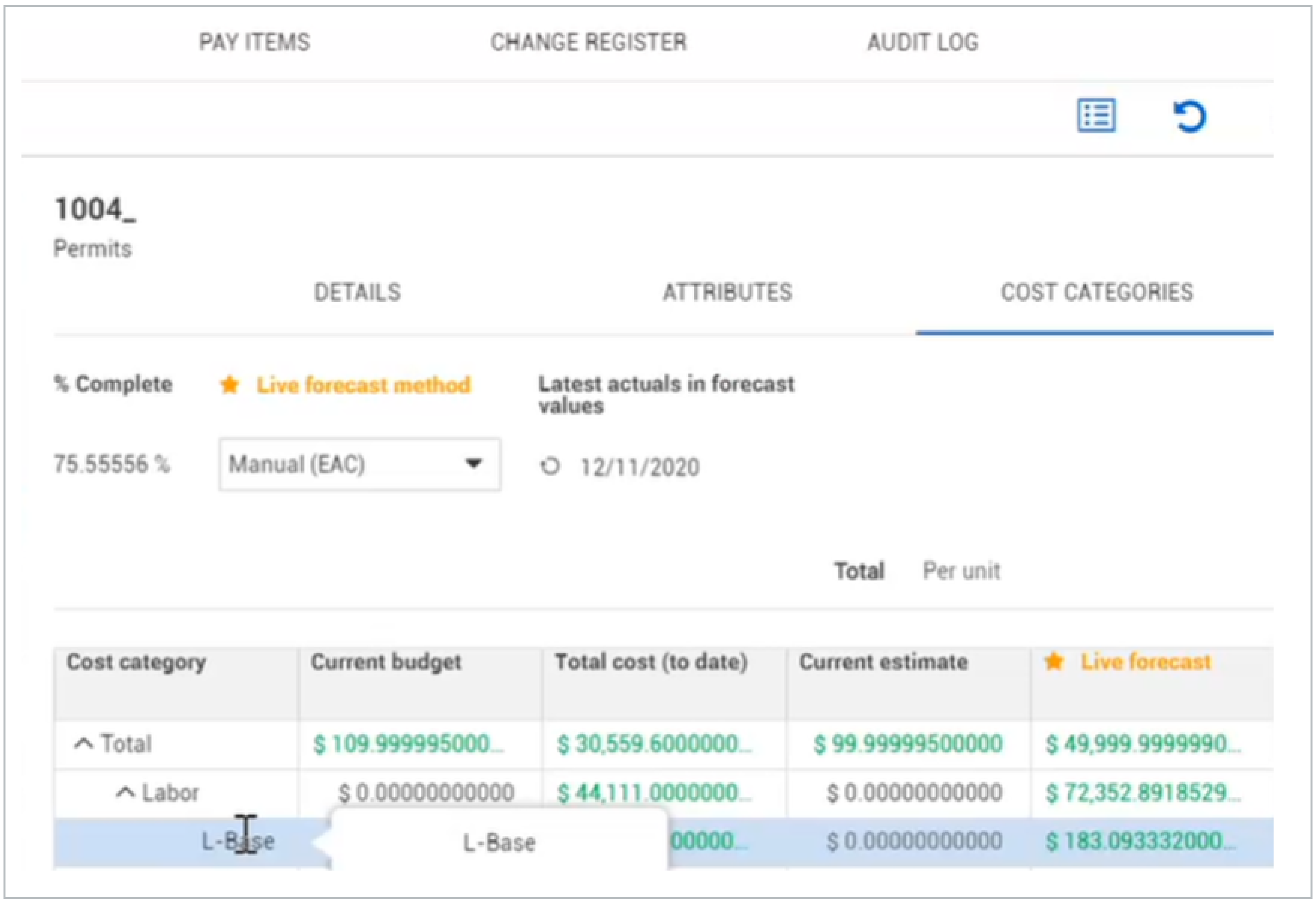
> These labels can be viewed at the organization level. Every project within that organization can see these labels.

If the organization prefers a different field name, it can be renamed using the cost category custom labels.

> Dimmed custom labels cannot be overwritten. For example, the Field name Total.

If the custom label for the field name is blank, then the custom label column will use the default name for the field name column.

One way of finding these custom labels in the project is by going to the CBS register. From there, open the Cost Categories slide-out panel. Under the Cost category column, find your custom label. For example, the Labor Base field name can be customized and renamed L-Base.



> These changes can take a few minutes to fully generate because custom categories span the entire project.

If the Enable custom labels toggle has been shut off, then the category names come from the Field names in the Master data libraries only.

Review

1. Account codes are created inside which of the following:
   a. ACS register page
   b. Library
   c. Project settings

---

2. Which of the following are account codes used to track?
   a. Quantity
   b. Budget
   c. Account Code Tags
   d. Unit Costs
   e. a, b, and d
   f. All of the above

---

3. Which of the following is not tracked in the CBS Audit Log?
   a. Change Attribute
   b. Changed By
   c. Change Date
   d. Pay Item Value
   e. Forecast Cost Before and After

Summary

As a result of this lesson, you can:

- Define what an account code is
- Set up account codes within the library
- Assign account codes to cost items

- Define the quantity contribution for each account code
- Review and analyze the audit log

1.6 INTERFACES

The InEight cloud platform has multiple options for synchronizing information from one platform to another. This gives you many options to utilize data efficiently between various programs, saving you time and resources.

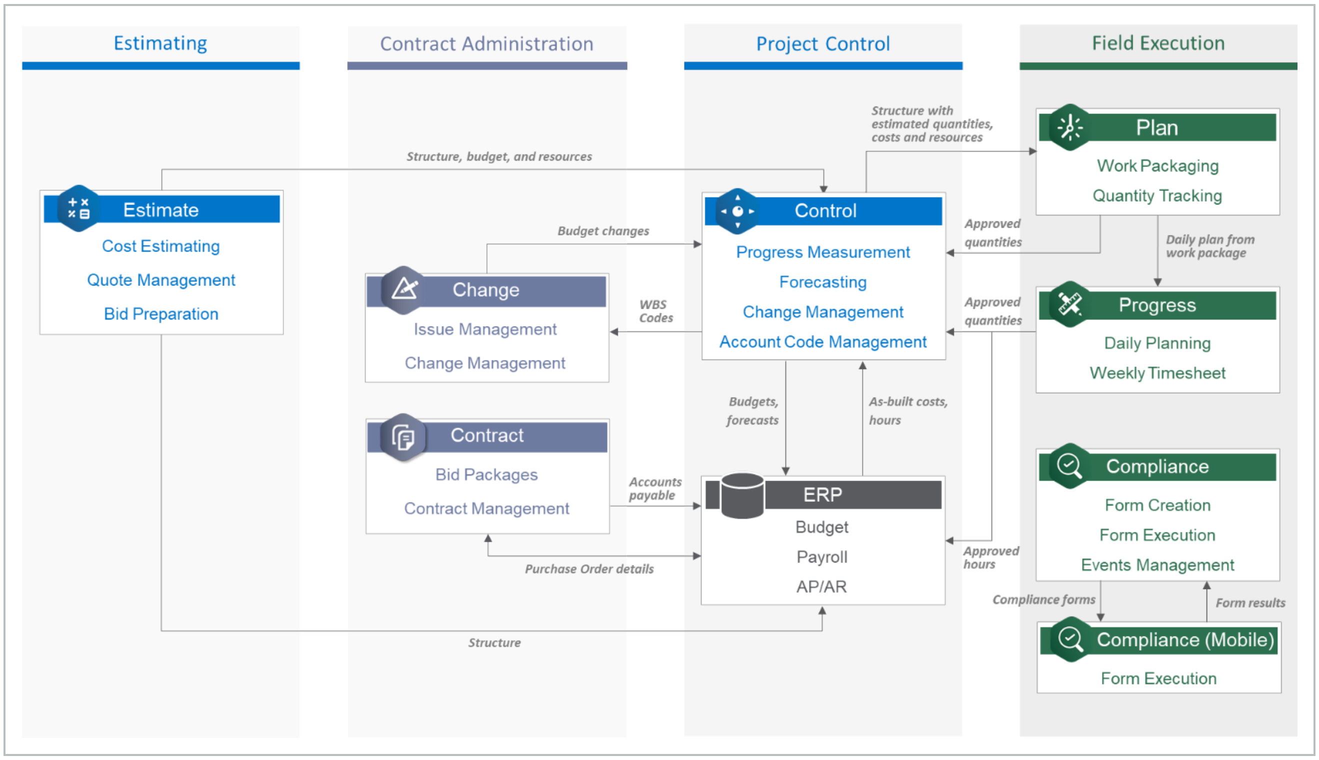
After the initial import from Estimate, you can use the Push and Get actions to integrate directly with Control. You can use Push actions to send the CBS structure, budget, live forecast, actual quantity, pay item, billed revenue, or forecast revenue from your job. You can use the Get actions to bring in quantities, actual cost, man-hours, and billed revenue from other Platform and external applications.

The table below shows you the high-level functions of platforms to help you better understand how the actions interrelate.

Title	Description
Estimate	Create CBS/ACS/WBS structures Create cost estimates Analyze contractor/supplier quotes Prepare bid proposals Benchmark estimate values
Contract	Create and manage bid packages Set up and manage contracts Create and manage issues and change orders
Control	Edit CBS/ACS/WBS structures Manage budgets and contracts Manage forecasts Record actuals (manual entry, or import from Plan and ERP) Calculate job costs/variances, earned values, contract earnings
Plan	Associate planning components with CBS/ACS/WBS structures Create work plans and packages
Progress	Create work plans and daily plans Record progress and timesheets (as-builts) Approve executed daily plans

Title	Description
ERP	Budget, Payroll, Forecasts, AP/AR, Final Costs

The workflow diagram below shows how programs connect and how data flows between the InEight products.

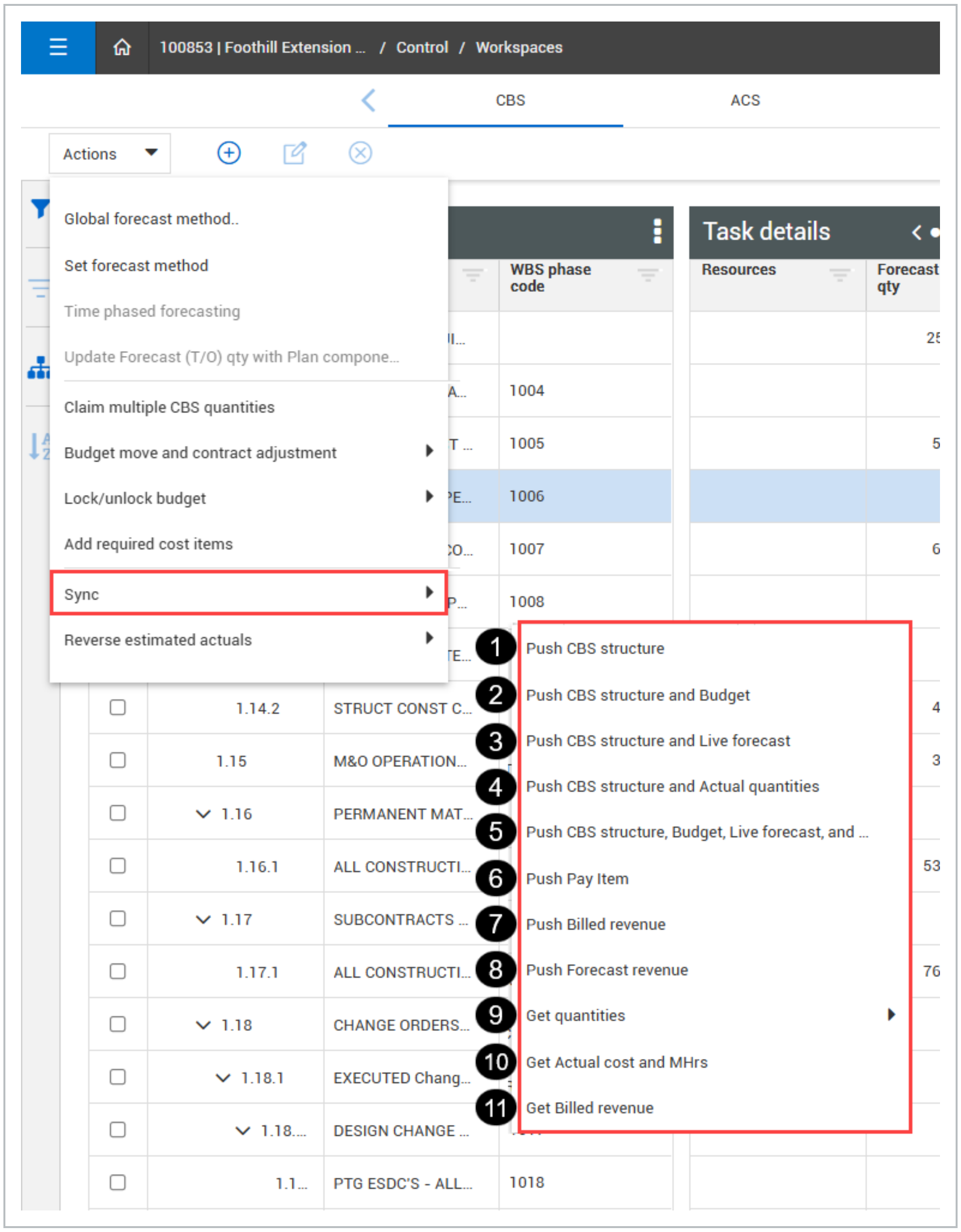


1.7 PUSH AND GET ACTIONS

Control integrations typically have one direction that specific information travels. As data is generated or modified in one product, it does not automatically change in other connected products downstream; you must perform a manual sync action, referred to as a *Push* or *Get* action.

- A *Push* sync occurs when you send information to another InEight cloud Platform application or an external application.
- A *Get* sync occurs when you retrieve information from a different InEight cloud Platform application or an external application.

You can view the various integration options by clicking on the Actions menu from the Control main page and hovering over the Sync option. The image and table below give a description of the sync type functions:

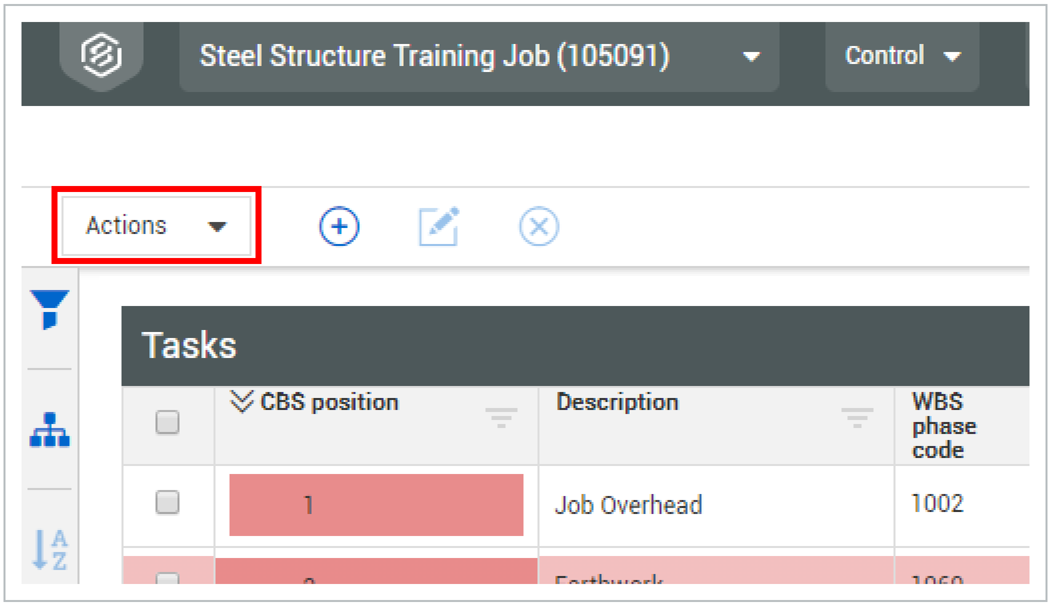


Sync Type		Function
1	**Push CBS Structure**	Syncs the Control CBS Structure to the ERP system.
2	**Push CBS Structure**	Syncs the Control CBS Structure, budgeted quantities, man-

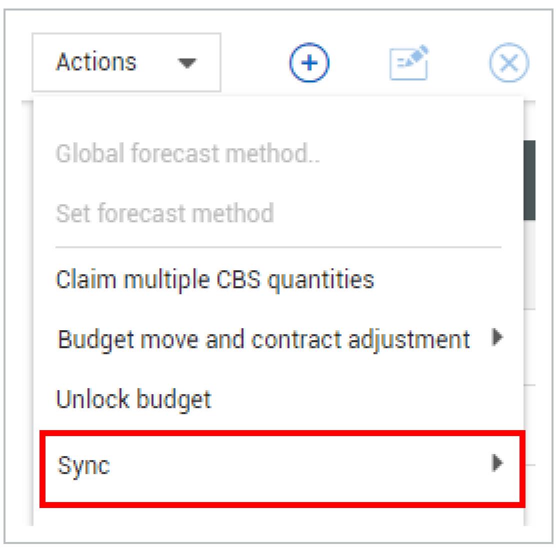
	Sync Type	Function
	and Budget	hours, and costs to the ERP system.
3	**Push CBS Structure and Live Forecast**	Syncs the Control CBS Structure and Live Forecasted quantities, man-hours, and costs to the ERP system.
4	**Push CBS Structure and Actual Quantities**	Syncs the Control CBS Structure and job-to-date actual quantities to the ERP system.
5	**Push CBS Structure, Budget, Live Forecast, and Actual QTY**	Simultaneously performs all the syncing functions listed above (1-4).
6	**Push Pay Item**	Syncs the Pay item list and data to the ERP system.
7	**Push Billed Revenue**	Syncs job to date billed amounts to the ERP system.
8	**Push Forecast Revenue**	Sync pay item revenue values (billed revenue, earned revenue, forecast revenue).
9	**Get Quantities (Through Previous Pay Period or Job To Date**	Retrieves the claimed quantities from InEight Plan and incorporates the information to Actual QTY within Control.
10	**Get Actual Cost and MH**	Retrieves actual project costs and man-hours from the ERP system and incorporates the information to Actual Costs and Actual Man-hours within Control.
11	**Get Billed Revenue**	Retrieves billed amounts from the ERP system and incorporates the information to Billed revenue within Control

Sync Options

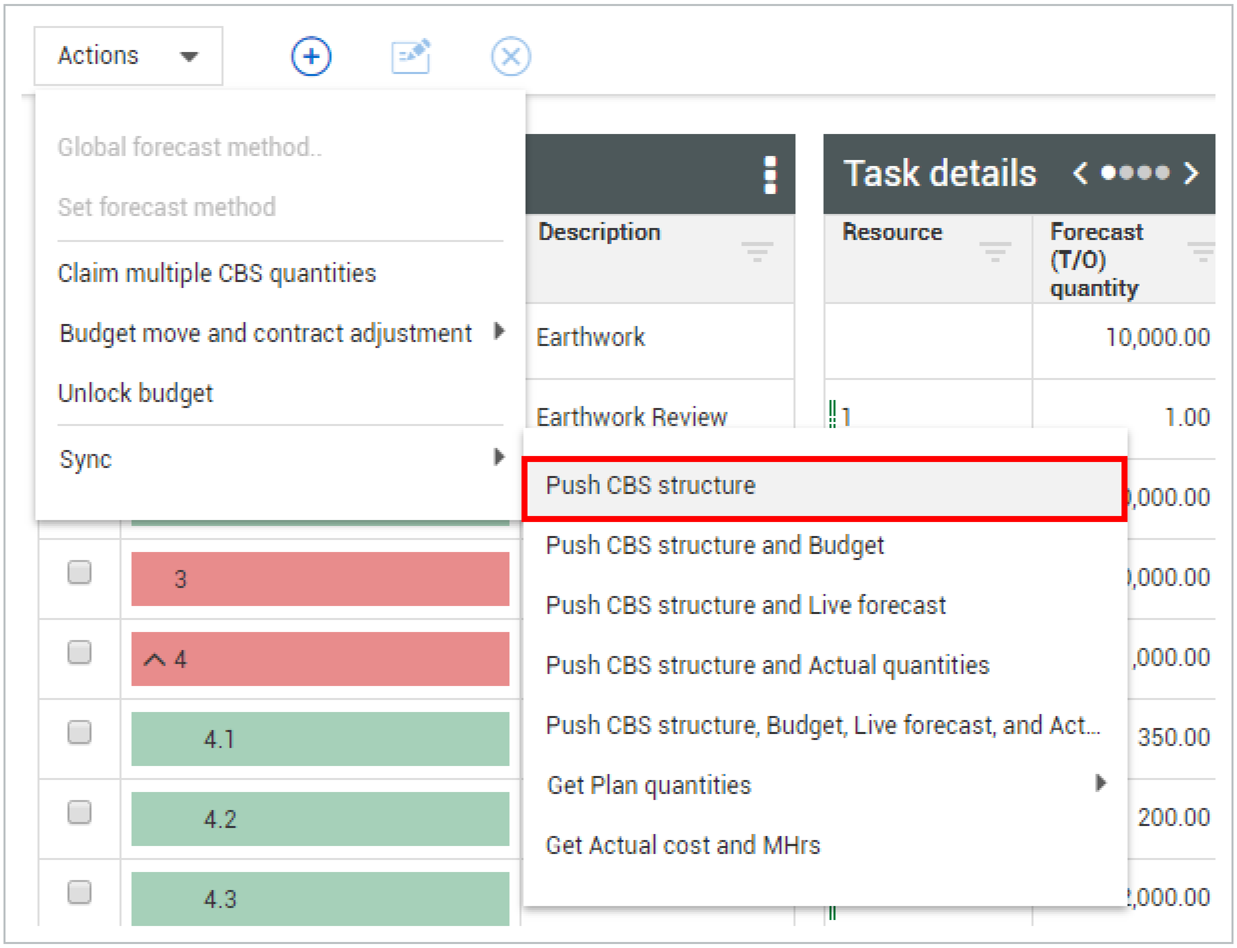
1. From the Control main page, click the **Actions** menu.



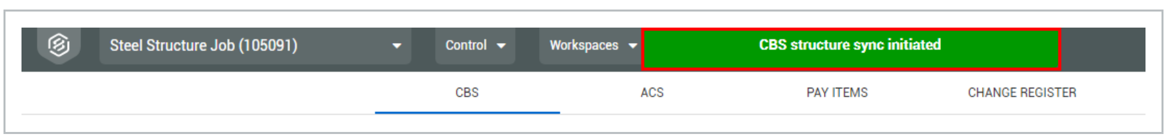
2. Select **Sync** from the Actions drop-down.



3. Select **Push CBS Structure** from the Sync drop-down.

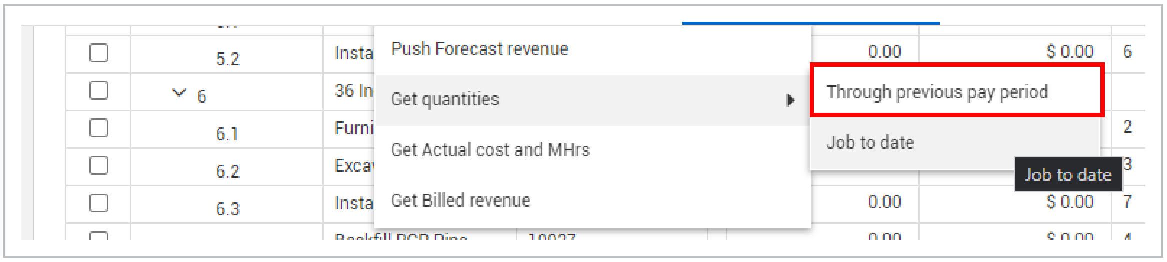


- A message shows at the top of the page that shows the process initiated.



- You can follow the same steps for selecting the other sync options
- For the Get Plan Quantities option, you must select the **Through Previous Pay Period**

option



When you want certain types of data to sync automatically, you can schedule syncs. For more information, see Scheduled Syncs.

1.8 SCHEDULED SYNCS

Scheduled syncs allow you to set up automatic syncs, so you don't have to manually perform the syncs. You can set a time and date for the type of information you want updated from push or get data sync options. You can do a one-time sync or set up recurring syncs to get up-to-date costs or man-hours.

To use the sync features in Control, you must first select **Control with confirmation** in Global Options. For more information, see Cost item integration behavior.

To schedule syncs, you must first configure them for your organization in Application integrations. You can open Application integrations in Main menu > Suite administration > **Application integrations**.

The available sync types are:

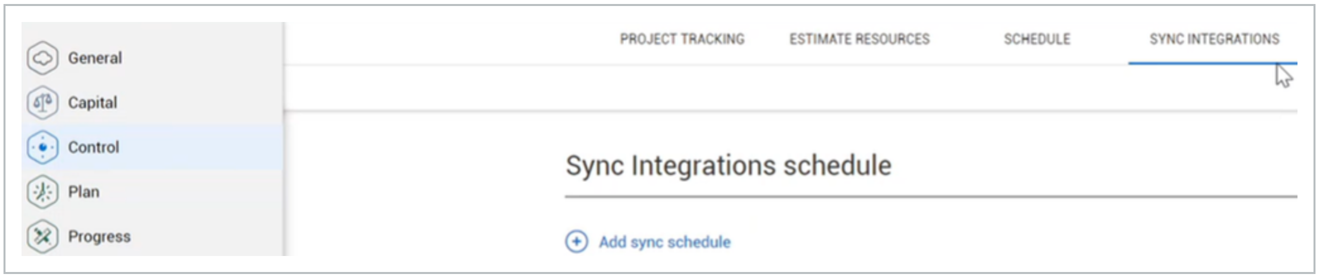
- Push CBS structure
- Push CBS structure and Budget
- Push CBS structure and Live forecast
- Push CBS structure and Actual quantities
- Push CBS structure, Budget, Live forecast and Actual quantities
- Push Pay item
- Push Billed revenue
- Push Forecast revenue
- Get Quantities

- Get Actual cost and MHrs
- Get Billed revenue

For more information about push and get functions, see Push and Get Actions.

1.8.1 Sync integrations

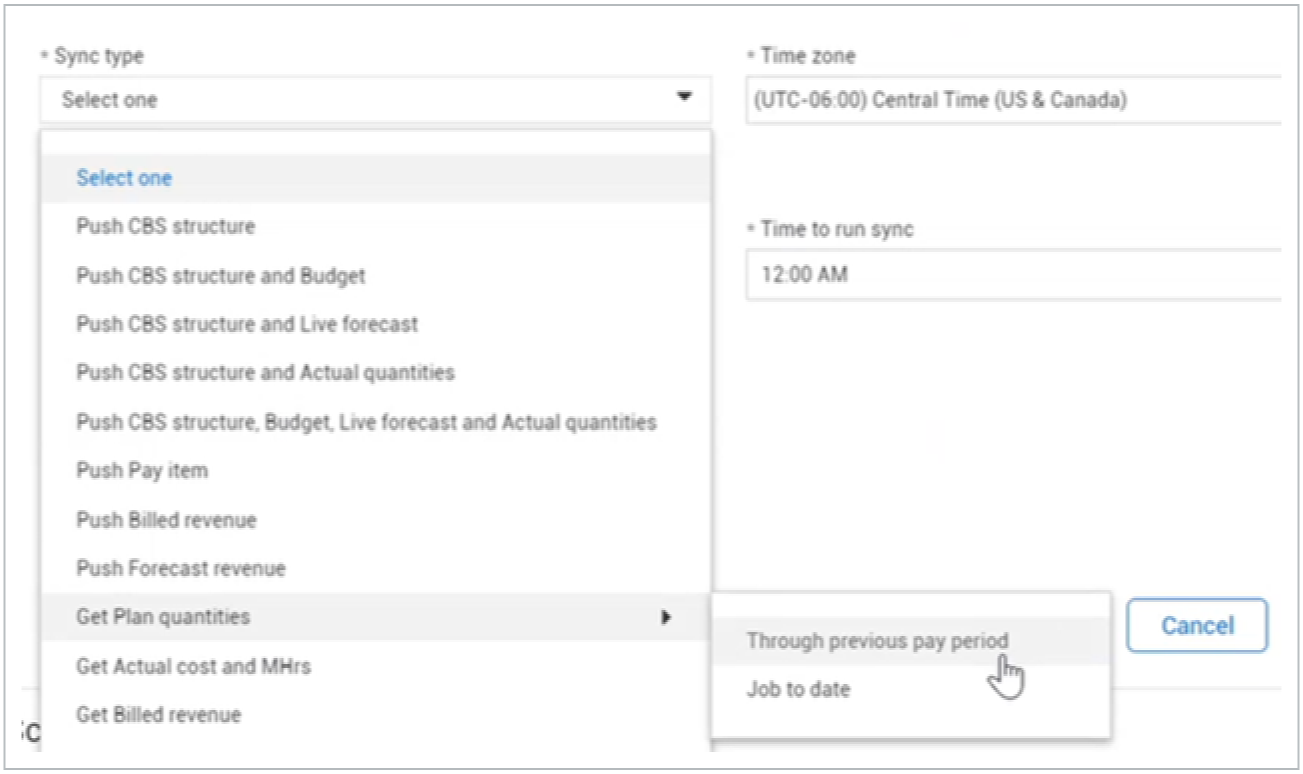
To start scheduling syncs, go to the Sync integrations tab in the Control Project settings. You can add syncs by selecting the **Add sync schedule** button. You can schedule all your syncs for the project at one time.



There are five required fields you must fill out in order to schedule a sync.

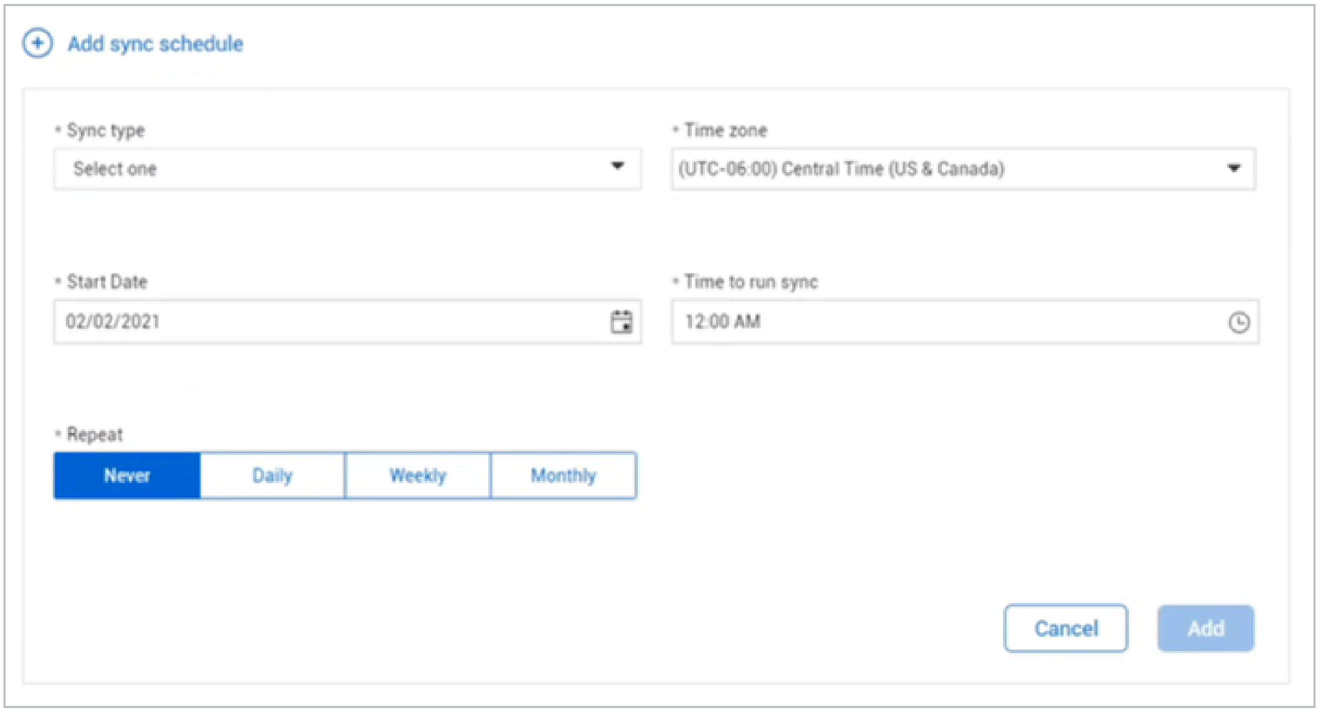
- Sync type
- Time zone
- Start date
- Time to run sync
- Repeat

Sync types lists all available push and get syncs.



The Time zone is where you select which region's time zone you are in.

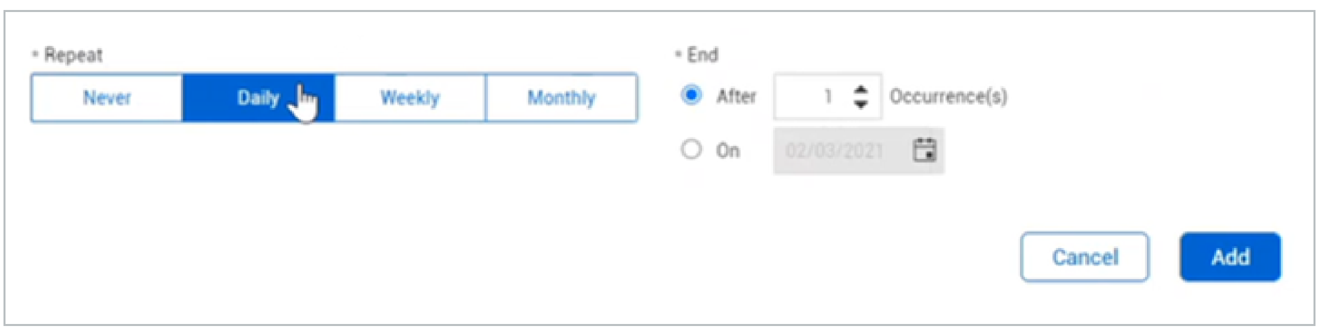
Start date functions similarly to selecting a start date for a project. You cannot select to start a sync from a day in the past. The scheduled sync starts at the current day by default unless you select otherwise.



> You can only select start times in 30 minute increments.

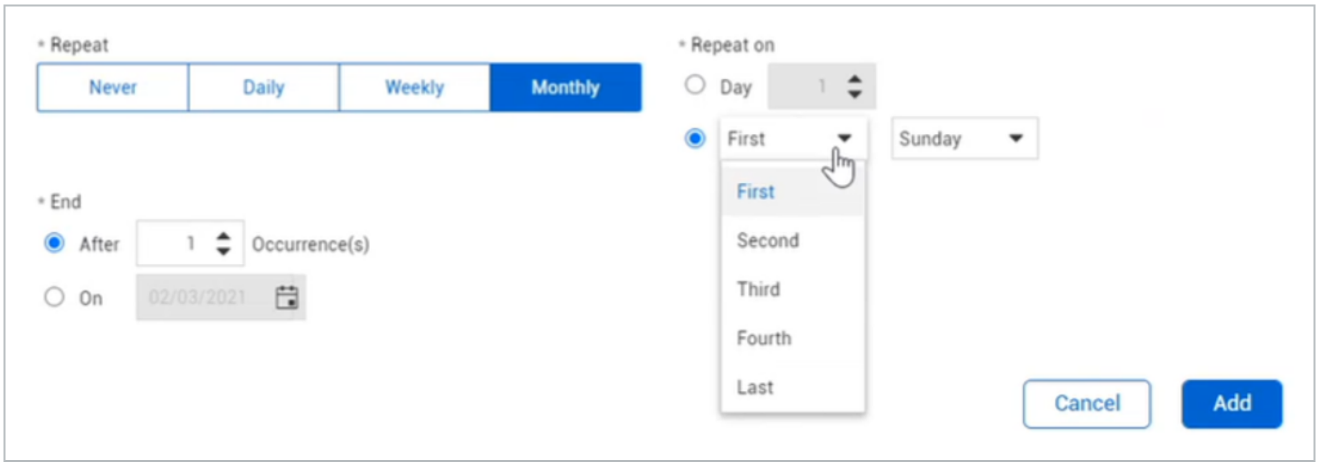
The Repeat section is where you select how often a scheduled sync repeats. You can choose to have the sync repeat daily, weekly, monthly, or never depending on your preference. You can end the schedule syncs on a certain date or end after a number of occurrences.

For daily syncs, select how often you want to repeat the sync or when you want the reoccurring syncs to end.

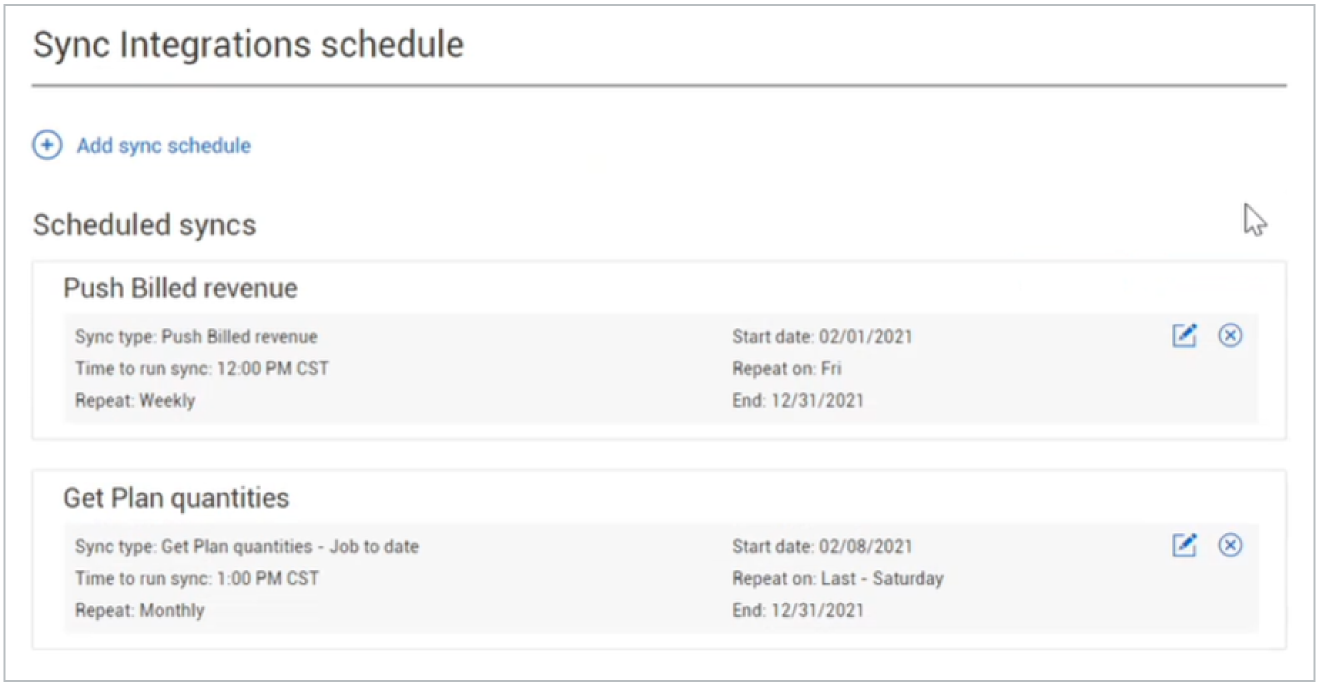


For weekly syncs, select which days the sync repeats on as well as when you want the sync to end.

For monthly syncs, select what day in the month the sync repeats and when you want the sync to end.



After you click **Add**, the sync appears in the synch integrations tab.



You can edit syncs or delete them using the Edit and Delete buttons on the right of the sync data box.

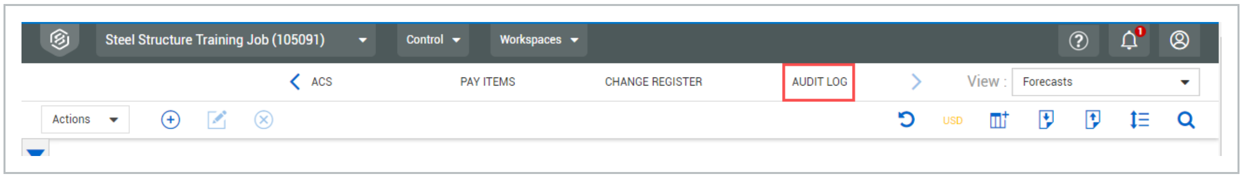
When you want to perform manual syncs for certain type of data, you can use the *Push* or *Get* action. For more information, see Push and Get Actions.

1.9 AUDIT LOG - INTEGRATION

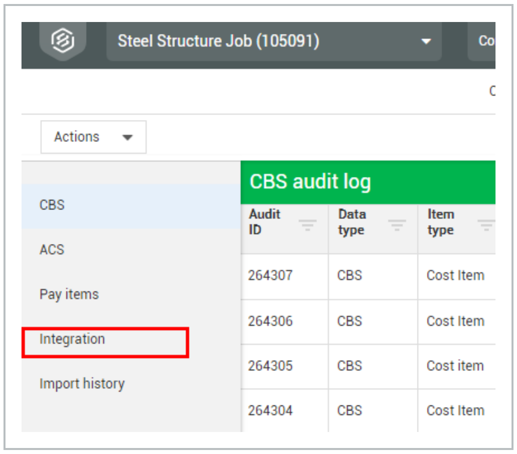
As you utilize the sync option, you have the option to go back and audit the status of the actions taken. The Audit Log Integration section shows all sync processes that have been initiated and their status. The Integration section captures whether the sync process between InEight Control and the ERP system was completed successfully. You can also view how long the sync process took to complete and who requested the sync.

Sync Audit Log

1. From the Control Workspaces page, click the **Audit Log** tab.



2. On the left side bar menu, click **Integration**.



The log displays the current sync status

Review

1. How can you know a sync process initiated?
   a. Viewing the CBS Audit log
   b. Appearance of a toast message
   c. There is no way to tell

2. Where can you view the status of a sync process?
   a. In the Change Register
   b. On the CBS tab, in the Forecast data block

c. On the Pay Items tab, under the sync status column

d. In the Sync Audit Log

Summary

As a result of this lesson, you can:

- Explain the InEight cloud platform Functional Flow diagram
- Explain the different InEight Control Push interfaces and use cases
- Explain the different InEight Control Get interfaces and use cases
- Identify where to go to audit sync transactions

1.10 INEIGHT PLATFORM SETTINGS

To manage a project successfully in Control, the correct project details must be added before project initiation.

> You can view project details in the All projects & organizations page of the InEight cloud platform.

Every new project launch has its own particularities, and the setup and initialization of these projects depends on multiple factors, such as:

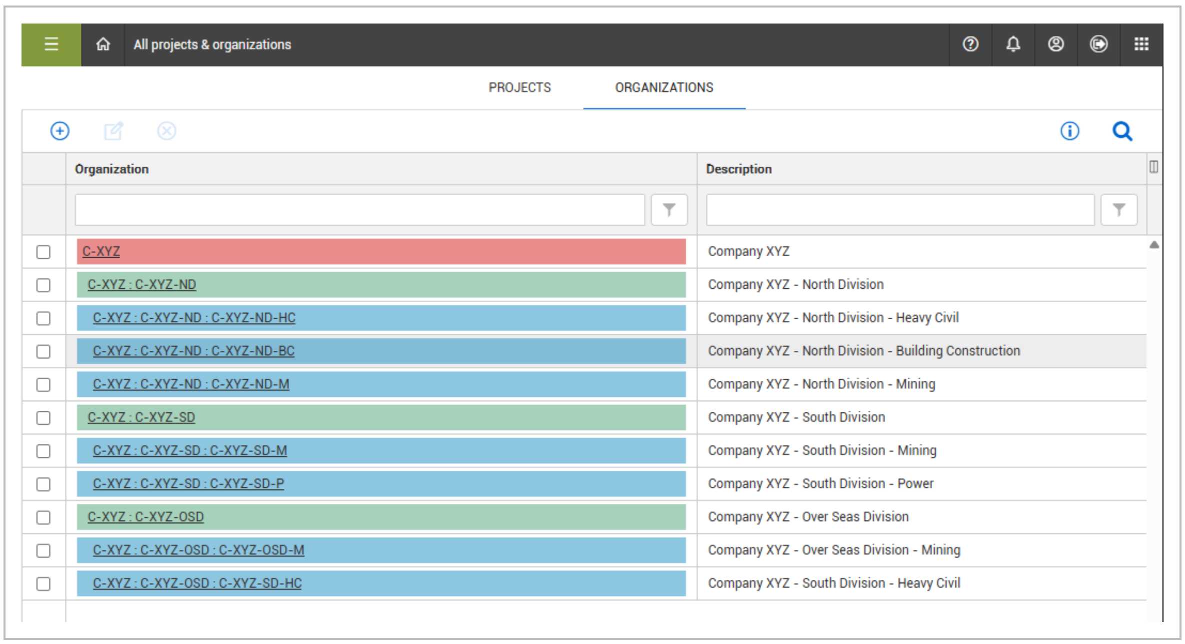
- Project organizational structure
- Staff and resources assigned
- Location of the project
- Units of measurement
- Currencies
- Financial reporting period

These settings are set up and configured in InEight Platform.

1.11 ORGANIZATIONAL BREAKDOWN STRUCTURE

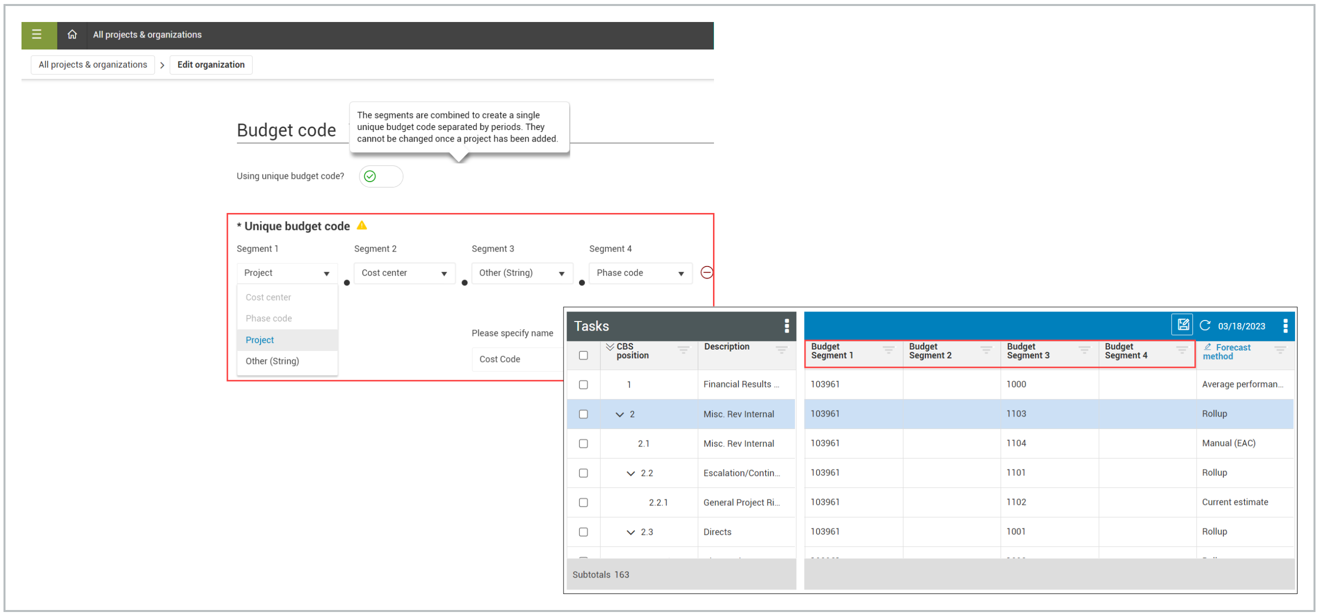
The Organizational Breakdown Structure (OBS) represents the hierarchical company structure. It is the way your company is structured and divided, such as departments, districts, sectors, etc. Roles and permissions can be added at different levels in your OBS, so users with district level access would have access to all the projects under that district's umbrella. For more information, see Organizational breakdown structure in Platform.

To access the OBS, from the main menu click **All projects & organizations**, and then select the **Organizations** tab.

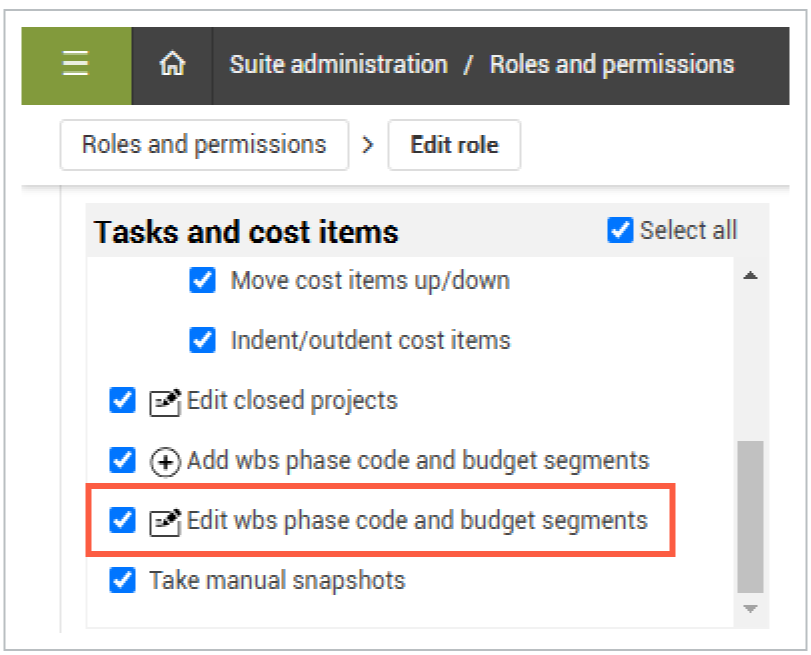


1.11.1 Unique budget code segments

You can populate budget segments in Workspaces to show a unique code label. Unique budget code segments contain additional options to identify a cost item using four independent fields that are separated by periods. Budget codes can be configured at the organization level and are primarily used with Time Center.

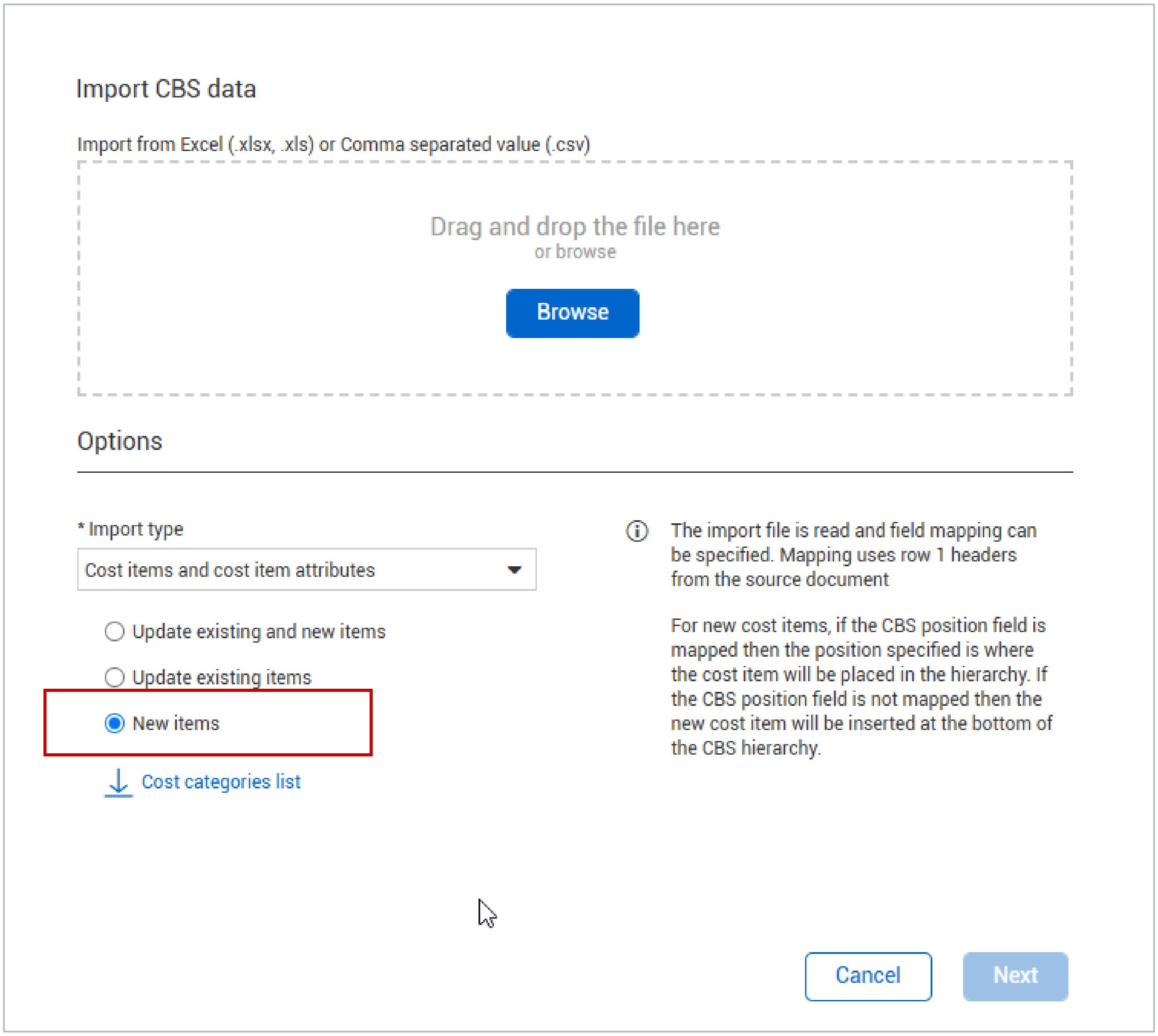


When the edit WBS phase codes and budget segments permission is assigned to a role in Suite administration > Roles and permissions > **Control**, users are allowed to populate the WBS phase codes and budget segments in the CBS workspace. This permission only applies based on configurations set for the WBS phase code and the budget segments. The edit WBS phase codes and budget segments permission must be selected to allow users to edit WBS phase codes and budget segments.



When only the Add wbs phase code and budget segments permission is assigned, users are only allowed to import WBS phase code and budget segments, and not to edit them.

When importing, users who have only been assigned the Add wbs phase code and budget segments permission must use the **New items** option in the Import CBS data dialog box.



Open Project Details

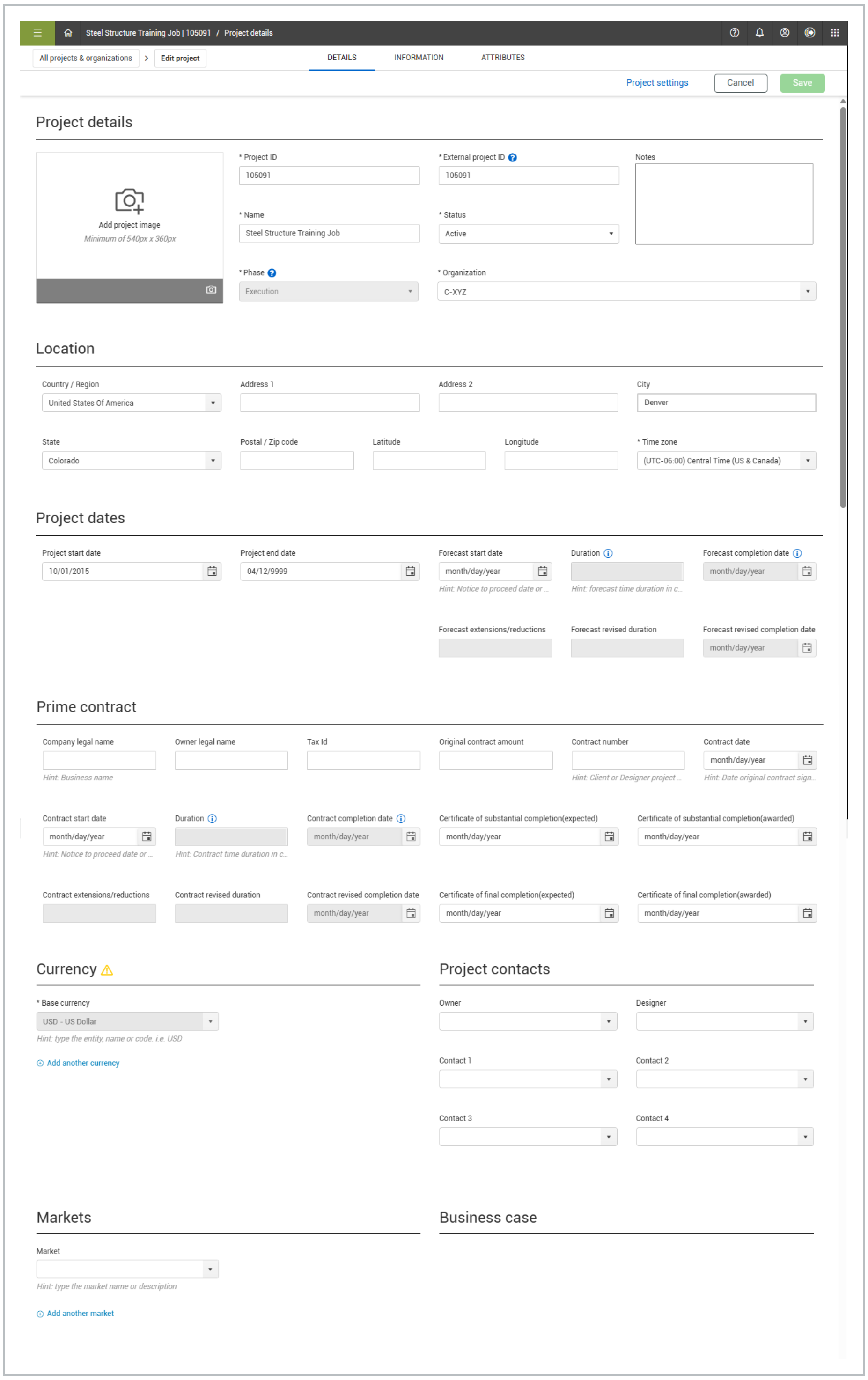
1. From the All projects & organizations page, right-click on **your job**.
2. Select **Edit Project**, or click the **Edit** icon.

1.12 PROJECT PAGE

The Edit Project page is where general project setup information is edited and stored, including the following settings:

- Project Details
- Location
- Project Dates
- Prime Contact and Project contacts

- Currency and Markets



For more information, see Project initiation in Platform.

1.13 MANAGE USERS

As an administrator, you can manage users and set up the correct roles and permissions in InEight Platform to manage and organize the application successfully.

1.13.1 User Management

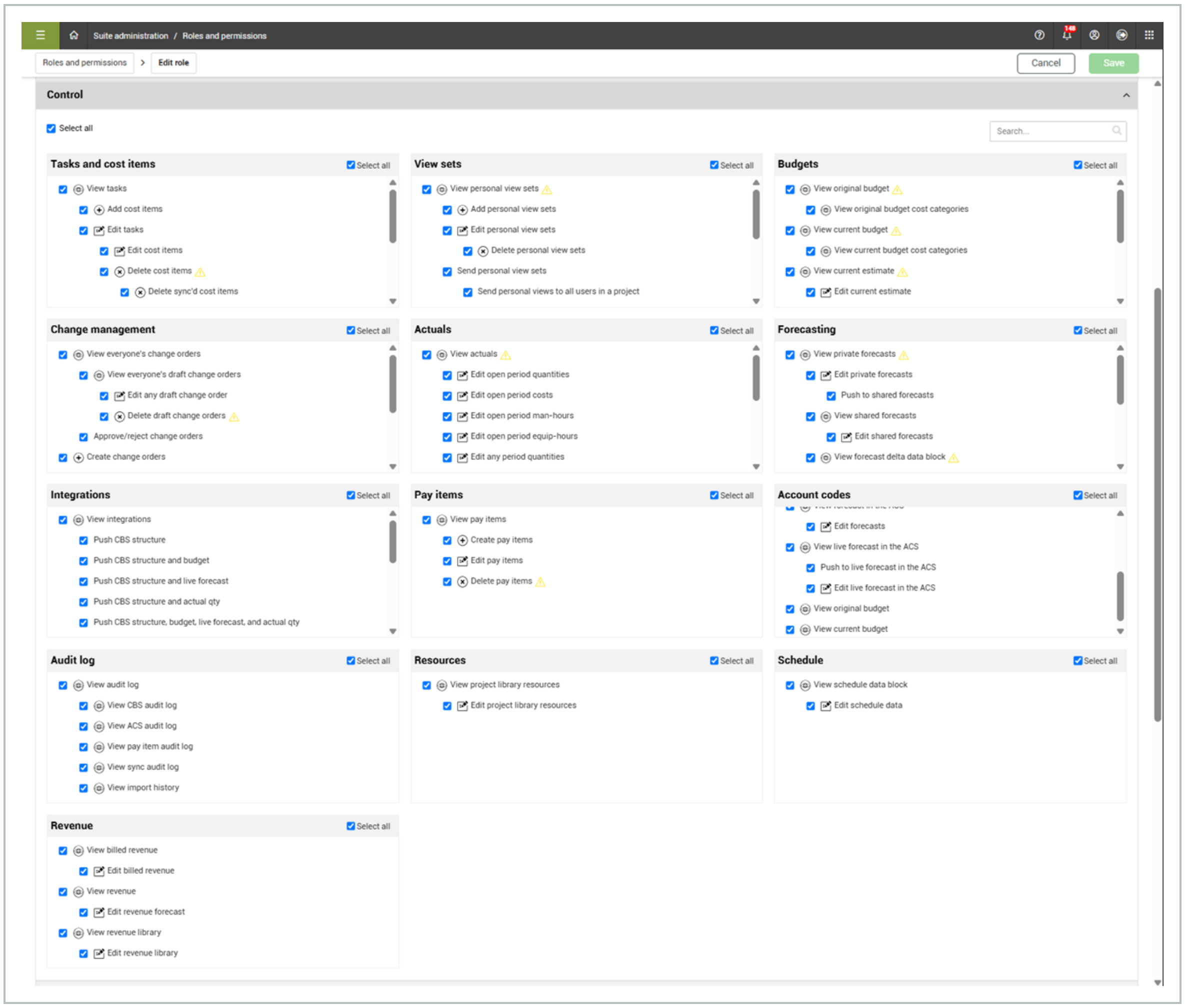
The User Management page provides a list of users inside your organization. You can view any user's project access, roles, and permissions within your organization. Users with applicable administrative permissions can edit and grant permissions to other users, up to the equivalent level of access they have been granted. For more information, see User Management in Platform.

1.13.2 Roles and permissions

A role in InEight Platform is defined as the function that a user occupies inside an organization or project. A role contains a set of predetermined authorizations and permissions. When a role is assigned to a user, they acquire all the permissions of that role in the project or organization that you can assign to users or project staff.

With sufficient rights and permissions, you can add or remove a role and all access it provides from the user. The Roles and Permissions section is where you can view what permissions each role has. For more information, see Roles and Permissions in Platform.

Control has permissions that control important functions within the program as shown in the image below.

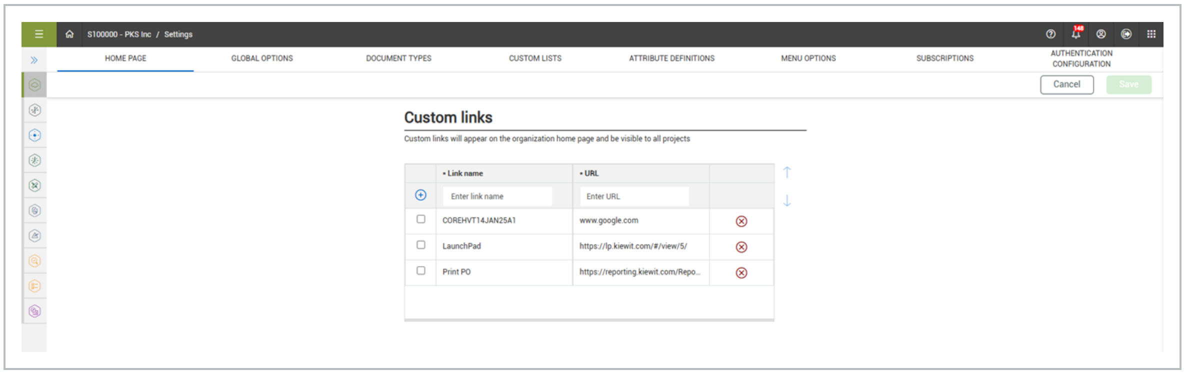


1.13.3 Considerations

Establishing roles and permissions is an administrative function. As such, access to these settings may not be available to you, as the setup of these settings may not be within the scope of your daily tasks.

1.14 ORGANIZATION GENERAL SETTINGS

The organization settings page contains general setup information for all the InEight products, including Control. The left ribbon menu lets you navigate to the appropriate settings for each application, including Control.

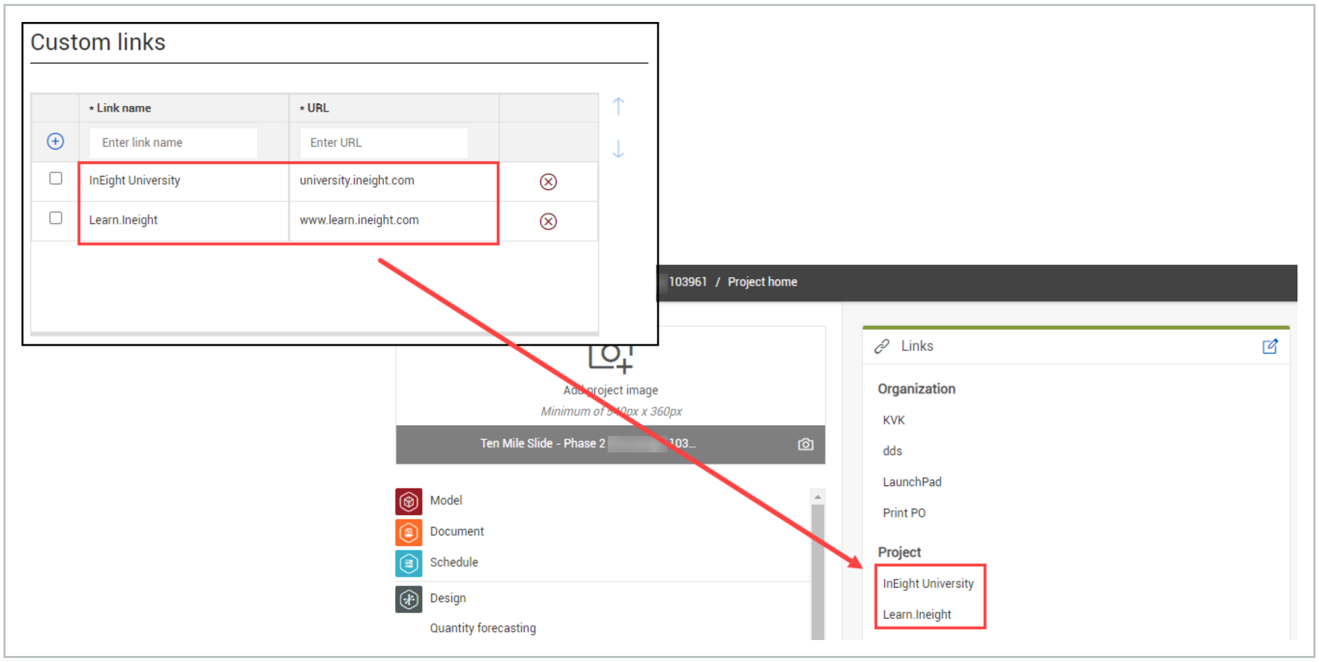


The general settings are the following:

- Home Page
- Global Options
- Fiscal Calendar
- Document Types
- Custom Lists
- Attribute Definitions
- Menu Options

1.15 HOME PAGE

In the Home Page tab, you can configure custom URL links that show on the organization and project level home pages.



To go to the Home page, click Main menu > <organization> > **Settings**.

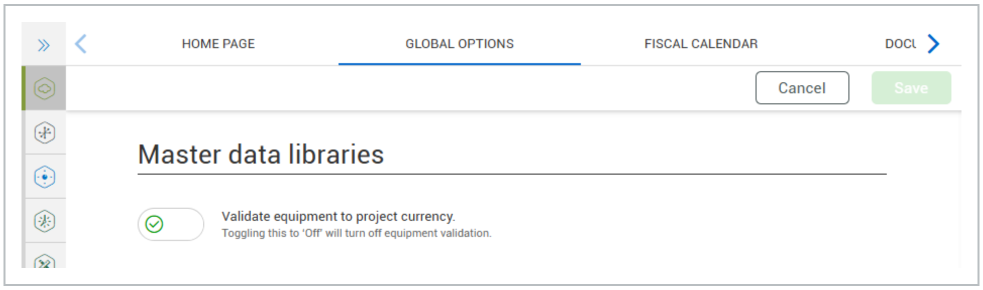
1.16 GLOBAL OPTIONS

In Global Options, you can configure the following settings:

- Master data libraries
- Role Assignment
- Project display in primary navigation
- Cost item integration behavior
- Email preferences
- Environment indicator
- Session timeout
- Landing page default view
- Organization/Project images
- Product integrations

1.16.1 Master data libraries

You can switch the Validate equipment to project currency toggle to *ON* to validate equipment to project currency. When turned *OFF*, equipment validation is turned off.



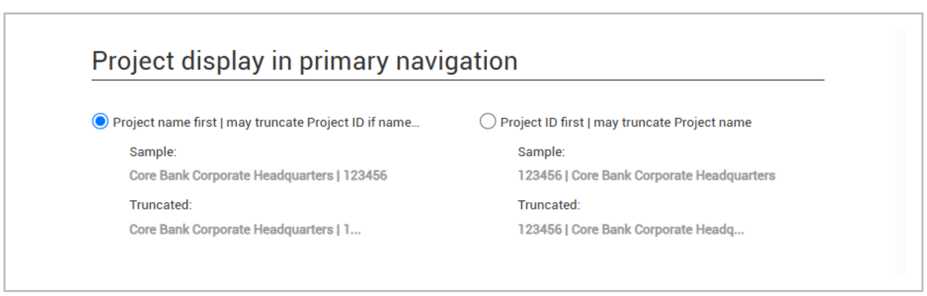
1.16.2 Role Assignment

You can switch the Allow users to self-assign roles toggle to *ON* to let users self-assign their own roles.

1.16.3 Project display in primary navigation

You can select to:

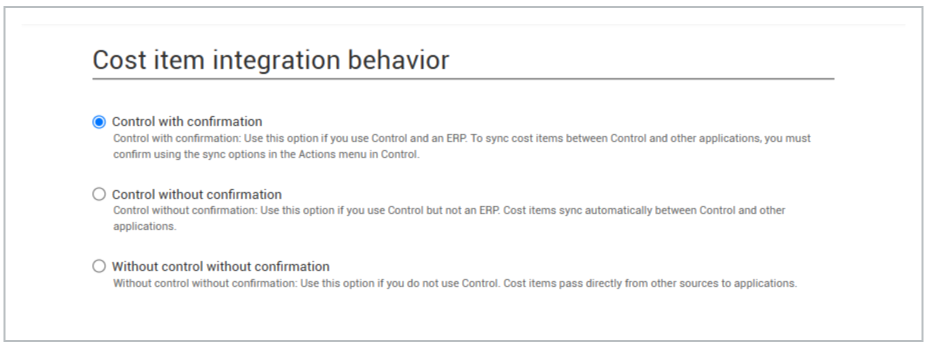
- Show the project name first which may truncate the Project ID if name are long.
- Show the project ID first which may truncate the project name.



1.16.4 Cost item integration behavior

Provides flexibility in how to configure Control with and without a direct tie to an ERP system. There is also an option to pass cost items directly from other sources to applications. You can select from the following options:

- **Control with confirmation** — Use this option if you use Control and an ERP. To sync cost items between Control and other applications, you must confirm using the sync options in the Actions menu in Control or set up a sync schedule in Sync Integrations. For more information about sync integrations, see Scheduled Syncs.
- **Control without confirmation** — Use this option if you use Control but not an ERP. Cost items sync automatically between Control and other applications.
- **Without Control without confirmation** — Use this option if you do not use Control. Cost items pass directly from other sources to applications.

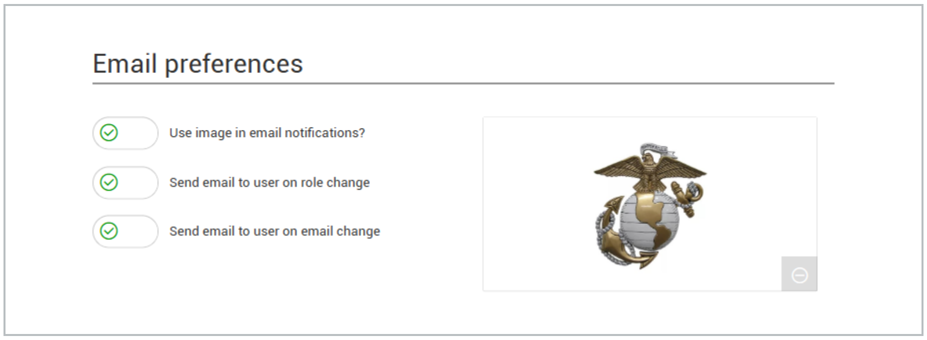


> When using a direct integration between InEight Control and your ERP, InEight Control will serve as the project controls interface for setting up and maintaining the project budget and cost structure. Every cost item created in InEight Control also needs to exist in your ERP system so actual costs can be recorded correctly. Your ERP system remains the system of record for all cost transactions, making it imperative that it remains in sync with any budget or structure changes. Your organization will need to consider what frequency is best for running each sync.

1.16.5 Email preferences

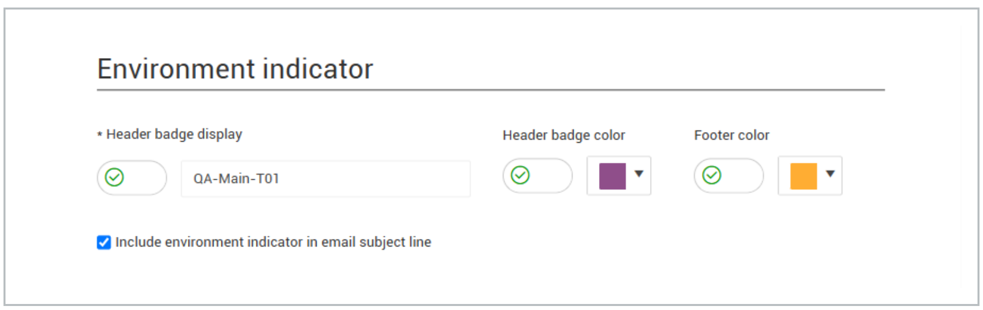
You can enable the following email options:

- Use image in email notifications.
- Send email to user when there is a role change
- Send email to user where there is an email change.



1.16.6 Environment indicator

You can enable indicators and options for header badge display, header badge color, and footer color. You can also select the option to *Include environment indicator in email subject line*.



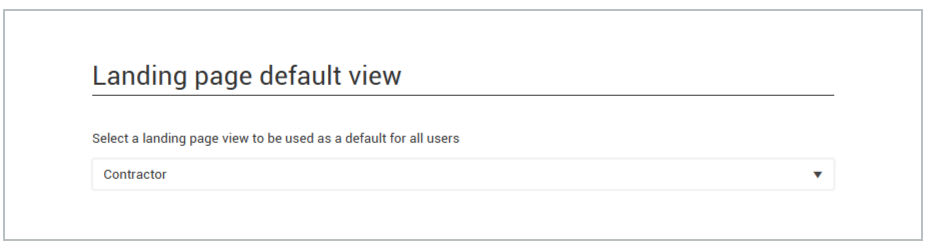
1.16.7 Session timeout

You can enable and configure session timeout options.

1.16.8 Landing page default view

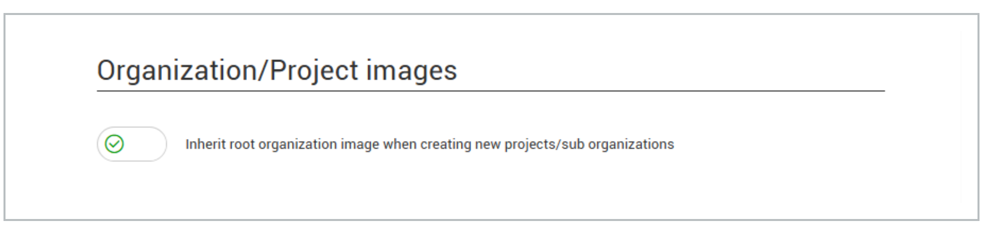
Select the default landing page view for all users. The default landing page views you can select from are:

- Owner
- Contractor
- Sub-contractor
- Vendor



1.16.9 Organization/Project images

You can enable the *Inherit root organization image when creating new projects/sub organizations* toggle to inherit the root organization image when creating new projects or sub-organizations.



1.16.10 Product integrations

Enable product settings for all projects created. When a project has a product enabled, the project is available in the selected product.

1.17 FISCAL CALENDAR

1.17.1 Fiscal calendar

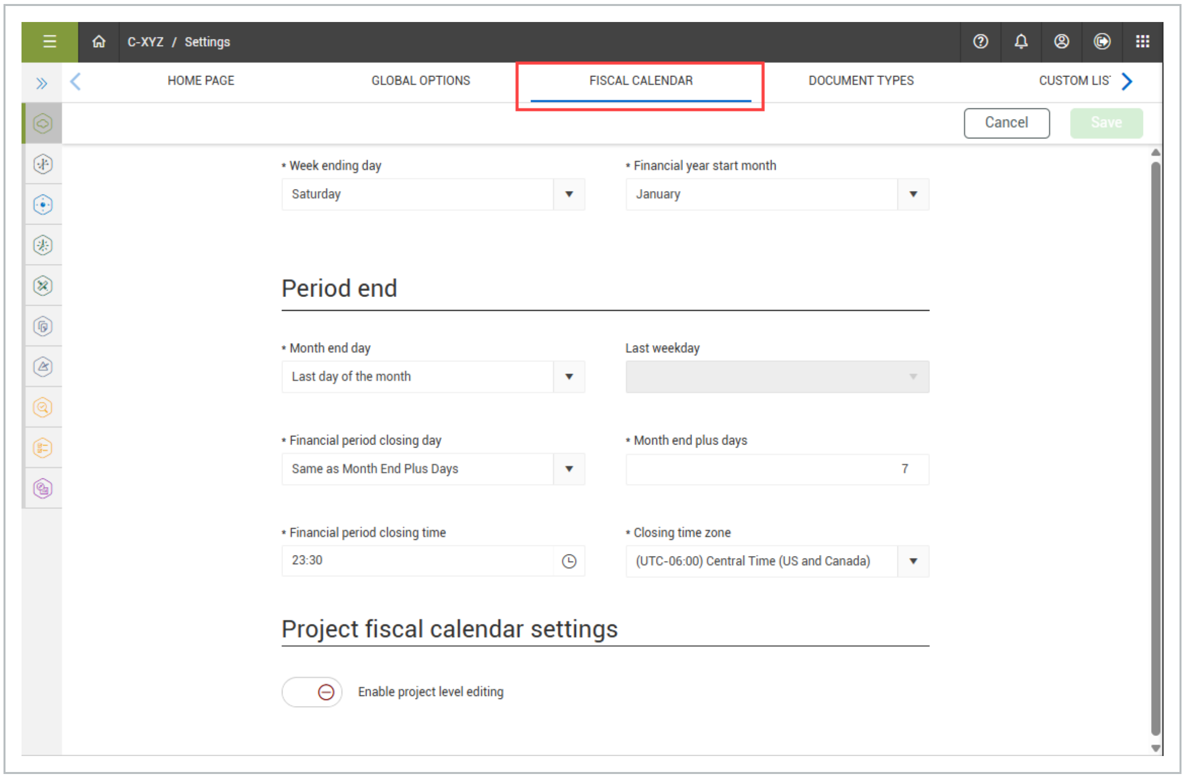
The settings in the Fiscal Calendar can be set at the organization and project levels. These settings specify:

- Week ending day
- Financial year start month
- Period end options of month end day, last weekday, financial period closing day, month end plus days, financial period closing time, and closing time zone.
- Project fiscal calendar settings (Organizational level only)

It is important to know the different cut-off dates, especially when you pull the current period actual quantities to compare them to prior periods, or when you synchronize your quantities with the other applications.

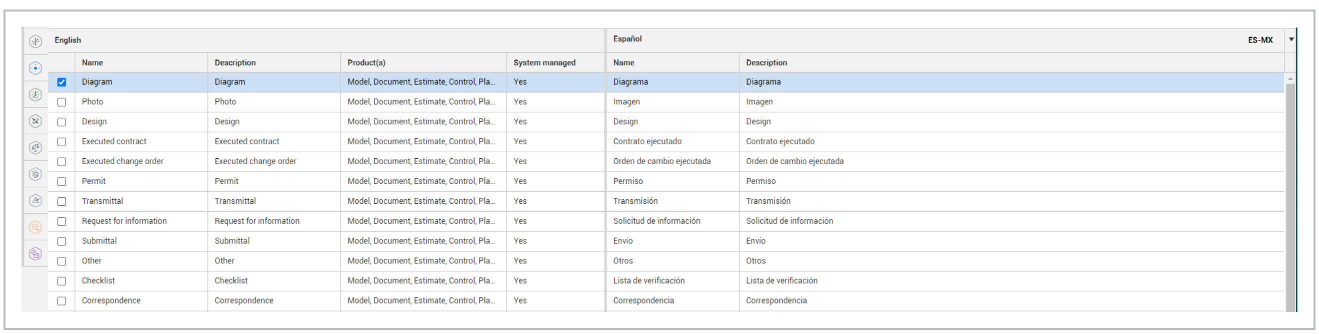
Changes to a project level fiscal calendar only impact the project, while changes to the organization level fiscal calendar impact all projects that do not have fiscal calendar modifications. If there are no changes at the project level, and the project matches the organization fiscal calendar settings, the project inherits the organization-level settings.

Any changes to the project fiscal calendar impact read-only snapshots, which are captured at the closure of month-end plus days, for the period month being closed. Changes also influence the monthly time buckets in time-phase forecasting and budgeting and to the time periods in which claims can or cannot be posted.



1.18 DOCUMENT TYPES

You can assign a document type to InEight applications. This lets you filter the payload of Document Types for visibility and use in the assigned application.



English				Español	ES-MX
Name	Description	Product(s)	System managed	Name	Description
Diagram	Diagram	Model, Document, Estimate, Control, Pla...	Yes	Diagrama	Diagrama
Photo	Photo	Model, Document, Estimate, Control, Pla...	Yes	Imagen	Imagen
Design	Design	Model, Document, Estimate, Control, Pla...	Yes	Design	Design
Executed contract	Executed contract	Model, Document, Estimate, Control, Pla...	Yes	Contrato ejecutado	Contrato ejecutado
Executed change order	Executed change order	Model, Document, Estimate, Control, Pla...	Yes	Orden de cambio ejecutada	Orden de cambio ejecutada
Permit	Permit	Model, Document, Estimate, Control, Pla...	Yes	Permiso	Permiso
Transmittal	Transmittal	Model, Document, Estimate, Control, Pla...	Yes	Transmisión	Transmisión
Request for information	Request for information	Model, Document, Estimate, Control, Pla...	Yes	Solicitud de información	Solicitud de información
Submittal	Submittal	Model, Document, Estimate, Control, Pla...	Yes	Envío	Envío
Other	Other	Model, Document, Estimate, Control, Pla...	Yes	Otros	Otros
Checklist	Checklist	Model, Document, Estimate, Control, Pla...	Yes	Lista de verificación	Lista de verificación
Correspondence	Correspondence	Model, Document, Estimate, Control, Pla...	Yes	Correspondencia	Correspondencia

1.18.1 Considerations

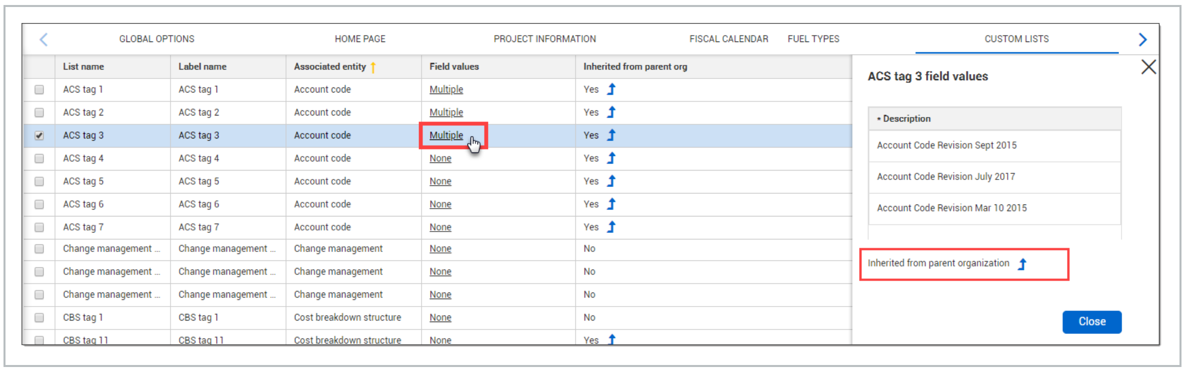
The Document Types settings is available at the organization level only.

1.19 CUSTOM LISTS

Similar to the tag feature in InEight Estimate, you can enter your tags and their values to use later for categorizing your cost items as you manage your project in Control.

Many of the tag fields are validated fields, meaning you can choose from options in a drop-down list. You define both the names of the tags and their drop-down values here.

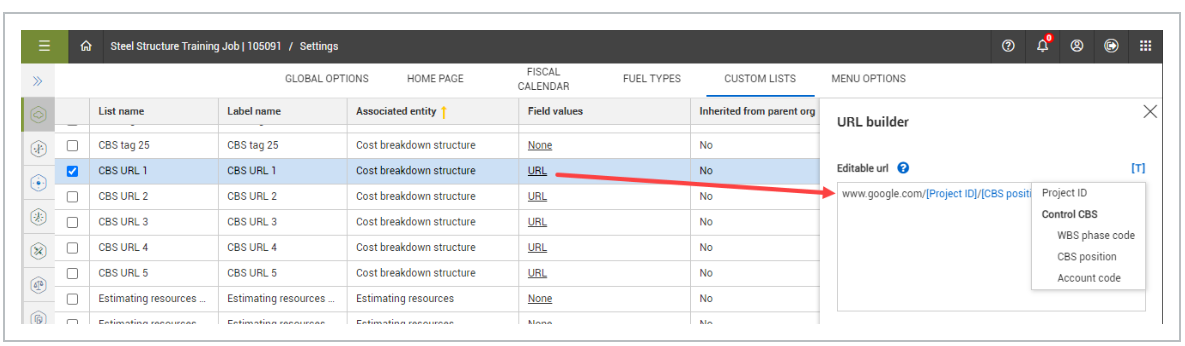
The field names associated with Cost breakdown structure and Account codes, are tags defined and editable at the organizational level; you cannot edit them at the project level, as indicated by the statement *Inherited from parent organization*.



1.19.1 CBS URL columns

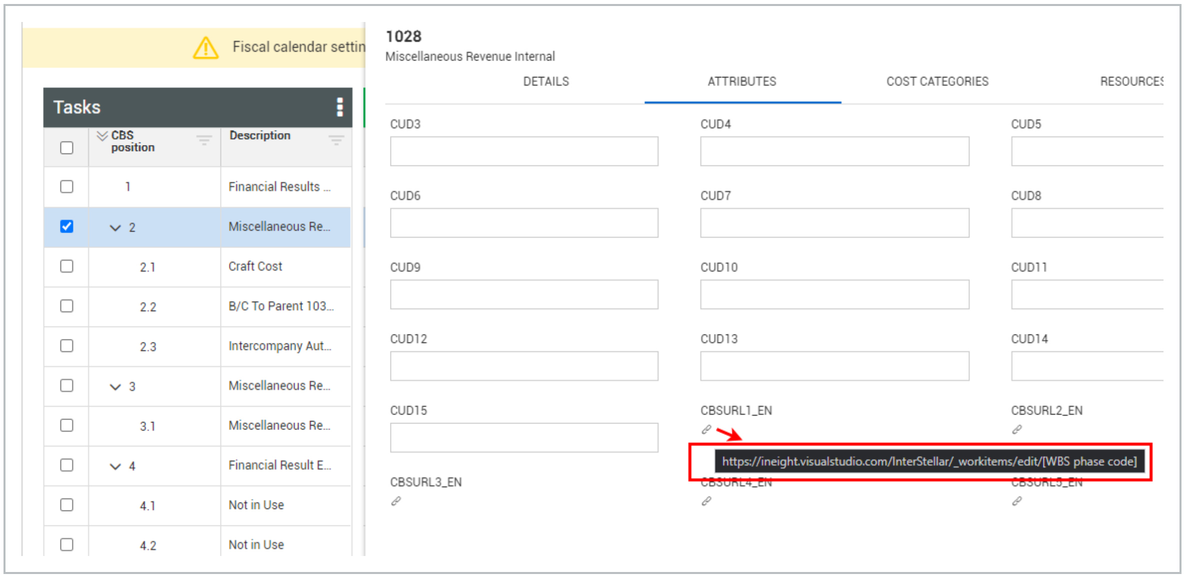
You can create direct links to URL addresses outside of Project Suite under Custom Lists. In the URL Field values you can define a URL with associated criteria to be used as an attribute for a cost item in the CBS.

In the URL Builder enter a URL that you want associated with your list name, along with any other dynamic attributes such as Project ID and CBS position code. Paste your URL and highlight the section you want to reference with another field. First highlight an attribute in the URL string, and then click the **[T]** reference icon to select which field to connect with.

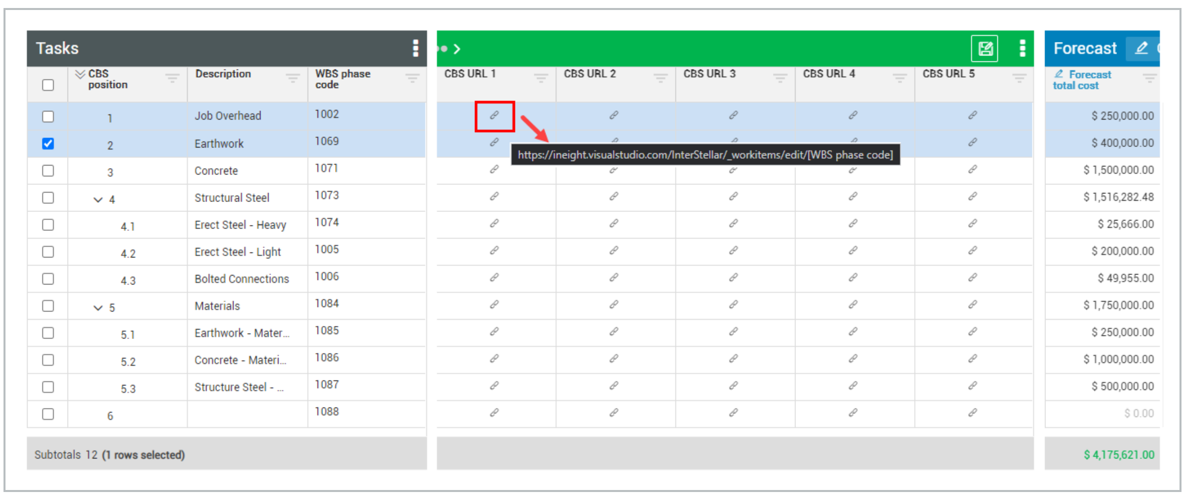


These quick links are accessible in the CBS and can contain detailed information pertaining to the cost item and project, which can also link to external reports.

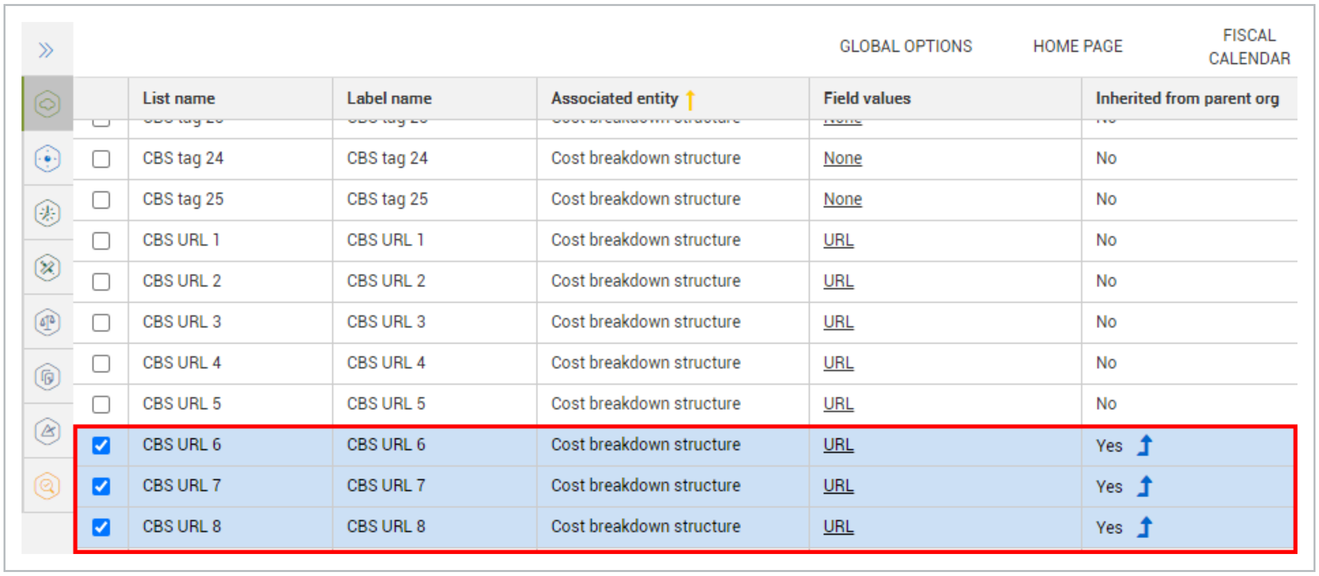
In the CBS cost item details attributes slide-out panel, the URL is concatenated to include the attributes defined. A link is included on a cost item that opens a new tab.



The links can also be accessed in the CBS register. Up to five CBS URL columns can be viewed in a data block in the CBS, per project.

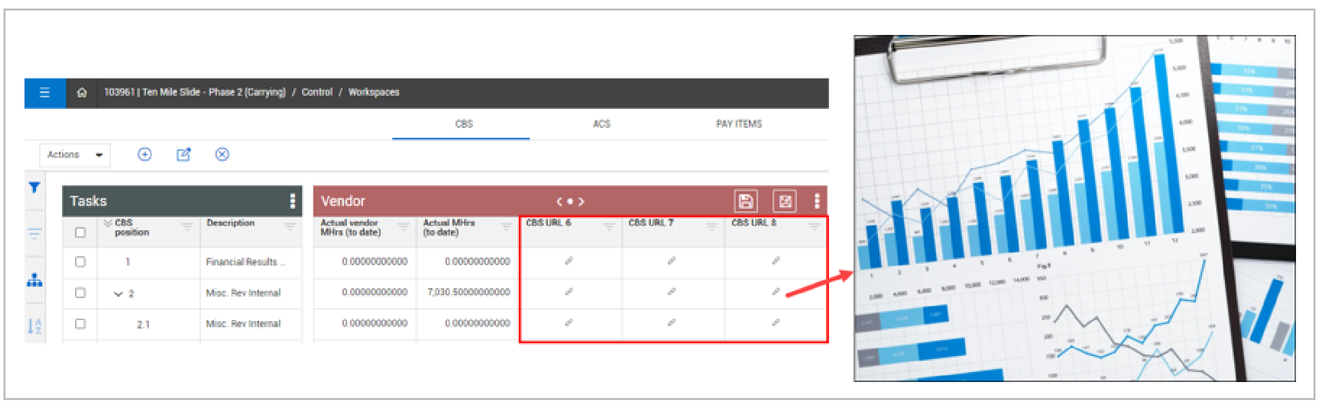


At the organization level, CBS URL columns 6, 7, and 8 have been added to the CBS register. When you define a CBS URL, it is then applied to each of the organization's projects.



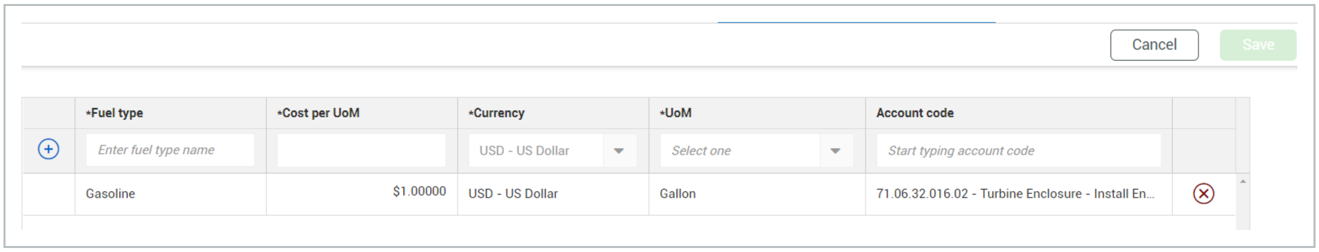
	List name	Label name	Associated entity	Field values	Inherited from parent org
☐	CBS tag 24	CBS tag 24	Cost breakdown structure	None	No
☐	CBS tag 25	CBS tag 25	Cost breakdown structure	None	No
☐	CBS URL 1	CBS URL 1	Cost breakdown structure	URL	No
☐	CBS URL 2	CBS URL 2	Cost breakdown structure	URL	No
☐	CBS URL 3	CBS URL 3	Cost breakdown structure	URL	No
☐	CBS URL 4	CBS URL 4	Cost breakdown structure	URL	No
☐	CBS URL 5	CBS URL 5	Cost breakdown structure	URL	No
☑	CBS URL 6	CBS URL 6	Cost breakdown structure	URL	Yes
☑	CBS URL 7	CBS URL 7	Cost breakdown structure	URL	Yes
☑	CBS URL 8	CBS URL 8	Cost breakdown structure	URL	Yes

Creating organization-level CBS URL links lets you associate shared documentation, such as external standard reports that are used across the organization. Instead of setting up links for every project, you can create a CBS URL link in Settings > Custom Lists.



1.20 ATTRIBUTE DEFINITIONS

Attribute Definitions are used to define project attributes which can be of the types text/date/number or can have source values from Organization, Project, and Market master data. These definitions are inherited inas all projects in the organization.



1.21 MENU OPTIONS

The below URL addresses specific to InEight products are updated when licenses are purchased or activated. The URLs are customer specific. The ability to maintain the URLs are intended for users with account admin only (root Org Setting) permissions. If no other products are purchased or activated, the URL opens an InEight related page to learn more about the products.

CHAPTER 1 – CONTROL SETTINGS

As an administrator, you can configure settings at the organization and project level in Control. The correct setting details must be added to manage projects successfully.

- **Organizational settings** — Settings configured at the organizational level are inherited when creating associated child organizations and new projects within the organization. You can configure organizational settings in Main menu > <organization> > Settings > **Control**.
- **Project settings** — At the project level, you can refine the default inherited organizational settings to customize how they are applied in each project. You can configure project settings in <project> > Settings > **Control**.

Organizational settings are applied as default settings for new projects. As an administrator, you can configure the default project settings to how they will apply to your individual project.

1.0.1 Considerations

You must have Level 3 – Account Admin permissions in InEight Platform, or an assignment to the root organization based on permission configuration.

1.1 PROJECT TRACKING

Project tracking settings configure how your project tracks progress and percent complete in Control. Organizational Project Tracking settings are configured in Main menu > organization > Settings > **Control**. For settings configured at the project level, go to project > Settings > **Control**.

These settings include the following options:

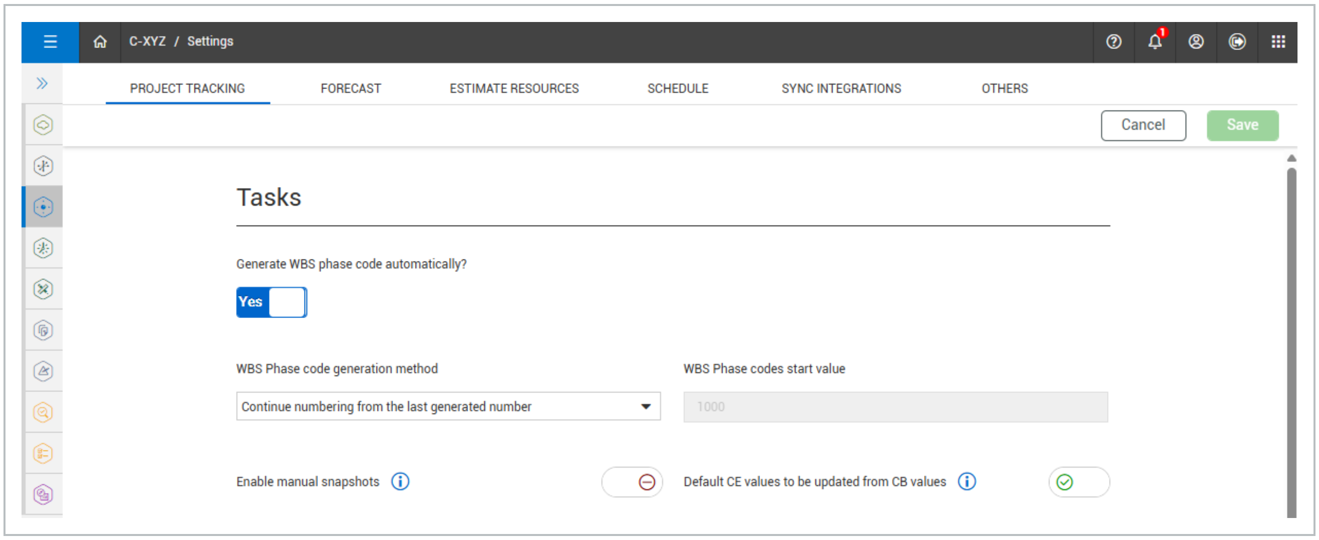
- Tasks
- Actuals
- Estimated actuals
- Time-phasing

1.2 TASKS

1.2.1 Organizational and project level

1.2.1.1 Generate WBS phase code automatically

In the Tasks section you can manage how WBS phase codes are generated. You can set the **Generate WBS phase code automatically** toggle to *Yes* or *No*.



When you set the toggle to *No*, phase codes for newly created cost items must be manually entered.

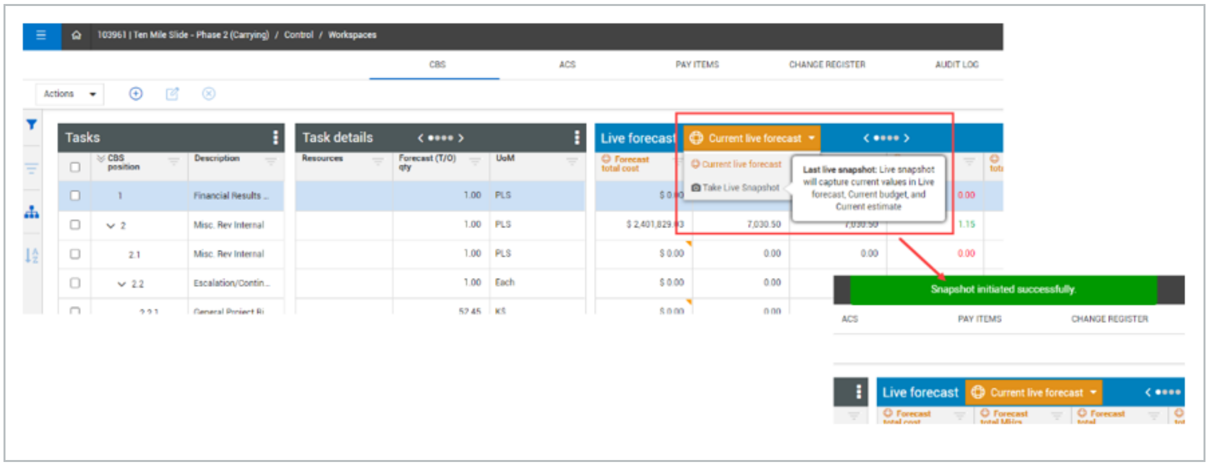
When you set the toggle to Yes, phase codes for newly created cost items are automatically generated and the **WBS Phase code generation method** list option activates. In the WBS Phase code generation method list, you can choose from the following:

- **Continue numbering from the last generated number**
- **Regenerates all values beginning from the specified start value** — This option activates the *WBS Phase code start value* field where you can enter a specified value. The value is the phase code for the first cost item created. When automatic phase code generation is activated, the proceeding new cost items is automatically created based on the phase code generation method selected.

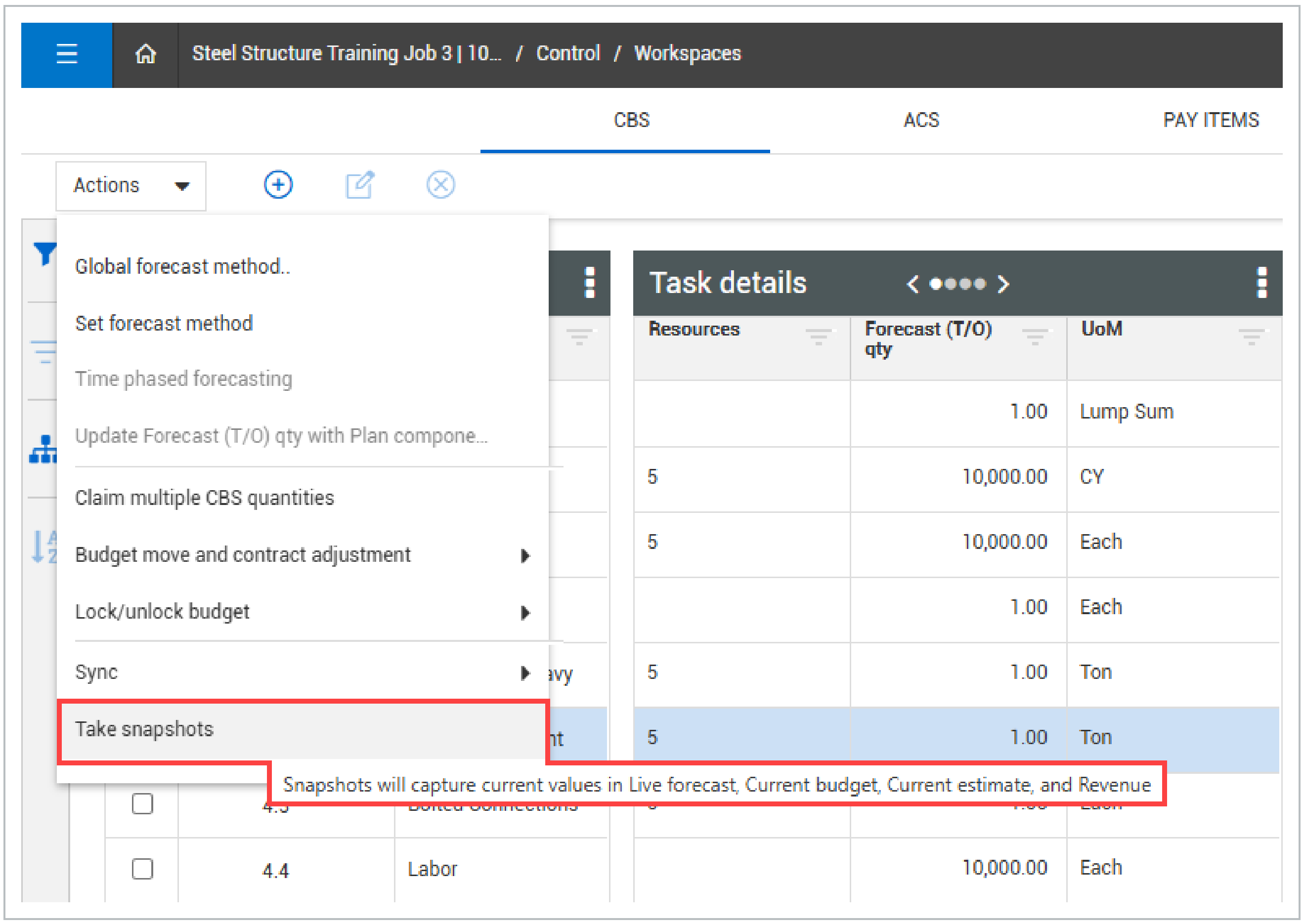
1.2.1.2 Enable Manual Snapshots

You can create a manual snapshot of Control project data in the CBS and Pay Items registers. When the *Enable manual snapshots* toggle is enabled, and with the applicable permissions, you can capture a snapshot at any point in time. When the setting is disabled, snapshots are captured only when *Push Live forecast* and *Push Forecast revenue* syncs are run or when the month-end plus days elapse.

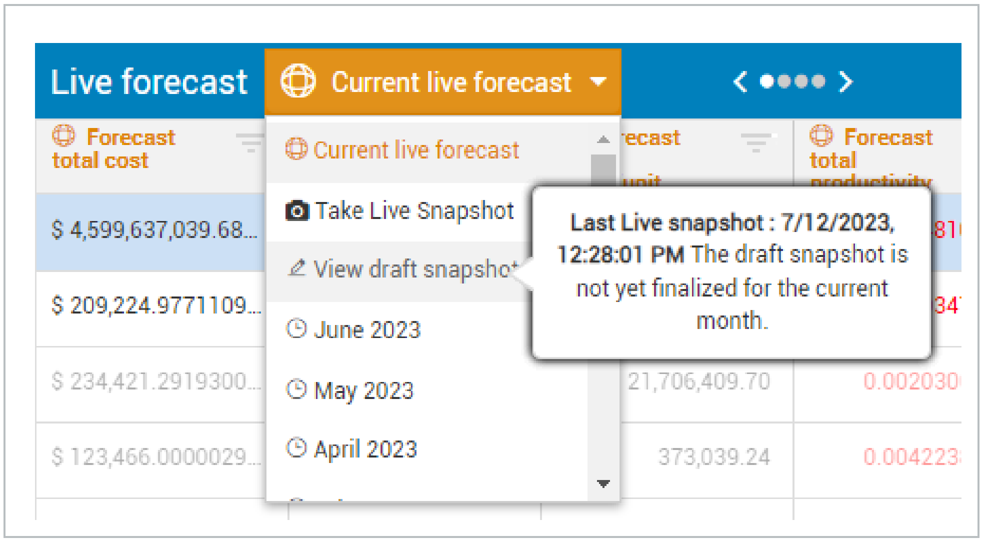
Enabling the manual snapshots settings lets you select the **Take Live Snapshot** option from the Current Live Forecast drop-down menu in the CBS to capture current values in the Live Forecast, Current Budget and Current Estimate.



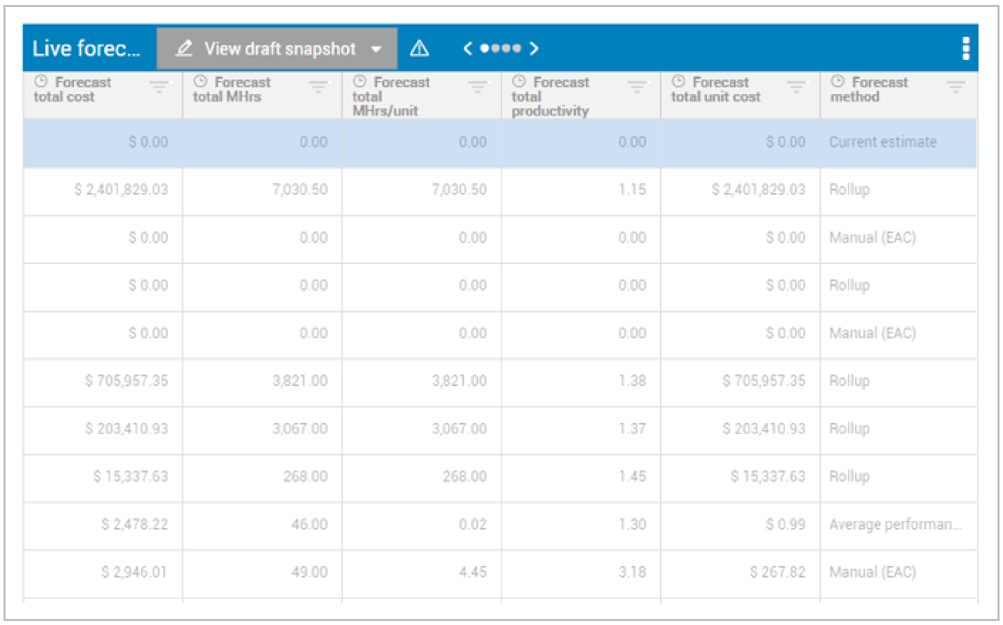
Snapshots can also be taken from the Actions menu.



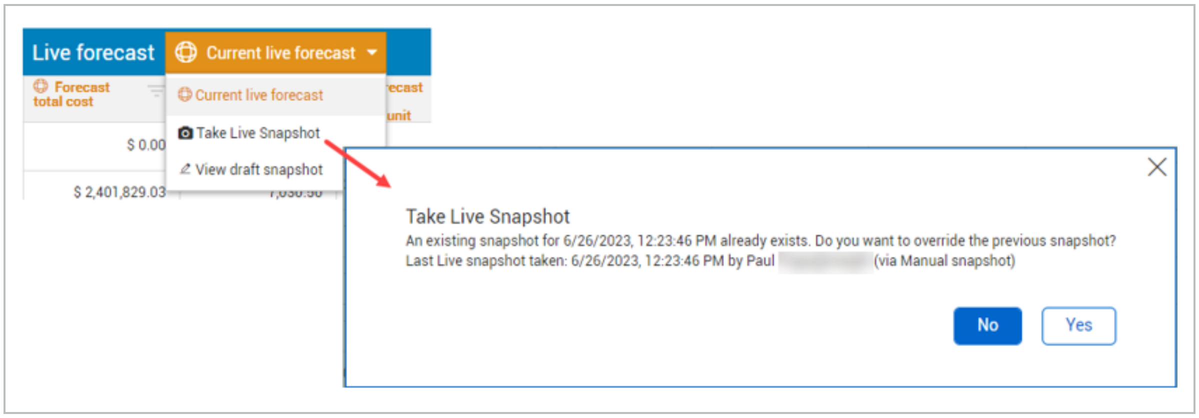
You can view the draft snapshot by selecting the **View draft snapshot** from the Current live forecast drop-down menu. This lets you know that the draft snapshot is not yet finalized for the current month.



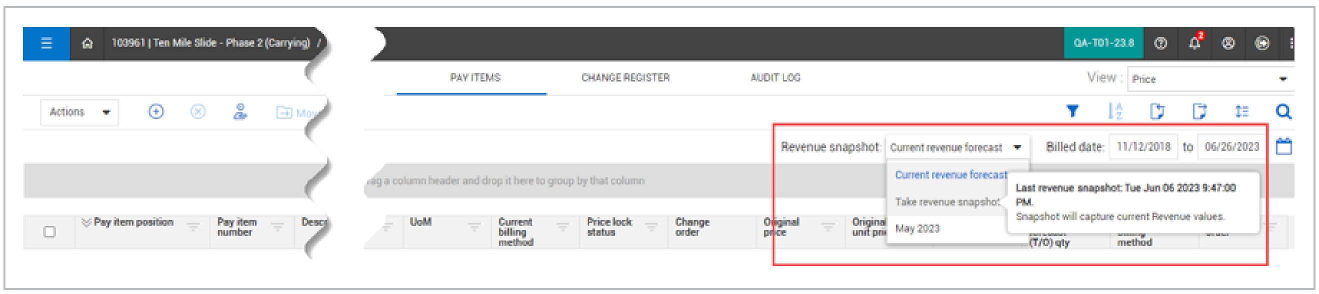
When you select **View draft snapshot**, the snapshot values load into the CBS in a read-only status.



When you select the **Take Live Snapshot** option consecutively, a message lets you know that an existing snapshot already exists and a choice to override the previous snapshot.



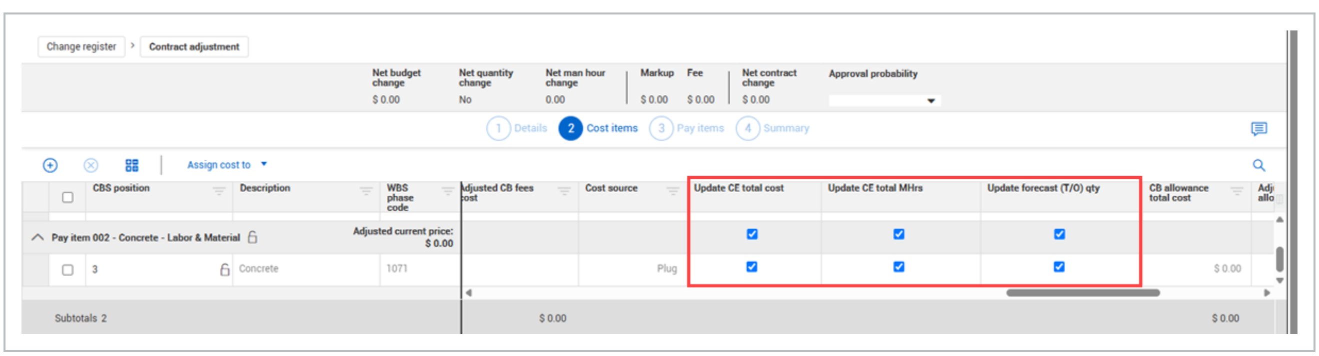
The same snapshot functionality now exists in Pay Items, with the exact same option.



1.2.1.3 Default CE values to be updated from CB values

You can select for the Current estimate cost, man-hours, and quantity values to be updated by default from an approved change order that contains adjustments to the Current budget cost, man-hours, and quantity. To set CE values to be updated from CB values, enable the **Default CE values to be updated from CB values** toggle. The check boxes are automatically selected in the change orders.

Whether the **Default CE values to be updated from CB values** toggle is enabled or disabled, you have the option to manually select or deselect to update the values using the check box options under the Update CE total cost, Update CE total MHrs, and Update forecast (T/O) qty in the change order.



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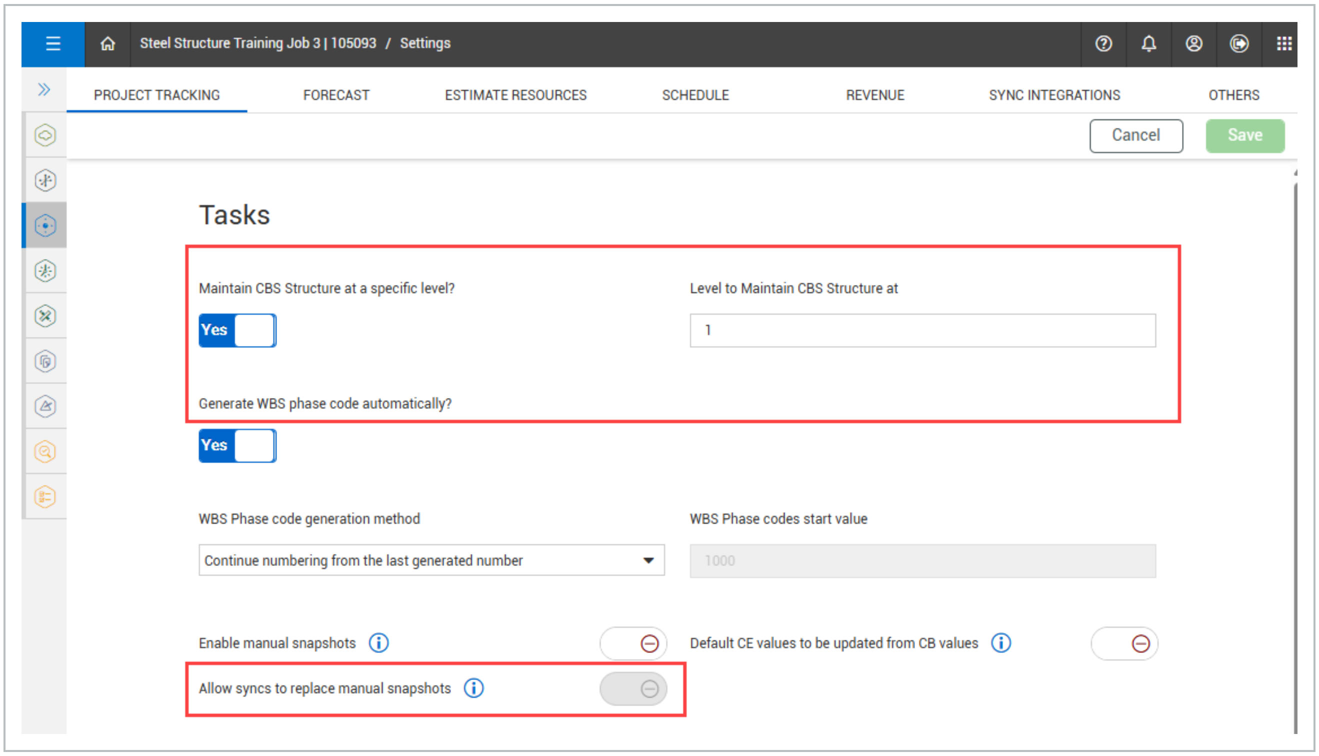
1.2.2 Project level

At the project level, you can further define settings for maintaining the CBS structure at a specific level and allowing syncs to replace manual snapshots.

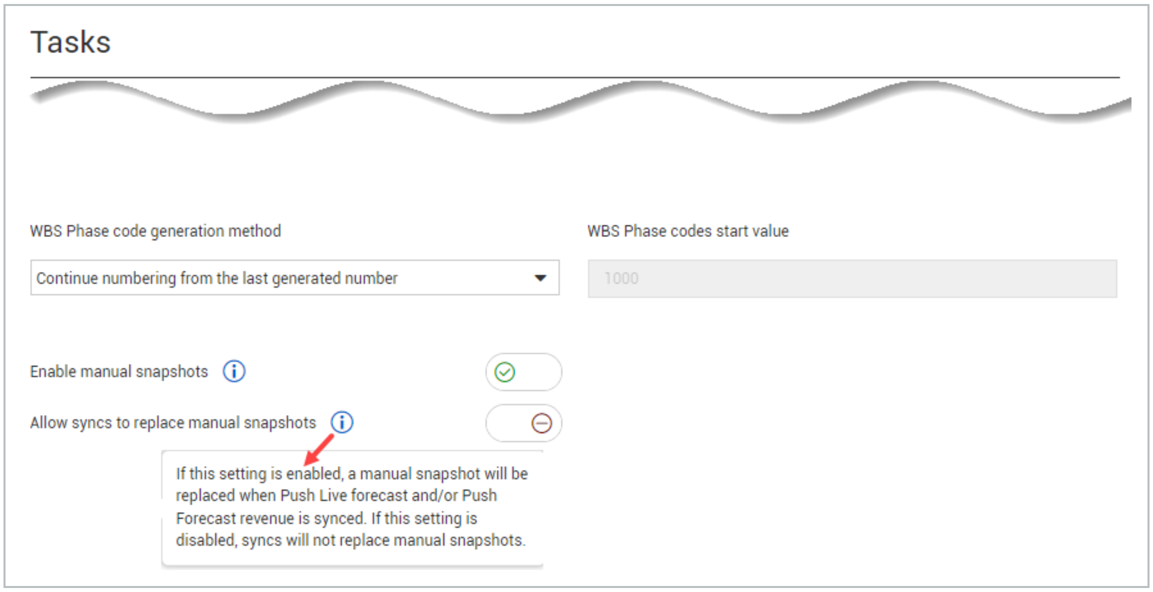


1.2.2.4 Maintain CBS Structure at a specific level

When set to *Yes*, the Level to Maintain CBS structure at field is enabled. You can enter at what level to maintain the CBS structure.

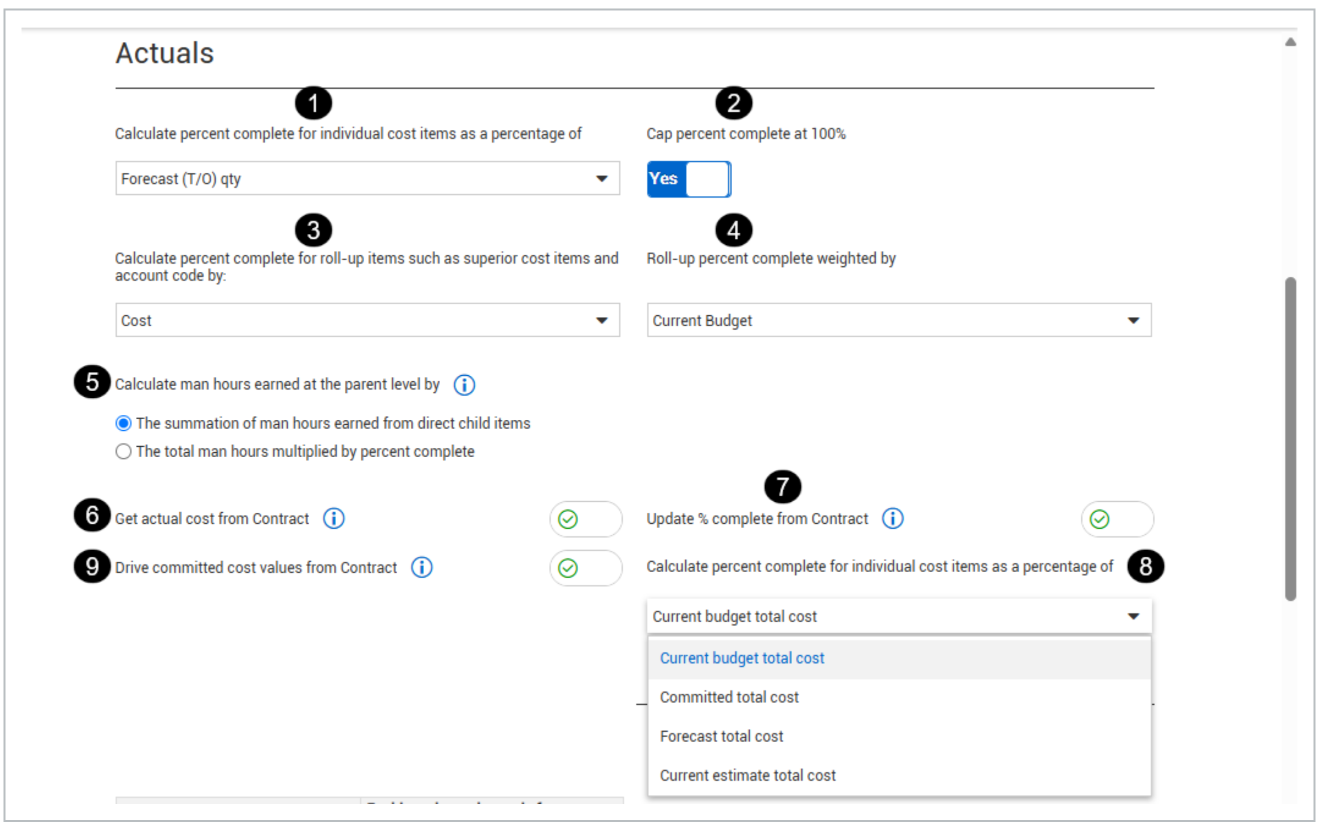
1.2.2.5 Allow syncs to replace manual snapshots

When set to *On*, the *Allow syncs to replace manual snapshots* toggle is enabled. When you enable the *Allow syncs to replace manual snapshots* toggle, the manual snapshot is replaced when the Push Live Forecast or Push Forecast revenue is synced. When the *Allow syncs to replace manual snapshots* setting is disabled, syncs are replaced with manual snapshots.



1.3 ACTUALS

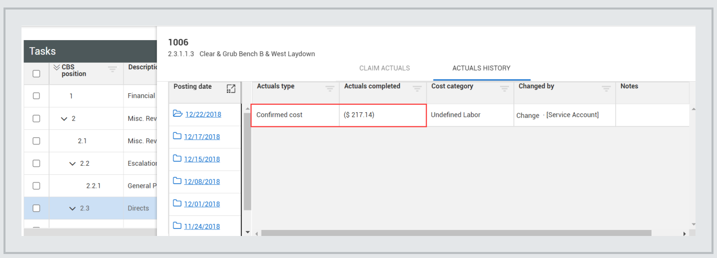
In the Actuals section of the Project Tracking tab, you can configure actuals settings for your organization and projects. The image and table below give a brief explanation of Actuals settings.



Overview - Project Tracking: Actuals

Title		Function	Level
1	**Calculate percent complete for individual cost items as a percentage of**	Calculate percent complete for individual cost items as a percentage of: • Forecast (T/O) Quantity • Current Budget Quantity	Organizational and project
2	**Cap percent complete at 100%**	Option to select to cap any cost item percent complete at 100%.	Organizational and project
3	**Calculate percent complete for roll-up items such as superior cost items and account code by**	Calculate percent complete for roll-ups, such as superior cost items and account codes by: • Cost • Man-hours	Organizational and project
4	**Roll-up percent complete weighted by**	Roll-up percent complete weighted by: • Current Budget • Current Estimate	Organizational and project
5	**Calculate man hours earned at the parent level by**	Calculate man-hours earned for roll-up items by summing the man-hours earned of the contributing items (regardless of roll-up items percent complete) by: • The summation of man hours earned from direct child items. • The total man hours multiplied by percent complete.	Organizational and project
6	**Get actual cost from Contract**	When switched to *On*, the subcontract actual cost is received from Contracts. Actual costs from Contract can consist of a goods receipt, an accrual, or an invoice receipt/payment form. If a goods receipt and an invoice receipt come in at	Project level only

Overview - Project Tracking: Actuals (continued)

Title		Function	Level
		the same time for a record, the higher cost is recognized and not duplicated.	
7	**Update % complete from Contract**	When switched to *On*, quantities that are claimed in Contract for SOV items updates the percent complete in Control. You must enable this setting before the contract is created. Updating the percent complete provides you with another way to claim quantities against schedule of value items in Contract. When quantities are claimed against a schedule of values item in Contract and the Get quantities sync is executed in Control, the cost items actuals quantity completed gets updated with a percentage claimed toward the contract's schedule value total cost. 	Project level only
8	**Calculate percent complete for individual cost items as a percentage of**	Calculate the percent complete for individual cost items as a percentage of: • Current estimate total cost • Committed total cost • Forecast total cost • Current estimate total cost	Project level only
9	**Drive committed cost values from Contract**	When switched to *On*, the committed costs are driven from Contracts. When switched to *Off*, committed costs are derived from the ERP.	Organizational and project

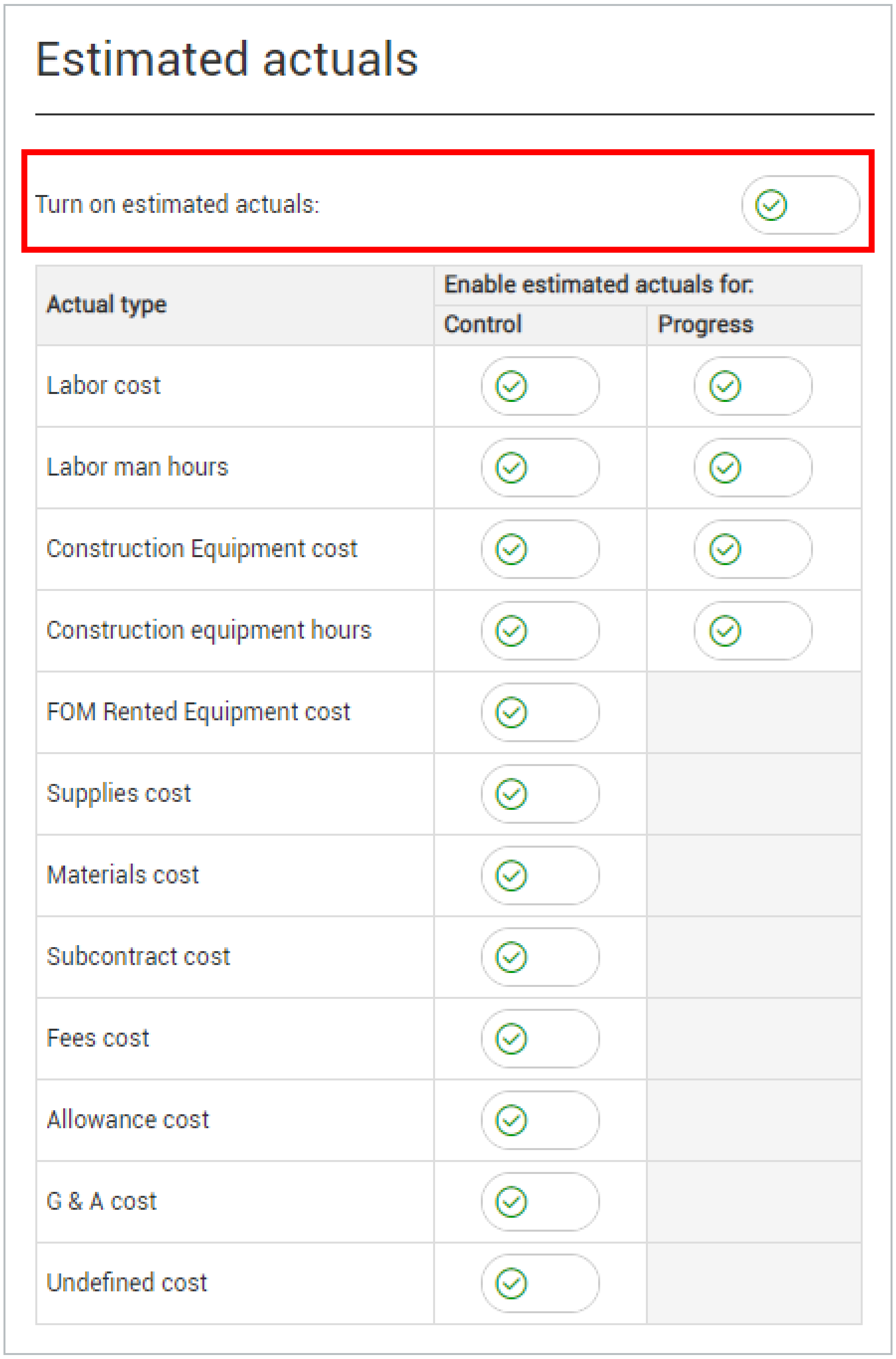
1.4 ESTIMATED ACTUALS

In the Estimated actuals section of the Project Tracking tab, you can configure estimated actuals settings for your organization and projects. Organizational settings are inherited in new projects. You can further define these settings at the project level.

The Estimated actuals settings allows estimated actuals to be accrued to a cost item, then used to contribute to the forecast. This results in the forecast being more accurate. The estimated actuals are calculated based on the cost category values associated to the cost items.

When *Turn on estimate actuals* is switched to *On*, you can choose to turn estimated actuals to *On* or *Off* for Control and InEight Progress cost categories. The Estimated actual quantities from InEight Plan and InEight Progress are also enabled.

When any one of the cost categories are switched to *On*, the Actuals details Claim Actuals tab shows the option when claiming quantity to accrue estimated cost based on the amount claimed.



Estimated actuals

Turn on estimated actuals: ✓

Actual type	Enable estimated actuals for:	
	Control	Progress
Labor cost	✓	✓
Labor man hours	✓	✓
Construction Equipment cost	✓	✓
Construction equipment hours	✓	✓
FOM Rented Equipment cost	✓	
Supplies cost	✓	
Materials cost	✓	
Subcontract cost	✓	
Fees cost	✓	
Allowance cost	✓	
G & A cost	✓	
Undefined cost	✓	

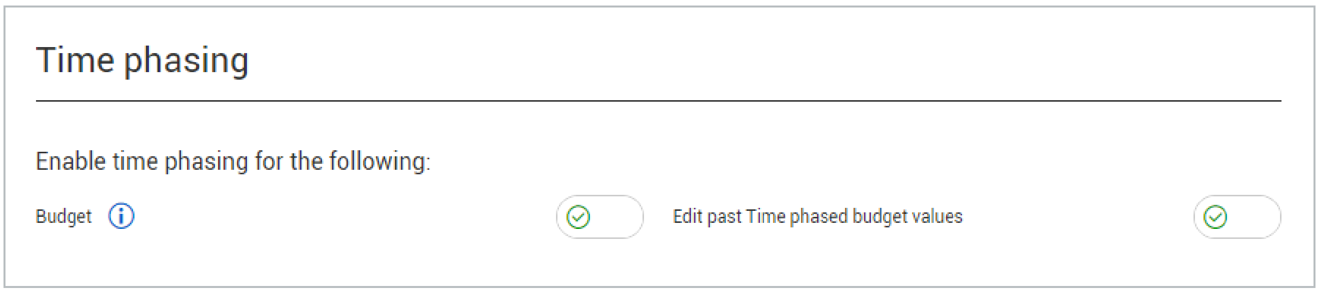
On the CBS, you can access the Claim actuals tab by right clicking the cost item, and then selecting **Actuals details**. In the Actuals details slide-out panel you can select the estimated actuals option.

1.5 TIME-PHASING

Time phasing lets you take for example, your budget, and break it down into more consumable, estimate related time blocks or periods.

1.5.1 Budget

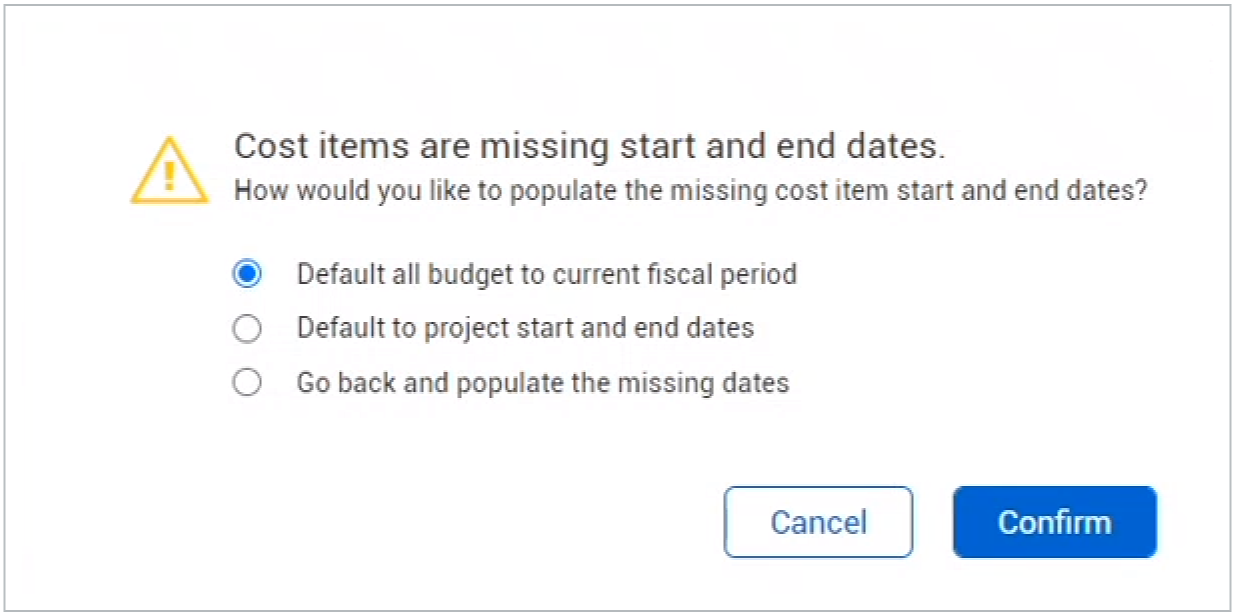
Time-phasing your budget lets you plan expenditures for your project within active fiscal periods, letting you break down budget planning into manageable short-term goals. Enabling time-phasing lets you plan your budget and spread it throughout the length of the project per cost item.



You can enable time-phasing for budget at the organizational level to set the default for all the projects within that organization. By default, new projects will inherit the organization settings.

1.5.2 Enable time-phasing for budget

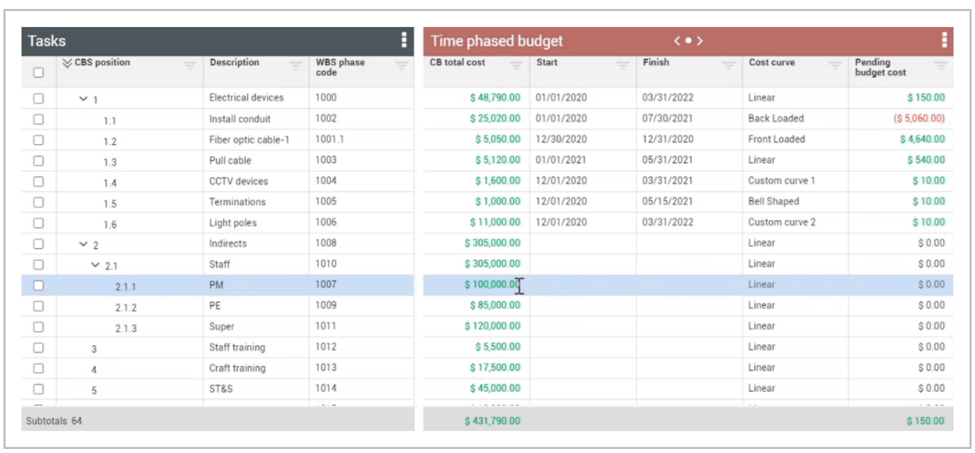
To enable time-phasing the budget for your project, you must have start and end dates assigned to cost items. When you switch the *Budget* toggle to *On*, and do not have start and end dates assigned to cost items, a *Cost items are missing start and end dates* dialog box shows.



You can select from the following options:

- **Default all budget to current fiscal period** — The first option you have is to default all of the budget to the current fiscal period. Then, all cost items that don't have defined start and finish dates have the current budget going to the current fiscal period.

  For example, if you look at WBS phase code 1007, you would have $100,000 put into December 2020.



CBS position	Description	WBS phase code	CB total cost	Start	Finish	Cost curve	Pending budget cost
1	Electrical devices	1000	$ 48,790.00	01/01/2020	03/31/2022	Linear	$ 150.00
1.1	Install conduit	1002	$ 25,020.00	01/01/2020	07/30/2021	Back Loaded	($ 5,060.00)
1.2	Fiber optic cable-1	1001.1	$ 5,050.00	12/30/2020	12/31/2020	Front Loaded	$ 4,640.00
1.3	Pull cable	1003	$ 5,120.00	01/01/2021	05/31/2021	Linear	$ 540.00
1.4	CCTV devices	1004	$ 1,600.00	12/01/2020	03/31/2021	Custom curve 1	$ 10.00
1.5	Terminations	1005	$ 1,000.00	12/01/2020	05/15/2021	Bell Shaped	$ 10.00
1.6	Light poles	1006	$ 11,000.00	12/01/2020	03/31/2022	Custom curve 2	$ 10.00
2	Indirects	1008	$ 305,000.00			Linear	$ 0.00
2.1	Staff	1010	$ 305,000.00			Linear	$ 0.00
2.1.1	PM	1007	$ 100,000.00			Linear	$ 0.00
2.1.2	PE	1009	$ 85,000.00			Linear	$ 0.00
2.1.3	Super	1011	$ 120,000.00			Linear	$ 0.00
3	Staff training	1012	$ 5,500.00			Linear	$ 0.00
4	Craft training	1013	$ 17,500.00			Linear	$ 0.00
5	ST&S	1014	$ 45,000.00			Linear	$ 0.00
Subtotals 64			$ 431,790.00				$ 150.00

- **Default to project start and end dates** — On the project details page you define all the project start and end dates. After those are defined, then we can default all those missing start and end dates to just the project start and end dates.
- **Go back and populate the missing dates** — You can also return to the Time phased budget step and manually populate the missing dates. If you choose this option, the budget setting turns off

again (if it wasn't already turned off and on again in previous sections). You then have to go into the CBS and manually enter all the start and finish dates. Then, you could turn the budget setting back on and it should distribute the budget.

> Currently, time-phased budget data can only be seen in the CBS contract adjustment.

Click **Confirm** after selecting an option and then save your setting.

1.5.3 Edit previous time-phased budget values

You can enable the *Edit past Time phased budget values* toggle to edit past fiscal period time phased budget values.

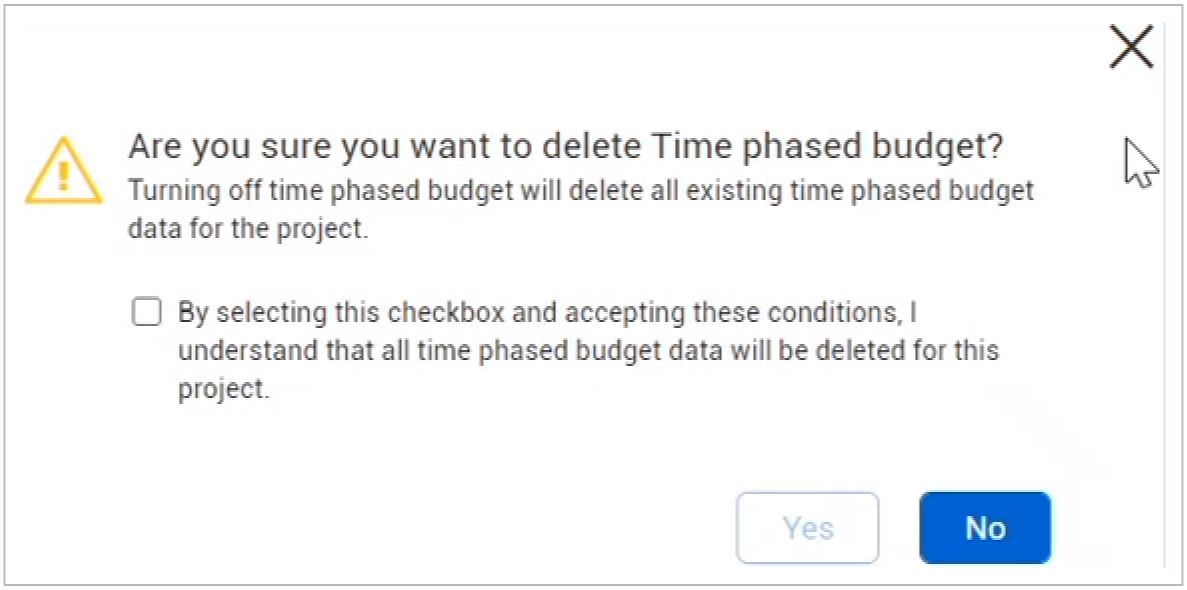
When this setting is enabled and with the applicable permissions, you can edit your past time phased budget values via a budget move or a contract adjustment in the time phased budget step.

You can also select to edit time phased budget for closed periods. When you want to edit time phased budget for closed periods, enable the **Edit past Time phased budget values** toggle.

For more information, see Time phased budget.

1.5.4 Switching off time phasing budget

When the Time phasing budget is enabled, it means that there is time phasing budget data in the database. If you disable time-phasing for the budget at the project level, the following warning message shows:



All of your time phased budget data is deleted when you switch time phased budget off. You must acknowledge that the data will be deleted by selecting the check box in the dialog box.

To disable time phasing budget, select **Yes**, and then click **Save**. This will delete the time phasing budget data from the database.

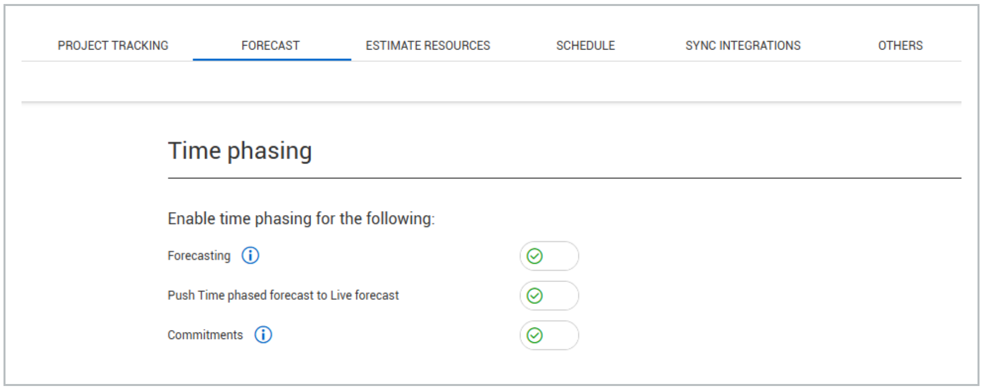
1.6 FORECAST

1.7 TIME-PHASING

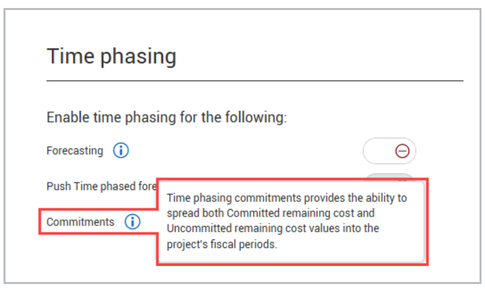
Time phasing lets you take for example, forecasting, and break it down into more consumable, estimate related time blocks or periods.

1.7.1 Forecasting

Time-phasing your forecast gives you more visibility into what activities and costs are going to occur in smaller time periods.



- **Forecasting** — Set the Forecasting toggle to *On* to enable time-phase forecasting to spread forecast remaining values into the project's fiscal periods.
- **Push Time phased forecast to Live forecast** — Set the Push Time phased forecast to Live forecast toggle to *On* to update the live forecast in the CBS with the modified values in time-phased forecasting.
- **Commitments** — Set the Commitments toggle to *On* to spread committed remaining cost and uncommitted remaining cost values into the project's fiscal periods.



In Project details you can see the start and end dates which define the earliest and latest project periods.

When time-phased forecasting is enabled, the Time phase forecasting option shows in the CBS's Action drop-down list.

For more information, see Time Phased Forecasting.

1.8 FORECAST

In the Forecast section of the Forecast setting, you can configure the percent complete threshold from a straight-line calculation and select to have mandatory notes when using a manual forecast.

1.8.1 Percent complete value at which delta from straight line calculation utilizes average performance

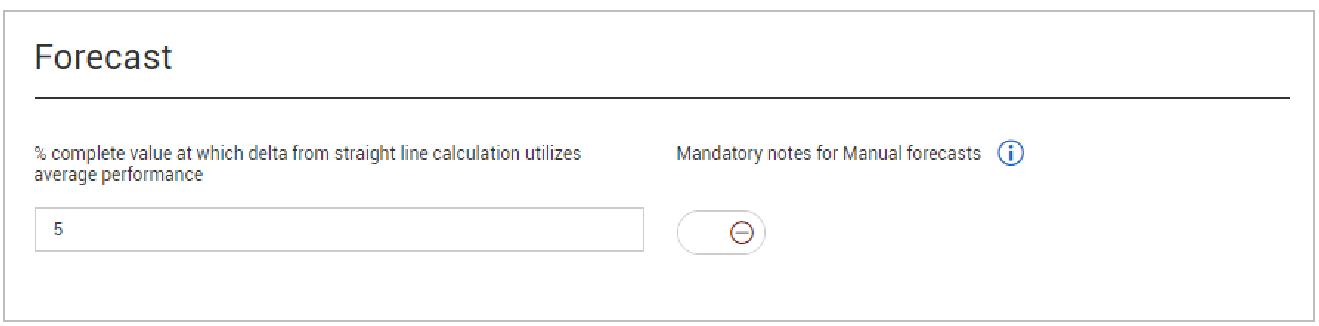
By configuring the value of the % complete value at which delta from straight line calculation utilizes average performance field, you can determine the equation used for the Delta from Straight-Line column depending on if those cost items have their % complete greater than or less than the value set in configurations.

Changing the threshold and impacting the formula is necessary because when a cost item has not been sufficiently completed, the actuals data is not yet reliable enough to predict the final anticipated cost (forecast cost) of that scope of work, so a different equation should be used until that cost item has been sufficiently completed.

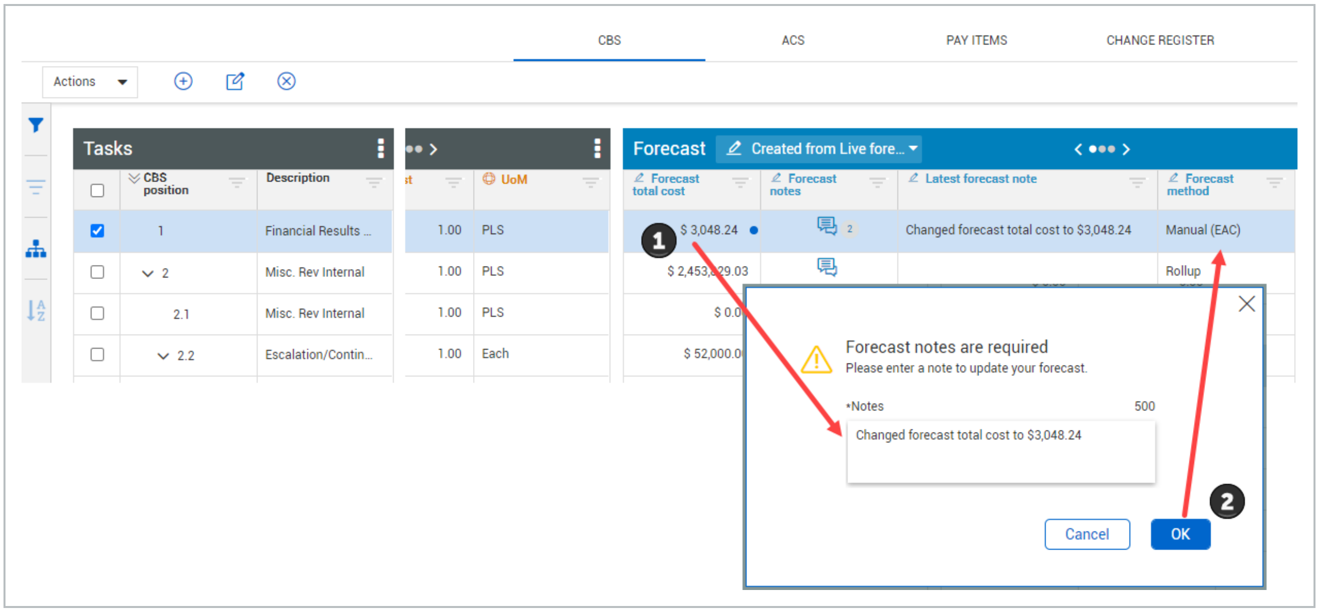
For example, if the threshold is 3% complete, and a cost item is less than 3%, then delta from straight line = Forecast total cost - CB total cost. Once the cost item has reached 3% complete, then the calc switches to Forecast total cost - Average performance total cost.

1.8.2 Mandatory notes for manual forecasts

You can set manual forecast notes to be mandatory for Manual (EAC) and Manual (ETC) forecasts when switching to a manual forecast type. This feature helps to keep track of manually entered forecasts. You can use the notes to explain the forecast. For example, you can enter a rationale for why a manual forecast is being used.

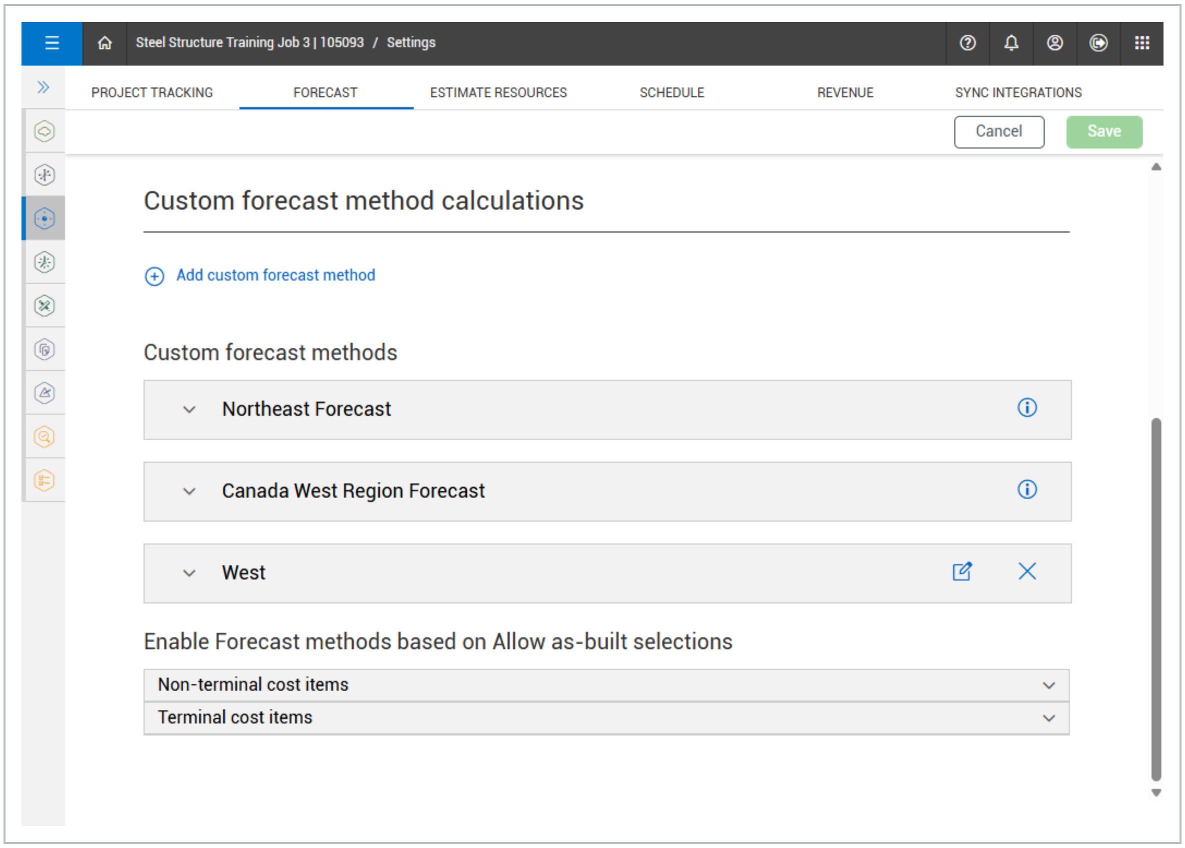


To set notes to be mandatory set the **Mandatory notes for Manual forecasts** toggle to *On*. When manually forecasting, notes are required to be entered in the Forecast notes are required dialog box. Once confirmed, the notes are captured, and the forecast method automatically changes to *Manual*.

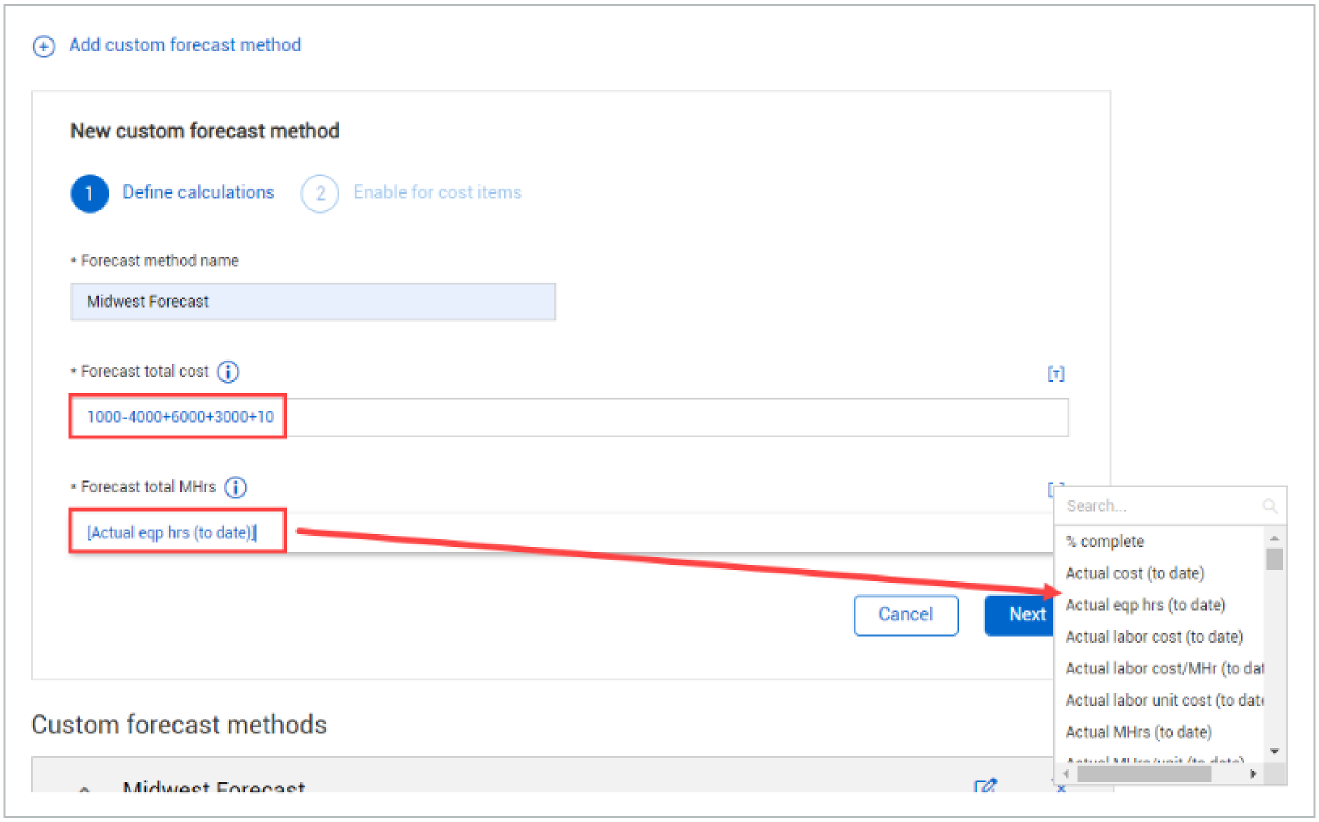


1.9 CUSTOM FORECAST METHOD CALCULATIONS

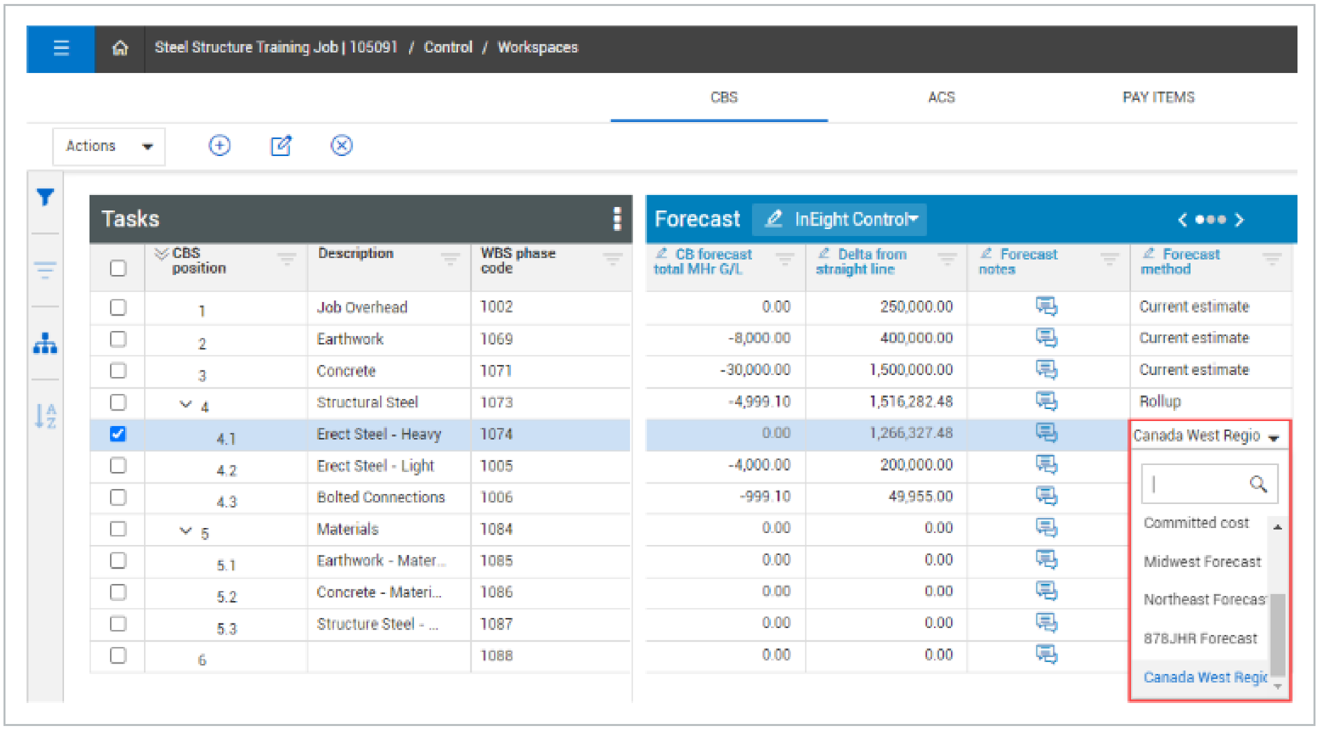
You can create custom forecast methods at both the organization and project levels. The forecast methods are customized by configuring your own calculations. Custom forecast methods created at the organization level are inherited in new projects and can only be managed at the organization level. Custom forecast methods created at the project level can only be viewed and managed at the project level.



To create a custom Forecast Method, click the **Add custom forecast method** button. Enter the Forecast method name, Forecast total cost and Forecast total Mhrs calculations manually or click the **Formula** icon to choose from the list. You can create a maximum of 10 custom organization and project level forecast methods each at one time.



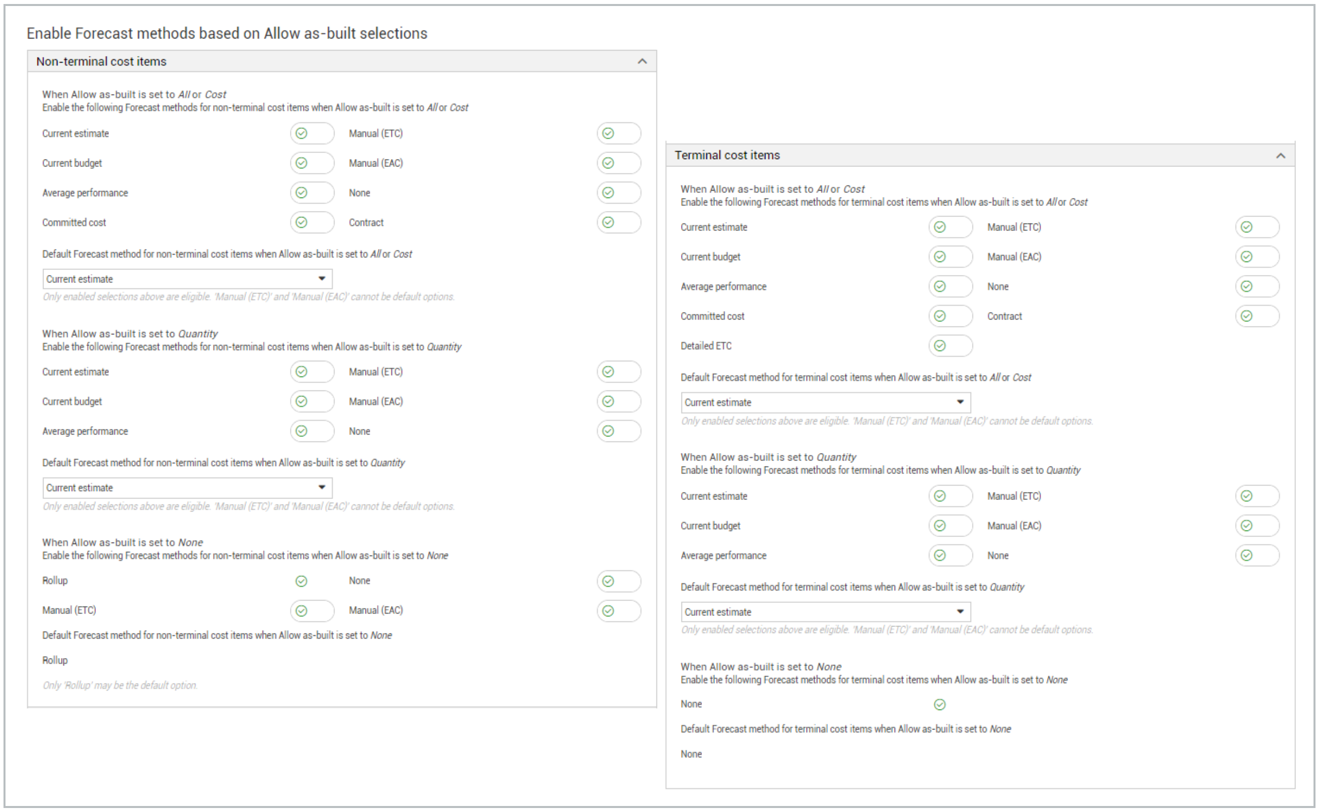
In the CBS you can select your custom forecast method in the Forecast method column of the cost item, which updates the Forecast total cost and Forecast total Mhrs based on the forecast method's custom calculations.



1.9.1 Enable Forecast methods based on Allow as-built selections

You can select which forecast methods can be used based on the allow as- built settings, for both terminal and non-terminal cost items.

There are multiple forecasts that allow as-built options to choose from to help you configure your forecasted cost items, in addition to the existing available Control forecasting methods. When an option is disabled, that method is not available to select for cost items with the allow as-built selected.



1.10 ESTIMATE RESOURCES

1.11 ESTIMATE RESOURCES

In Estimate resources you can configure three scale percentages for wage rate composition.

1.11.1 Wage rate composition

The Wage rate composition section lets you determine what default percentage each labor hour will be calculated at the scale 1, scale 2, or scale 3 rate.

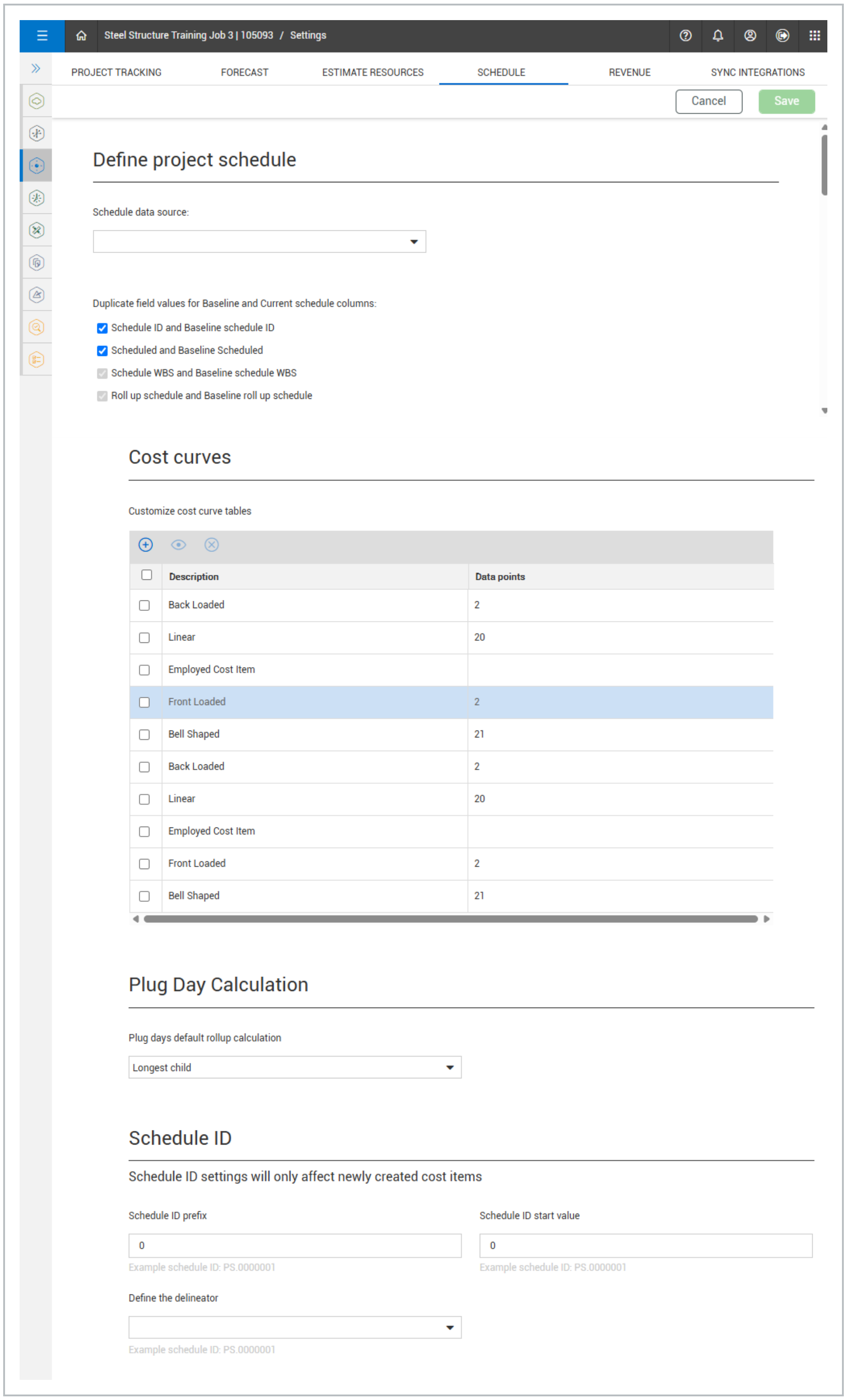
1.12 SCHEDULE

1.13 SCHEDULE

In the Schedule settings tab, you can configure the following schedule settings:

- Define project schedule
- Cost curves
- Plug Day Calculation

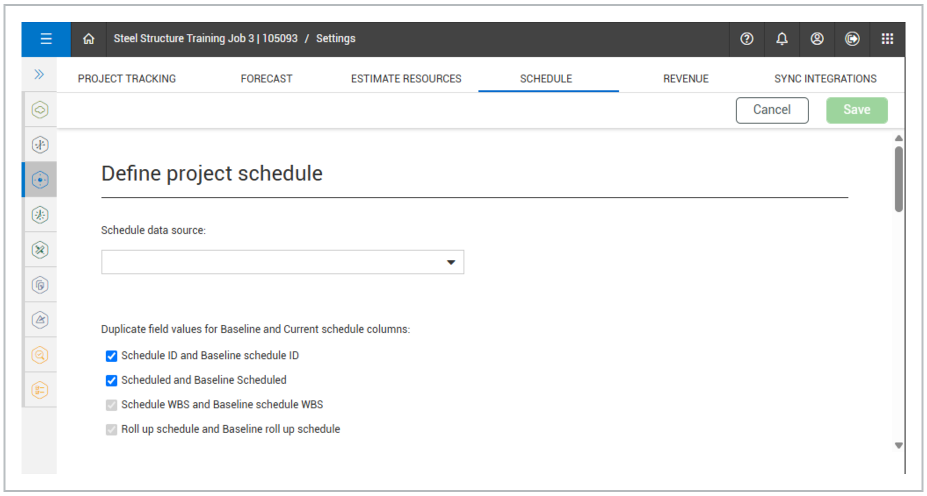
- Schedule ID


Steel Structure Training Job 3 | 105093 / Settings
PROJECT TRACKING
FORECAST
ESTIMATE RESOURCES
SCHEDULE
REVENUE
SYNC INTEGRATIONS
Cancel
Save
Define project schedule
Schedule data source:
Duplicate field values for Baseline and Current schedule columns:
Schedule ID and Baseline schedule ID
Scheduled and Baseline Scheduled
Schedule WBS and Baseline schedule WBS
Roll up schedule and Baseline roll up schedule
Cost curves
Customize cost curve tables
Description
Data points
Back Loaded
2
Linear
20
Employed Cost Item
Front Loaded
2
Bell Shaped
21
Back Loaded
2
Linear
20
Employed Cost Item
Front Loaded
2
Bell Shaped
21
Plug Day Calculation
Plug days default rollup calculation
Longest child
Schedule ID
Schedule ID settings will only affect newly created cost items
Schedule ID prefix
0
Example schedule ID: PS.0000001
Schedule ID start value
0
Example schedule ID: PS.0000001
Define the delineator
Example schedule ID: PS.0000001

1.14 DEFINE PROJECT SCHEDULE

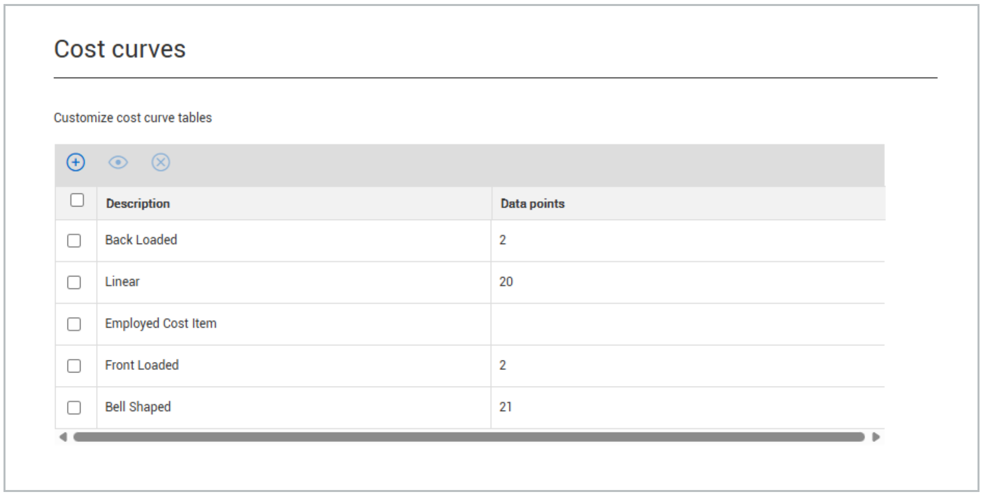
You can define the project schedule by selecting the following options:

- **Schedule data source (Project level only)** – You can select which data source to use for your schedule. Click the drop-down list to select to use Manual entry or an XER file type.
- **Duplicate field values for Baseline and Current schedule columns** – Select from the list to duplicate values for schedule columns. Values selected at the organization level are inherited in new projects and cannot be changed. At the project level, you can further refine your selections.



1.15 COST CURVES

Cost curves determine the proportion of money to be expended in a certain period. You can create custom cost curve tables to apply to your progressed work, based on actual costs and schedule. The default cost curve assigned to a cost item is *Linear*.



You can update the cost curve in the following ways:

- Cost curve column of the Schedule data block.
- When performing a contract adjustment. The budget time phasing option must be enabled in settings.

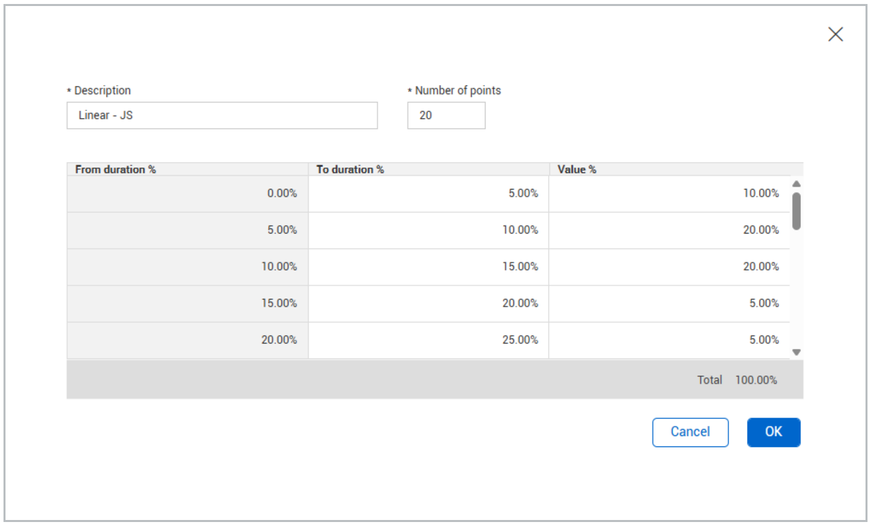
When the budget is locked, it sets the current budget and original budget equal to the current estimate. The cost curve can only be changed using a change order.

1.15.1 Manage cost curve tables

Add a custom cost curve table

1. Click the **Add** icon, and then enter the following:
    - Description of cost curve (required)
    - Number of data points (required)

- Value percentages which must equal to 100%



2. Click **OK** to save.

View a cost curve table

Select a cost curve table, and then click the **View** icon. In view mode, you can only edit a cost curve table that is not yet assigned to any cost items.

Delete a cost curve table

To delete a cost curve table, select a cost curve table, and then click the **Delete** icon. You can only delete cost curve tables not yet assigned to cost items.

1.16 PLUG DAY CALCULATION

You can select from the following options to set as default for calculating plug days when rolling up cost items for scheduling purposes.

- Longest child
- Sum of all children

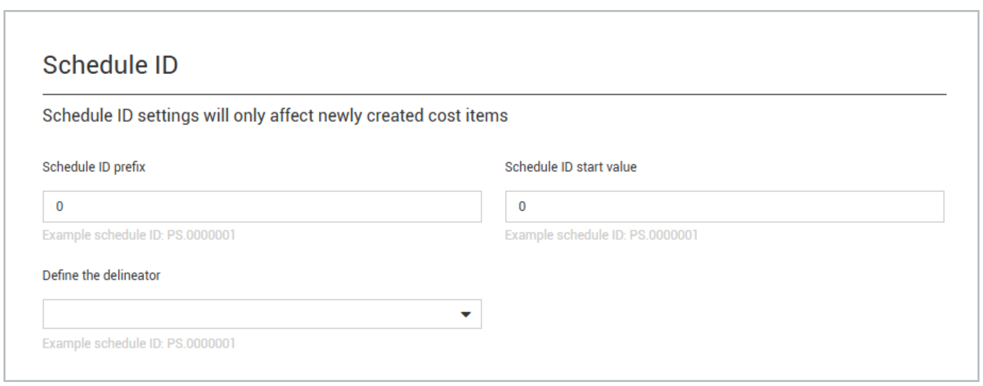
1.17 SCHEDULE ID

You can define new cost items schedule ID options. The settings you define determine your ID structure.

When integrating with InEight Schedule, Schedule IDs in Control must correspond to Activity IDs in InEight Schedule.

When integrating with Primavera, Schedule IDs in Control are used to map Primavera Activity IDs to import and export project information. The status of construction activities and progress are then integrated back into the InEight scheduling tools.

When using a XER type file to import a schedule, the *Schedule ID* in Control must match the *Activity ID* in the XER file.



You can define the following:

- Schedule ID prefix
- Schedule ID start value
- Define the delineator

1.18 REVENUE

1.19 REVENUE

Revenue settings are available at the project level only. You can define and configure setting for the following:

- Revenue and Cost Timing
- Billing method default earnings rules
- Pay item to cost item forecast (T/O) quantity relationship
- Markup

1.20 REVENUE AND COST TIMING

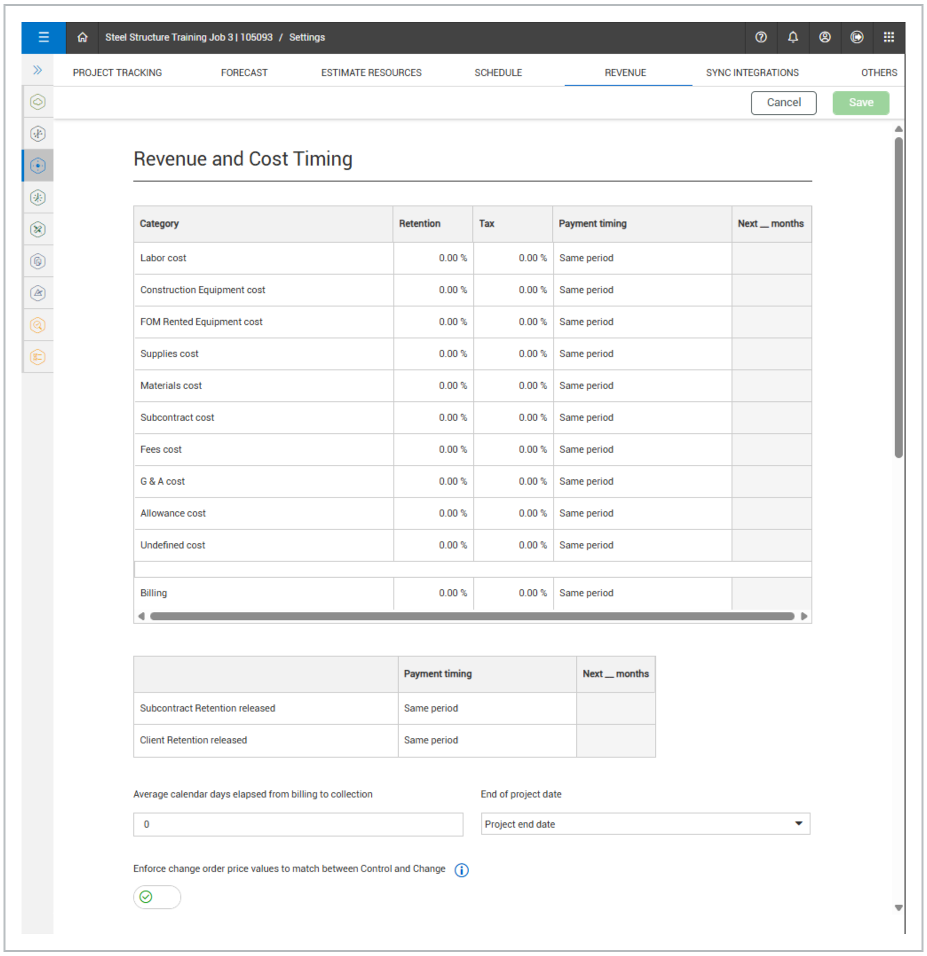
In the Revenue and Cost Timing table, you can define a default retainage percentage and set the reoccurrence payment period at the cost category level for the following:

- Retention percentage
- Tax percentage
- Payment timing - The Payment timing provides the following options:
    - Same period
    - Next period
    - End of project
    - Set custom reoccurrence – When selected, the Next months column activates to set a customized reoccurrence.
    - Subcontract Retention released
    - Client Retention released

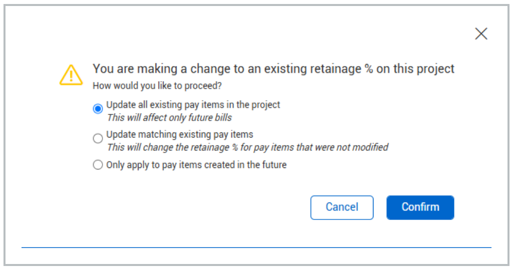
The default retainage percentage is held back from each bill on the pay items. Pay item retainage creates an incentive for contractors to complete contracted work on a project. Typically, contractors do not get paid the total amount of money until all work or a set milestone is completed. With pay item retention, an agreed upon retainage percentage is held back by the owner for each bill by the client until the owner agrees to release the retention.

You can set the average calendar days elapsed from the billing collection, in addition to setting the end of project date to any of the following options in the End of project date drop-down list.

- Project end date
- Forecast completion date
- Contract completion date
- Certificate of substantial completion (expected)
- Certificate of substantial completion (expected)



When changing the Default Billing retainage percent, a dialog box shows where you can choose to either update all existing items on a project, update matching existing pay items, or only apply to pay items created in the future.



1.20.1 InEight Change integration

When integrated with Change and approving contract adjustments from Change to Control, you enable the *Enforce change order price values to match between Control and Change* toggle to allow change order pay item values to match or not match the amount received from Change. This is ideal when pay items are being used in a contract adjustment.

When the *Enforce change order price values to match between Control and Change* toggle is switched *OFF*, pay item amounts are not required to equal the amounts from Change to approve contract adjustments from Change.

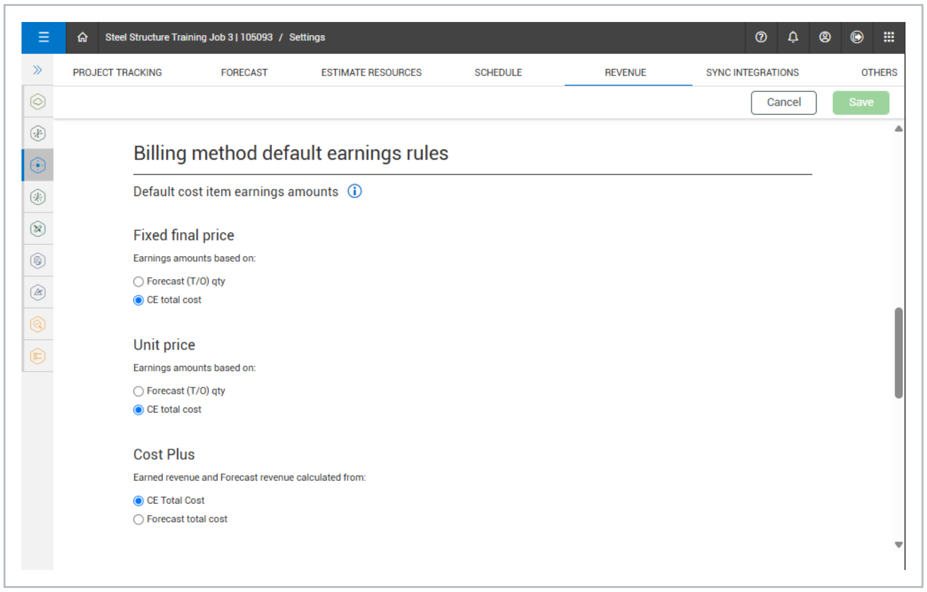
When switched *ON*, Net contract changes for pay items must equal current price from the received change order.

1.21 BILLING METHOD DEFAULT EARNINGS RULES

You can manage the default cost item earnings amounts based on either Forecast (T/O) quantity or CE total cost for the following billing methods.

- Fixed final price
- Unit price

- Cost Plus



The default earnings are calculated using the forecast takeoff quantity of the cost item and comparing it to the total forecast takeoff quantities of all the cost items assigned to that pay item to generate the percentage.

1.21.1 Fixed final price and Unit price

Fixed final price and Unit price lets you select a default way to calculate those earnings amounts based on takeoff forecast quantity or CE final cost. After the settings are saved, all your fixed final price pay items that normally calculate based on CE final cost and unit price then calculate forecast takeoff quantity or any of the other options you select. You can still modify this selection at the pay item level.

1.21.2 Cost plus

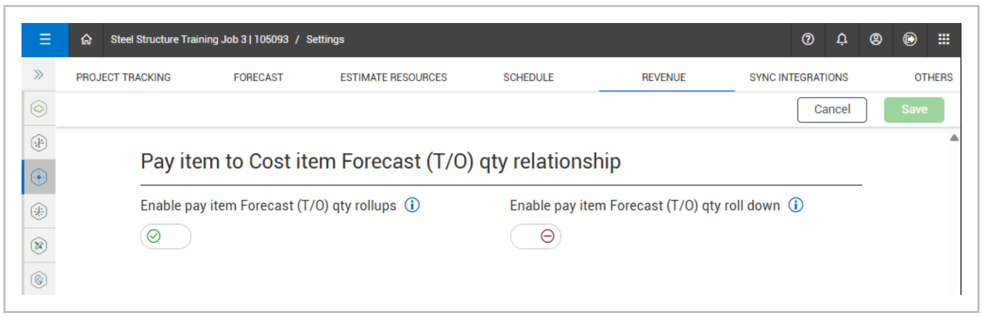
Cost plus pay items can have revenue calculated based on the assigned cost items' CE total cost or Forecast total cost.

1.22 PAY ITEM TO COST ITEM FORECAST (T/O) QTY RELATIONSHIP

You can manage settings for pay the item to cost item forecast (T/O) quantity relationships using the Enable pay item Forecast (T/O) qty rollups and Enable pay item Forecast (T/O) qty roll down toggles.

1.22.1 Enable pay item Forecast (T/O) quantity rollups

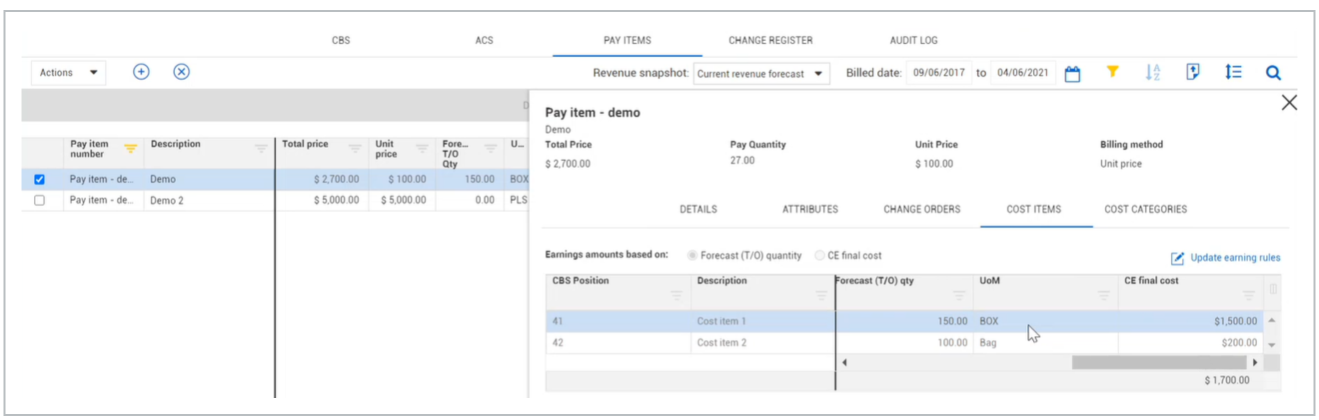
The *Enable pay item Forecast (T/O) qty rollups* toggle is only applicable to unit price pay items. It lets you enable the pay item forecast take-off quantity to be calculated based on the sum of all the assigned cost items forecast takeoff quantities.



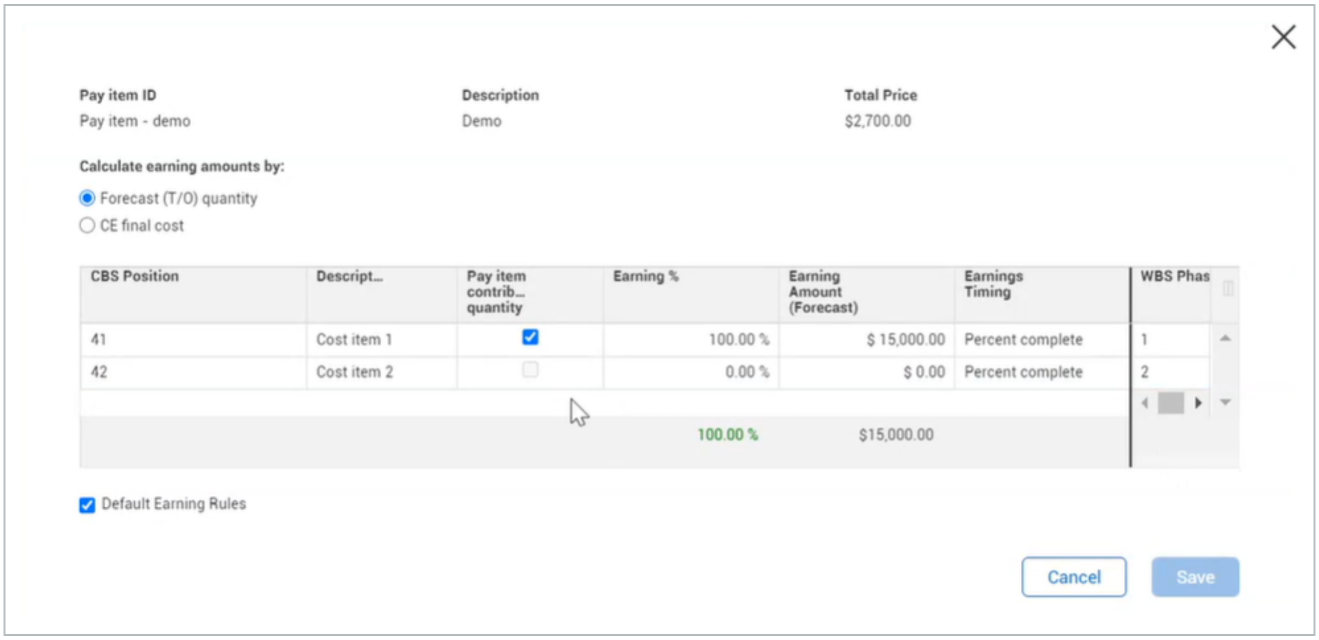
When the *Enable pay item Forecast (T/O) qty rollups* toggle is enabled, you can no longer edit your pay item forecast takeoff quantity in the Pay item register.

For example, you cannot add unlike units of measure. Only cost items that have the same unit of measure as the pay item can contribute to that pay item's forecast takeoff quantity.

In the following image, the two cost items have different units of measure.



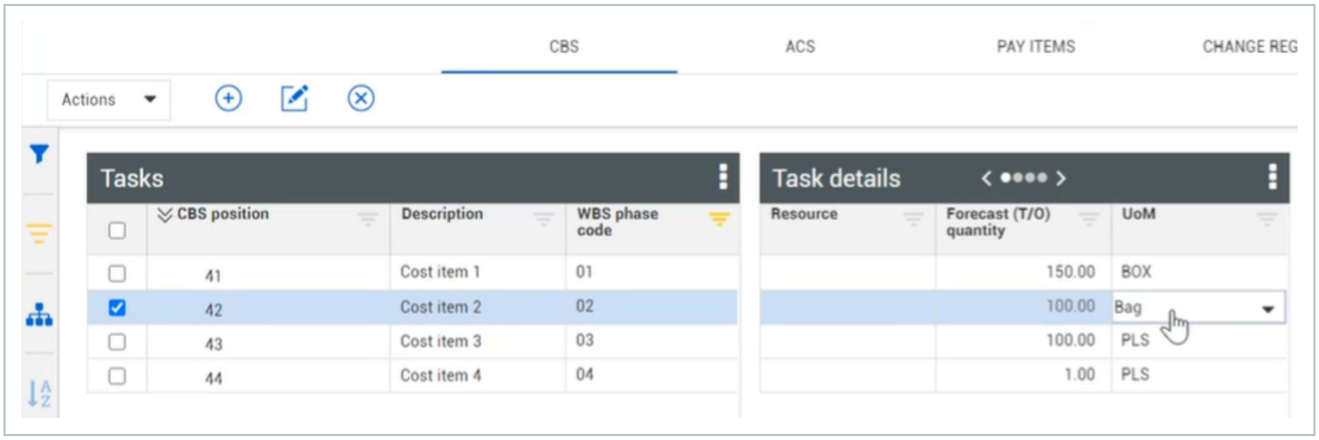
Cost item 1 has a unit of measure of box, which also has the pay item contribute quantity box checked. Cost item 2 has a unit of measure of bag with the pay item contribute quantity box unchecked. When you go into the update earning rules editor, you cannot check the pay item contribute quantity box for cost item 2 because the unit of measure does not match with cost item 1.



If you deselect the pay item contribute quantity box for cost item 1, the cost item's quantity does not contribute to the pay item's quantity. Then, the pay item quantity is zero. If it is checked, cost item 1 with the unit of measure of box has a forecast takeoff quantity of 150. This means the pay item also has a forecast takeoff quantity of 150.

In the CBS, you can change the Unit of Measure from bag to box and then forecast take off quantity updates.

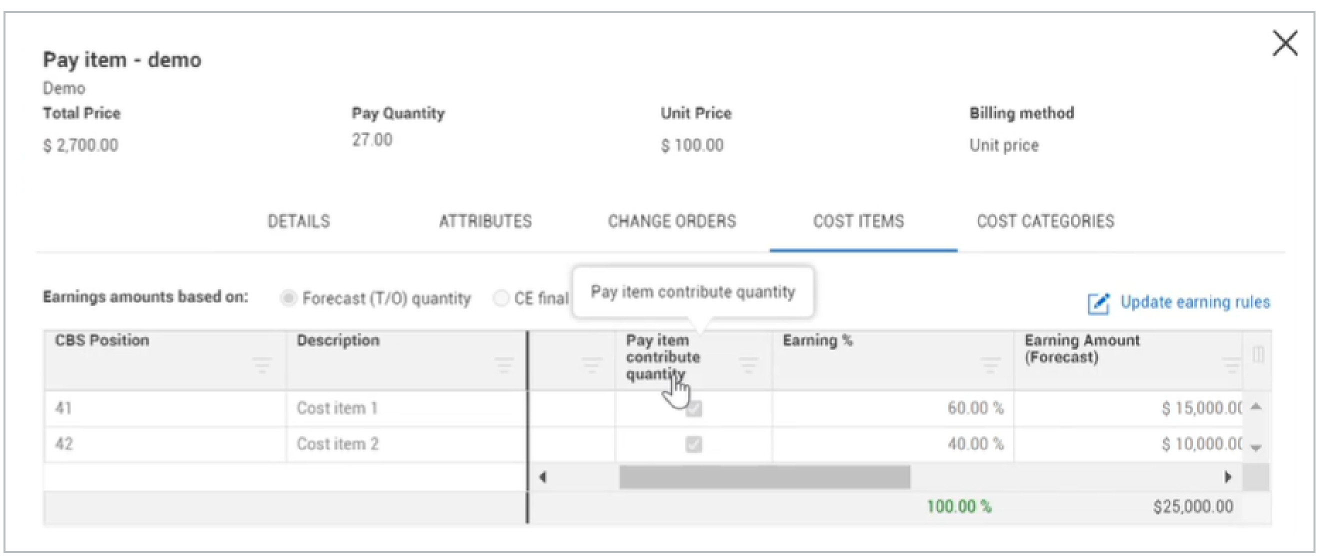
By default, they both now have the pay item contribute quantity checked and the pay item forecast take off quantity is the sum of any cost items that have pay item contribute quantity checked.



For example, with cost item 2 updated, the forecast takeoff quantity from of 100 is added to the forecast takeoff quantity of cost item 1. The total forecast takeoff quantity is now 250. It includes both of them since they now both have a matching unit of measure.

Also, this affects you earnings percent as well if you have forecast takeoff quantity selected. The pay item contribute quantity for both cost items drives your earnings percent if the forecast takeoff quantity radio button is selected. It also decides which cost items are going to contribute to the pay item's forecast takeoff quantity.

> When you turn to *ON* Enable pay item Forecast (T/O) qty rollups, the *Pay item contribute quantity* column does not show by default. To add it, go into the columns chooser, and then select that column. After it is added to your view, it remains there until you deselect it from the columns chooser.



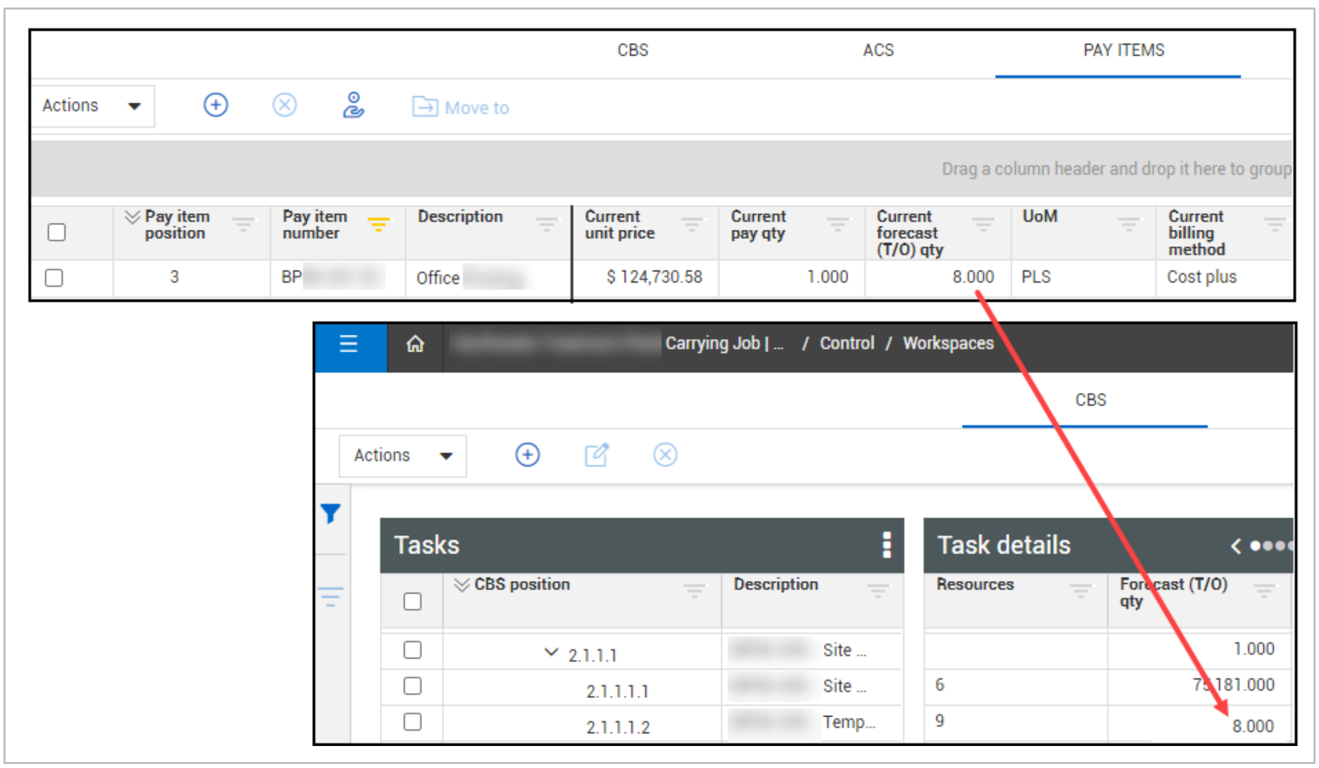
In the *Update earnings rule* dialog box, the Pay item contribute quantity column is a default editable column in that view. The Pay item contribute quantity column is not editable in the main table. You can only select to add it to your main table view in the pay item slide-out panel for informational purposes.

The Pay item contribute quantity column is not available when the setting is turned to *OFF* or if you are not looking at a unit price pay item. If a user turns the setting to *ON* and added the column, and then decided to turn the setting to *OFF*, the columns no longer show.

1.22.2 Enable pay item Forecast (T/O) quantity roll down

When the amount of contract deliverables changes on unit price contracts, manually updating all the quantities for every associated cost item can be time consuming. Pay item forecast take off quantity allocations can be proportionally rolled down to the assigned cost items by setting the Enable pay item Forecast (T/O) qty roll down switch to On.

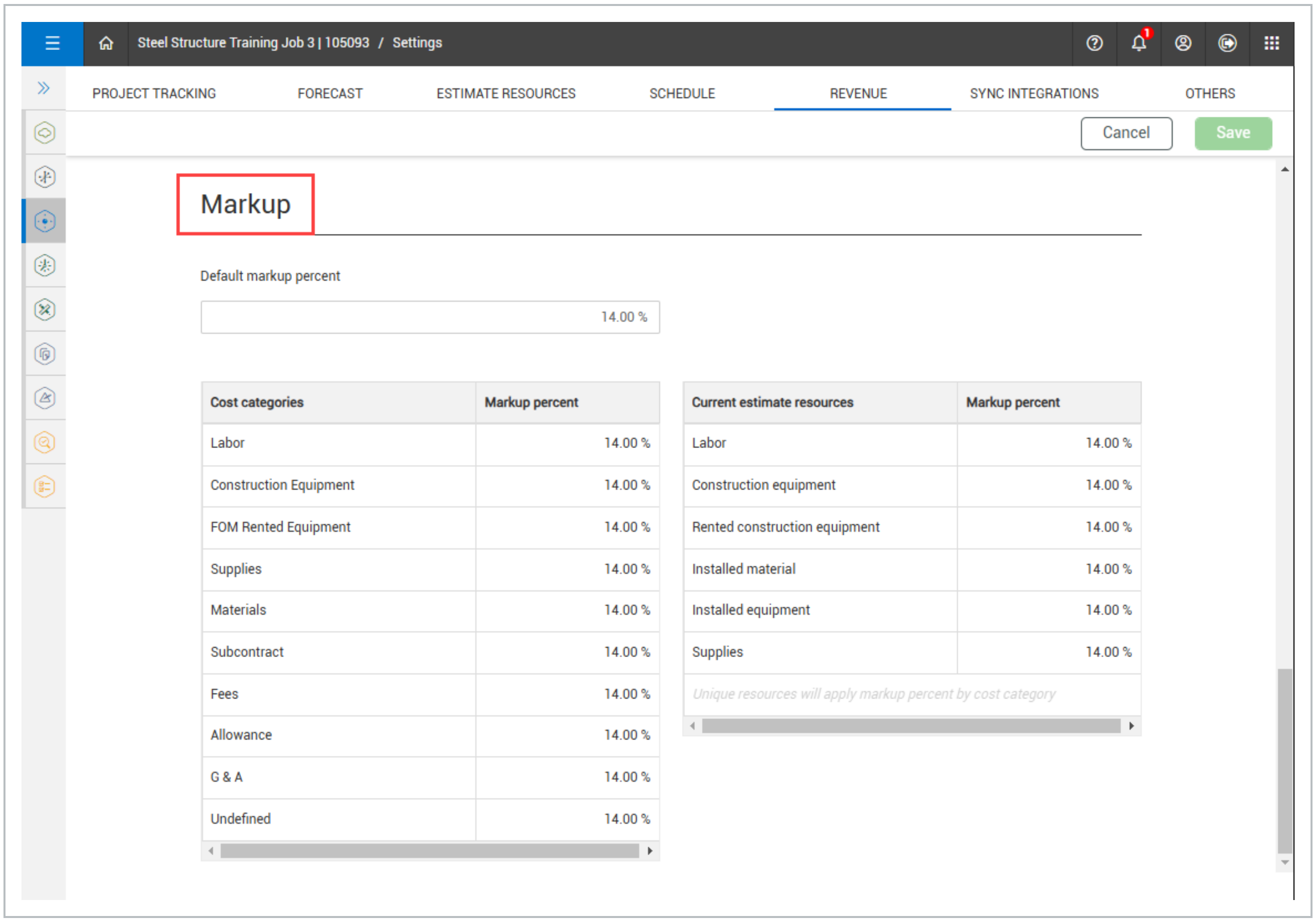
The unit price pay item Forecast (T/O) quantities proportionally rolls down to the contributing cost items' Forecast (T/O) quantities. Pay item to cost item roll down changes also show in the CBS Audit log.



The *Allow as-built* setting must be set to *All* or *Quantity* for the selected cost items.

1.23 MARKUP

On the Revenue tab, you can configure a default markup percentage that applies the markup to the entire project. The Markup percent table adds a markup per cost category and per resource type on all cost categories in resources in the project.



For example, if you added 10% to Labor resources, then any labor resources automatically have a 10% markup added to it, and that affects the resources charge rate. Then that charge rate affects the amount of revenue that cost items can bill for and earn.

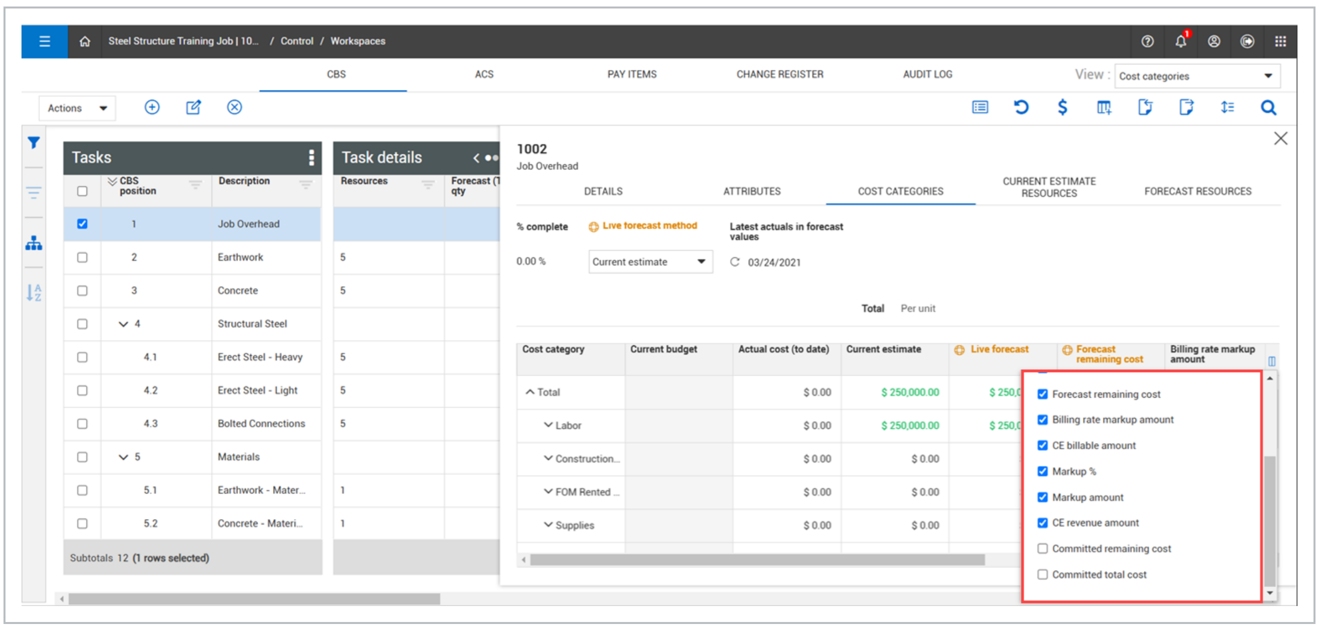
After you set labor at 10% and click **Save**, you can select from the following options to confirm your change:

Option	Description
Update all existing cost categories and resources in the	This option adds 10% resource markup percent for all labor resources.

Option	Description
project	
Update matching existing cost categories and resources	This option changes the current charge rates only for resources that were not manually modified. Anything that has not been modified such as a labor resource, this option overrides it with 10%.
Only apply to cost items and resources created in the future	This option makes no changes to existing resources. Any newly created resources, labor resources in this example, have a 10% markup added to them.maps

Cost categories are applicable in plug cost items that do not have resources or are not resource driven. The cost categories have only a blanket cost category markup that helps drive the total revenue amount on the cost item.

You can view this information from Markup columns such as Billing rate markup amount, CE billable amount, Markup amount, and CE revenue amount.



The following table shows markup column information in the Cost categories tab of the Cost item details slide out.

Column	Formula
CE	**Current estimate amount + your Billing rate markup amount = CE billable**

Column	Formula
billable amount	amount
Markup amount	**Markup percent x your current estimate = markup amount** - The Billing rate markup amount for plug cost items is always set to zero because you can only have a billing rate on resources. When this is a detailed cost item, this will shows your billing rate markup amount for all those resources.
CE revenue amount	**CE billable amount + your Markup amount = CE revenue amount** - The CE revenue amount is how much revenue a cost item can have. This is only applicable for cost plus pay items. You can apply markups on cost items, and they do not affect the revenue on those cost items. The markups affect the revenue for cost plus pay items and any cost items that are assigned to cost plus pay items.

For more information, see Markup percent.

1.24 SYNC INTEGRATIONS

1.25 SYNC INTEGRATIONS

You can configure sync integrations for actual cost and man-hour options at the organizational level, and manage sync schedules at the project level.

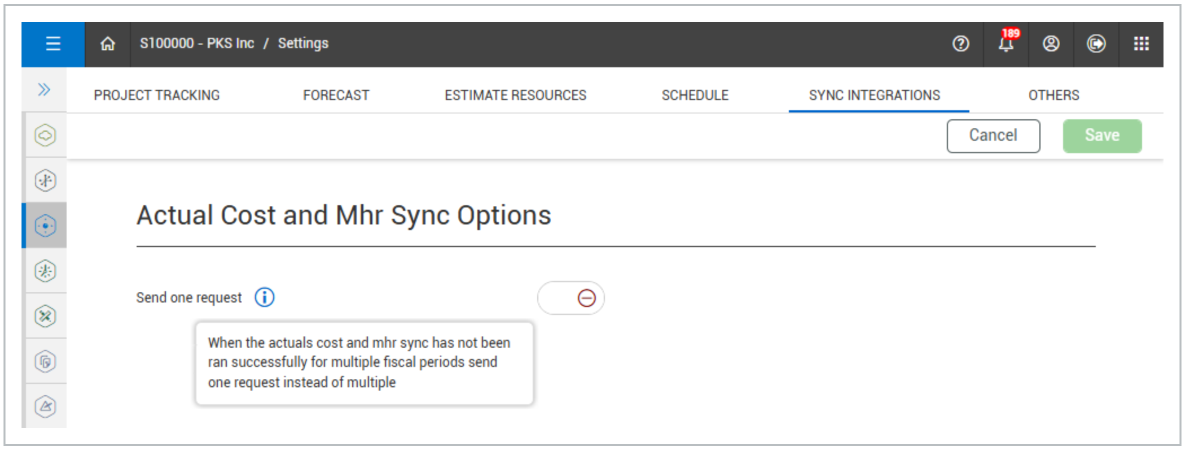
1.25.1 Organizational level

1.25.1.1 Actual cost and man-hour sync options

You have the option to choose to receive just one payload request instead of multiple ones for when the following occurs:

- If there are multiple fiscal periods since the last successful actual cost and man-hour sync.
- If the sync has never been ran and the project start date is longer than one fiscal month.

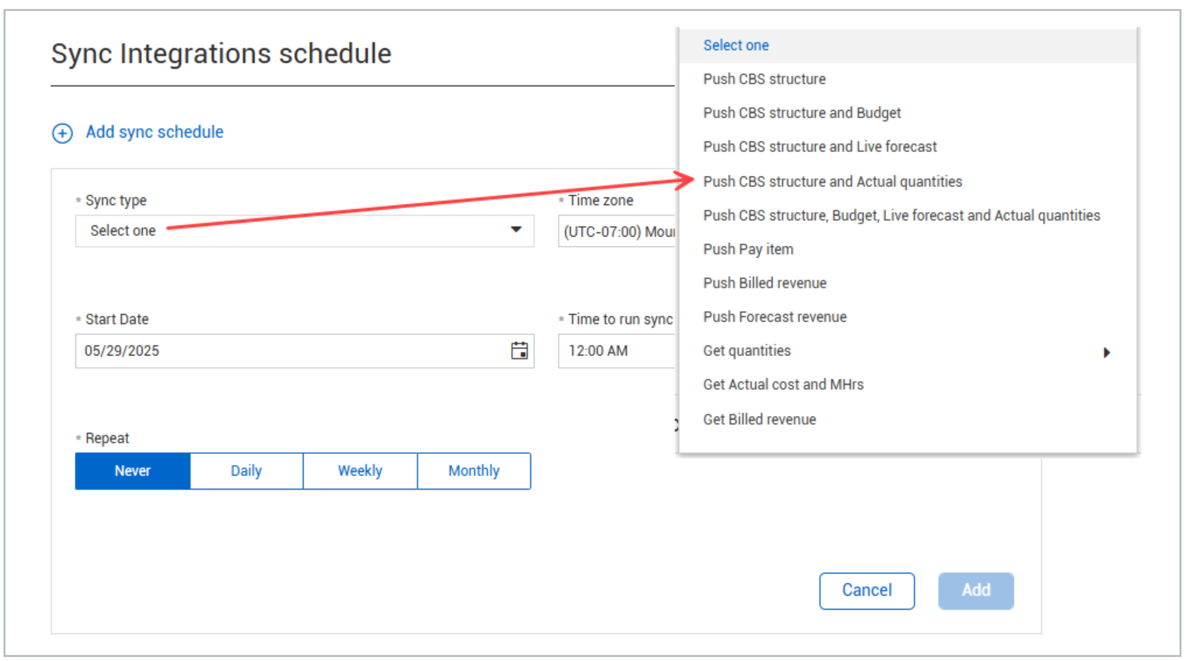
To opt to receive one request, set the **Send one request** toggle to *ON*.



1.25.2 Project level

1.25.2.2 Sync integrations schedule

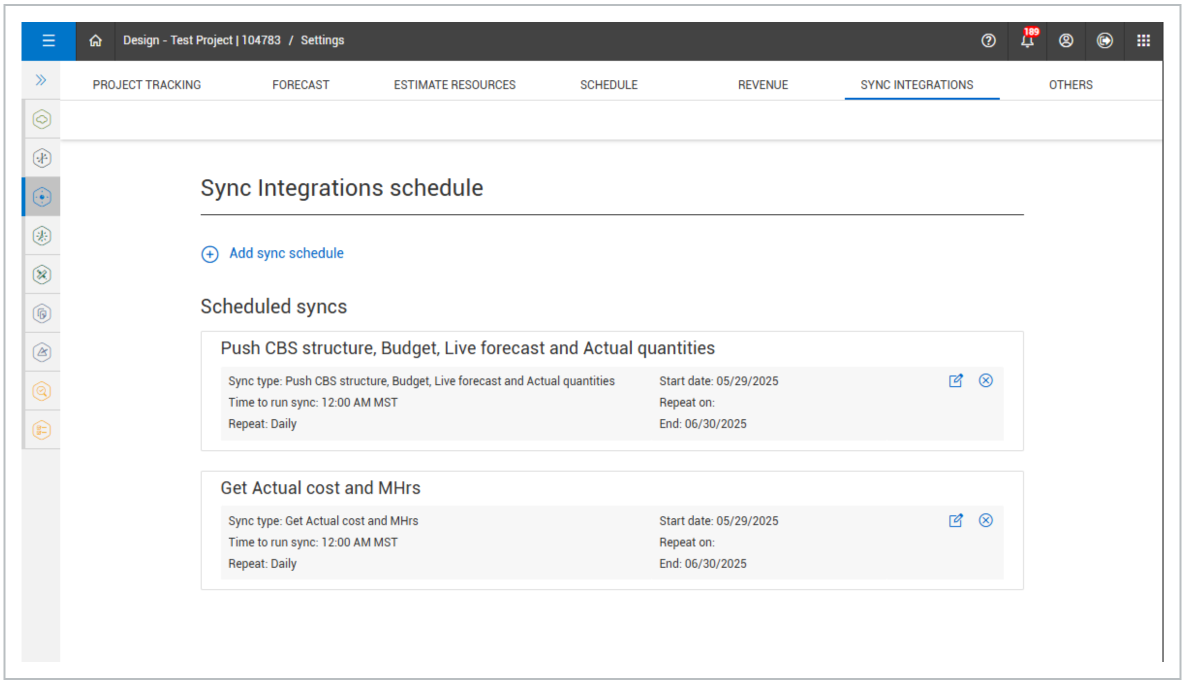
You can schedule sync integrations to run at specific times. Sync types include pushing the CBS structure, pay items, billed revenue, budget, live forecast, forecast revenue and getting quantities, actual cost, and man-hours. For more information about push and get actions, see Push and Get Actions in InEight Control Interfaces.



When adding a sync schedule, you can define the following:

- Sync type
- Time zone
- Start Date
- Time to run sync
- Repeat (Never/Daily/Weekly/Monthly)

The scheduled syncs show at the under the Scheduled syncs section. You can edit or delete scheduled syncs.



For more information about scheduled syncs , see Scheduled Syncs in InEight Control Interfaces.

1.25.3 Considerations

- To use the sync features in Control, you must first select **Control with confirmation** in Global Options. For more information, see Cost item integration behavior.
- To schedule syncs, you must first configure them for your organization in Application integrations. You can open Application integrations in Main menu > Suite administration > **Application integrations**.

1.26 OTHERS

1.27 OTHERS

The Others tab contains other Control related items you can define and configure at the organizational and project level.

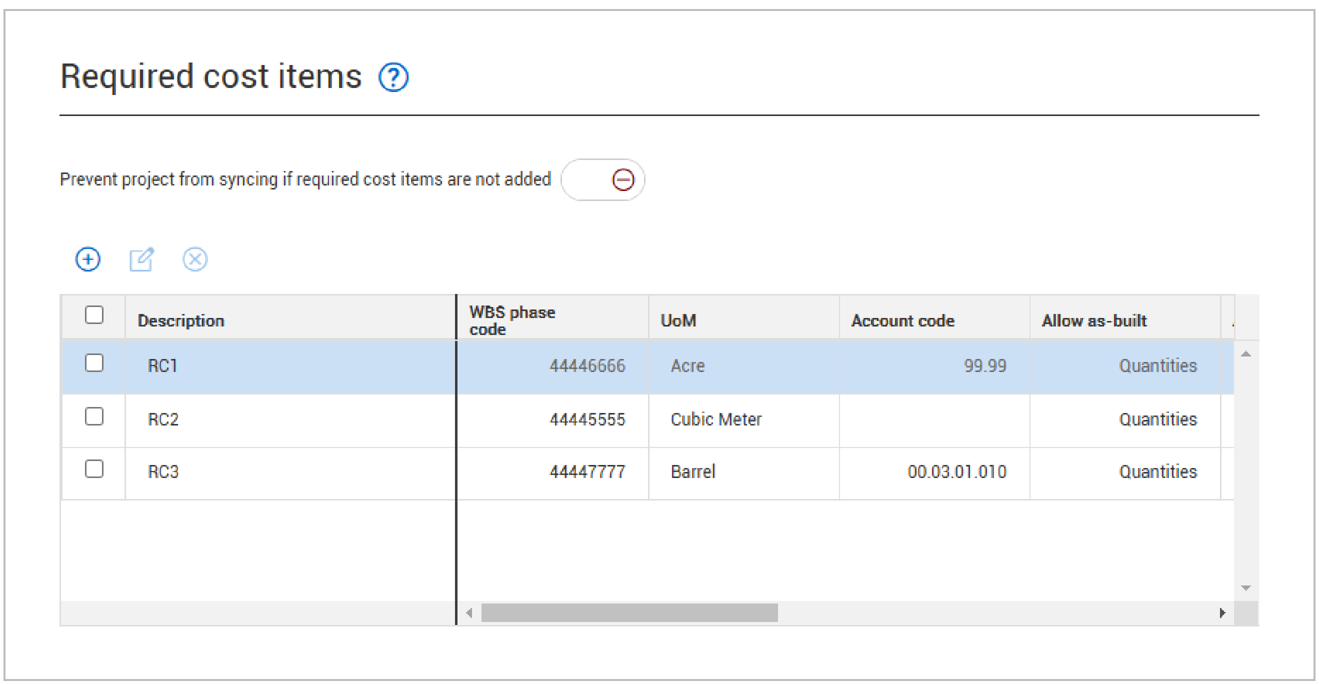
1.27.1 Organizational level

The following items are Control related settings you can define and configure at the organizational level:

- Required cost items
- Change order details

1.27.1.1 Required cost items

The Required cost items feature lets you create standardized or most commonly used cost items at the organization level and then add them to the project structure in the CBS register.



You can turned to *ON* the *Prevent project from syncing if required cost items are not added* toggle to prevent the project from syncing if required cost items are not added.

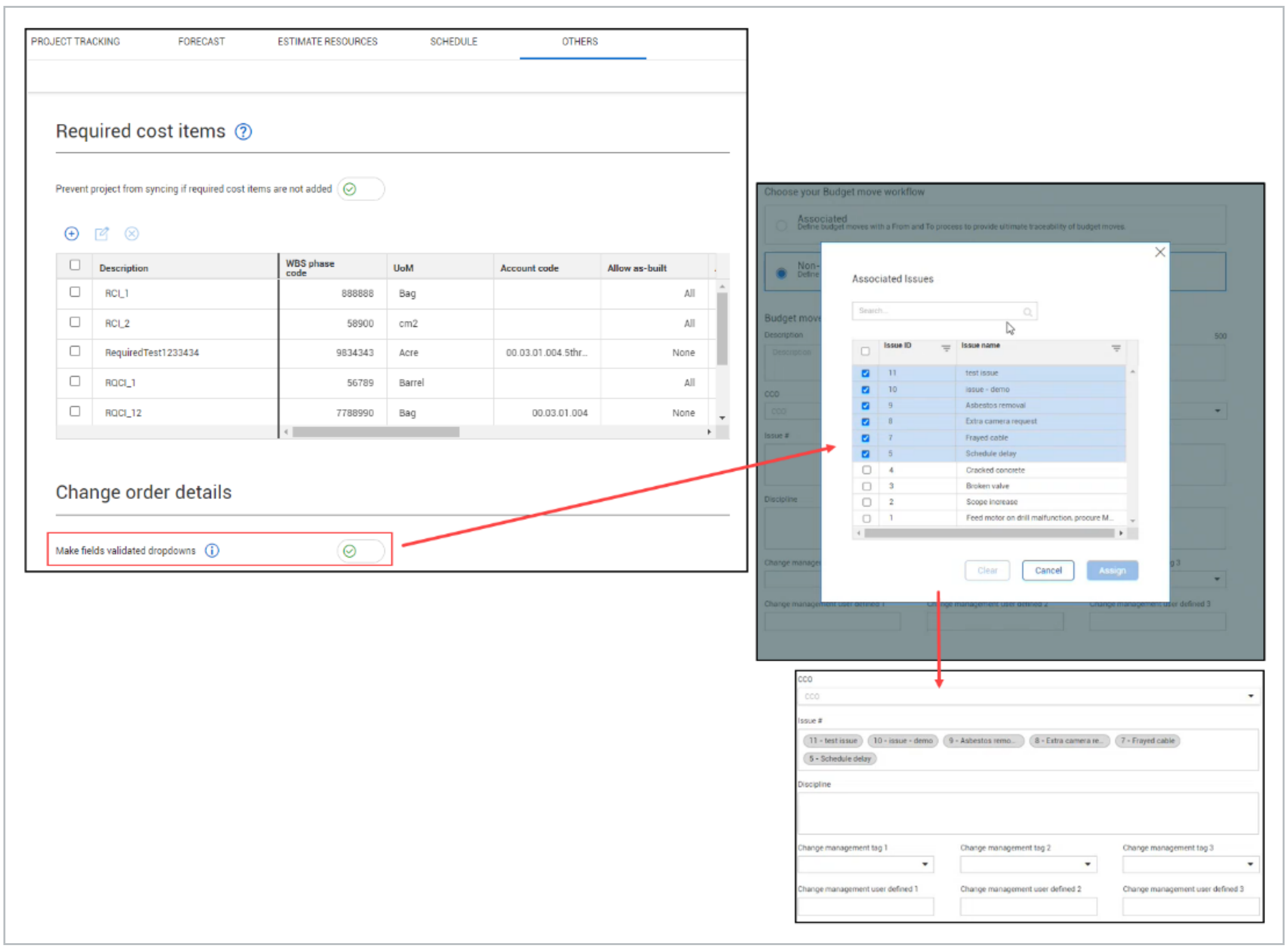
In the cost item grid, you can add, edit, and delete required cost items.

1.27.1.2 Change order details

Change Order fields can be configured as validated drop-down list fields at the organization level.

When you set the toggle to *ON*, the discipline list is populated from Master Data Libraries in InEight Platform, and the issue number and CCO fields are populated from inEight Change. When the toggle is set to *OFF*, these fields are free editable text fields with no validations.

In the example below, six validated issues have been selected to be associated with this change order after it is submitted.



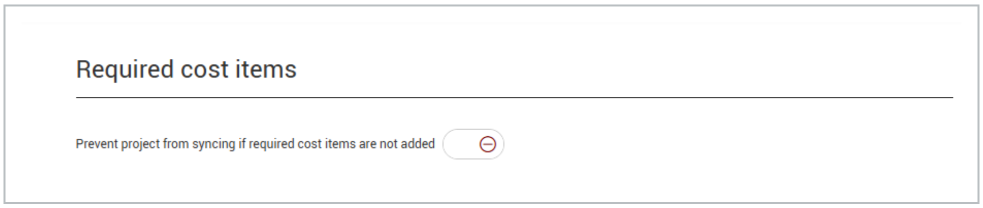
1.27.2 Project level

The following items are Control related settings you can define and configure at the project level:

- Required cost items
- Decimal precision

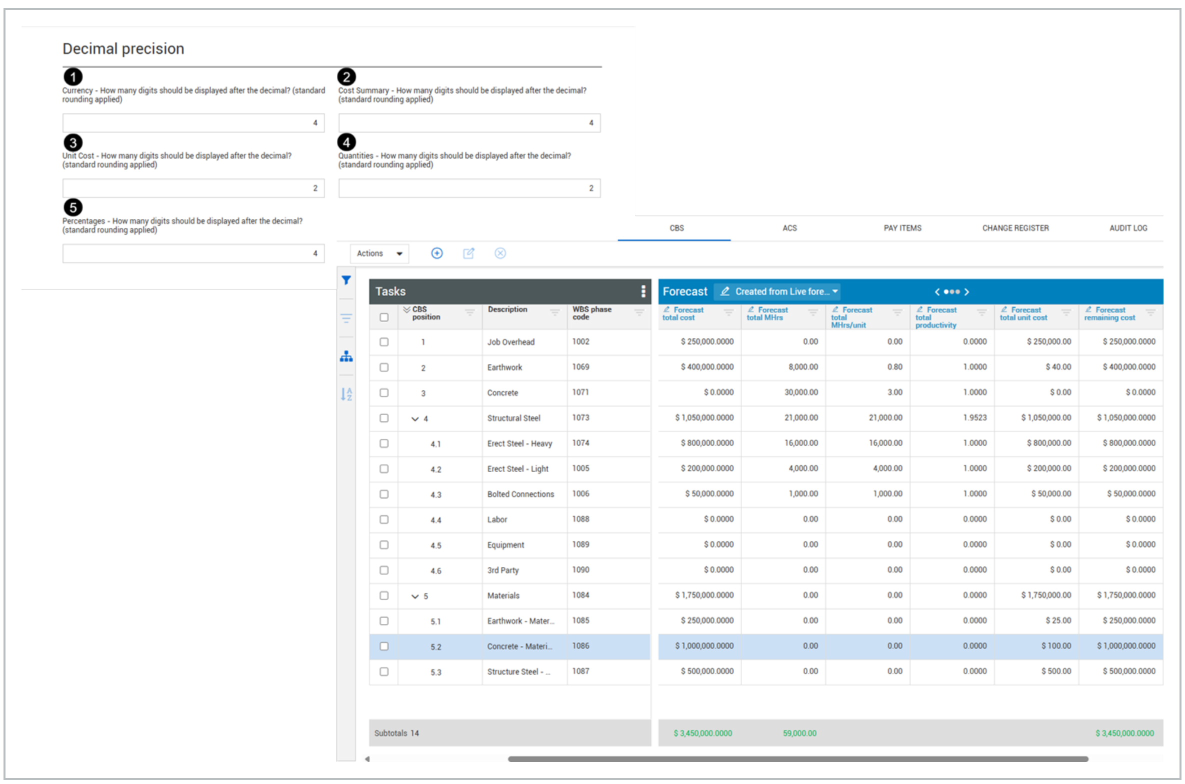
1.27.2.3 Required cost items

You can prevent the project from syncing when required cost items are not included by setting the *Prevent project from syncing if required cost items are not added* toggle to *ON*.



1.27.2.4 Decimal precision

The image and table below summarize the different decimal precision options:



	Name	Function
1	**Currency**	Number of decimal places for currencies. Any field that includes currency data will be affected by this setting.
2	**Cost Summary**	Number of decimal places for total cost information both at the terminal and non-terminal level.
3	**Unit Cost**	Number of decimal places for any unit cost displayed.
4	**Quantities**	Number of decimal places for any quantities displayed.
5	**Percentages**	Percent complete calculations at both the terminal and non-terminal level.

Review

1. How many administrative levels are there when you create a new role?
   a. 1
   b. 2
   c. 3
   d. 4

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2. There are several options when setting up project tracking. What setting is NOT included in these options?
   a. How import of your CBS structure will be configured
   b. How percent complete for individual cost items will be calculated
   c. Configuring and naming tags
   d. Capping percent complete at 100%

Summary

As a result of this lesson, you can:

- Create and manage InEight Control roles and permissions
- Navigate and define the different type of InEight Control project settings