

CONTROL USER GUIDE

Control



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EXERCISES

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CHAPTER 1 – INEIGHT CONTROL OVERVIEW

LESSON DURATION: 30 MINUTES

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Describe the InEight cloud platform and how it relates to your project management process
- Define InEight Control and its purpose

LESSON TOPICS

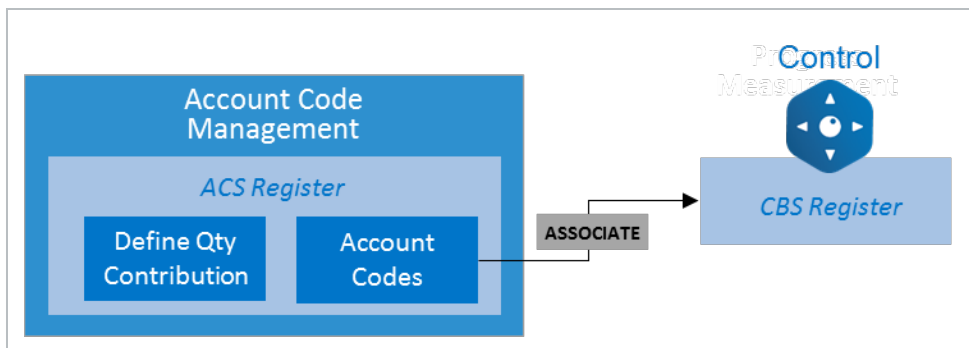
CHAPTER 1 – INEIGHT CONTROL OVERVIEW

As one of the applications within the InEight portfolio of products, InEight Control is a project management tool used for:

- Managing account codes
- Measuring progress
- Forecasting final man-hours and costs
- Managing revenue
- Managing budget/contract changes

1.0.1 ACCOUNT CODE MANAGEMENT

Within InEight Control, you can define and assign account codes to your cost items. This association can be synced to your ERP, and can also be used to benchmark data with other projects.



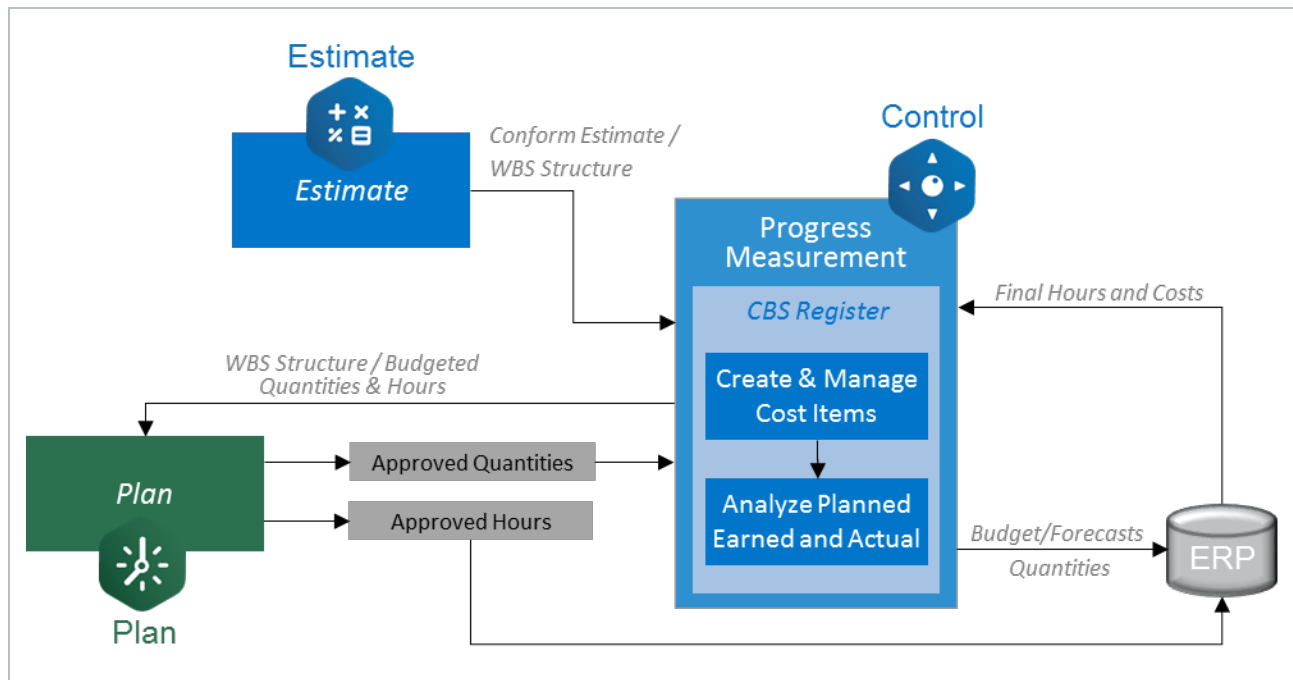
1.0.2 PROGRESS MEASUREMENT

InEight Control is the application where your Cost Breakdown Structure and budget are established and where you can monitor project progress. You can:

- Import your conformed estimate and structure from InEight Estimate
- Create and manage cost items

- Import approved quantities from InEight Plan
- Import final hours and costs from your ERP system
- Track your actuals and compare them against your Current Budget and earned values

The following workflow illustrates how these functions relate and pass information between systems.



You can utilize this information to analyze trends, track productivity factors, and measure progress.

| Tasks | | | Progress Overview | | | | |
|-------|------------|------------------------|-------------------|-----------------|----------------------|----------------------|--------------------------|
| | CBS Pos... | Description | % Complete | C B-Total C... | C B-Earned Total ... | Total Cost (To Date) | C B-Total Cost G/L (T... |
| | ▼1 | Infrastructure | 0.01 | \$14,193,548.20 | \$80,054.65 | \$3,000.00 | \$77,051.61 |
| | 1.1 | Mobilization | 0.00 | \$10,794.00 | \$0.00 | \$0.00 | \$0.00 |
| | ▼1.2 | West Screen Demolition | 0.38 | \$4,605.59 | \$1,772.88 | \$3,000.00 | (\$1,227.13) |
| | 1.2.1 | West - Removal-Conduit | 0.34 | \$3,448.93 | \$1,172.88 | \$3,000.00 | (\$1,827.12) |

1.0.3 FORECASTING

InEight Control provides options for forecasting final costs, man-hours, and productivity for your project.

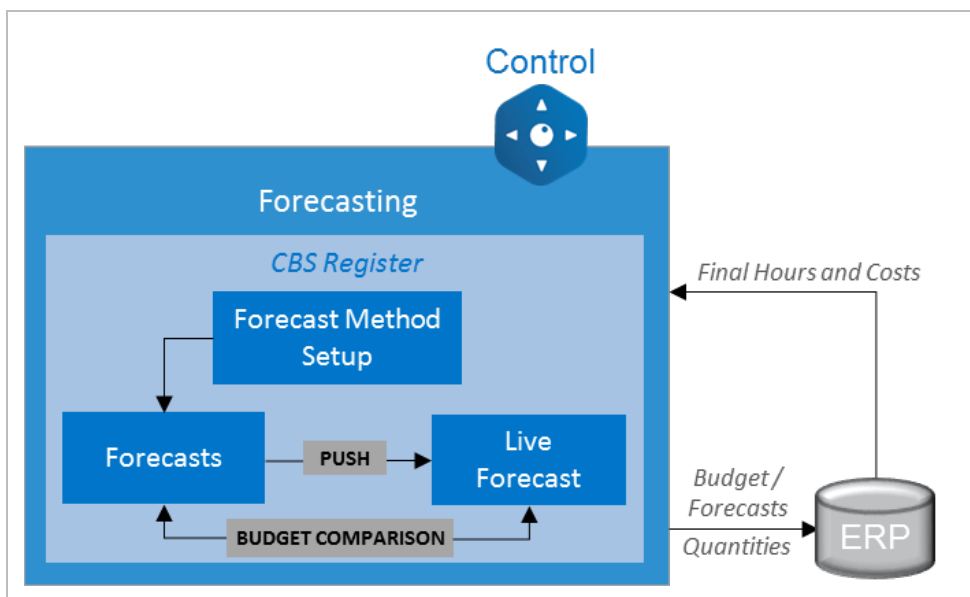
| Tasks | | Task details | | | Forecast Created from Live forec... | | | |
|--------------|---------------------|--------------|-------------------------|-----|---------------------------------------|---------------------|-------------------------------|------------------------------------|
| CBS position | Description | Resource | Forecast (T/O) quantity | UoM | Forecast final cost | Forecast final Mhrs | Forecast final man hours/Unit | Forecast final productivity factor |
| 2 | Earthwork | 5 | 10,000.00 | CY | \$ 400,000.00 | 8,000.00 | 0.80 | 1.00 |
| 3 | Concrete | 6 | 10,000.00 | CY | \$ 1,500,000.00 | 30,000.00 | 3.00 | 1.00 |
| 4 | Structural Steel | | 1,000.00 | Ton | \$ 1,000,035.71 | 20,000.71 | 20.00 | 1.00 |
| 4.1 | Erect Steel - Heavy | 5 | 800.00 | Ton | \$ 800,000.00 | 16,000.00 | 20.00 | 1.00 |
| 4.2 | Erect Steel - Light | 5 | 200.00 | Ton | \$ 200,000.00 | 4,000.00 | 20.00 | 1.00 |
| 4.3 | Bolted Connections | 8 | 2,000.00 | Ea | \$ 35.71 | 0.71 | 0.00 | 1.00 |

You can forecast your remaining work based on any of the following Forecast Methods:

- Current Budget
- Current Estimate
- Average performance
- Committed Cost
- Manual Entry

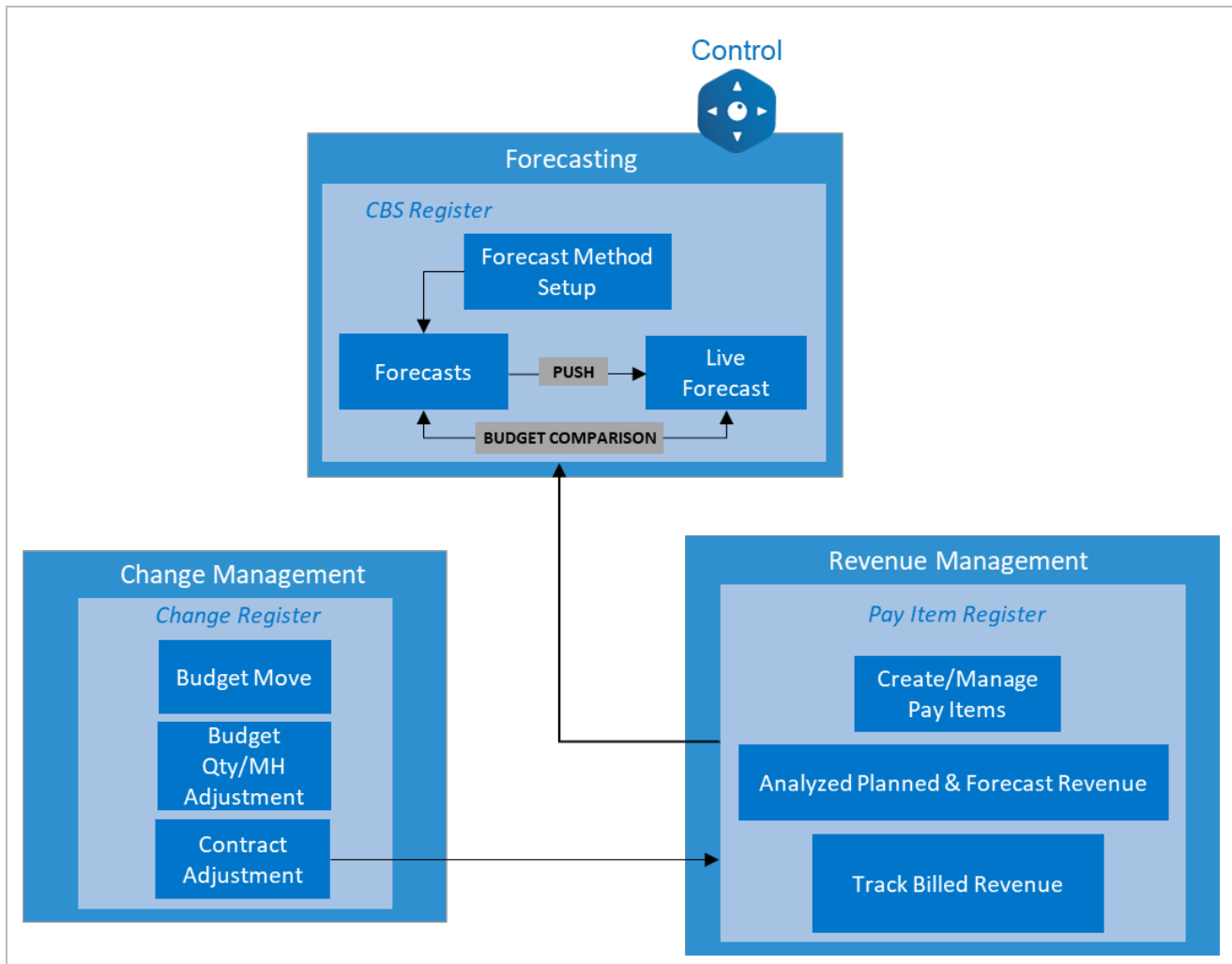
You can save private forecasts, share them with others, and push them to a “live” forecast which can be reviewed by all and used for official reporting. You can also compare the Live Forecast to other forecasts created, for example to compare to the previous month’s forecast.

The workflow diagram below illustrates how forecasting functions relate to the rest of InEight Control and other systems.



1.0.4 REVENUE MANAGEMENT

Within InEight Control, you can create and manage pay items for tracking pay quantities, actual and forecasted revenue, and how much has been billed to the client.



1.0.5 CHANGE MANAGEMENT

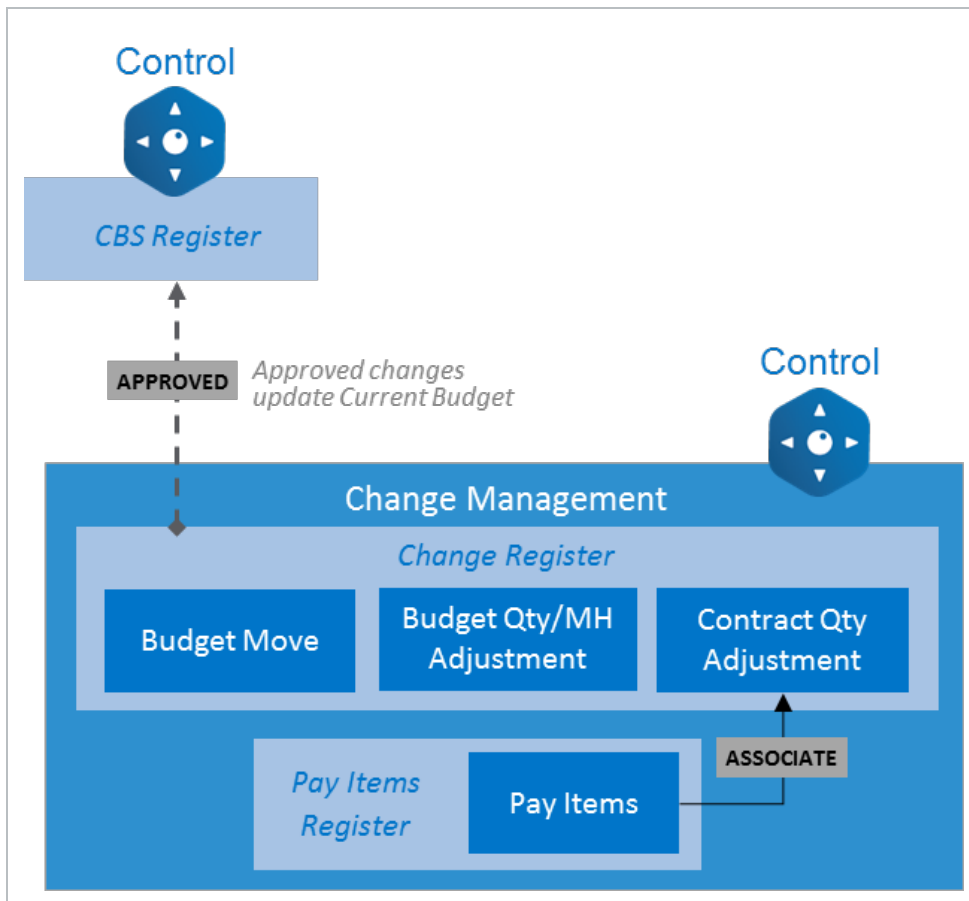
InEight Control allows you to manage changes to quantities, man-hours, and costs in each cost item as needed during the execution of the project. You can make three different kinds of changes within the Change Management register:

- **Budget move** – Movement of costs between cost items where the total dollars moved must balance to zero. There is no revenue associated with this type of change

- **Budget quantity and man-hour adjustment** – change to quantities or man-hours within the project without changing costs
- **Contract adjustment** – both the budget and the revenue either increase or decrease and are not required to be a net zero transaction. You will associate pay items with the change order to reflect the revenue change

Approved changes update your Current Budget within the CBS register.

The below workflow shows the relationship of Change Management to the rest of InEight Control.

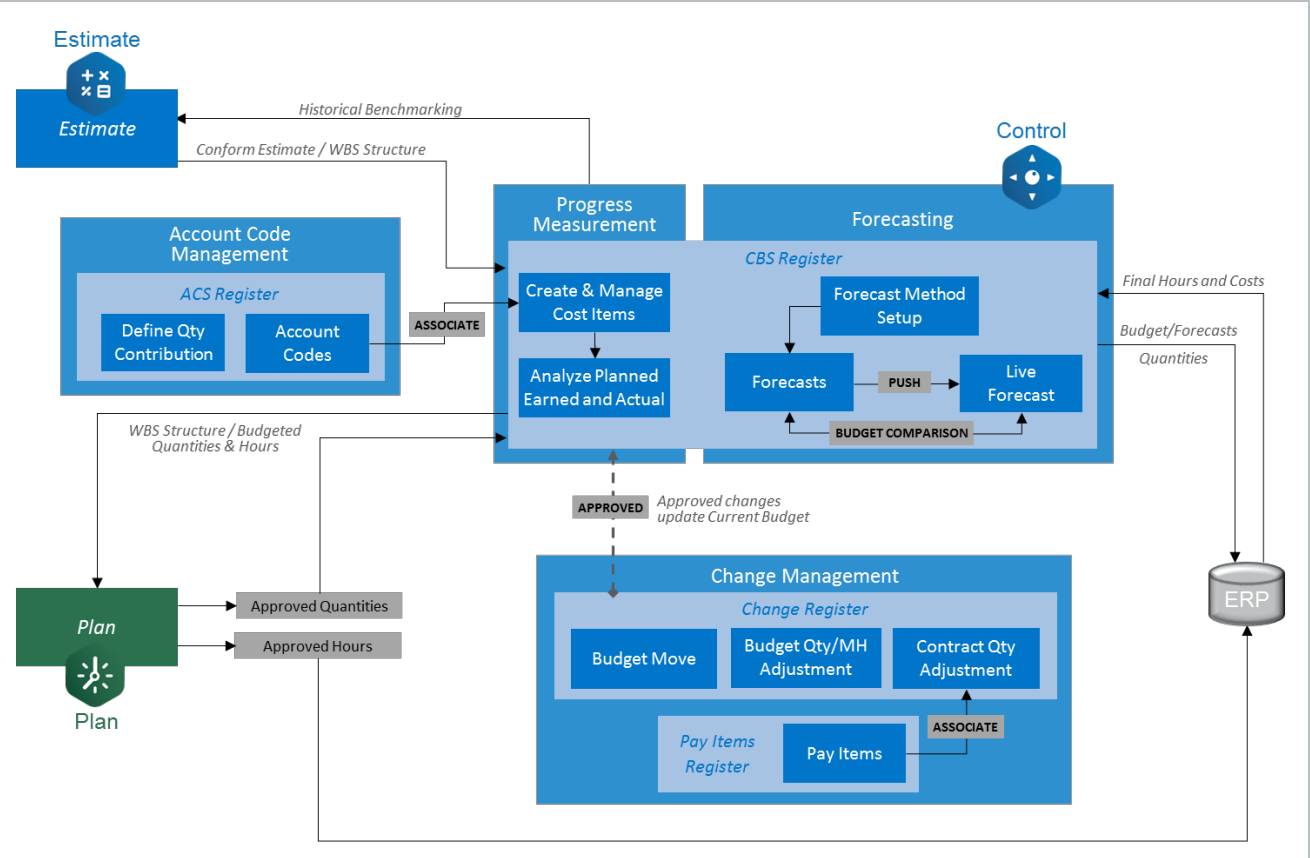


Below is an example of what the Change Register looks like in InEight Control.

| Change Register | | | | | | |
|-----------------|-----|---------|---|--------------------------|------------|------------------------|
| ID | CCO | Issue # | Description | Type | Discipline | Total Budget \$ adjust |
| 20.0 | 001 | 001 | Increase budget in the code for Plan and Progress | Contract adjustment | 1 | \$4,800.00 |
| 21.0 | | | Increase budget quantity for proper production factor | Budget Qty&MH adjustment | 1 | \$0.00 |

1.0.6 INEIGHT CONTROL WORKFLOW

The following workflow illustrates how all the functions of InEight Control work together.



REVIEW

1. Which InEight application do you use for capturing time and quantities in the field?
 - a. InEight Control
 - b. InEight Plan
 - c. InEight Progress
 - d. InEight Inspect

2. What key data is imported from the ERP system into InEight Control? (Select all that apply.)
 - a. Costs
 - b. Quantities
 - c. Hours
 - d. Notes

3. Which of the following is NOT a function of InEight Control?
 - a. Budget Management
 - b. Daily Planning
 - c. Change Management
 - d. Progress Measurement
 - e. Forecasting

SUMMARY

As a result of this lesson, you can:

- Describe the InEight cloud platform and how it relates to your project management process
- Define InEight Control and its purpose

GENERAL NAVIGATION

LESSON DURATION: 45 MINUTES

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Navigate the InEight Control Workspaces page
- Manage columns
- Group Pay Items
- Manage data blocks
- Create viewsets
- Change row density

LESSON TOPICS

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| | |
|---|----|
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2.1 PAGE NAVIGATION

You can access Control within the InEight Cloud Suite using the link provided by your manager or facilitator. To access Control, you must open a project by selecting Main menu > **All projects & organizations**.



The All projects & organizations page opens to the Projects tab that shows all projects you are associated with.

| All projects & organizations | | | | | | | | | |
|--|--|---------|--------------|-----------------|-------------------------|-------------------|-----------------------|-------------|--|
| PROJECTS | | | | | ORGANIZATIONS | | | | |
| ID | Name | Stat... | Organization | Created by | Created on | Forecast duration | Original contract ... | Contract nu | |
| <input type="checkbox"/> 105091 | Steel Structure Training Job | Active | C-XYZ | Jeremy cheek | 08/31/2018 1:40:49 PM | | | | |
| <input type="checkbox"/> 105092 | Steel Structure Training Job 2 | Active | C-XYZ | Jeremy cheek | 08/31/2018 1:44:12 PM | | | | |
| <input type="checkbox"/> 105093 | Steel Structure Training Job 3 | Active | C-XYZ | Jeremy cheek | 08/31/2018 1:44:46 PM | | | | |
| <input type="checkbox"/> 105094 | Steel Structure Partner Job | Active | C-XYZ | Jeremy cheek | 08/31/2018 1:45:25 PM | | | | |
| <input type="checkbox"/> 183850 | Wards Island WWTP | Active | C-XYZ | Jeremy cheek | 11/07/2018 8:02:08 AM | | | | |
| <input type="checkbox"/> BMS Test | BMS Test | New | C-XYZ | Brenda Steven | 10/20/2020 1:55:15 PM | | | | |
| <input type="checkbox"/> Heavy PM Estimate | Heavy PM Estimate | Active | C-XYZ | Jeremy cheek | 01/08/2019 1:33:34 PM | | | | |
| <input type="checkbox"/> Training Job | Training Job | Active | C-XYZ | Sterling yazzie | 09/11/2018 10:28:37 ... | | | | |

You can search projects by clicking the Search icon at the top right of the page. This search function searches all columns in the page.

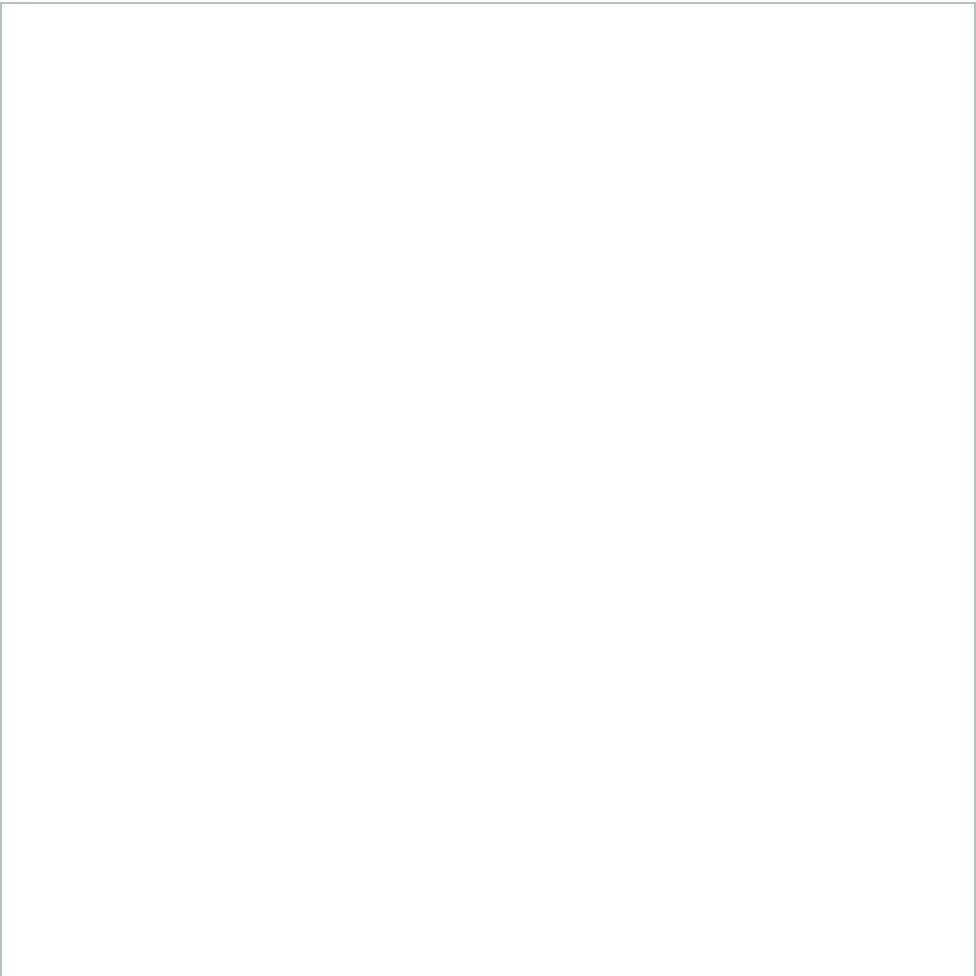
All projects & organizations

PROJECTSORGANIZATIONS

| | ID | Name | Stat... | Organization | Created by | Created on | For |
|--------------------------|-------------------|--|---------|--------------|-----------------|-------------------------|-----|
| <input type="checkbox"/> | 105091 | Steel Structure Training Job | Active | C-XYZ | Jeremy cheek | 08/31/2018 1:40:49 PM | |
| <input type="checkbox"/> | 105092 | Steel Structure Training Job 2 | Active | C-XYZ | Jeremy cheek | 08/31/2018 1:44:12 PM | |
| <input type="checkbox"/> | 105093 | Steel Structure Training Job 3 | Active | C-XYZ | Jeremy cheek | 08/31/2018 1:44:46 PM | |
| <input type="checkbox"/> | 105094 | Steel Structure Partner Job | Active | C-XYZ | Jeremy cheek | 08/31/2018 1:45:25 PM | |
| <input type="checkbox"/> | 183850 | Wards Island WWTP | Active | C-XYZ | Jeremy cheek | 11/07/2018 8:02:08 AM | |
| <input type="checkbox"/> | BMS Test | RMS Test | New | C-XYZ | Brenda Steven | 10/20/2020 1:55:15 PM | |
| <input type="checkbox"/> | Heavy PM Estimate | Heavy PM Estimate | Active | C-XYZ | Jeremy cheek | 01/08/2019 1:33:34 PM | |
| <input type="checkbox"/> | Training Job | Training Job | Active | C-XYZ | Sterling yazzie | 09/11/2018 10:28:37 ... | |

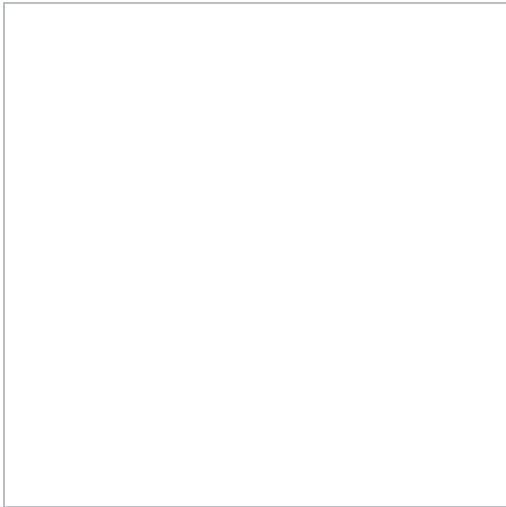
Search...

Click a project name to open it. The project opens to the **Project home** landing page. In the Project home landing page, you can access Control from the left menu.



2.1.1 NAVIGATE THE INEIGHT CONTROL WORKSPACES PAGE

In the Project home landing page, under Control, click Workspaces to open the **Workspaces** module.





Overview - Control Workspaces Page

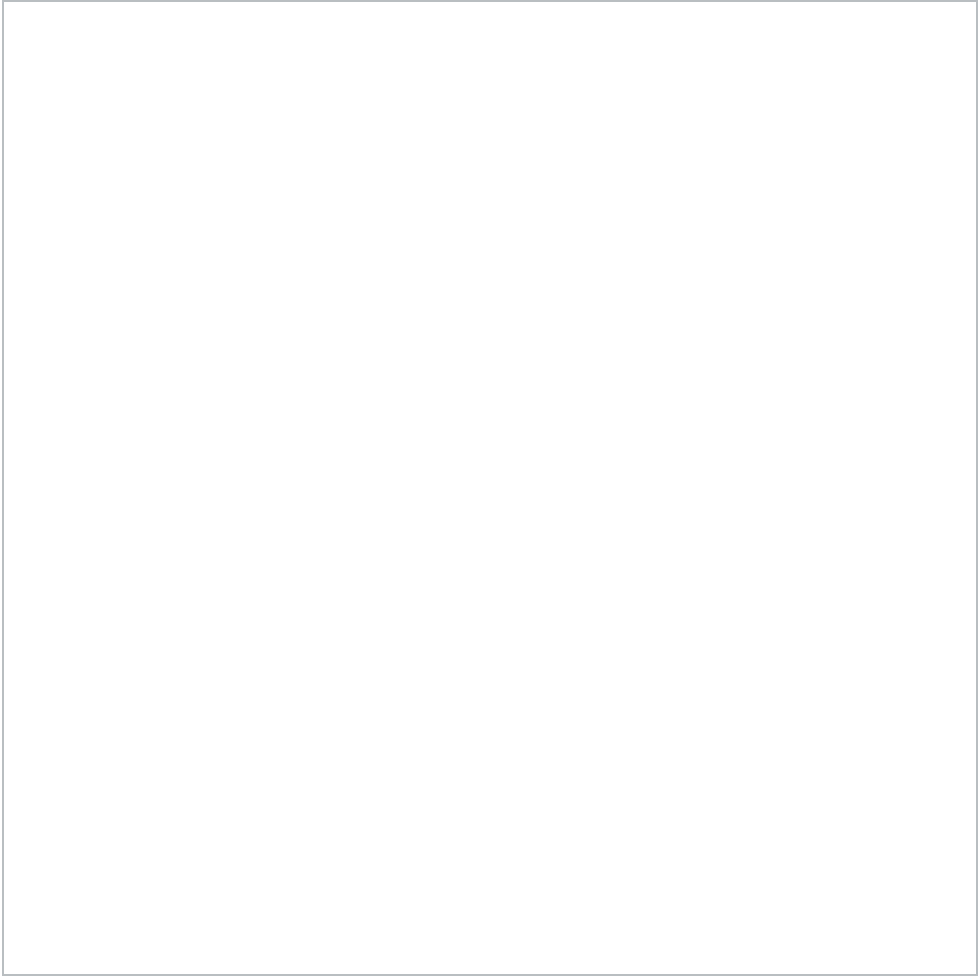
| Title | | Description |
|-------|----------------------|--|
| 1 | Left Navigation Menu | Opens a side panel where you can quickly access pages across the InEight Suite, such as settings, favorite projects, and other InEight applications. |
| 2 | Home Menu | Returns to the Organization or Project home landing page. |
| 3 | Help Menu | Opens a window where you can quickly access eLearning courses, |

Overview - Control Workspaces Page (continued)

| Title | | Description |
|-------|-----------------------|--|
| | | Knowledge Library topics, and training videos. |
| 4 | User Profile | Access your User Profile and update preferences such as language and number formats. |
| 5 | Right Navigation Menu | Opens a side panel where you can quickly access project-specific pages and applications. |
| 6 | Tabs | Navigate to the CBS (Cost Breakdown Structure), ACS (Account Code Structure), Pay items, Change Register and Audit Log pages. |
| 7 | Viewset Menu | Display different preset views and manage custom viewsets. |
| 8 | Actions Menu | Select available actions for the current register tab you are viewing. |
| 9 | Left Toolbar | Contains commonly-used buttons to make changes in the register. In this case, Add is used to add cost items, Edit to edit cost items, and Delete to remove a cost item from the project. |
| 10 | Right Toolbar | Contains functions for the register page you are currently viewing. (Additional information shown below). |
| 11 | Side Toolbar | Contains options for filtering the register and indicators for filtering and sorting. |
| 12 | Register content | Displays page content in rows and columns, grouped together in customizable data blocks. |

2.1.2 RIGHT TOOLBAR OVERVIEW

The right toolbar allows you to use functions for the register page. The toolbar options change depending on which tab you select (CBS, ACS, Pay Items, Change Register, or Audit Log). The right toolbar is commonly used for the CBS register page. The following image and table show the right toolbar functions:



Overview - Workspaces Page CBS Tab - Right Toolbar

| Icon | | Function |
|------|------------------|---|
| 1 | Group Columns | Group rows of the cost breakdown structure by like information from selected columns. |
| 2 | Undo | Access a list of entries from the current day and select specific entries to undo. |
| 3 | Display Currency | Display currency in the CBS as entered or as the project default currency. |
| 4 | Add Data Block | Open a panel where you can manage data blocks and add data blocks to your view. |
| 5 | Import | Import cost item data from an Excel File. |

Overview - Workspaces Page CBS Tab - Right Toolbar (continued)

| Icon | | Function |
|------|-------------|--|
| 6 | Export | Export your register view to an Excel file. Only the data blocks currently displayed on the page will be exported to the file. |
| 7 | Row Density | Adjust the line height at which the register content is displayed. Choose between Relaxed, Narrow, or Tight. |
| 8 | Find | Find value in register content by selecting a data block column, selecting either the Begins with or Contains criteria, then entering the value to search for. |

2.2 COLUMNS/GROUPING/SORTING

InEight Control allows you to customize columns in your data blocks according to your preferences. Changes made to the placement of your columns will be retained the next time you access any page you have customized.

2.2.1 MOVE COLUMNS

You can move a column from one place to another to customize your view using drag and drop.

MOVE COLUMNS

- 1. On the Pay Items tab, click and hold any column.

Actions + ×

| Pay items | | | | | | | |
|-------------------------------------|-----|---------|-------------|------------|----------------|----------------|--------------|
| | .. | .. | Line number | Row number | Total price | Unit price | Pay quantity |
| <input type="checkbox"/> | 001 | Eart... | 1 | 1 | \$759,887.01 | \$759,887.01 | 1.00 |
| <input type="checkbox"/> | 002 | Con... | 2 | 2 | \$2,919,020.71 | \$2,919,020.71 | 1.00 |
| <input checked="" type="checkbox"/> | 003 | Ste... | 3 | 3 | \$1,821,092.28 | \$1,821,092.28 | 1.00 |

- 2. Drag it to the left of right of another column.

| Total price | | | |
|-------------|--------------|---------------|--------------|
| Row number | Total price | Total price + | Pay quantity |
| 1 | \$759,887.01 | \$759,887.01 | 1.00 |

- Two black arrows appear to guide you to the location the column will be dropped

2.2.2 SORT COLUMNS

You can sort columns in ascending or descending order for both for alpha and numeric fields on any column by clicking once on the column header.

SORT COLUMNS

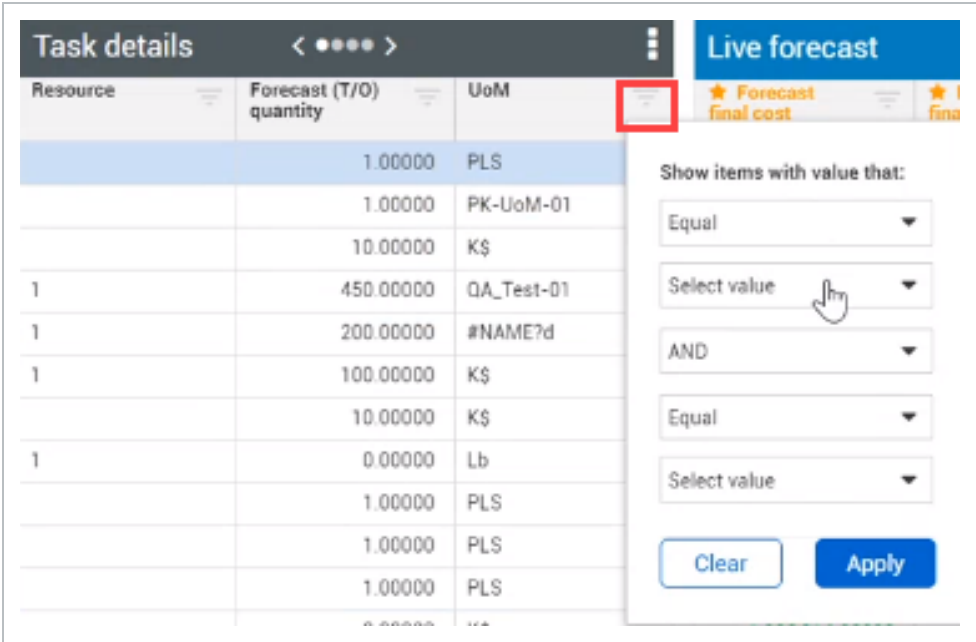
1. On the CBS tab, select any **column header**.
 - A yellow arrow appears, facing downward, indicating that you are sorting that column alphabetically from A-Z or numerically.
2. To revert the sort, select the **column header** again.
 - The yellow arrow faces upward indicating the reverse sort.
3. Select the **column header** once more to return the column to the original sort.

2.2.3 FILTER COLUMNS

You can filter your column data to show only specific, pertinent information that you need. There are two ways to set a filter:

2.2.3.1 METHOD 1: FILTER FROM COLUMN HEADER

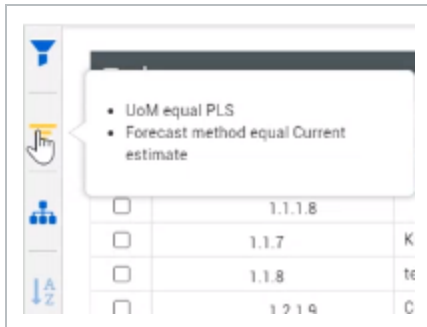
You can set a filter for a column by clicking on the filter icon on any column header. This brings up a drop down list of items that you can filter by to apply to that specific column.



NOTE

If you wanted to remove a single filter, locate the column you filtered, click the filter icon, and select the **Clear** button.

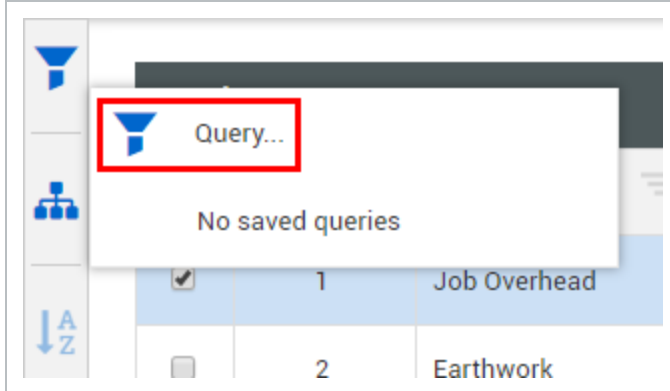
On the resulting filter, you can hover over the filter icon on the right icon selection to view which filters are applied.



Selecting the filter icon will remove all the filters applied to the columns.

2.2.3.2 METHOD 2: FILTER FROM RIGHT TOOLBAR

You can also set a filter by selecting the Filter icon from the right toolbar and selecting **Query**.



This option is helpful when you:

- Need to search for the column you need to filter
- Need to apply filters to more than one column

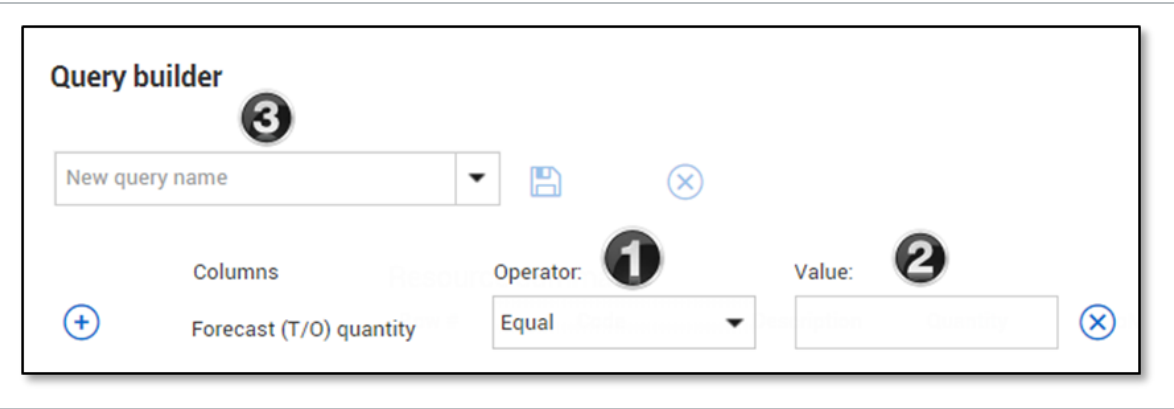
Selecting the Filter icon from the right toolbar opens the Query builder slide out panel, where you can set the filter value.

2.2.3.3 FILTER SLIDE OUT PANEL

The Filter slide out panel contains three key settings:

Filter Settings

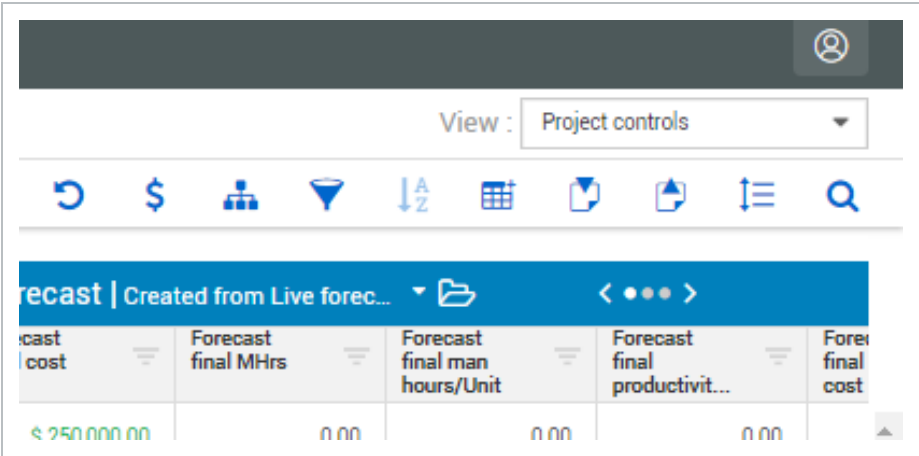
| | Title | Description |
|---|------------|--|
| 1 | Columns | Drop-down list to select the column to filter. |
| 2 | Operator | Determines what kind of filter to apply. Includes the following: <ul style="list-style-type: none">• Equal• Greater than• Greater than or equal• Is not null• Is null• Less than• Less than or equal• Not equal |
| 3 | Query Name | Name of query. |



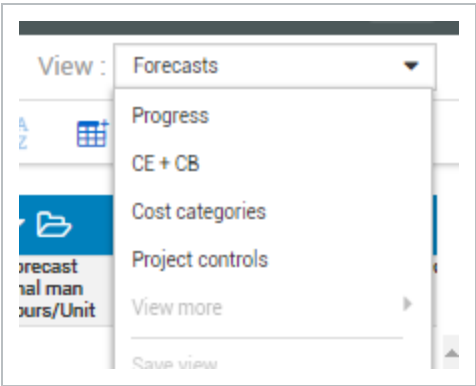
The following steps walk you through how to set a filter using the filter icon on the right toolbar.

FILTER COLUMNS

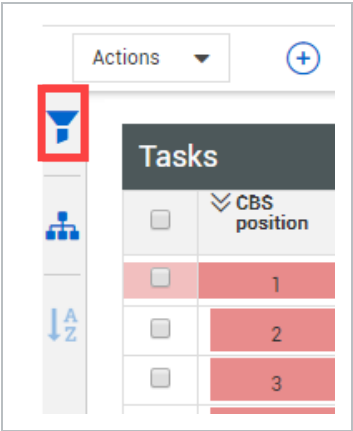
- 1. From the CBS tab of the Control Workspaces page, click on the **View drop-down arrow**.



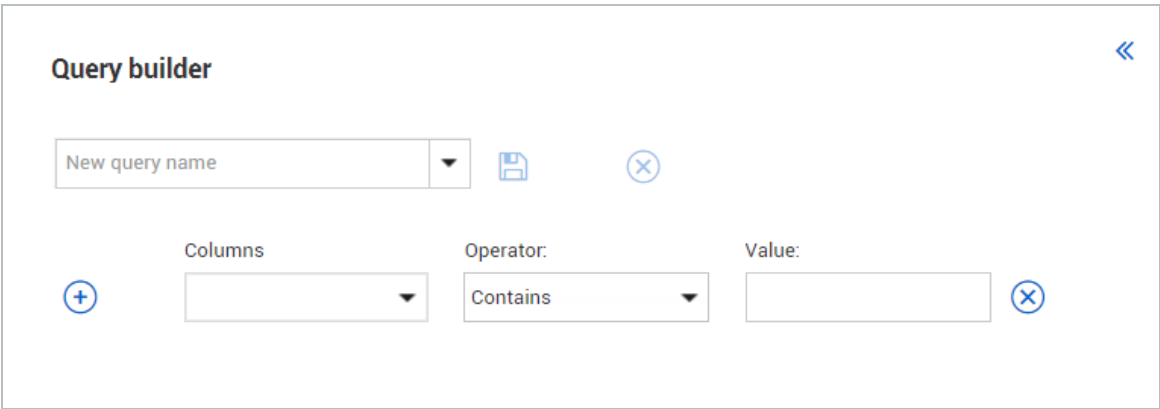
- 2. Select the **Project controls** viewset.



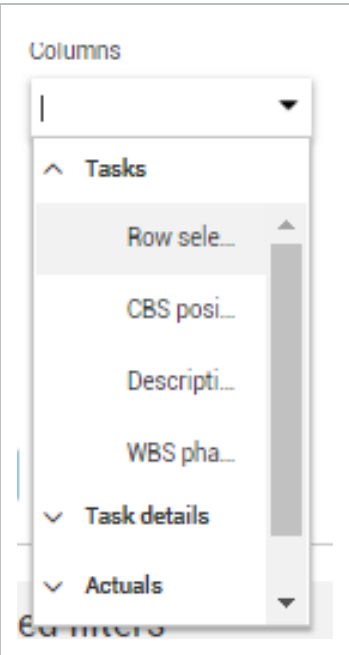
- 3. Select the **Filter**, then **Query** icon from the left toolbar.



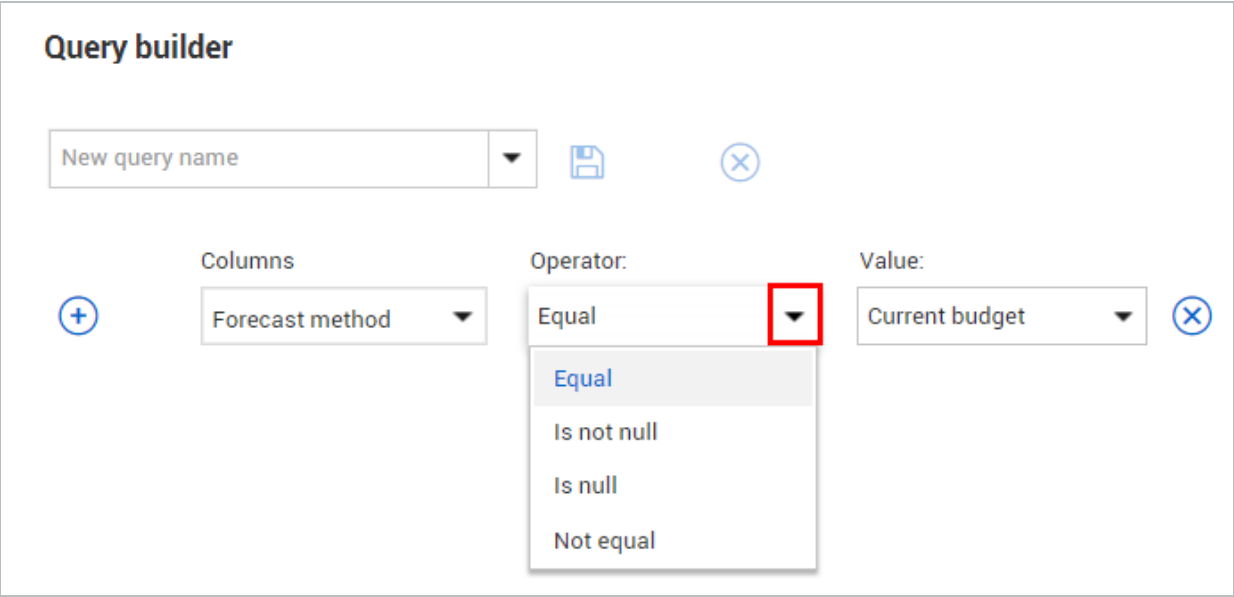
- The Query builder slide out panel appears



4. Click on the **Columns drop-down arrow** to select a column.



- Notice that the column titles are grouped by the data block in which they are housed
5. Select the **Forecast Method** column.
- This can also be typed into the text box to search for the column you need
6. Click on the **Operator drop-down arrow** and select **Equal**.



7. Click on the **Value drop-down arrow** and select **Rollup**.

- Note that you can add additional filter criteria by clicking the plus icon

The screenshot shows the 'Query builder' interface. At the top, there is a 'New query name' input field with a dropdown arrow, a save icon, and a close icon. Below this, the main configuration area is divided into three sections: 'Columns', 'Operator:', and 'Value:'. The 'Columns' section has a plus icon in a circle to its left, which is highlighted by a red arrow. The 'Columns' dropdown is set to 'Forecast method'. The 'Operator:' dropdown is set to 'Equal'. The 'Value:' dropdown is set to 'Rollup', and its dropdown menu is open, showing options: 'Current budget', 'Current estimate', 'Average performance', 'Manual (EAC)', 'None', 'Rollup' (which is highlighted with a red box), and 'Manual (ETC)'. There is a close icon to the right of the 'Value:' dropdown. At the bottom left is a 'Reset' button, and at the bottom right is an 'Apply' button.

- Note that you can click **Save** to add the filter to the My saved filter section for future use

8. Click **Apply** to apply the filter.

2.2.4 PAY ITEM GROUPING

Pay item grouping allows you to group your data in the most efficient way that makes sense to you. This is useful if you want the option to group certain columns, and subtotal pay items.

PAY ITEMSCHANGE REGISTERAUDIT LOG

Actions

↑ Billing methods

| | Pay item number | Di | Line number | Row number | Total price | Unit price | Pay quantit | Foreca: (T/O) Qty | UoM | Is billed | Billing methoc | Chan... order |
|--------------------------------------|-----------------|---------|-------------|------------|-----------------|----------------|-------------|-------------------|-----|-------------------------------------|-----------------|---------------|
| ▼ Billing methods: Cost Plus | | | | | | | | | | | | |
| <input type="checkbox"/> | P 1 | Test | 2 | 2 | \$ 40.0000000 | \$ 40.0000000 | 1.0000000 | 0.0000000 | AU | <input type="checkbox"/> | Cost Plus | |
| <input type="checkbox"/> | asdf | fawd... | 3 | 3 | \$ 3,630.000... | \$ 30.0000000 | 121.0000000 | 120.0000000 | AU | <input type="checkbox"/> | Cost Plus | ⋮ (3) |
| | | | | | \$3,670.0000... | | | | | | | |
| ▼ Billing methods: Fixed Final Price | | | | | | | | | | | | |
| <input type="checkbox"/> | 333 | | 4 | 4 | \$ 24,032.00... | \$ 400.0000... | 60.0800000 | 90.0000000 | Bag | <input checked="" type="checkbox"/> | Fixed Final ... | |
| <input type="checkbox"/> | P_1 | P_Test | 7 | 7 | \$ 250.0000... | \$ 22.0000000 | 11.3636364 | 150.0000000 | K\$ | <input type="checkbox"/> | Fixed Final ... | ✓ (1) |
| | | | | | \$24,282.000... | | | | | | | |

The following steps walk you through how to set a pay item group by using drag and drop.

PAY ITEM GROUPING

- 1. From the Pay Items tab of the Control Workspaces page, click and drag the **Billing methods** column header, and drop it in the space above.

CBSACS

PAY ITEMSCHANGE REGISTERAUDIT LOG

Actions

Drag a column header and drop it here to group by that column

+ Billing methods

Billing methods

| | Pay item number | Di | Line number | Row number | Total price | Unit price | Pay quantity | Forecast (T/O) Qty | UoM | Is billed | Billing methods | Change |
|--------------------------|-----------------|---------|-------------|------------|-------------------|----------------|--------------|--------------------|--------|-------------------------------------|-------------------|--------|
| <input type="checkbox"/> | P 1 | Test | 2 | 2 | \$ 40.0000000 | \$ 40.0000000 | 1.0000000 | 0.0000000 | AU | <input type="checkbox"/> | Cost Plus | |
| <input type="checkbox"/> | asdf | fawd... | 3 | 3 | \$ 3,630.0000000 | \$ 30.0000000 | 121.0000000 | 120.0000000 | AU | <input type="checkbox"/> | Cost Plus | ⋮ |
| <input type="checkbox"/> | 333 | | 4 | 4 | \$ 24,032.0000000 | \$ 400.0000000 | 60.0800000 | 90.0000000 | Bag | <input checked="" type="checkbox"/> | Fixed Final Price | |
| <input type="checkbox"/> | dsvsdv | | 5 | 5 | \$ 10.0000000 | \$ 10.0000000 | 1.0000000 | 0.0000000 | 1'Acre | <input type="checkbox"/> | Unit Price | ⋮ |
| <input type="checkbox"/> | P_1 | P_Test | 7 | 7 | \$ 250.0000000 | \$ 22.0000000 | 11.3636364 | 150.0000000 | K\$ | <input type="checkbox"/> | Fixed Final Price | ✓ |
| <input type="checkbox"/> | S_123 | 123 | 8 | 8 | \$ 10.0000000 | \$ 10.0000000 | 1.0000000 | 10.0000000 | 1'Acre | <input type="checkbox"/> | Unit Price | ⋮ |

- Your Pay Items are now grouped by Billing methods

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

Actions

+

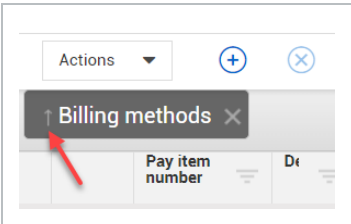
×

Billing methods

×

</

2. Click on the **sort arrow** to the left of Billing methods column header to reverse the order of the sort grouping.



- Your **Billing methods** are now sorted, and the Unit Price displays as the first Billing Methods grouping

| Forecast (T/O) Qty | UoM | Is billed | Billing methods | Change order |
|--------------------|--------|-------------------------------------|-------------------|--------------|
| 0.0000000 | 1!Acre | <input type="checkbox"/> | Unit Price | ⋮ (2) |
| 10.0000000 | !Acre | <input type="checkbox"/> | Unit Price | ⋮ (2) |
| | | | | |
| 90.0000000 | Bag | <input checked="" type="checkbox"/> | Fixed Final Price | |
| 150.0000000 | K\$ | <input type="checkbox"/> | Fixed Final Price | ✓ (1) |
| | | | | |
| 0.0000000 | AU | <input type="checkbox"/> | Cost Plus | |
| 120.0000000 | AU | <input type="checkbox"/> | Cost Plus | ⋮ (3) |

2.2.5 SUBTOTAL GROUPING

Subtotal grouping lets you group your data based on the subtotals in the CBS. This is useful if you want the option to group certain columns. You can group the following columns:

- Forecasting columns
- Current Estimate
- Current Budget
- Actual columns
- Cost columns
- Man Hour columns

The following steps walk you through how to group by subtotals using drag and drop.

SUBTOTAL GROUPING

- From the CBS tab of the Control Workspaces page, click the **Group By** icon.

The screenshot shows the 'CBS' tab of the Control Workspaces page. The top toolbar contains several icons, with the 'Group By' icon (a square with a grid pattern) highlighted by a red box. Below the toolbar, the 'Tasks' table is visible, showing columns for CBS position, Description, and WBS phase code. The 'Current estimate' table is also visible, showing columns for CE final Mhrs, CE final cost, CE Mhrs/unit, CE units/Mhr, CE unit cost, and Secondary UoM. The 'Current budget' table is also visible, showing columns for CB total quantity and C.

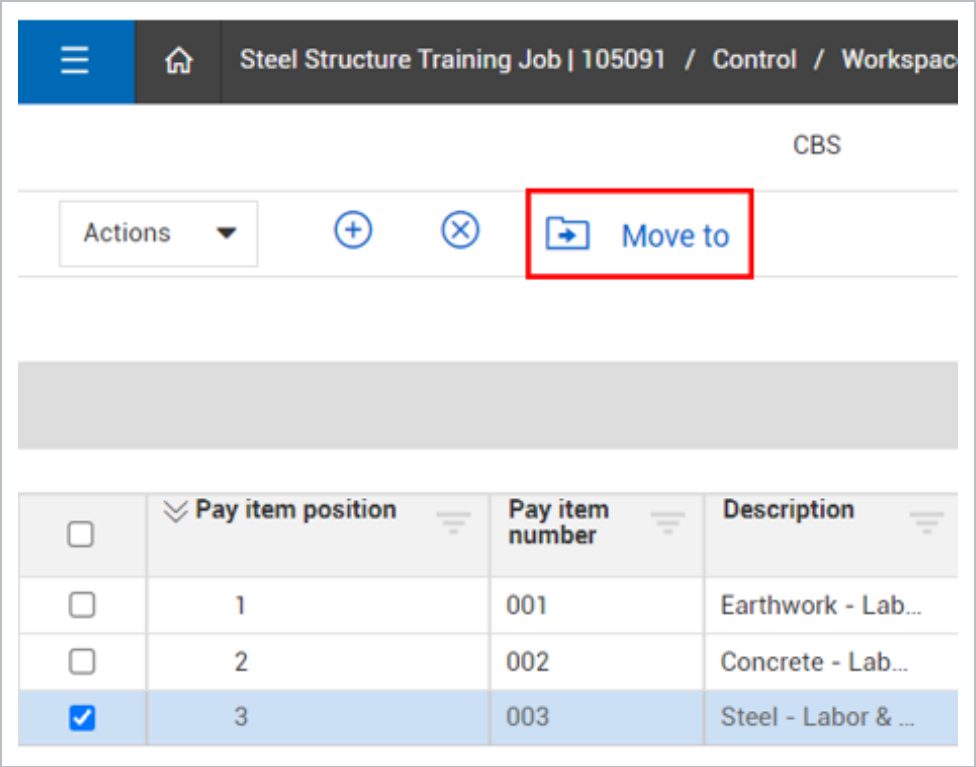
- Click and drag the **Unit of Measure** column header, and drop it in the space above.
 - Your columns are now sorted by Unit of Measure.

The screenshot shows the 'CBS' tab of the Control Workspaces page. The top toolbar contains several icons, with the 'Unit of Measure' icon (a square with a grid pattern) highlighted by a red box. Below the toolbar, the 'Tasks' table is visible, showing columns for CBS position, Description, and WBS phase code. The 'Task details' table is also visible, showing columns for Resources, Forecast (T/D) qty, and UoM. The 'Current estimate' table is also visible, showing columns for CE final Mhrs, CE final cost, CE Mhrs/unit, CE units/Mhr, and CE unit cost. The 'Current budget' table is also visible, showing columns for CB total quantity and C.

2.2.6 PAY ITEM MOVE OPTION

The move to feature is the only way to adjust the pay item order. This feature is similar to the adjust CBS position feature in the CBS register. For a pay item to become a parent, billed revenue, billed quantity, and current price must be zero, and no cost items can be assigned to it.

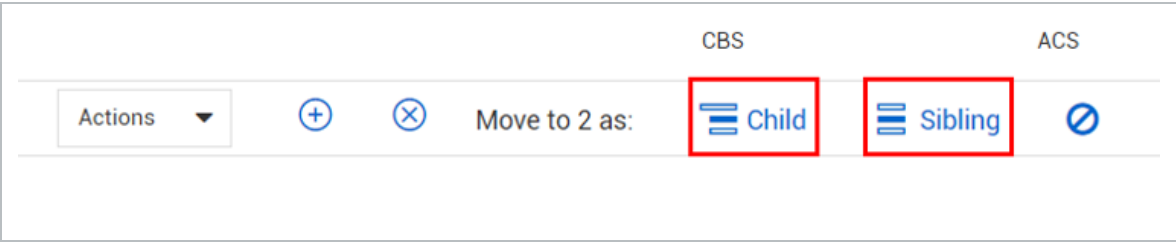
Selecting one or many pay items activates the Move to icon.



Selecting the move to icon opens the move-to field, where you can select the pay item you want to move your selected pay item to.



After selecting the move to pay item and then clicking on the Move to icon, you have the option to move the pay item as a child or a sibling.



2.2.7 PAY ITEM VIEWS

After your page view is arranged to your preference in the Pay Items page, you can create and save pay item views.

The pay item view feature lets you select which columns to display in the current Pay item view, with the Price and Revenue views as the default views.

PAY ITEMSCHANGE REGISTERAUDIT LOG

View :

Save view as

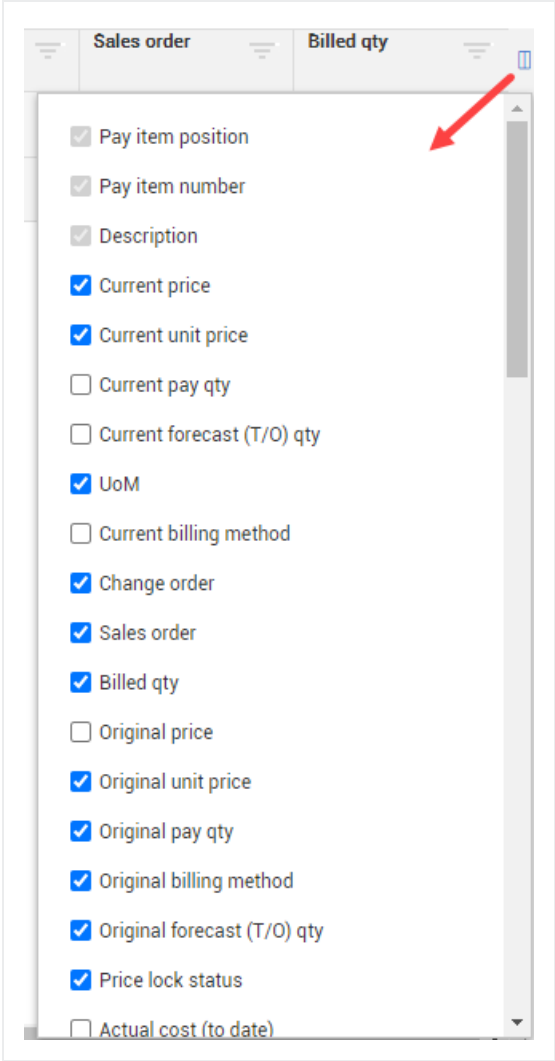
Unsaved (Price)RevenuePriceView moreSave viewRename current viewDelete this viewNew view

Revenue snapshot: Current revenue forecastBilled date: 07

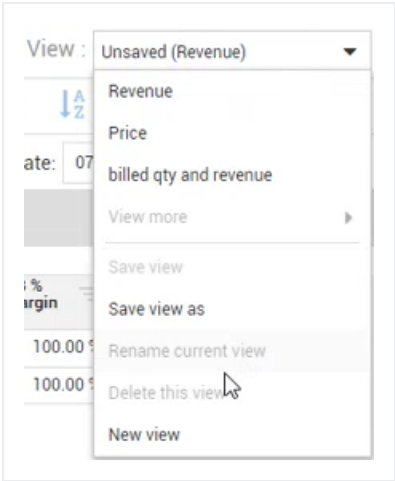
column header and drop it here to group by that column

| JoM | Current billing method | Price lock status | Change order | Original price | Original unit price | Original pay qty | Original forecast (T/O) | Original billing method |
|-----|------------------------|-------------------|--------------|----------------|---------------------|------------------|-------------------------|-------------------------|
| PLS | Cost plus | 🔒 | | | | | | |
| PLS | Unit price | 🔒 | | | | | | |

You can click the pay item column selection icon to choose which fields to include in your view.



Like the view feature in the CBS, you can create, save, rename, and delete views.



2.3 DATA BLOCKS

Each data block is a set of columns grouped together based on categories of information. Using data blocks helps you organize and manage all the columns on a page.

Data blocks are customizable, and you can view them side by side and move them around in the register. The information in each data block displays in a grid like format, maintaining a spreadsheet look and feel.

| CBS | | | | ACS | | PAY ITEMS | | CHANGE REGISTER | | AUDIT LOG | | View : Forecasts | |
|--------------|--------------------------|----------------|--|--------------|-------------------------|-----------|---------------------|----------------------------|-------------------------------|------------------------------------|--------------------------|------------------|--|
| Tasks | | | | Task details | | Forecast | | Created from Live forec... | | | | | |
| CBS position | Description | WBS phase code | | Resource | Forecast (T/O) quantity | UoM | Forecast final cost | Forecast final Mhrs | Forecast final man hours/Unit | Forecast final productivity factor | Forecast final unit cost | | |
| 1 | Job Overhead | 1002 | | 16 | 1.00 | Lump Sum | \$ 695.00 | 11.00 | 11.00 | 0.00 | | | |
| 2 | Earthwork | 1069 | | 5 | 10,000.00 | CY | \$ 400,000.00 | 8,000.00 | 0.80 | 1.00 | | | |
| 3 | Concrete | 1071 | | 6 | 10,000.00 | CY | \$ 1,500,000.00 | 30,000.00 | 3.00 | 1.00 | | | |
| 4 | Structural Steel | 1073 | | | 1,000.00 | Ton | \$ 1,000,035.71 | 20,000.71 | 20.00 | 1.05 | \$ | | |
| 4.1 | Erect Steel - Heavy | 1074 | | 5 | 800.00 | Ton | \$ 800,000.00 | 16,000.00 | 20.00 | 1.00 | \$ | | |
| 4.2 | Erect Steel - Light | 1005 | | 5 | 200.00 | Ton | \$ 200,000.00 | 4,000.00 | 20.00 | 1.00 | \$ | | |
| 4.3 | Bolted Connections | 1006 | | 8 | 2,000.00 | Ea | \$ 35.71 | 0.71 | 0.00 | 1,400.00 | | | |
| 5 | Materials | 1084 | | | 1.00 | Each | \$ 1,750,000.00 | 0.00 | 0.00 | 0.00 | \$ 1.75 | | |
| 5.1 | Earthwork - Materials | 1085 | | 1 | 10,000.00 | CY | \$ 250,000.00 | 0.00 | 0.00 | 0.00 | | | |
| 5.2 | Concrete - Materials | 1086 | | 1 | 10,000.00 | CY | \$ 1,000,000.00 | 0.00 | 0.00 | 0.00 | | | |
| 5.3 | Structure Steel - Mat... | 1087 | | | 1,000.00 | Ton | \$ 500,000.00 | 0.00 | 0.00 | 0.00 | | | |
| 5.4 | Iron Trailer | 1088 | | | 1.00 | PI S | \$ 0.00 | 0.00 | 0.00 | 0.00 | | | |
| Subtotals 13 | | | | | | | \$ 4,650,730.71 | 58,011.71 | | | | | |

Each type of data block has its own unique default settings such as date range selectors and date preset options (for financial periods). You can choose the total number of columns and panels for each data block.

2.3.1 RESIZE COLUMN WIDTH

Data blocks can be customized based on your viewing preferences.. You can resize the columns widths within a data block, so you are able to see all the data within a column.

In the below example, the Tasks Data block contains a column called Description. There are values in the Description column which have the capability of being expanded for better visibility. The shortened descriptions to be expanded are denoted by a '...' after the shortened description name.

| Tasks | | | |
|--------------------------|--------------|-----------------|----------------|
| | CBS position | Description | WBS phase code |
| <input type="checkbox"/> | 4.3 | Bolted Con... | 1006 |
| <input type="checkbox"/> | 3 | Concrete | 1071 |
| <input type="checkbox"/> | 5.2 | Concrete - ... | 1086 |
| <input type="checkbox"/> | 2 | Earthwork | 1069 |
| <input type="checkbox"/> | 5.1 | Earthwork - ... | 1085 |
| <input type="checkbox"/> | 4.1 | Erect Steel ... | 1074 |
| <input type="checkbox"/> | 4.2 | Erect Steel ... | 1005 |

If you want to resize and move the Description column to the right, select the Description column border, and drag it to the right. Stop dragging the column when you’re satisfied with the column width.

| Tasks | | | |
|--------------------------|--------------|---------------------|----------------|
| | CBS position | Description | WBS phase code |
| <input type="checkbox"/> | 5.4 | Materials | |
| <input type="checkbox"/> | 1 | Job Overhead | 1002 |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 |
| <input type="checkbox"/> | 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> | 2 | Earthwork | 1069 |
| <input type="checkbox"/> | 3 | Concrete | 1071 |
| <input type="checkbox"/> | 4 | Structural Steel | 1073 |
| <input type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 |

2.3.2 DATA BLOCK CATEGORIES

There are three categories of data blocks: Standard, Cost Category and Custom data blocks.

2.3.2.1 STANDARD DATA BLOCK

These include the following default data blocks:

- Task Details
- Actuals
- Current Budget & Estimate
- Forecast
- Forecast Delta

- Live Forecast
- Schedule

You can customize the columns grouped within each of these data blocks.

2.3.2.2 COST CATEGORY DATA BLOCK

These data blocks organize key project progress information by cost category, and include the following:

- Cost categories: Actuals
- Cost categories: Current Budget
- Cost categories: Current Estimate
- Cost categories: Forecast

You can change the columns in Cost Category data blocks.

2.3.2.3 CUSTOM DATA BLOCK

There are nine types of custom data blocks, each with their own unique characteristics:

The screenshot shows the 'Create new data block' dialog. The 'Data block type' list is highlighted with a red box. The 'General' type is selected. The 'Preview' section shows a header 'Title here' and a large area labeled 'General'. The 'Next' button is visible at the bottom right.

You have the freedom to choose the type that best meets your needs. You will then select which columns go into the custom data block.

2.3.3 ADD A DATA BLOCK

The following step by step walks you through adding a standard or cost category data block to the CBS tab of the Workspaces page.

ADD A STANDARD DATA BLOCK

1. On the CBS tab of the Workspaces page, click on the **Add data block** button on the right toolbar to open the Data block slide out panel.

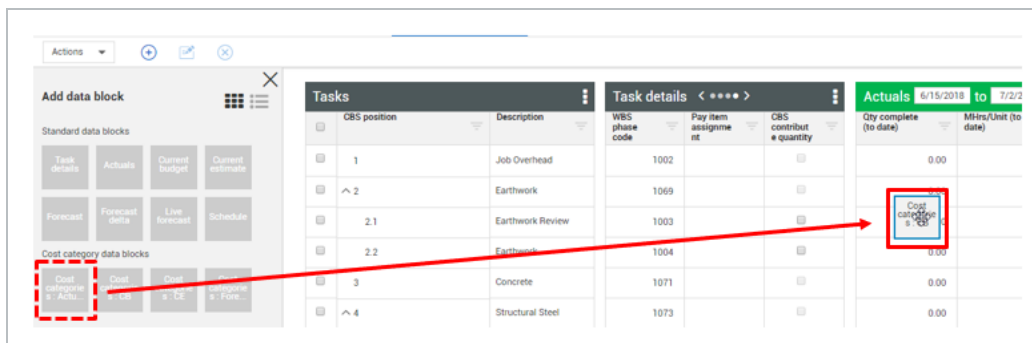


2. On the slide out panel on the left, drag and drop the **Cost categories: CB** data block into the register page on the right.

NOTE

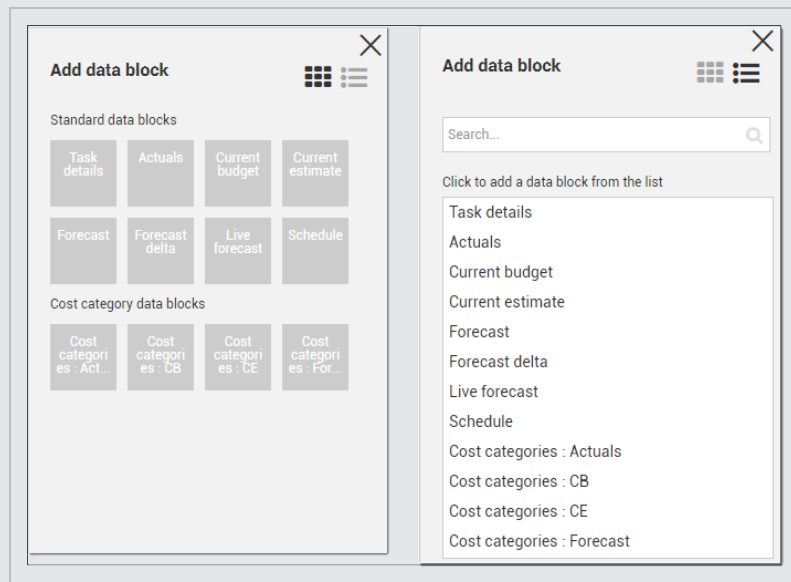
Each view holds a maximum of five data blocks.

- This will drop the data block at the very far right side and you can then move it via drag and drop in the register



TIP

You can view currently active project data blocks by either a thumbnail or list.



2.3.4 CREATE A CUSTOM DATA BLOCK

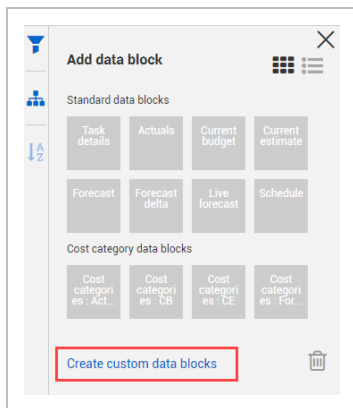
The following steps walk you through creating a custom data block from scratch.

CREATE A CUSTOM DATA BLOCK

1. On the CBS register page, click on the **Add data block** button, to open the data block slide out panel.



2. At the bottom of the Data Block menu, select **Create custom data blocks**.



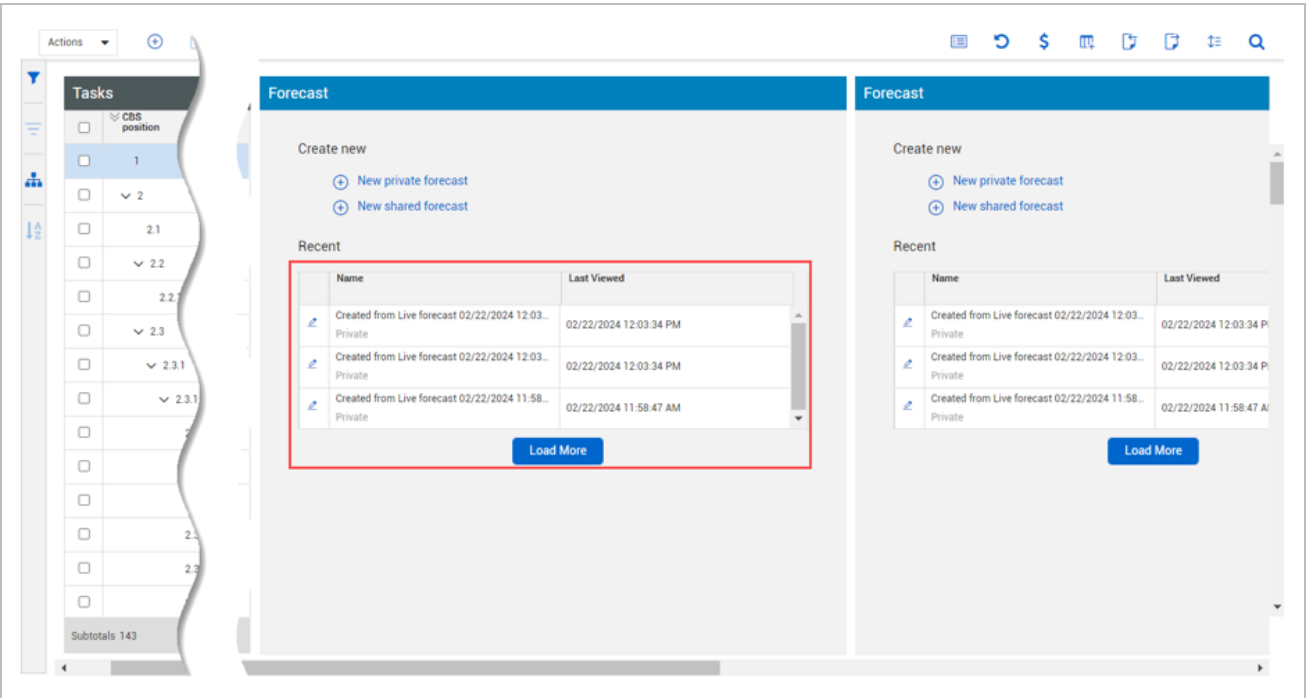
3. Select Data Block Type: **General**.
4. In the Data block title, enter in **[your initials] Training – Unit Cost**.
5. Select **Next**.
6. Using one of the methods above, add the following columns to the data block on the right:
 - Unit Cost (To Date)
 - CE Unit Cost (To Date)
 - Forecast Remaining Unit Cost
 - Forecast Final Unit Cost
 - CE Forecast Unit Cost G/L
7. Once your data block is finalized, click **Save** at the bottom right of the slide out panel.

NOTE

On the Add data blocks slide out panel, you will only see the Custom data blocks you create. Custom data blocks created by other users will only show up under their respective logins.

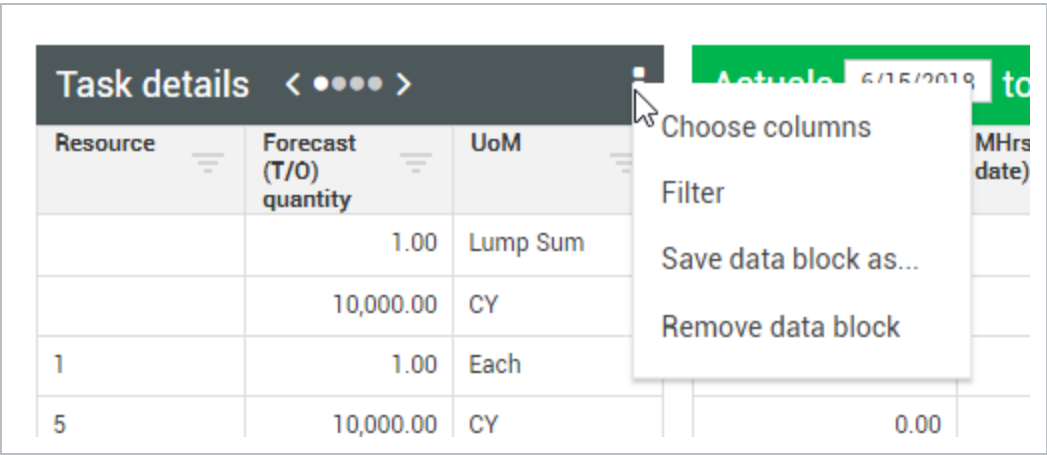
2.3.5 FORECAST DATA BLOCK

When you open the Forecasts view, you can select existing private forecasts or choose to create a new private or shared forecast. This helps to create a more manageable list of private and shared forecasts.



2.3.6 DATA BLOCK CONTEXT MENU

The data block Context Menu allows you to perform different operations specific to the data block you select.



The following table provides an overview of Context Menu options:

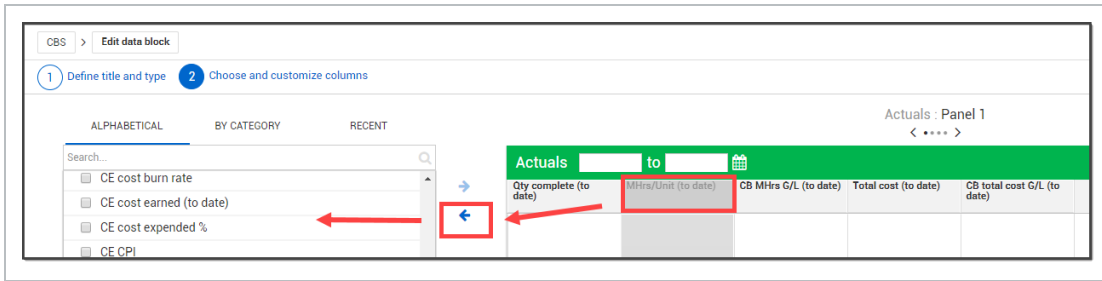
| Data Block Context Menu | |
|-------------------------|-------------|
| Title | Description |

| Data Block Context Menu | |
|---|---|
| Choose columns | Open the column chooser menu and move, add, and remove columns from the data block. |
| Filter | Filter data within a data block. |
| Save data block as | Create a copy of the existing data block and save it. |
| Remove data block | Remove the data block from the current view. |
| Color coded terminal items (Tasks data block only) | Add colors to terminal items of your current data block. |
| Color-coded CBS position (Tasks data block only) | Adds colors to all CBS lines. |
| Show/Hide WBS Phase Code (Tasks data block only) | Display or remove the WBS Phase Code column within the Tasks data block. |

In the following step by step, you will learn how to modify a custom or an existing data block using the Context Menu.

EDIT A DATA BLOCK

1. In the CBS register, select the **Context Menu** icon of the custom data block you created.
2. Select **Choose columns** from the context menu.
3. Add a new column to your custom data block.
4. Remove a column from your custom data block by selecting the header and clicking the left-facing arrow to return it to the left column.



5. To close the slide out panel, click the **APPLY** button on the bottom right of the slide out.

2.3.7 FILTER DATA BLOCK DATA

You can filter the columns in your data blocks to see relevant information pertaining to your specific needs.

The following Step by Step walks you through filtering data block columns.

FILTER DATA IN A DATA BLOCK COLUMN

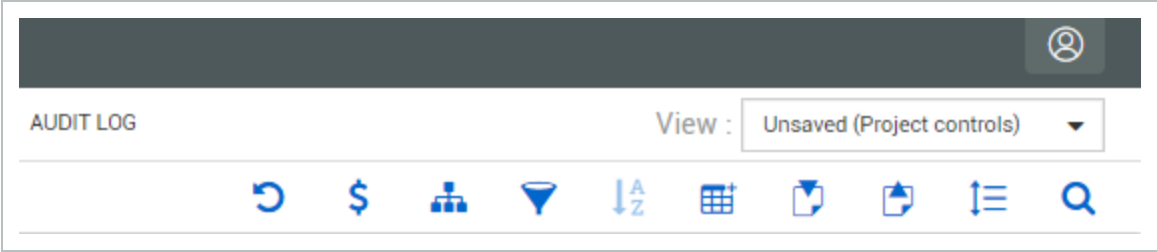
1. From any tab, on any column header, select the **yellow arrow** icon.
2. Select your desired **operator** from the first drop-down list.
3. Enter the **value** in the next field.
4. Select the next fields for **filters logic** and **additional operator**.
5. Select **Apply**. The pyramid turns yellow.
6. To clear the filter, select the same **column header** and **yellow arrow**.
7. Select **Clear**.

2.4 VIEWSETS

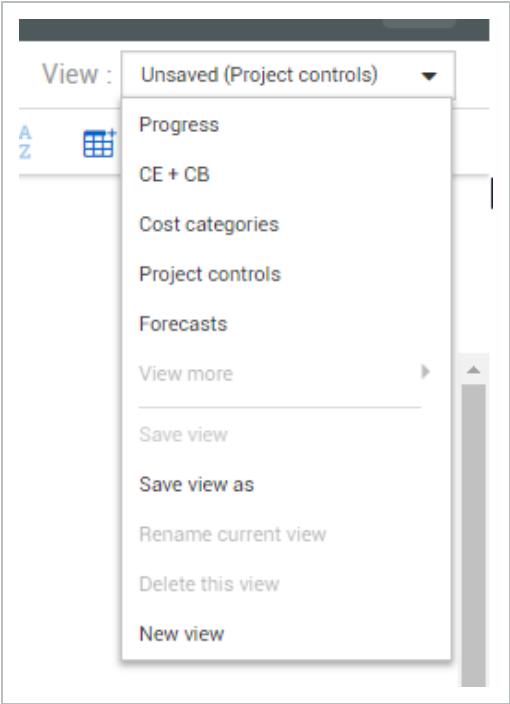
Once you have all desired data blocks organized to your liking, you can create a saved view of your page so that you can always revert to it. This saved view is called a Viewset. The viewset can also be shared with other users.

CREATE AND SAVE A VIEWSET

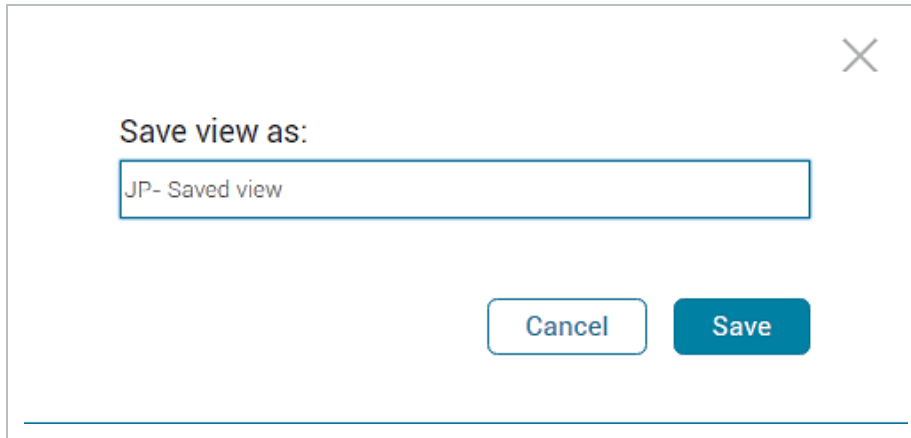
- 1. From the CBS register page, click on the **View** drop-down arrow.



- 2. From the Viewset drop-down list, select **Save view as**.



- 3. Name your view **[your initials] – Saved view**.

A dialog box titled "Save view as:" with a close button (X) in the top right corner. Below the title is a text input field containing "JP- Saved view". At the bottom of the dialog are two buttons: "Cancel" and "Save".

Save view as:

JP- Saved view

Cancel Save

4. Click **Save**.

2.4.1 SENDING VIEWS AND DATA BLOCKS

NOTE Certain permissions are needed to send views and data blocks to roles.

You can send views to all users that have a certain role. You can also send it to specific projects or full organizations. To send to a project, you have to be a user on that project or in that organization.

SEND A VIEWSET

1. With the Viewset selected and shown, from the Viewset drop-down list, select **Send view**.
2. In the **Search for a User** field, type an employee's name and select their name from the list.

Send view (test danielle) to

Users

Search for a user...

Send to

Users

No users selected

Roles

No roles selected

Projects

No projects selected

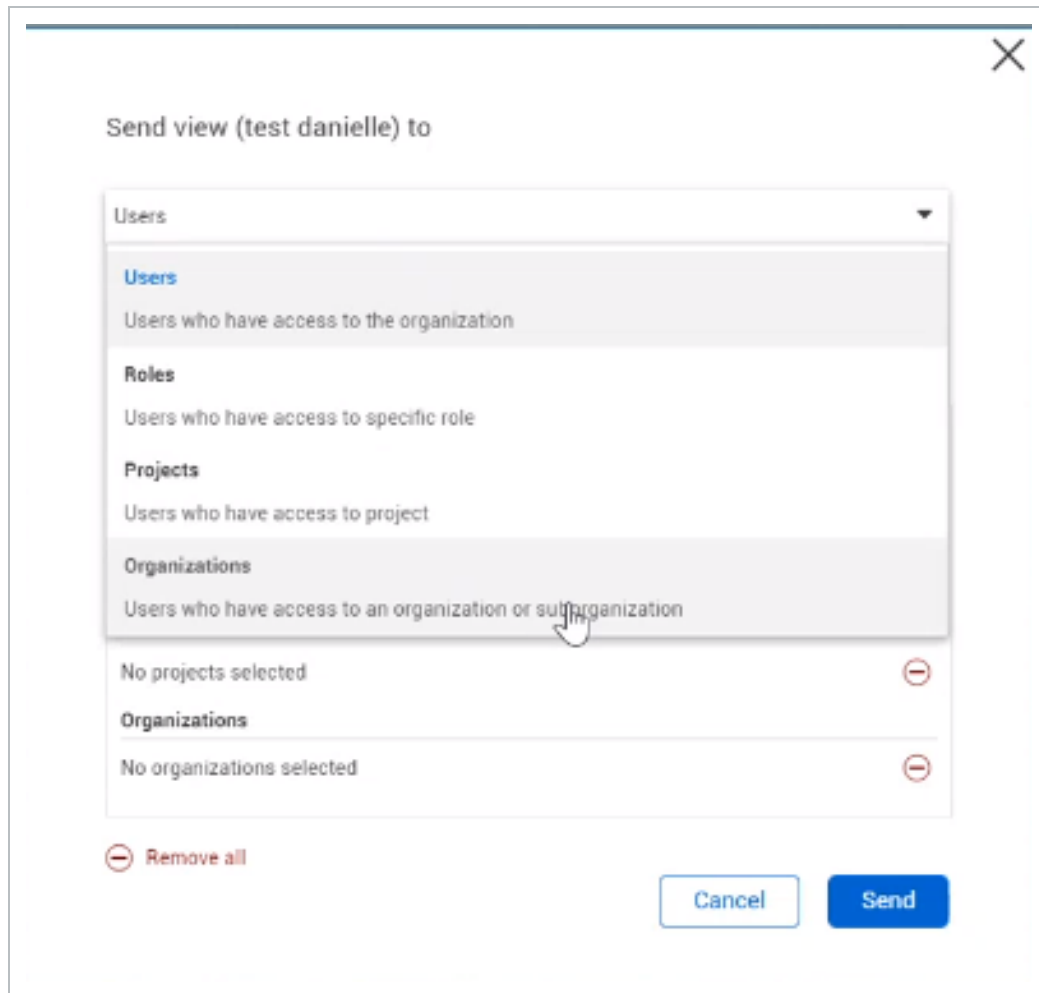
Organizations

No organizations selected

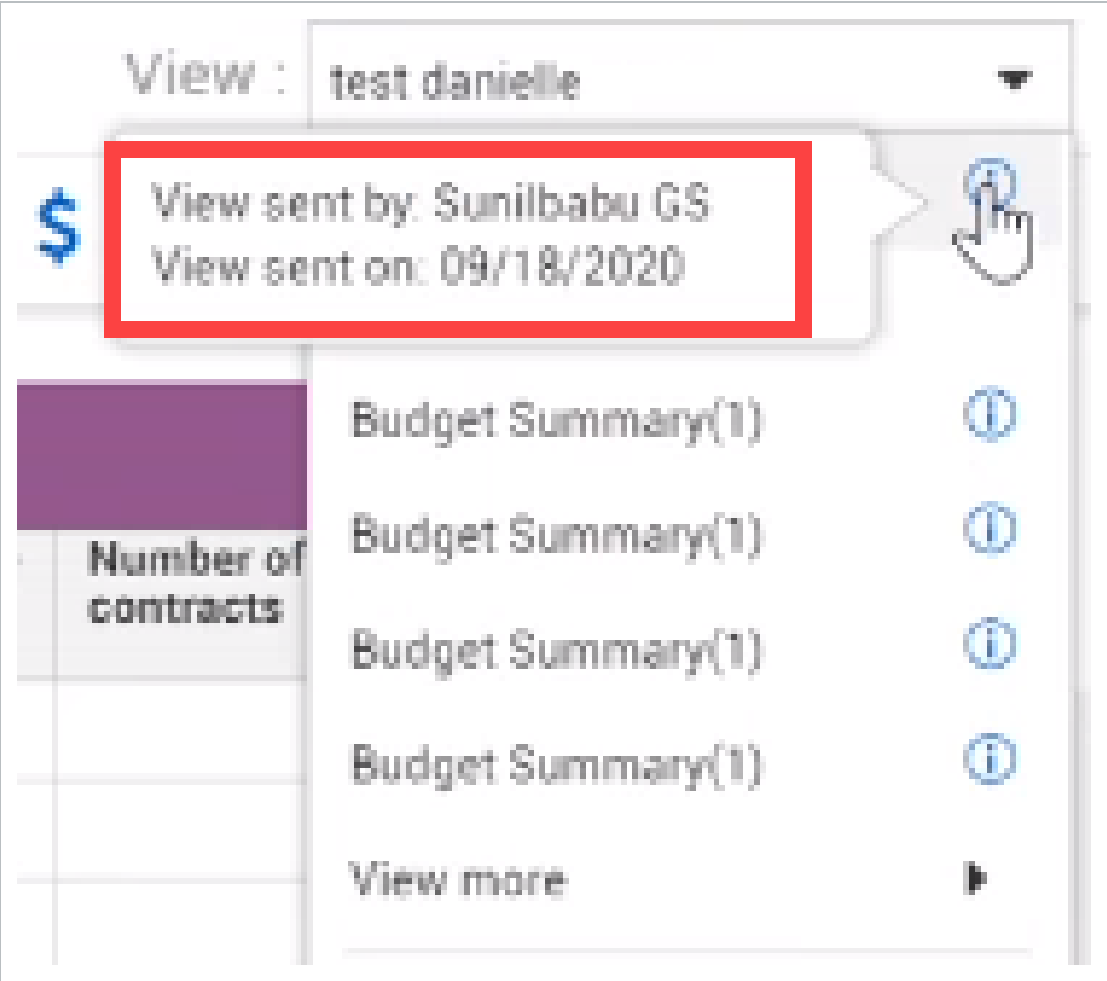
Remove all

Cancel Send

- To send to a project, you have to be a user on that project or organization. Then select the Send View to drop down list and select the option you want.



3. Click **Send**.
4. The selected Viewset will send a notification to the selected employee, and will be available in their drop-down list with sender's name and when the Viewset was sent.



NOTE If the user does not have the proper permissions to view all the columns in the view that was sent to them, then the employee will only be able to view the columns for which they have permissions.

2.5 ROW DENSITY

The row density feature allows you to change the spacing between rows within the various pages and slide out panels in Control, allowing you to view your data with the amount of spacing you prefer.

There are three options available:

- Relaxed

| Tasks | | | Task details < ● ● ● ● > | | |
|--------------------------|--------------|------------------|--------------------------|-------------------------|----------|
| <input type="checkbox"/> | CBS position | Description | Resource | Forecast (T/O) quantity | UoM |
| <input type="checkbox"/> | 1 | Job Overhead | | 1.00 | Lump Sum |
| <input type="checkbox"/> | ^ 2 | Earthwork | | 10,000.00 | CY |
| <input type="checkbox"/> | 2.1 | Earthwork Review | 1 | 1.00 | Each |
| <input type="checkbox"/> | 2.2 | Earthwork | 5 | 10,000.00 | CY |

- Narrow

| Tasks | | | Task details < ● ● ● ● > | | |
|--------------------------|--------------|------------------|--------------------------|-------------------------|----------|
| <input type="checkbox"/> | CBS position | Description | Resource | Forecast (T/O) quantity | UoM |
| <input type="checkbox"/> | 1 | Job Overhead | | 1.00 | Lump Sum |
| <input type="checkbox"/> | ^ 2 | Earthwork | | 10,000.00 | CY |
| <input type="checkbox"/> | 2.1 | Earthwork Review | 1 | 1.00 | Each |
| <input type="checkbox"/> | 2.2 | Earthwork | 5 | 10,000.00 | CY |
| <input type="checkbox"/> | 3 | Concrete | 5 | 10,000.00 | CY |

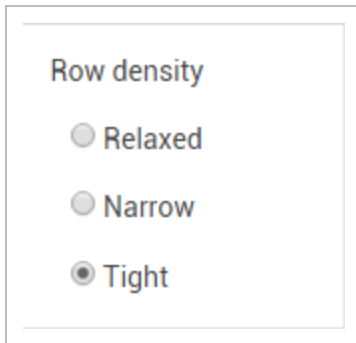
- Tight

| Tasks | | | Task details < ● ● ● ● > | | |
|--------------------------|--------------|------------------|--------------------------|-------------------------|----------|
| <input type="checkbox"/> | CBS position | Description | Resource | Forecast (T/O) quantity | UoM |
| <input type="checkbox"/> | 1 | Job Overhead | | 1.00 | Lump Sum |
| <input type="checkbox"/> | ^ 2 | Earthwork | | 10,000.00 | CY |
| <input type="checkbox"/> | 2.1 | Earthwork Review | 1 | 1.00 | Each |
| <input type="checkbox"/> | 2.2 | Earthwork | 5 | 10,000.00 | CY |
| <input type="checkbox"/> | 3 | Concrete | 5 | 10,000.00 | CY |
| <input type="checkbox"/> | ^ 4 | Structural Steel | | 1,000.00 | Ton |

The Row density icon is available on the CBS, ACS, Pay Items, Change Register, and Audit Log tabs.



When you select the Row density icon, a drop-down menu appears, where you can select the row density (space between rows) you prefer.



The row density you select applies to all registers within Control, including all tabs and slide out panels on the Workspaces and Project Library pages.

Row density is user-specific, so different users can apply different row densities within Control, and the row density option you select will remain the next time you log in.

NOTE

Row density is independent from the Viewsets you create. The row density you select is therefore not saved as part of your viewsets.

2.6 AUDIT LOG

The **Audit Log** tab within the CBS register is used to capture changes that were made within InEight Control and is broken down into five sub-tabs located on a left sidebar menu. Each log is designed to capture the changes that happened within each of the different registers and during synchronization.

All five audit logs can be accessed by selecting the Audit log tab on the menu bar, then selecting each individual audit log on the far left.

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

Actions

| | | | | | | | | | | | | | |
|----------------|----------|-----------|-----------|---------------|------|--------------|--------------|-------------|-------------|-------------|-------------|-------------------|-------------------|
| CBS | Audit ID | Data type | Item type | Desc | WBS | Attrit | Chan by | Chan date | Value befor | Value after | Actual comp | Forec total co... | Forec total co... |
| ACS | 4871359 | CBS | Cost Item | Concrete | 1071 | Schedule ... | Michael M... | 07/23/20... | False | True | | | |
| Pay items | 4871358 | CBS | Cost Item | Earthwork | 1069 | Schedule ... | Michael M... | 07/23/20... | False | True | | | |
| Integration | 4871357 | CBS | Cost Item | Job Overh... | 1002 | Schedule ... | Michael M... | 07/23/20... | False | True | | | |
| Import history | 4871356 | CBS | Cost Item | Structural... | 1073 | Scheduled | Michael M... | 07/23/20... | False | True | | | |

2.6.1 CBS

You can access the CBS audit log by selecting CBS from the left side menu.

The **CBS audit Log** captures changes in the CBS register and utilizes an attribute field to identify what type of change was made. Other columns include:

- Changed By (who made the change)
- Change Date (the date and time the change was made)
- The attribute value before and after
- Forecast cost before and after
- Forecast man-hours before and after
- Posting date before and after

| | | | | | | | | | | |
|----------------|----------|-----------|-----------|---------------|------|--------------|--------------|-------------|-------------|-------------|
| CBS | Audit ID | Data type | Item type | Desc | WBS | Attrit | Chan by | Chan date | Value befor | Value after |
| ACS | 4871359 | CBS | Cost Item | Concrete | 1071 | Schedule ... | Michael M... | 07/23/20... | False | True |
| Pay items | 4871358 | CBS | Cost Item | Earthwork | 1069 | Schedule ... | Michael M... | 07/23/20... | False | True |
| Integration | 4871357 | CBS | Cost Item | Job Overh... | 1002 | Schedule ... | Michael M... | 07/23/20... | False | True |
| Import history | 4871356 | CBS | Cost Item | Structural... | 1073 | Scheduled | Michael M... | 07/23/20... | False | True |

2.6.2 ACS

You can access the ACS Audit Log by selecting **ACS** from the left side menu.

The **ACS Audit Log** functions similarly to the CBS Audit Log, but contains the changes that were made within the ACS (Account Code Structure) tab. The fields utilized to capture what changes were made are:

- Change attribute
- Changed By (who made the change)
- Changed Date (the date and time the change was made)
- Attribute value before and after

| CBS | Audit ID | Data type | Item type | Description | AC No. | Attribute | Changed by | Changed date | Value before | Value after |
|----------------|----------|-----------|--------------|--------------------------------|-----------------|------------------------------|---------------|---------------------|--------------|-------------|
| ACS | 177 | ACS | Account Code | Structural Steel industrial... | 62.03.02.004.02 | Primary Auto Quantity | Paul Jernison | 11/19/2018 12:28 PM | False | True |
| Pay items | 176 | ACS | Account Code | Structural Steel industrial... | 62.03.02.004.02 | Primary Auto Quantity | Paul Jernison | 11/19/2018 12:24 PM | True | False |
| Integration | 175 | ACS | Account Code | Structural Steel industrial... | 62.03.02.004.06 | Primary Quantity | Paul Jernison | 11/19/2018 12:21 PM | 800.00 | 400.00 |
| Import history | 174 | ACS | Account Code | Structural Steel industrial... | 62.03.02.004.06 | Primary Auto Quantity | Paul Jernison | 11/19/2018 12:21 PM | True | False |
| | 170 | ACS | Account Code | Structural Steel industrial... | 62.03.02.004 | Contribute Primary To Pri... | Paul Jernison | 11/19/2018 11:30 AM | False | True |

2.6.3 PAY ITEMS

You can access the Pay Item Audit Log by selecting **Pay Items** from the left side menu.

| CBS | Audit ID | Data type | Item type | Description | Pay Item No. | Attribute | Changed by | Changed date | Value before | Value after |
|----------------|----------|-----------|-----------|-------------|--------------|----------------|------------|-------------------|--------------|-------------------|
| ACS | 4873330 | Pay Item | Pay Item | Pay Item 1 | 001 | Billing Method | Renee Japp | 07/26/2019 01:... | Cost Plus | Fixed Final Price |
| Pay items | 4872029 | Pay Item | Pay Item | | 1 | Pay item tag 8 | Renee Japp | 07/24/2019 02:... | | PY 8 |
| Integration | 4872028 | Pay Item | Pay Item | | 1 | Pay item tag 6 | Renee Japp | 07/24/2019 02:... | | PY 6 |
| Import history | 4872027 | Pay Item | Pay Item | | 1 | Pay item tag 4 | Renee Japp | 07/24/2019 02:... | | PY 4 |

The **Pay Item Log** again functions similarly but contains changes that were made to the pay items. The fields utilized to capture what changes were made are:

- Attribute
- Changed By (who made the change)
- Changed Date (the date and time the change was made)
- Value before and Value after
- Total price before and after

| Audit ID | Description | Attribute | Changed by | Changed date | Value before | Value after | Total price before |
|----------|---------------|-------------|-------------|-------------------|--------------|---------------|--------------------|
| 1333638 | Testing 07/31 | Description | paul trippi | 07/31/2019 08:... | Test | Testing 07/31 | \$1040.00000000... |
| 1333637 | Testing 07/31 | Sales Order | paul trippi | 07/31/2019 08:... | | S1 | \$40.000000000... |

2.6.4 INTEGRATION

You can access the Integration/Sync Audit Log by selecting **Integration** from the left side menu.

| | Audit ID | Interface | Status | Processing details | Start | Finish | User name | Log Handle |
|--------------------|----------|--------------|-----------|------------------------|---------------------|---------------------|--------------------|---|
| CBS | | | | | | | | |
| ACS | 65639 | ActualQty | Succeeded | 4 of 4 | 07/29/2019 03:23 PM | 07/29/2019 03:24 PM | pavithra baskaran1 | 4a2a98f6-eaa6-431b-81f- |
| Pay items | 65638 | LiveForecast | Succeeded | 4 of 4 | 07/29/2019 03:23 PM | 07/29/2019 03:24 PM | pavithra baskaran1 | ce90c8df-f916-4a50-847- |
| Integration | 65637 | Budget | Succeeded | 4 of 4 | 07/29/2019 03:23 PM | 07/29/2019 03:24 PM | pavithra baskaran1 | 43b8dc1c-6825-413a-9c- |
| Import history | 65636 | CBS | Succeeded | 4 of 4 | 07/29/2019 03:23 PM | 07/29/2019 03:24 PM | pavithra baskaran1 | 0985605a-745c-4f27-88- |


The **Sync Audit Log** is different from the other three. This log is used to capture:

- Whether the synchronization process between InEight Control and the ERP system was completed successfully
- How long the sync process took to complete and who requested the sync

It keeps track of the functions performed under the Actions > Sync menu.

The syncing process will be discussed further in the *Chapter 11 — Audit Log Integration on page 484*.

To help troubleshoot sync issues, you can click the link under the Processing details column to get more information on which steps succeeded, are suspended, or failed.


Last updated: 08/29/2018 01:03 PM
Use shortcut key F5 to refresh status

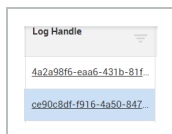
Completed details - - Plan quantities pull: 31570

| Step | Status |
|-------------------------|----------|
| Step 1: Recieving data | Complete |
| Step 2: Populating data | Complete |

Close

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INEIGHT

If a sync error should occur, you can click on the Log Handle link to obtain troubleshooting information.



This brings you into the InEight **Suite App Logs** screen, where you can see information relating to the error including Level, Time, Domain, Area, Exception Message, Exception Type and Correlation Id, which can help you determine the cause of the sync error.

2.6.5 IMPORT HISTORY

You can access the Import history audit log by selecting **Import history** from the left side menu.

The Import history log contains status information for all imports coming into all InEight products. For example, cost item and actuals import processes can both be viewed in the Import history log for status, then you can eventually make corrections and reprocess.

| CBS | File name | Status | Processi Details | Total line items | Errors | Total imported | Added estimate resource | Added pay items | Created by | Created date | Last edited by | Last edited date |
|----------------|--|------------|---------------------|------------------------|--------|-------------------|-------------------------------|-----------------------|---------------|-----------------|----------------------|------------------------|
| ACS | Market_ST_9_8_17_GMP_Baseline.xer (Mark... | Failed | Step 3 | 1842 | 0 | 0 | 0 | 0 | Renee Japp | 07/24/2019 1... | Renee Japp | 07/24/2019 1... |
| Pay items | Market_ST_9_8_17_GMP_Baseline.xer (Mark... | Failed | Step 3 | 1842 | 0 | 0 | 0 | 0 | Renee Japp | 07/23/2019 1... | Renee Japp | 07/23/2019 1... |
| Integration | Book1.xlsx | Processing | Step 3 | 2 | 2 | 0 | 0 | 0 | Renee Japp | 07/12/2019 0... | paul trippi | 07/30/2019 0... |
| Import history | Market_ST_9_8_17_GMP_Baseline.xer (Mark... | Cancelled | Step 5 | 0 | 0 | 0 | 0 | 0 | Renee Japp | 07/10/2019 0... | Renee Japp | 07/23/2019 1... |

The Import history audit log allows you to take action on import and sync failures, based on error messages. Error messages are contained within the error file for those imports that have failed import.





You can view progress in sync longs, view error messages, and then resolve issues in effort to continue with your import.

Control – Audit Log

| Section | | Description |
|---------|--------------------|--|
| 1 | File name | The name of the actual import file being used to import data. |
| 2 | Status | The current status of the import file. There are six import status that can define the current state of an import process. |
| 3 | Processing Details | This column describes the processing state in which the file is being processed. This column is not applicable for all statuses. |
| 4 | Total line items | This is the total line items that are included within the Excel import file. |

Control – Audit Log (continued)

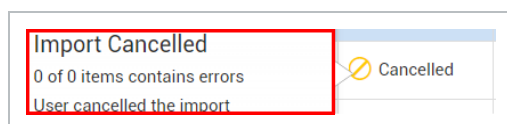
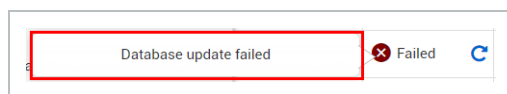
| Section | | Description |
|---------|--------------------------|---|
| 5 | Errors | This is a count of the number of errors during import. |
| 6 | Total import | This is the total amount of records that were successfully imported from the Excel import file. |
| 7 | Added estimate resources | This is the total amount of added estimate resources that were added in the CBS. |
| 8 | Added pay items | This is the total amount of pay items successfully imported from the Excel import file. |
| 9 | Created by | This is user responsible for importing the Excel upload file. |
| 10 | Created date | This is the actual date the Excel upload file was imported. |
| 11 | Last edited by | This is the last user to edit the Excel upload file. |
| 12 | Last edited date | This is the last date the Excel upload file was edited. |

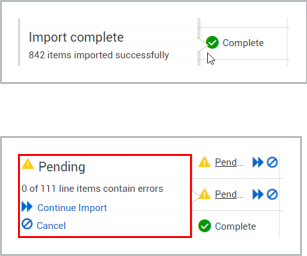
| File name | Status | Processing Details | Total line items | Errors | Total imported | Added estimate resources | Added pay items | Created by | Created date | Last edited by | Last edited date |
|-------------------|---|--------------------|------------------|--------|----------------|--------------------------|-----------------|-------------|--------------------|----------------|--------------------|
| NEWPROJ.xer (D... |  Pending | Step 5 | 18 | 0 | 0 | 0 | 0 | paul trippi | 08/02/2019 12:1... | paul trippi | 08/02/2019 12:1... |
| NEWPROJ.xer (D... |  Cancelled | Step 5 | 0 | 0 | 0 | 0 | 0 | paul trippi | 08/02/2019 12:1... | paul trippi | 08/02/2019 12:1... |
| NEWPROJ.xer (D... |  Cancelled | Step 5 | 0 | 0 | 0 | 0 | 0 | paul trippi | 08/02/2019 12:0... | paul trippi | 08/02/2019 12:1... |
| NEWPROJ.xer (D... |  Cancelled | Step 5 | 0 | 0 | 0 | 0 | 0 | paul trippi | 08/02/2019 12:0... | paul trippi | 08/02/2019 12:0... |

If you hover over one of these Status symbols below, it provides you with a brief explanation of the selected status.



Here are some examples:





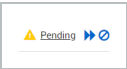
There are six possible import statuses listed below.

Import history Statuses

| Status | Status Icon | Definition |
|--------------------|-------------|---|
| Failed | | Import failed due to a duplicate row within the Excel file. |
| Failed with errors | | Import failed with an attachment to download with further information. |
| Pending | | The Excel import file is pending, further action is needed. The double blue arrows will open a new window where you can correct and re-process the Excel import file. The blue circle with the line through it will cancel the import completely. |
| Cancelled | | The Excel import file has been cancelled. |
| Processing | | The Excel import is still processing. Once this is complete, the status will move into one of the other five statuses. |
| Complete | | Processing of the Excel import files is complete. |

2.6.5.1 PENDING STATUS

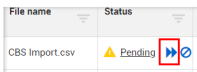
When an import is in a **Pending** status, this means that further action is needed to complete the Excel file import.



There are two options:

OPTION 1

1. By selecting the double blue errors, you will be taken to another window to continue processing the faulty records.



As an example, in the below screenshot, there are 3 existing errors. If you hover over one of the errors, it will tell you what needs to be corrected.

In this case, there is an issue with the account code assignment, as the pop-up hover suggests.

Audit log > Import history > CBS Import.csv

Find previous error 3 errors remain Find next error

Cancel Import

| Status Details (WBS phase code) | | Import Columns | | | | |
|---------------------------------|---------------------------------------|----------------------------|--------------|-----------------------------|----------------|-----------------|
| Import status | CBS match status | Import method | CBS position | Description | WBS phase code | Account code |
| Pending | ✓ to 1002 [1] [Job Overhead] | Update existing items o... | 1 | Job Overhead | 1002 | 20 |
| Pending | ✓ to 1069 [2] [Earthwork] | Update existing items o... | 2 | Earthwork | 1069 | 51 |
| Pending | ✓ to 1071 [3] [Concrete] | Update existing items o... | 3 | Concrete | 1071 | 61 |
| Pending | ✓ to 1073 [4] [Structural Steel] | Update existing items o... | 4 | Structural Steel | 1073 | |
| Pending | ✓ to 1074 [4.1] [Erect Steel - H...] | Update existing items o... | 4.1 | Erect Steel - Heavy | 1074 | 62.03.02.004.06 |
| Pending | ✓ to 1005 [4.2] [Erect Steel - Li...] | Update existing items o... | 4.2 | Erect Steel - Light | 1005 | 62.03.02.004.02 |
| Pending | ✓ to 1006 [4.3] [Bolted Connec...] | Update existing items o... | 4.3 | Bolted Connections | 1006 | 62.03.02.006 |
| Pending | ✓ to 1084 [5] [Materials] | Update existing items o... | 5 | Materials | 1084 | 1112233 |
| Error | ✓ to 1085 [5.1] [Earthwork - M...] | Update existing items o... | 5.1 | Earthwork - Materials | 1085 | 1112234 |
| Error | ✓ to 1086 [5.2] [Concrete - Mat...] | Update existing items o... | 5.2 | Concrete - Materials | 1086 | 1112235 |
| Error | ✓ to 1087 [4.4] [Module 01 - Er...] | Update existing items o... | 4.4 | Module 01 - Erect Steel ... | 1087 | 1112236 |

2. When you double click into one of the 3 errors, it will take you directly into an account code assignment screen where you can make the correction.

From here you can select an account code and click on Assign.

Assign account code

Search...

| Select | Account code | Description | UoM |
|----------------------------------|--------------|--------------------------------------|-----|
| <input type="radio"/> | 00 | Overhead.6233 EDIT | PLS |
| <input type="radio"/> | 00.03 | OH - Get Work | MWk |
| <input type="radio"/> | 00.03.02 | OH - Estimating | MWk |
| <input checked="" type="radio"/> | 00.03.02.002 | OH - Estimating - Engineering (Pr... | MWk |
| <input type="radio"/> | 00.03.02.006 | OH - Estimating - Research & Qu... | MWk |
| <input type="radio"/> | 00.03.02.008 | OH - Estimating - Prepare Estima... | MWk |
| <input type="radio"/> | 00.03.02.010 | OH - Estimating - Review (Pre-Bid) | MWk |
| <input type="radio"/> | 00.03.02.014 | OH - Estimating - Post Bid | MWk |
| <input type="radio"/> | 00.03.02.016 | OH - Estimating - Management | MWk |
| <input type="radio"/> | 00.03.02.018 | OH - Estimating - 2nd Estimates | MWk |

Cancel

Assign

3. After all corrections have been made to the existing errors, you can select the Import button on the top right on the screen.

Find next error

Cancel

Import

| Description | WBS phase code | Account code |
|------------------|----------------|--------------|
| Job Overhead | 1002 | 20 |
| Earthwork | 1069 | 51 |
| Concrete | 1071 | 61 |
| Structural Steel | 1073 | |

- 4. A warning message appears stating that changes will be made, and this project will be disabled until completion.

Importing cost items will update the CBS for all connected users. Notify all users that changes need to be saved prior to continuing with import. Upon commitment of import, this project will be disabled until completion. Please note this may take several mins.

Active Users :

bridgette quintero

Import now

Save draft

- 5. Once processing has finished, you will receive an Import complete message.

Import complete

The project has updated and is now enabled.




Close

- 6. The Import history page now shows that the imported file is now successfully imported and updates the Last edited date.

| File name | Status | Total line items | Errors | Total imported | Added estimate resources | Added pay items | Created by | Created date | Last edited by | Last edited date |
|----------------|----------|------------------|--------|----------------|--------------------------|-----------------|----------------|----------------------|----------------|----------------------|
| CBS Import.csv | Complete | 11 | 0 | 0 | 0 | 0 | Keith Anderson | 06/19/2019 06:30 ... | paul trippi | 07/31/2019 10:32 ... |

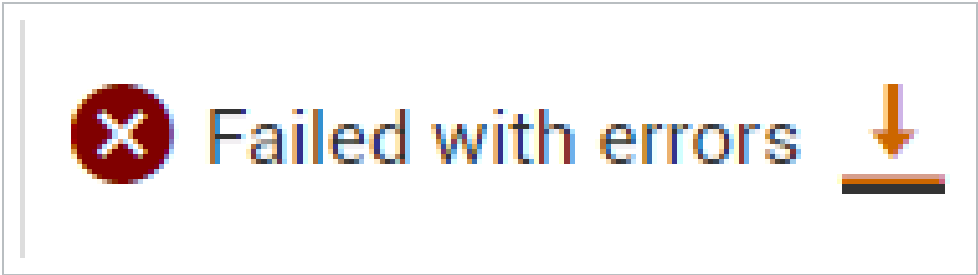
OPTION 2

- 1. Selecting cancel, the blue circle with the line through it, will cancel the import completely.

| File name | Status |
|----------------|--|
| CBS Import.csv |  Pending   |

2.6.5.2 FAILED WITH ERRORS STATUS

When an import is in a **Failed with errors** status, the system will generate a Word error report. The document displays detected errors while attempting to import the Excel file values. Errors will need to be reviewed within the Word document



An example of the Failed with errors Word **error file** provides direction on how to proceed with correcting the Excel import errors, and a course of action to run the import again

```
Import actuals CBS data: CBS import.xls
File Import attempted on: 7/31/2019 3:45:03 PM

The following errors were detected while attempting to import actual
values into control.
Review the errors below, once all the errors have been resolved,
reattempt the import to Control.

Error 1: Posting date in external system must be valid (this error
affects 10 WBS/CBS items out of 10 total attempted imported WBS/CBS items
and 10 rows out of 10 total attempted imported rows)

WBS: 2904
CBS: 10
Row: 7

WBS: 2905
CBS: 11
Row: 8

WBS: 2906
CBS: 12
Row: 9

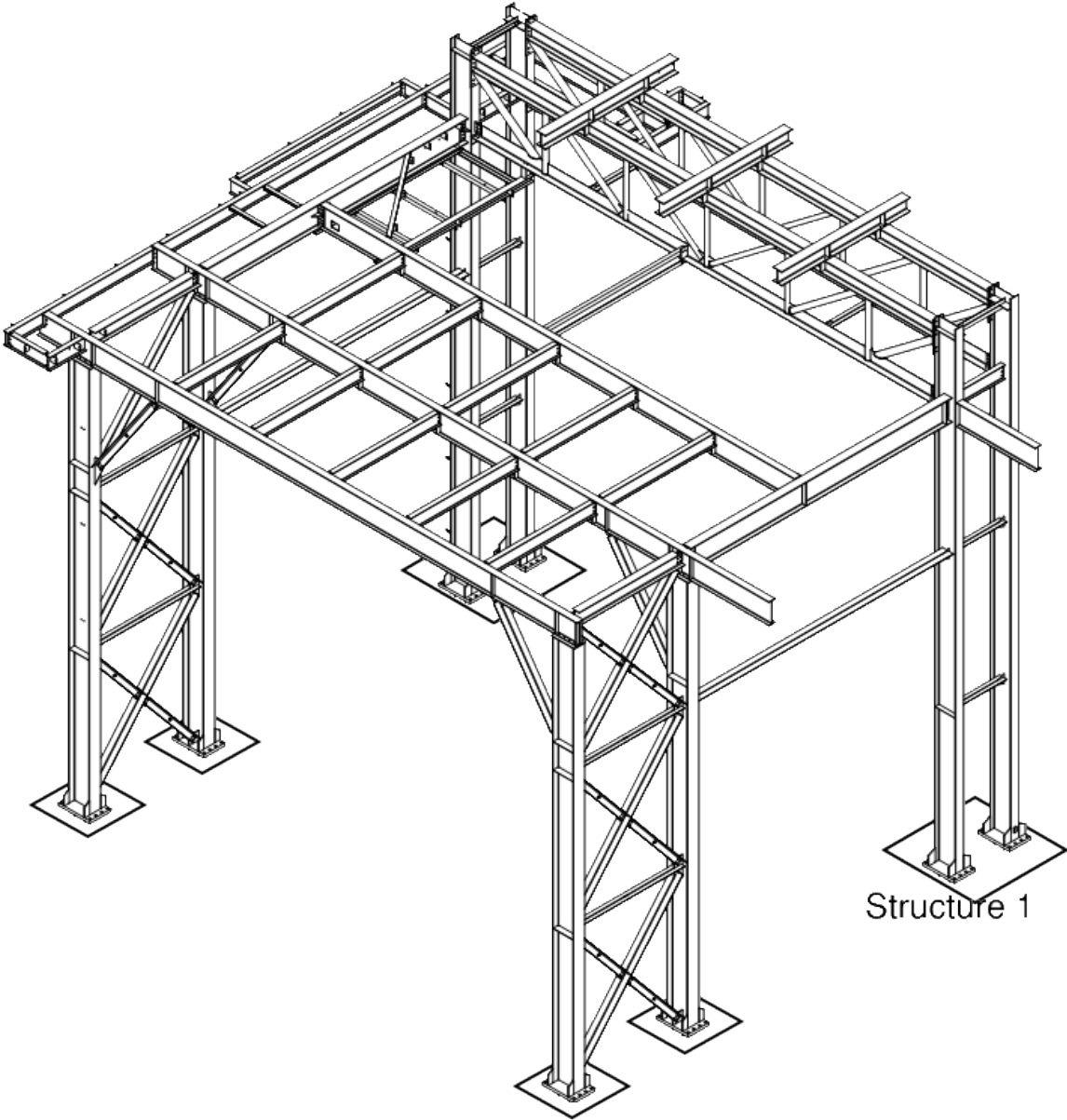
WBS: 2907
CBS: 13
Row: 10
```

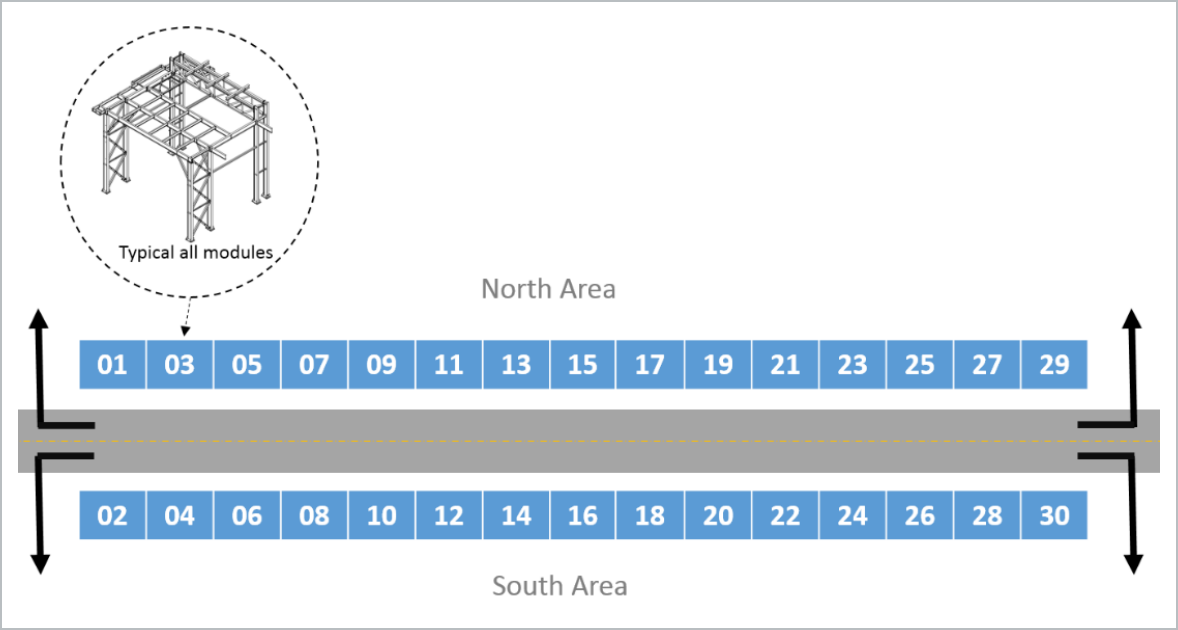
The only option with a Failed with errors status is to review the errors, resolve them within the initial Excel file import, and then re-import the file.

2.7 PROJECT INTRODUCTION

You will be using the project titled “**Steel Structure Training Job**” for the InEight Control training. Within this Control training, you will create cost items and other data that will be utilized in trainings covering the other InEight products (Plan, Progress, etc.)

The project consists of the construction of multiple steel support platforms in a greenfield site. The project scope ranges from site preparations, concrete foundation and footing pours, steel erection, and bolted connections.





REVIEW

1. Match each term to its correct definition:

| <u>Term</u> | <u>Definition</u> |
|-------------------|---|
| Home Menu | Select available actions for the current register tab you are viewing. |
| Actions Menu | Navigate to the CBS, ACS, Pay Items, Change Register and Audit Log register pages. |
| Tabs | Select what application you want to use (Control, Plan, etc.), as well as other project settings. |
| Right Toolbar | Contains functions for the register page you are currently viewing. |
| Second Level Menu | Returns to the Organization or Project home landing page |

2. Which two of the following are not a data block category?
- a. Standard
 - b. Unique
 - c. Cost category
 - d. Custom
 - e. Audit
3. How are filtered columns in InEight Control indicated in the content register's data blocks?
- a. Column header is highlighted green
 - b. Column will shade red

- c. Sort/Filter button in column header is yellow
- d. No indication is given

4. How do you change the spacing of your rows in Control?

- a. Select the Row density icon from the right toolbar
- b. Select Row density from the Actions menu
- c. Change Row density in the Project settings

SUMMARY

As a result of this lesson, you can:

- Navigate the InEight Control Workspaces page
- Manage data blocks
- Group Pay Items
- Manage columns
- Create viewsets
- Change row density

This page intentionally left blank.

COST ITEM SETUP

LESSON DURATION: 45 MINUTES

LESSON OBJECTIVES

After completing this lesson, you will be able to:

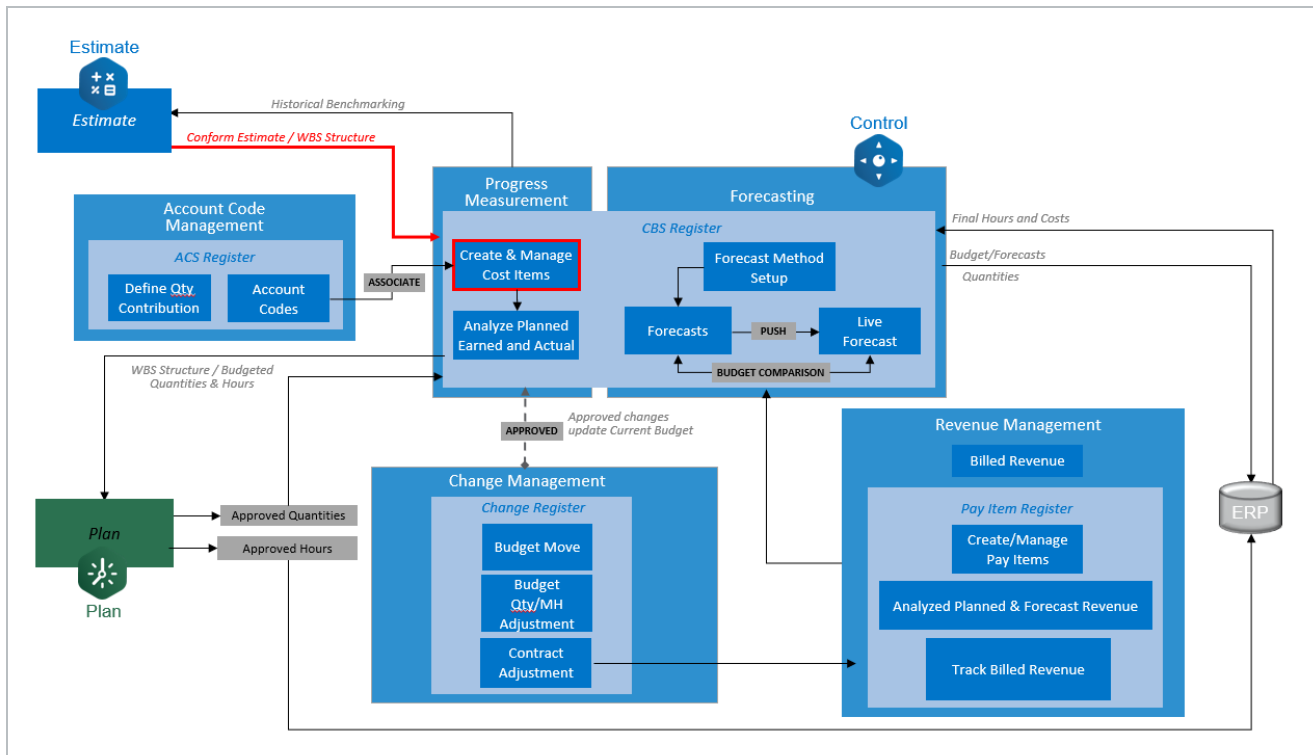
- Explain the Cost Breakdown Structure and its purpose
- Create, arrange and delete cost items
- Import cost items

LESSON TOPICS

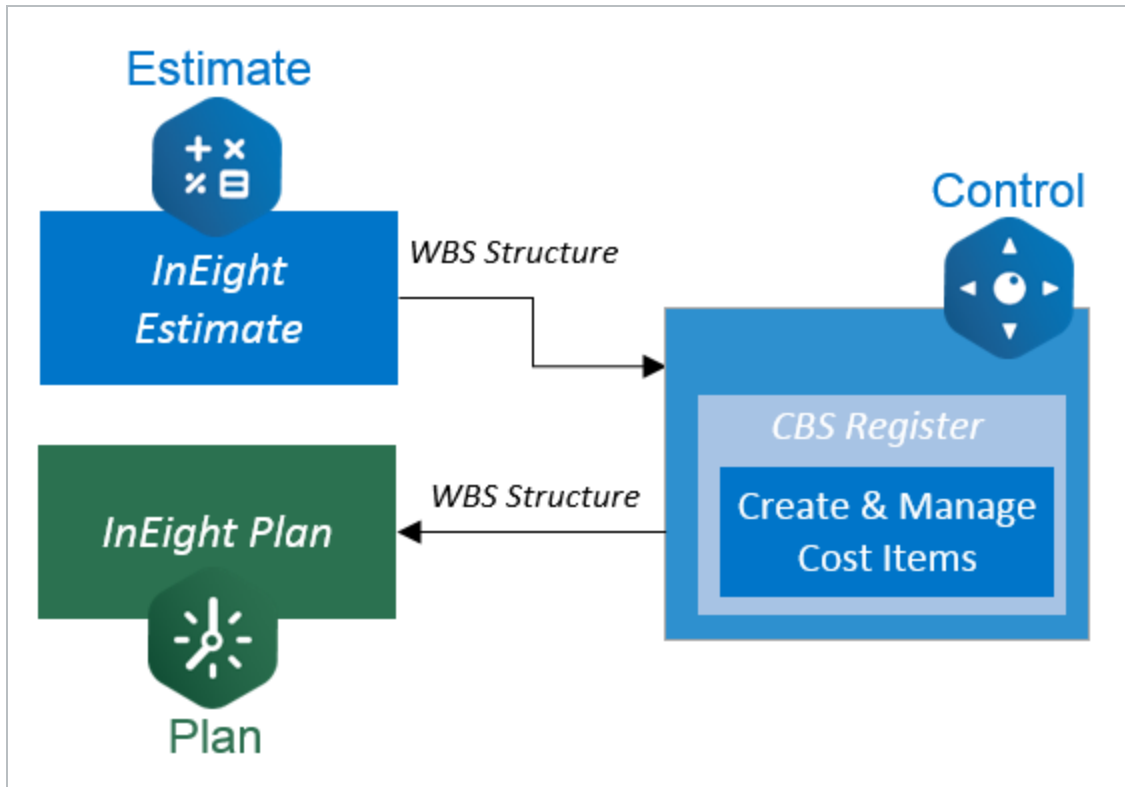
| | |
|---|-----|
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| | |
|--|-----|
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3.1 INEIGHT CONTROL WORKFLOW - COST ITEM SETUP



InEight Control is the application used to create and manage cost items. The cost breakdown structure developed and maintained in Control is utilized by other InEight applications which inherently share the same data set to eliminate duplicate data entry.



3.2 COST ITEM OVERVIEW

3.2.1 COST BREAKDOWN STRUCTURE

The CBS (Cost Breakdown Structure) is the main tab of the Workspaces page in Control and is the tab where you typically spend most of your time. Each row in the CBS represents a work activity and is called a cost item.

Steel Structure Training Job 2 | 1... / Control / Workspaces

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

View : CE + CB

Actions

Task details

Current estimate

| Tasks | Task details | Current estimate | | | | | | | |
|---------------------------------------|---------------------------------------|------------------|------|--------------------|----------|---------------|-----------------|--------------|--------------|
| <input type="checkbox"/> CBS position | Description | WBS phase code | R.L. | Forecast (T/O) qty | UoM | CE total MHRs | CE total cost | CE MHRs/unit | CE units/MHr |
| <input type="checkbox"/> 1 | Job Overhead | 1002 | | 1.00 | Lump Sum | 0.00 | \$ 250,000.00 | 0.00 | 0.00 |
| <input type="checkbox"/> 2 | Earthwork | 1069 | 5 | 10,000.00 | CY | 8,000.00 | \$ 400,000.00 | 0.80 | 1.25 |
| <input type="checkbox"/> 3 | Concrete | 1071 | 5 | 10,000.00 | CY | 30,000.00 | \$ 1,500,000.00 | 3.00 | 0.33 |
| <input type="checkbox"/> 4 | Structural Steel | 1073 | | 1,000.00 | Ton | 23,000.00 | \$ 1,150,000.00 | 23.00 | 0.04 |
| <input type="checkbox"/> 4.1 | Erect Steel - Heavy | 1074 | 5 | 900.00 | Ton | 18,000.00 | \$ 900,000.00 | 20.00 | 0.05 |
| <input type="checkbox"/> 4.2 | Erect Steel - Light | 1005 | 5 | 200.00 | Ton | 4,000.00 | \$ 200,000.00 | 20.00 | 0.05 |
| <input type="checkbox"/> 4.3 | Bolted Connections | 1006 | 5 | 2,000.00 | Ea | 1,000.00 | \$ 50,000.00 | 0.50 | 2.00 |
| <input type="checkbox"/> 5 | Materials | 1084 | | 1.00 | Each | 0.00 | \$ 1,750,000.00 | 0.00 | 0.00 |
| <input type="checkbox"/> 5.1 | Earthwork - Materials | 1085 | 1 | 10,000.00 | Ton | 0.00 | \$ 250,000.00 | 0.00 | 0.00 |
| <input type="checkbox"/> 5.2 | Concrete - Materials | 1086 | 1 | 10,000.00 | CY | 0.00 | \$ 1,000,000.00 | 0.00 | 0.00 |
| <input type="checkbox"/> 5.3 | Structure Steel - Materials | 1087 | | 1,000.00 | Ton | 0.00 | \$ 500,000.00 | 0.00 | 0.00 |
| <input type="checkbox"/> 6 | Merrill Iron & Steel - Steel Material | 1088 | | 100.00 | Ton | 0.00 | \$ 50,000.00 | 0.00 | 0.00 |

The CBS is organized in a hierarchy of superior and subordinate cost items. A cost item is superior and/or subordinate based on its relationship to other cost items. This is similar to a parent and a child relationship where an individual can be both a parent and a child at the same time. The CBS is color coded to identify which level of the hierarchy a specific cost item is located.

Tasks

| <input type="checkbox"/> CBS position | Description | WBS phase code |
|---------------------------------------|-----------------------------|----------------|
| <input type="checkbox"/> 1 | Job Overhead | 1002 |
| <input type="checkbox"/> 2 | Earthwork | 1069 |
| <input type="checkbox"/> 3 | Concrete | 1071 |
| <input type="checkbox"/> 4 | Structural Steel | 1073 |
| <input type="checkbox"/> 4.1 | Erect Steel - Heavy | 1074 |
| <input type="checkbox"/> 4.2 | Erect Steel - Light | 1005 |
| <input type="checkbox"/> 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> 5 | Materials | 1084 |
| <input type="checkbox"/> 5.1 | Earthwork - Materials | 1085 |
| <input type="checkbox"/> 5.2 | Concrete - Materials | 1086 |
| <input type="checkbox"/> 5.3 | Structure Steel - Materials | 1087 |

Superior

→

→

| Tasks | | | |
|--------------------------|--------------|-----------------------------|----------------|
| <input type="checkbox"/> | CBS position | Description | WBS phase code |
| <input type="checkbox"/> | 1 | Job Overhead | 1002 |
| <input type="checkbox"/> | 2 | Earthwork | 1069 |
| <input type="checkbox"/> | 3 | Concrete | 1071 |
| <input type="checkbox"/> | 4 | Structural Steel | 1073 |
| <input type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light | 1065 |
| <input type="checkbox"/> | 4.3 | Bolted Connections | 1066 |
| <input type="checkbox"/> | 5 | Materials | 1084 |
| <input type="checkbox"/> | 5.1 | Earthwork - Materials | 1085 |
| <input type="checkbox"/> | 5.2 | Concrete - Materials | 1086 |
| <input type="checkbox"/> | 5.3 | Structure Steel - Materials | 1087 |

Subordinate

If a cost item has no subordinates it is considered a terminal cost item. Terminal cost items are where cost is tracked. All superior items are a roll up of the budget, manhours, and cost of the cost items below. Terminal items are identified with a special symbol located at the first column of each data block.

| Tasks | | | | Task details | |
|--------------------------|--------------|---------------------|----------------|--------------------------|--|
| <input type="checkbox"/> | CBS position | Description | WBS phase code | Resources | |
| <input type="checkbox"/> | 1 | Job Overhead | 1002 | <input type="checkbox"/> | |
| <input type="checkbox"/> | 2 | Earthwork | 1069 | <input type="checkbox"/> | |
| <input type="checkbox"/> | 3 | Concrete | 1071 | <input type="checkbox"/> | |
| <input type="checkbox"/> | 4 | Structural Steel | 1073 | <input type="checkbox"/> | |
| <input type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 | <input type="checkbox"/> | |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 | <input type="checkbox"/> | |
| <input type="checkbox"/> | 4.3 | Bolted Connections | 1006 | <input type="checkbox"/> | |
| <input type="checkbox"/> | 5 | Materials | 1084 | <input type="checkbox"/> | |

Terminal

This terminology and associated graphics provide a way to communicate and understand the hierarchy of the Cost Breakdown Structure. The following table provides definitions for each of these terms.

| Term | Definition |
|-------------|---|
| Superior | Cost item that has subordinate subcost items that roll up under it. |
| Subordinate | Cost item that is a child to a superior cost item. |

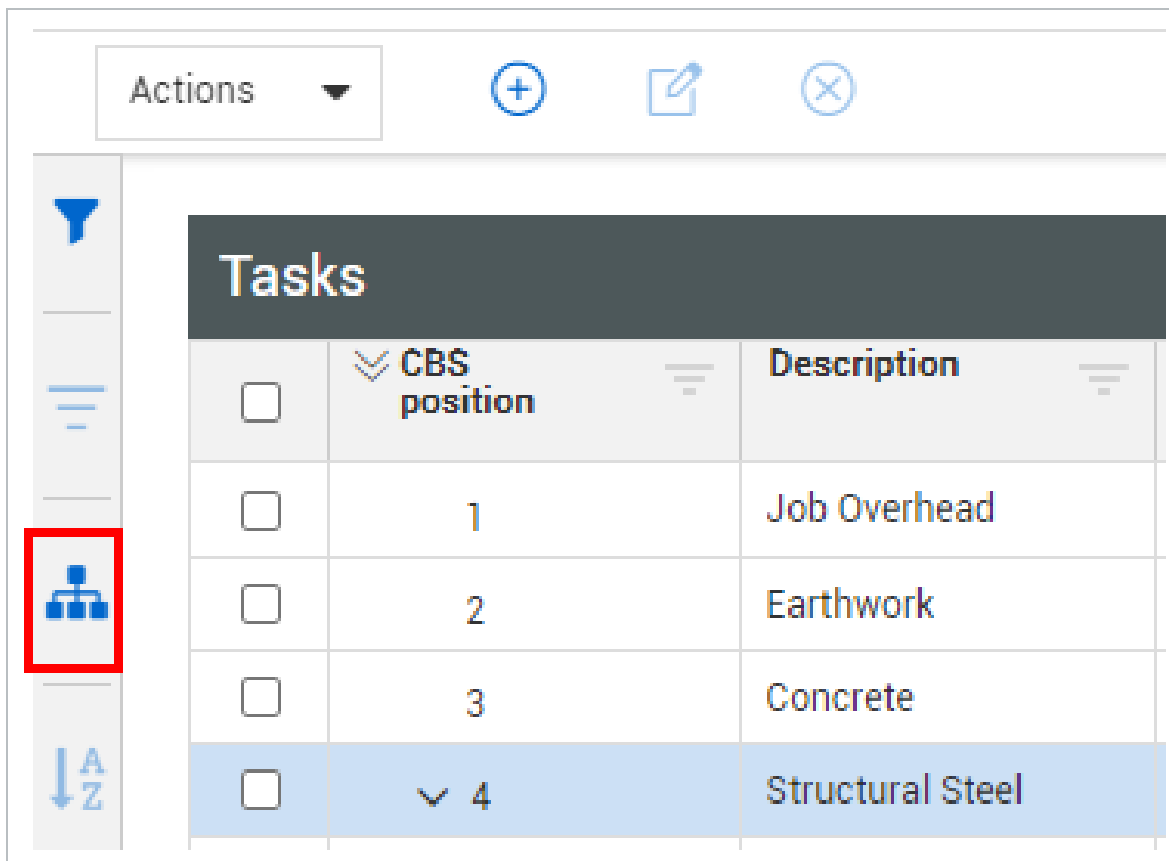
| Term | Definition |
|----------|--|
| Terminal | Cost item that has no subordinate beneath it. Costs and hours are defined at the terminal level. |

As accurate as estimators try to build the estimate, changes occur during the project's execution that affect the CBS register in Control. To learn how to maintain, improve, and use the CBS register properly, this topic focuses on the fundamentals of the Cost Breakdown Structure.

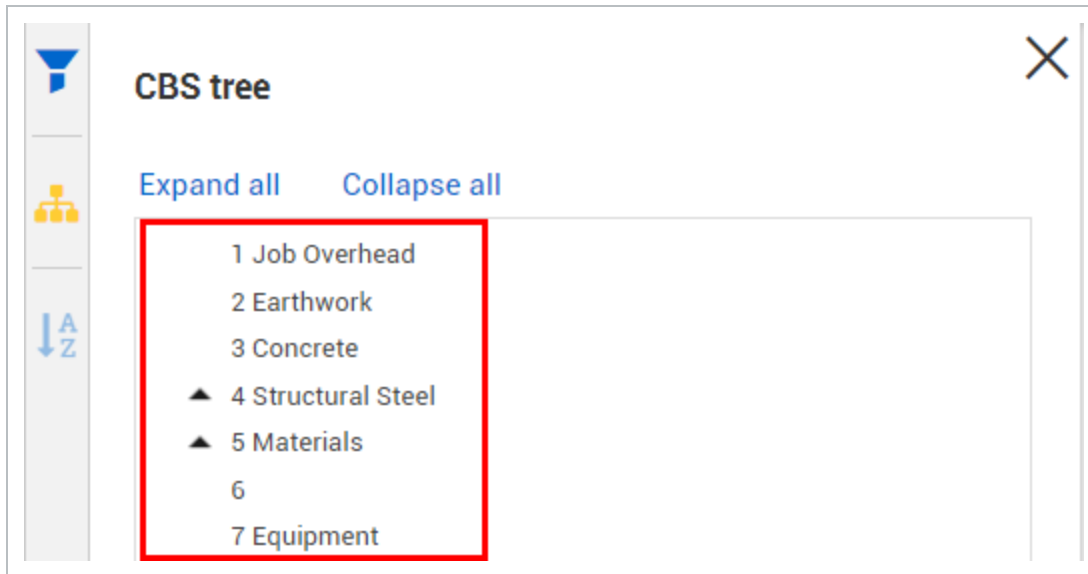
3.2.2 CBS TREE

The CBS tree provides a way to navigate up and down your Cost Breakdown Structure and a way to filter down to a subset of the structure.

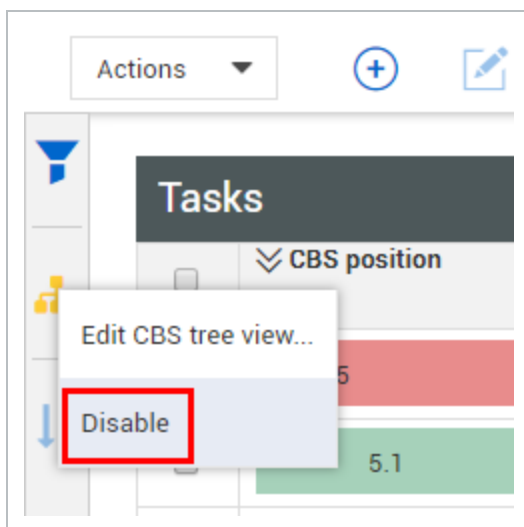
You open the CBS tree slide out panel by clicking on the CBS Tree icon on the Side Toolbar.



When selected, the CBS tree icon turns yellow and the slide out panel appears.



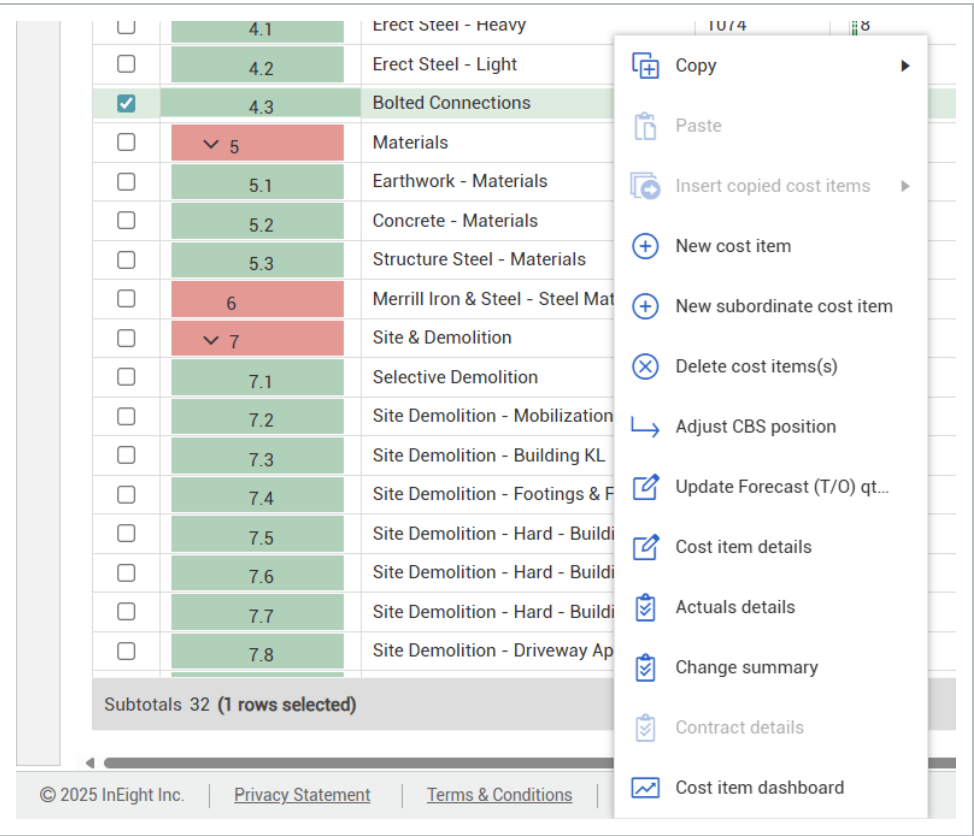
- Select Expand all to expand the entire Cost Breakdown Structure
- Select Collapse all to collapse the entire Cost Breakdown Structure
- Click on the arrow icons to expand a cost item to view its subordinates
- Select a cost item and then click **Apply** to filter your view to that cost item and its subordinates
- To clear the CBS filter, click the CBS tree icon and then click Disable

**TIP**

You can select more than one cost item on the tree to create a customized view.

3.2.3 COST ITEM MENU

You can access a variety of cost item details and actions from the Cost Item menu.



You can open the Cost Item menu in one of two ways:

- Right-click the cost item
- Click the three vertical dots in the Description column

| | | | |
|--------------------------|-----|---------------------|------|
| <input type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 |
| <input type="checkbox"/> | 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> | 5 | Materials | 1084 |

The following table provides details for the options in the Cost Item menu.

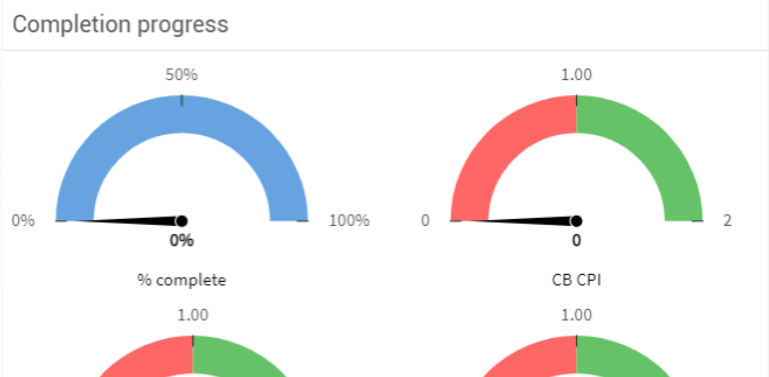
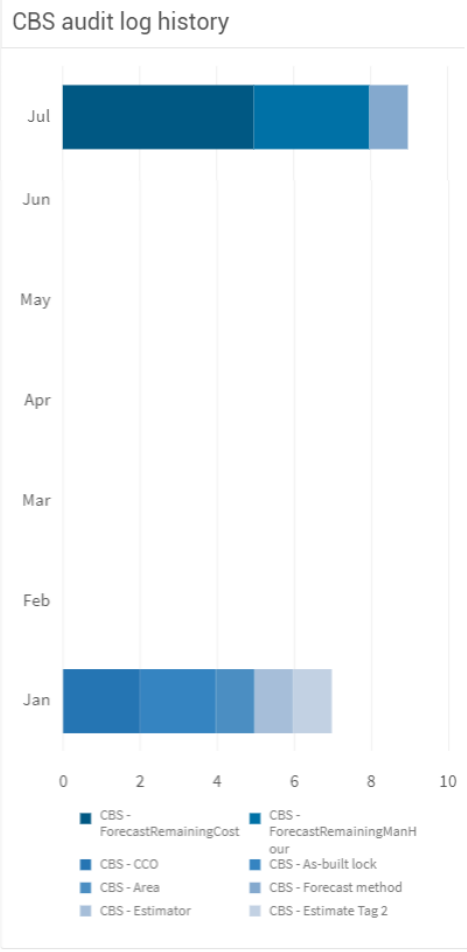
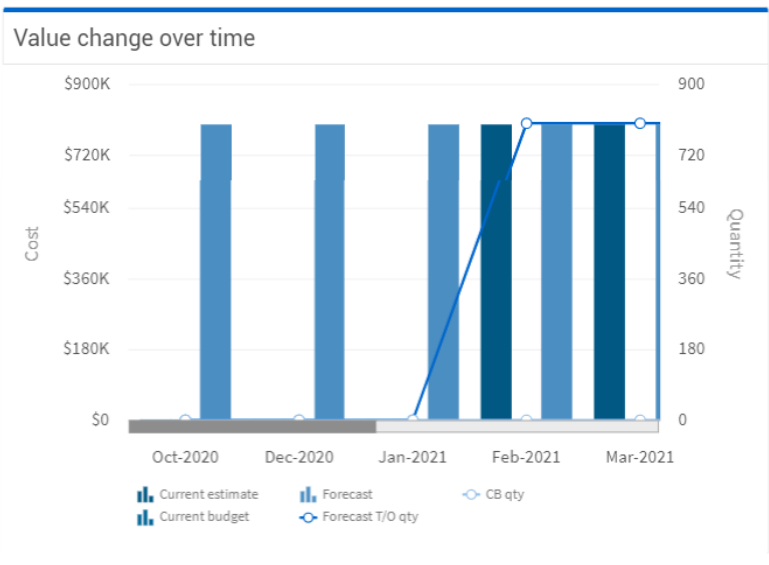
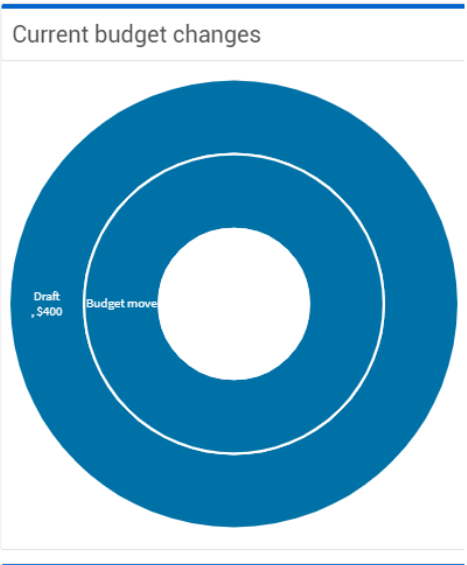
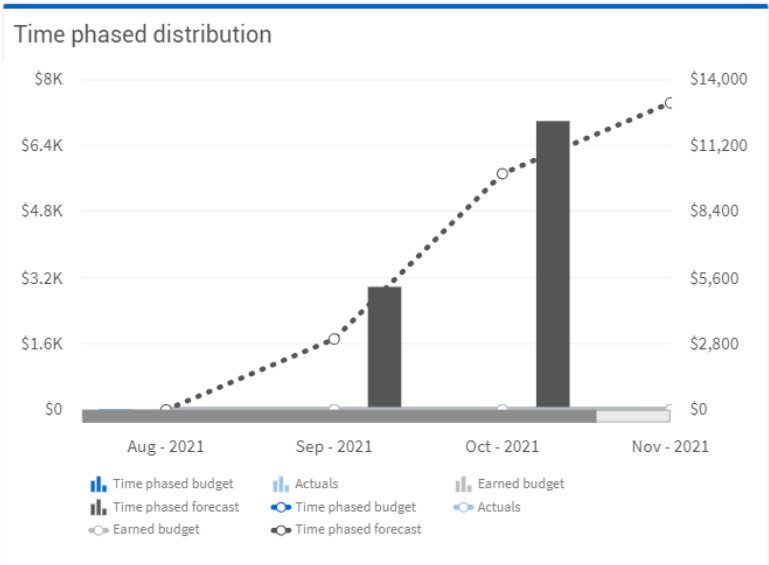
| Option | Details |
|---|--|
| Copy cost item | Copy the selected cost item with its associated resources. |
| Copy selection | Copy the value from a specific cell. |
| Paste | Paste the copied content. |
| Insert copied cost items | Insert the copied cost item in a CBS position that is above, below, or subordinate to the selected cost item. |
| New cost item | Create a new cost item. |
| New subordinate cost item | Create a new cost item that is subordinate to the selected cost item. |
| Delete cost item(s) | Delete the selected cost item. |
| Adjust CBS position | Move the selected cost item to a new position in the CBS. |
| Update Forecast (T/O) qty with Plan component total qty | Copy the total quantity of the associated component in InEight Plan to the Forecast (T/O) quantity of the selected cost item. |
| Cost item details | Open the Cost Item Details slide-out panel, where you can manage the cost item. |
| Actuals details | Open the Actuals Details slide-out panel, where you can input claimed quantities and view actuals history and commitments. |
| Change summary | Open the Change Order Details slide-out panel, where you can view associated change orders, the budget change summary, and the change order summary. |
| Contract details | Open the Contract Details slide-out panel, where you can view associated contract details from InEight Contract. |
| Cost item dashboard | Open the Cost Item Dashboard slide-out panel. |

3.2.4 COST ITEM DASHBOARD

The Cost Item Dashboard slide-out panel shows multiple cost item affiliated graphs. These graphs let you further analyze cost item past and current performance trends related to time-phased distribution, current budget changes, value over time, completion progress indicators, and a CBS audit history log.

1074

Erect Steel - Heavy



3.3 COST ITEM SETUP

While most of your project structure typically imports from your estimating system, you may need to adjust the Cost Breakdown Structure (CBS) to better reflect how the work will be executed in the field. Additionally, contract changes or newly added scope may require updates. To accommodate these needs, you can add, edit, and rearrange cost items as necessary.

If you need to build additional structure from the ground up, you can create new cost items manually. This flexibility allows you to construct an entirely new project structure within Control – even starting from a blank project if needed.

3.3.1 COST ITEM CREATION

Within InEight Control, you can create a new cost item in two ways:

- **New Cost Item:** Creates a new cost item at the same hierarchy level as the selected item, using the next available number. For example, if you select 1.6, the new item will be 1.7 (if available).
- **New Subordinate Cost Item:** Creates a new cost item one level below the selected item, using the next available number at that level. For example, if you select 1.6, the new item will be 1.6.x, where x is the next available number.

When creating a new cost item, there are multiple fields available for populating the cost item details. Not all fields are required; you can edit these details after the cost item has been created. The following table provides more information on the available options.

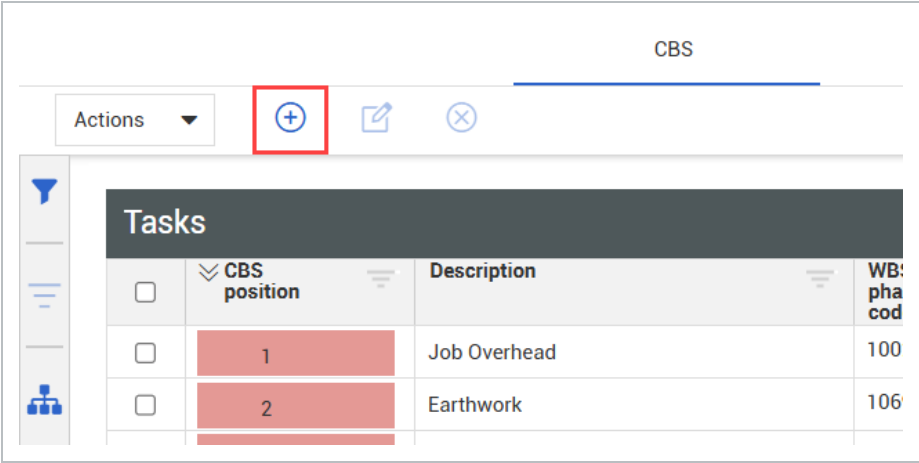
| Field | Required | Details |
|------------------|----------|---|
| Description | Optional | Text field for the name or description of the cost item. |
| Forecast T/O qty | Required | The Forecast Takeoff Quantity is the amount of work or materials expected to be completed for the cost item. This value can be updated as project details progress. |
| UoM | Required | The Unit of Measure is the standard measurement used to quantify the Forecast T/O qty, such as linear feet, cubic yards, or labor hours. |
| Cost source | Required | Indicates how the cost item's value is derived - |

| Field | Required | Details |
|-------------------------|----------|---|
| | | either as a Plug (a lump-sum amount) or as Detail (built from associated quantities, rates, or resources). |
| Current Estimate fields | Optional | If available, input costs, unit rates, man-hours, and/or equipment hours. Many of these values are linked, and changes to these values will update related values as well as the Current Estimate total cost. Fields include CE total cost , CE total MHrs , CE total equipment Hrs , CE unit cost , CE Mhr/Unit , CE Units/MHrs , and CE labor cost/MHrs . |
| Cost segment | Required | <p>Categorizes whether the cost item is a direct or indirect cost.</p> <ul style="list-style-type: none"> • Direct Cost - Costs that directly pertain to the deliverables (pay items) of the job • Job Overhead - Overhead costs associated with running and managing the job (e.g., management, jobsite facilities) • Business Overhead - Overhead costs associated with running the business (not directly related to running the job) • Subcontract - Subcontract associated costs |
| Pay item assignment | Optional | Select an existing pay item to associate to this cost item. |
| Account code | Optional | Select an organizational account code for this cost item. |
| Live forecast method | Optional | Select how the live forecast is calculated for this cost item. Forecast Method applies to individual cost items and can be changed at any time. |
| Allow as-built | Required | Determines whether you can enter actual costs and quantities for a cost item. |

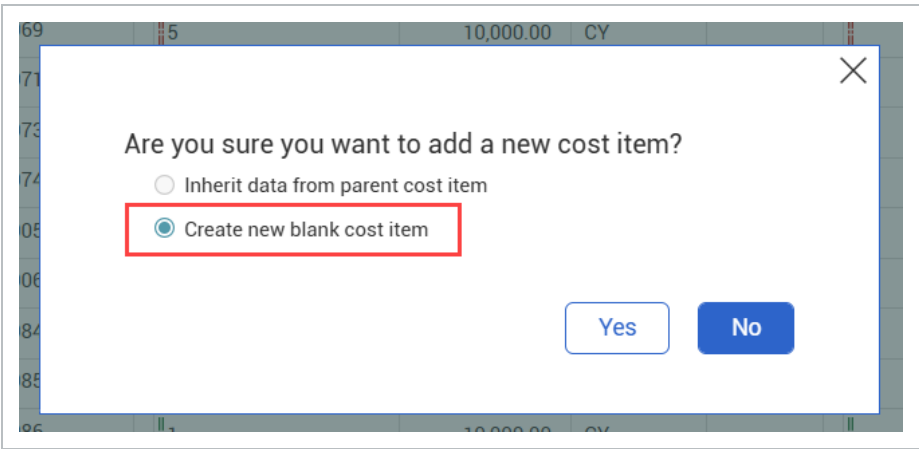
| Field | Required | Details |
|------------------------------------|----------|--|
| | | <ul style="list-style-type: none"> • None - Cost item does not accept cost or quantities. This is typically seen in Superior cost items • All - Allows a cost item to accept both direct costs and quantities • Quantities - Cost item only accepts quantities • Cost - Cost item only accepts costs, man hours, and equipment hours |
| Quantity driver | Required | <p>Defines how a cost item's Forecast T/O qty is controlled.</p> <ul style="list-style-type: none"> • Superior CI - Automatically updates the quantity based on changes to a parent cost item using a proportional multiplier • Fixed - Keeps the quantity constant regardless of changes to related cost items |
| Currency | Required | Select a currency unit for this cost item. |
| As-built lock | Optional | Select the checkbox to lock the ERP status for this cost item. Once you lock the ERP status, your ERP does not allow the cost item to be progressed. |
| Hide in Plan, Progress, and Design | Optional | Select the checkbox to make this cost item unavailable for claiming in InEight Plan, Progress, or Design. |
| CBS contribute qty | Optional | Select the checkbox to add the Forecast (T/O) qty of this cost item with any other selected siblings to the superior (parent) cost item. Note that the UoM must be the same for all cost items. |

CREATE A NEW COST ITEM

1. From the CBS tab of Control > Workspaces, click the **Add Cost Item** icon on the top left toolbar.



2. Select **Create a new blank cost item**, and then click **Yes**.



- To specify the CBS position of the new cost item, first select an existing cost item from the CBS, and then click Add Cost Item > **New cost item**.
3. The New cost item dialog box opens to the Details tab. Enter the cost item details as needed.

New cost item

New cost item

+

Add new cost item

DETAILS

ATTRIBUTES

Forecast T/O qty

UoM

CE unit cost

CE total cost

1.00

PLS

\$0.00

\$0.00

Description

• Forecast T/O qty

• UoM

WBS phase code

1.00

PLS

Generated on Save

• Cost source

CE total cost

CE total MHrs

CE total equipment Hrs

Plug

\$0.00

0.00

0.00

CE unit cost

CE MHr/Unit

CE Units/MHrs

CE labor cost/MHrs

\$0.00

0.00

0.00

\$0.00

Cancel

Save

4. When finished, click **Save**.

CREATE A NEW SUBORDINATE COST ITEM

1. From the CBS tab of Control > Workspaces, select the superior cost item.

CBS

ACS

Actions

+

×

Tasks

CBS position

Description

WBS phase code

1

Job Overhead

1002

2

Earthwork

1069

3

Concrete

1071

✓

4

Structural Steel

1073

4.1

Erect Steel - Heavy

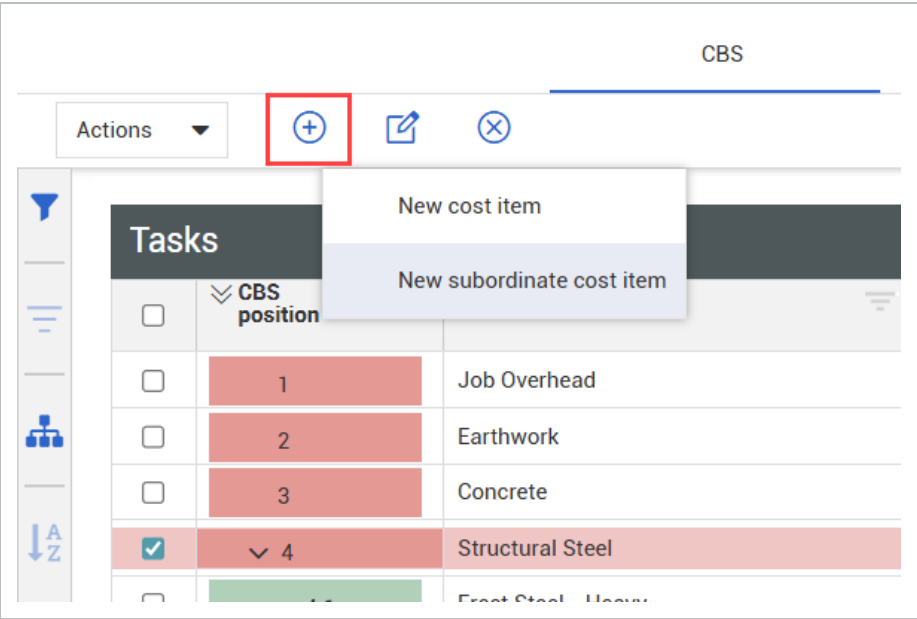
1074

4.2

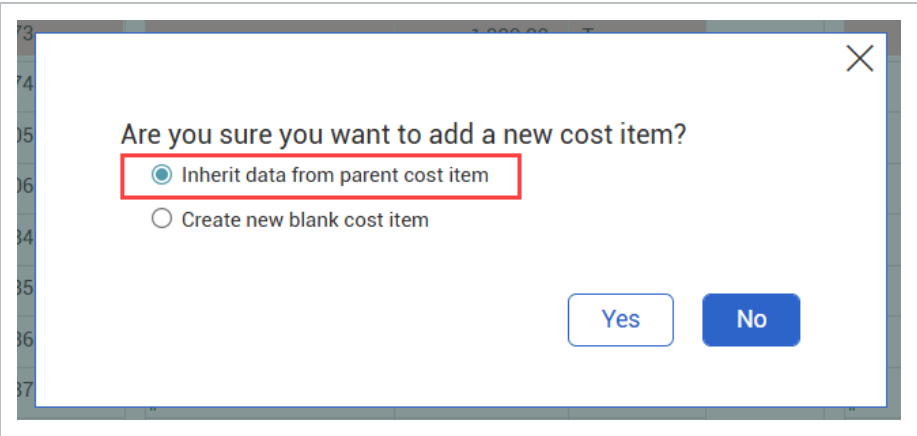
Erect Steel - Light

1005

2. On the top left toolbar, click **Add cost item > New subordinate cost item**.



3. Select **Inherit data from parent cost item**, and then click **Yes**.



- Note that the fields in the New cost item window are populated with the existing data from the selected cost item.
4. Modify the cost item details as needed.

Structural Steel

Structural Steel

+

 Add new cost item

DETAILS

ATTRIBUTES

Forecast T/O qty

UoM

CE unit cost

CE total cost

1,000.00

Ton

\$0.00

\$0.00

Description

• Forecast T/O qty

• UoM

WBS phase code

Structural Steel

1,000.00

Ton

Generated on Save

• Cost source

CE total cost

CE total M/Hrs

CE total equipment Hrs

Plug

\$0.00

0.00

0.00

CE unit cost

CE M/Hr/Unit

CE Units/M/Hrs

CE labor cost/M/Hrs

\$0.00

0.00

0.00

\$0.00

• Cost segment

Pay item assignment

Account code

★ Live forecast method

Job Overhead

None

Cancel

Save

5. When finished, click **Save**.

3.3.1.1 CREATE MULTIPLE COST ITEMS

When you need to create multiple cost items, you can save time by including additional cost items in the New cost item window. From the left panel, click **Add new cost item** to add another cost item record.

Precast Concrete

New cost item

+

 Add new cost item

DETAILS

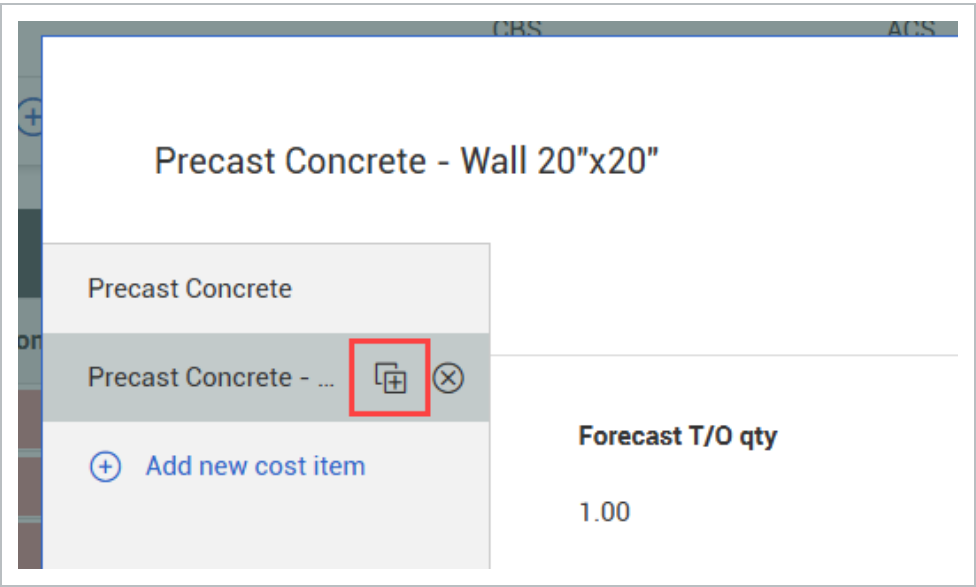
Forecast T/O qty

UoM

1.00

PLS

To copy the details of a new cost item record, click the **Copy cost item** icon.



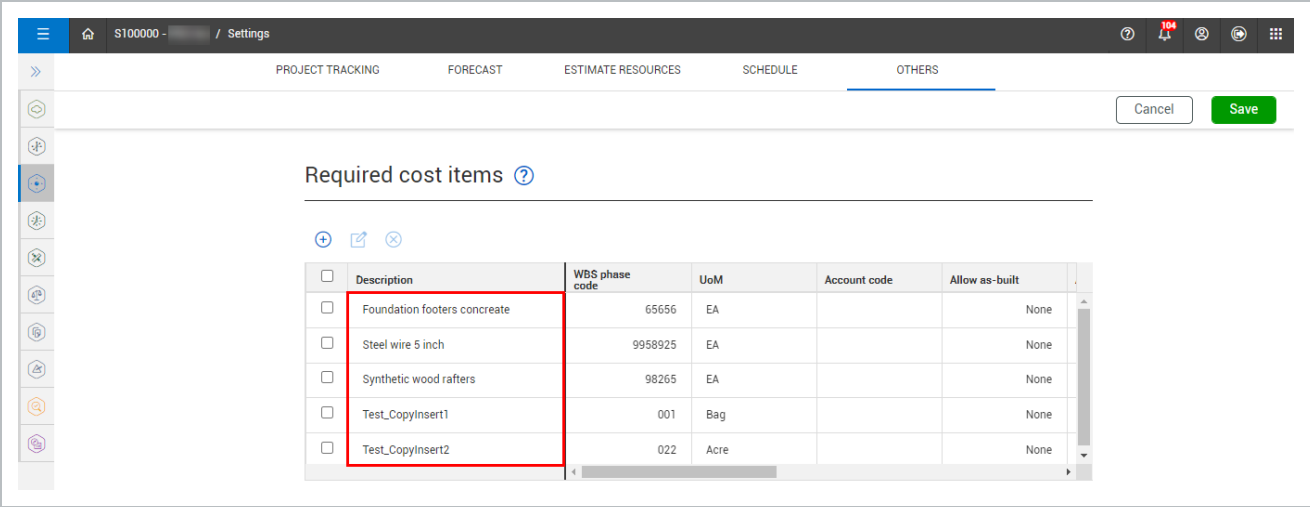
When you're finished, click **Save**. The new cost items will appear in sequence in the CBS.

| | | | | | |
|-------------------------------------|-----|---------------------------------|------|-------|----|
| <input checked="" type="checkbox"/> | 4.4 | Precast Concrete Wall - 8" | 1089 | 69.00 | Ea |
| <input checked="" type="checkbox"/> | 4.5 | Precast Concrete Wall - 9" | 1090 | 71.00 | Ea |
| <input checked="" type="checkbox"/> | 4.6 | Precast Concrete Wall - 20" | 1091 | 1.00 | Ea |
| <input checked="" type="checkbox"/> | 4.7 | Precast Concrete Wall - 20"X20" | 1092 | 29.00 | Ea |

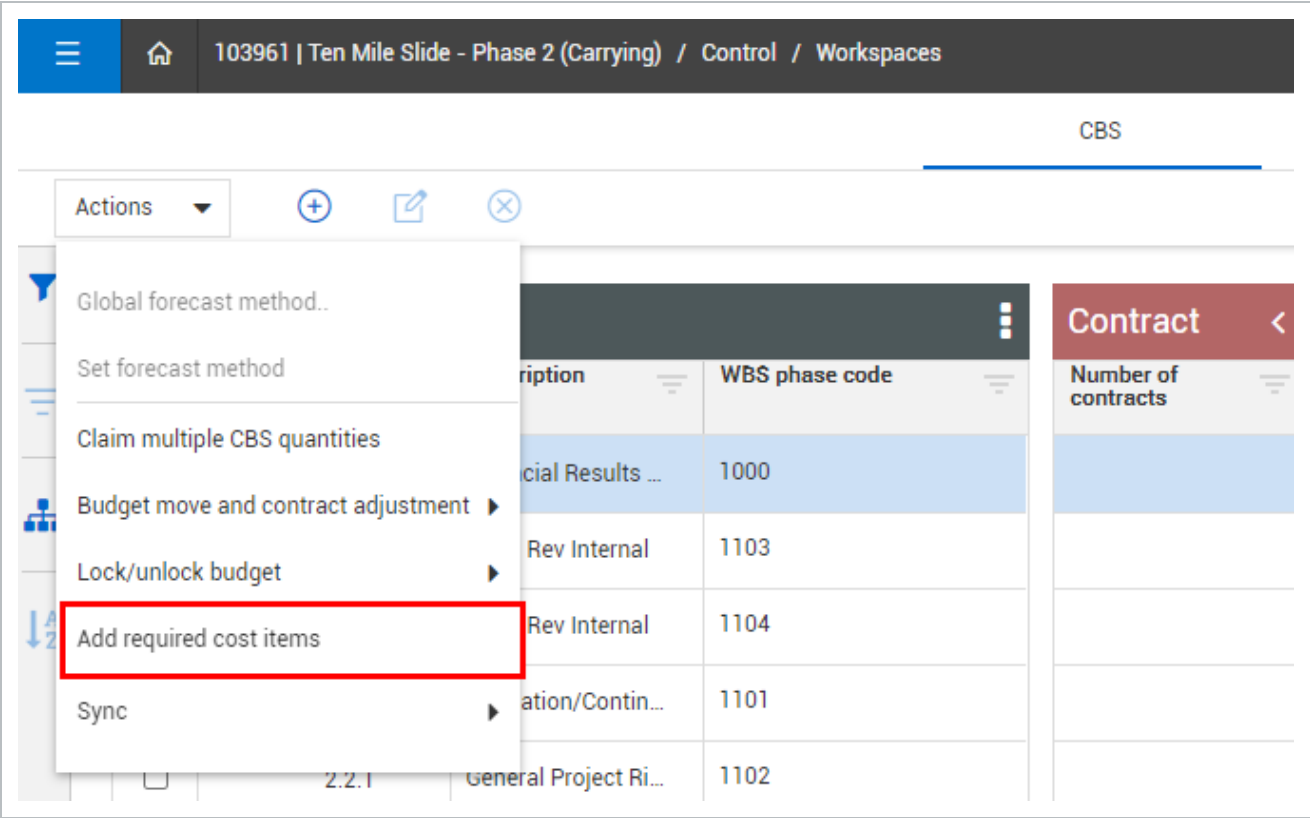
3.3.2 REQUIRED COST ITEMS

The Required cost items feature lets you create standardized or commonly used cost items at the organization level, and then add them at the project CBS level. Changing any of the required cost items at the organization level, such as the account code or UOM, also updates the cost items at the project level.

When required cost items are added in Settings > Control > Others > **Required cost items**, the feature provides standardization across all projects for those cost items that are commonly used.



This feature can be a substitute for copying and pasting cost items from one project into another and ensures the same WBS phase code is being used regardless of the project a team member is working on.

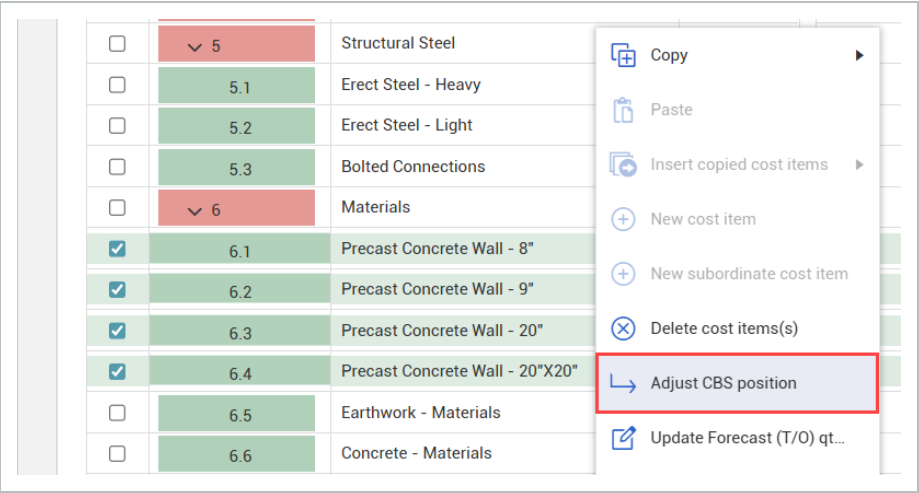


3.3.3 COST ITEM ARRANGEMENT

As the project progresses, you may need to rearrange cost items in the CBS to accommodate project changes.

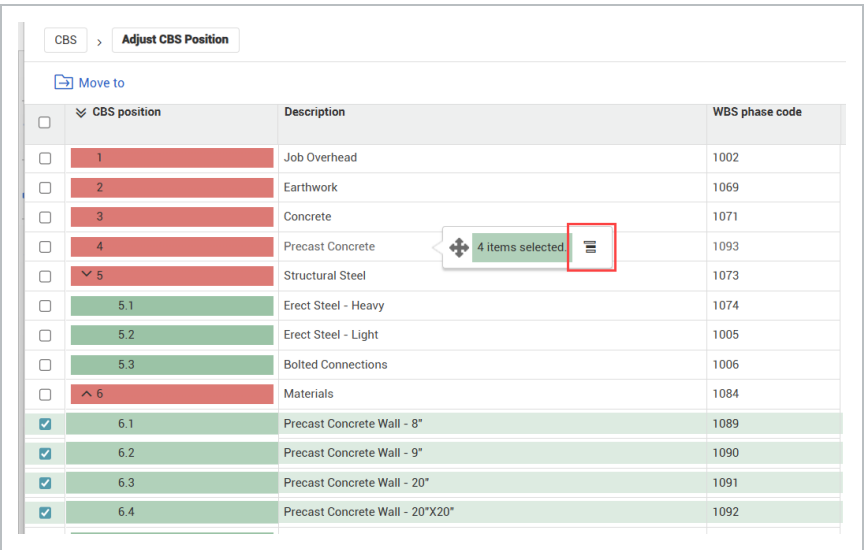
MOVE A COST ITEM

- 1. Select the cost item(s) that you want to move.
- 2. Right-click the cost item(s) to open the cost item menu, and then select **Adjust CBS position**.

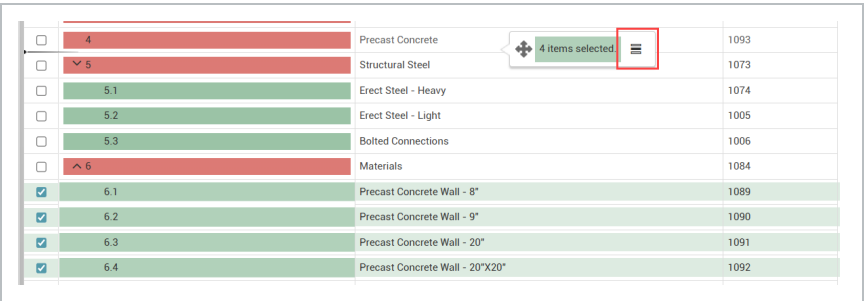


- 3. In the Adjust CBS Position window, drag and drop the selected cost item(s) into a new position in the CBS.

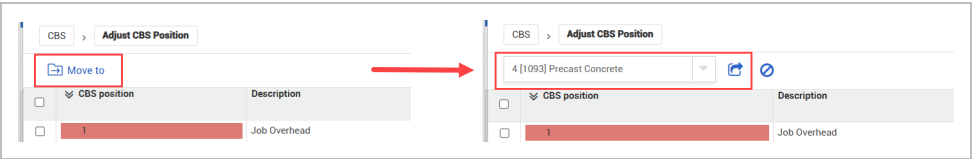
- This icon indicates that the cost item is moved into a subordinate position.



- This icon indicates that the cost item is moved into an equal position.



- If you prefer not to use drag and drop, click the **Move to** icon. Input the applicable CBS position, and then click **Move to** again. Select Child to move the cost item(s) into a subordinate position, or Sibling to move the cost item(s) to an equal position.



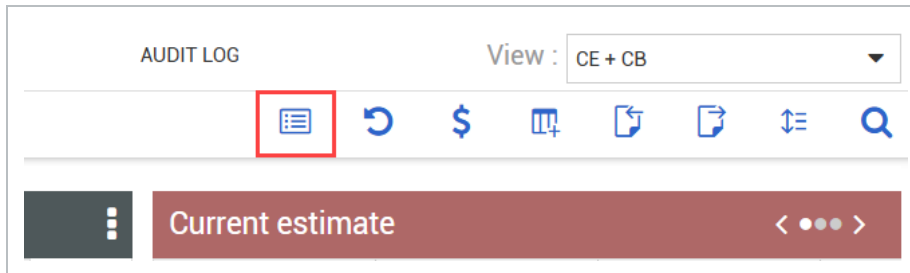
4. Confirm the new position in the Adjust CBS Position window. When finished with the changes, click **Save**.

3.3.4 VIEWING THE CBS GROUPED BY COLUMN

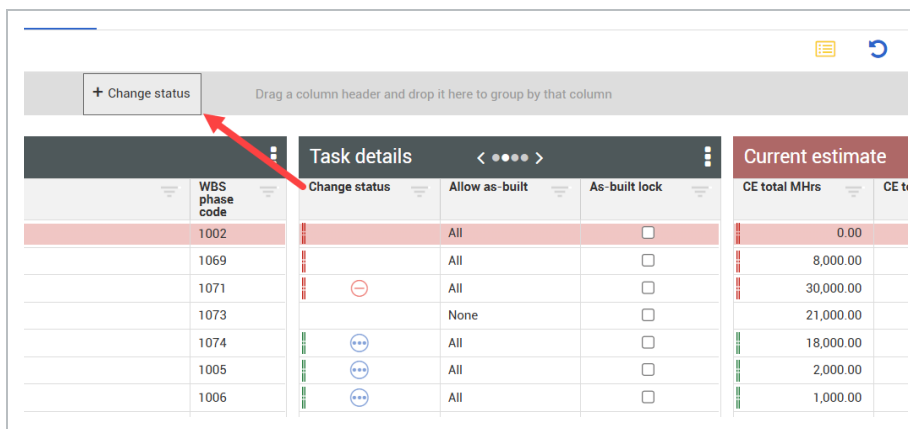
Navigating the CBS can be challenging when searching for specific information, as data is often distributed across multiple levels. Projects may contain large volumes of diverse data, making it difficult to locate and view relevant details- especially in a flat list format. The CBS Group By feature helps simplify this by allowing users to organize the CBS into logical groupings based on shared attributes. You can drag and drop column headers to group cost items by the criteria most relevant to your workflow.

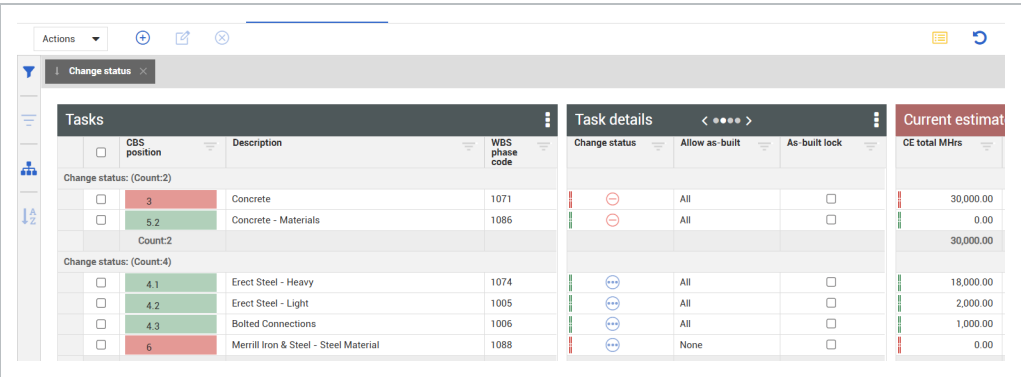
CBS GROUP BY COLUMN

1. On the CBS register tab, select the **Group Columns** icon on the right toolbar.



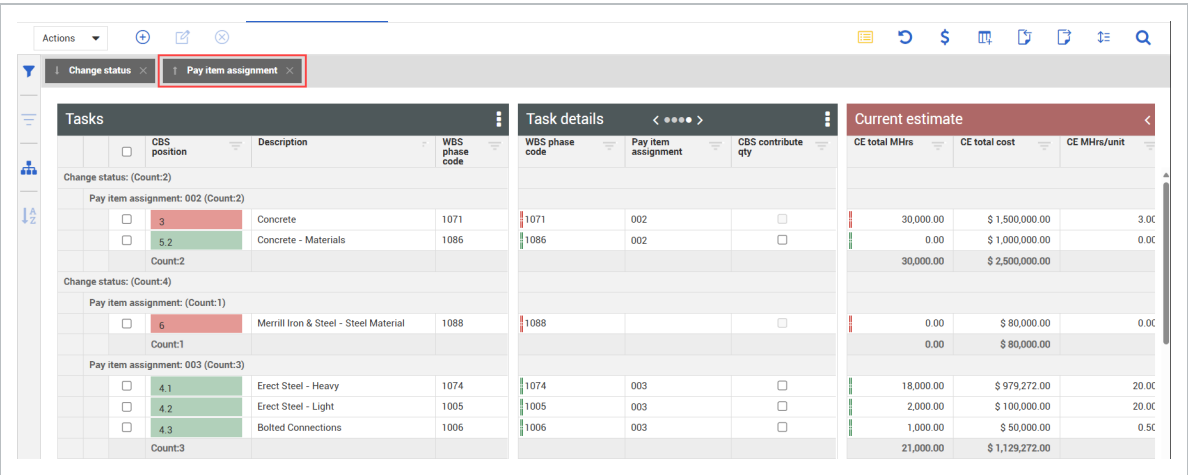
2. Drag the **column header** of a column and drop it into the grey grouping area.
 - Note that this feature can only be used with columns with a predefined set of discrete values, such as UoM or Allow as-built.





| Tasks | Task details | Current estimate |
|--------------|---------------|------------------|
| CBS position | Change status | CE total Mhrs |
| 3 | All | 30,000.00 |
| 5.2 | All | 0.00 |
| Count:2 | | 30,000.00 |
| 4.1 | All | 18,000.00 |
| 4.2 | All | 2,000.00 |
| 4.3 | All | 1,000.00 |
| 6 | None | 0.00 |

3. To add subgroupings, drag and drop additional column headers into the grouping area. You can rearrange these headers in the grouping area to modify the subgroupings.



| Tasks | Task details | Current estimate |
|--------------|----------------|------------------|
| CBS position | WBS phase code | CE total Mhrs |
| 3 | 1071 | 30,000.00 |
| 5.2 | 1086 | 0.00 |
| Count:2 | | 30,000.00 |
| 6 | 1088 | 0.00 |
| Count:1 | | 0.00 |
| 4.1 | 1074 | 18,000.00 |
| 4.2 | 1005 | 2,000.00 |
| 4.3 | 1006 | 1,000.00 |
| Count:3 | | 21,000.00 |

4. To return to the standard CBS, click the **Group columns** icon again.

3.3.5 COST ITEM DELETION

You can delete one cost item or multiple cost items by selecting the cost items, right clicking, and then selecting **Delete Cost Item**.

When deleting cost items from the CBS, deleting the forecast, clearing out the account code, or changing attributes to delete a cost item is not necessary.

| | | | |
|-------------------------------------|-----|-----------|------|
| <input checked="" type="checkbox"/> | 2 | Earthwork | 1069 |
| <input type="checkbox"/> | 3 | Concrete | |
| <input type="checkbox"/> | ▼ 4 | Structura | |
| <input type="checkbox"/> | 4.1 | Erect Ste | |
| <input type="checkbox"/> | 4.2 | Erect Ste | |
| <input type="checkbox"/> | 4.3 | Bolted C | |
| <input type="checkbox"/> | ▼ 5 | Material | |
| <input type="checkbox"/> | 5.1 | Earthwo | |
| <input type="checkbox"/> | 5.2 | Concrete | |
| <input type="checkbox"/> | 5.3 | Structur | |
| <input type="checkbox"/> | 5.4 | Material | |
| <input type="checkbox"/> | 5.5 | Material | |
| <input type="checkbox"/> | 6 | | |

Subtotals 14 (1 rows selected)

Copy

Paste

Insert copied cost items

New cost item

New subordinate cost item

Delete cost items(s)

Adjust CBS position

Cost item details

Actuals details

Change summary

Contract details

Cost item dashboard

You can also select a cost item and click the **Delete** icon on the left toolbar.

Actions ▼

+

Tasks

| CBS position | Description |
|--------------|-------------|
| | |

NOTE

A cost item must meet the following conditions to be deleted:

- Total Cost (To Date) = 0, MH (To Date) = 0, Eqp Hours (To Date) = 0, Qty Complete (To Date)=0
- C B-Total Cost = 0, C B-Total MH = 0, CB-Total Quantity = 0, C B-Qty Remaining = 0
- If the cost item is a parent item, all the subordinate cost items will also need to be checked to see if they can be deleted

If you are deleting multiple cost items and do not meet the following conditions for deletion, a downloadable file appears that lists all of the validations and why they failed.

3.3.6 COPYING COST ITEMS WITH RESOURCES

You can copy and paste entire cost items with resources from the CBS tab to any cost item you select.

NOTE

When you copy a cost item, you cannot copy the current budget because the current budget must be approved in a contract adjustment or budget move.

Follow the step by step to copy a cost item.

COPY AND PASTE COST ITEMS

1. From the CBS tab, select one or more cost items that you want to copy that contain a resource.

NOTE

This can be checked in the Resources column. If the cost item has a 1 or higher, then a resource is attached to that cost item.

2. Right-click your selected cost items.
3. Hover over the Copy selection and select **Copy cost item**.

| | | | |
|-------------------------------------|-------|---------------------|---|
| <input checked="" type="checkbox"/> | 3.1 | Excavation | <div> <div>Copy</div> <div>Copy cost item</div> <div>Paste</div> <div>Copy selection</div> <div>Insert copied cost items</div> <div>New cost item</div> <div>New subordinate cost item</div> <div>Delete cost items(s)</div> <div>Adjust CBS position</div> <div>Cost item details</div> <div>Actuals details</div> <div>Change summary</div> <div>Contract details</div> <div>Cost item dashboard</div> </div> |
| <input checked="" type="checkbox"/> | 3.2 | Embankment | |
| <input checked="" type="checkbox"/> | 4 | Aggregate | |
| <input type="checkbox"/> | 4.1 | Furnish & Place | |
| <input type="checkbox"/> | 4.2 | Finegrade | |
| <input type="checkbox"/> | 4.3 | Install Aggregate | |
| <input type="checkbox"/> | 4.3.1 | Place Aggregate | |
| <input type="checkbox"/> | 4.3.2 | Blue Top Aggregate | |
| <input type="checkbox"/> | 5 | Asphalt Concrete | |
| <input type="checkbox"/> | 5.1 | Furnish & Place | |
| <input type="checkbox"/> | 5.2 | Install Hot Mix | |
| <input type="checkbox"/> | 6 | 36 Inch RCP | |
| <input type="checkbox"/> | 6.1 | Furnish RCP | |
| <input type="checkbox"/> | 6.2 | Excavate & Backfill | |
| <input type="checkbox"/> | 6.3 | Install RCP | |
| Subtotals 96 (3 rows selected) | | | |

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4. Right-click on another cost item in the CBS tab.
5. Hover over the option **Insert copied cost items**. You have three options as to where to place the copied cost items:
 - Insert above
 - Insert below

- Insert as a subordinate

Tasks

| <input type="checkbox"/> | CBS position | Description |
|-------------------------------------|--------------|----------------------------|
| <input type="checkbox"/> | 1 | Financial Results Analysis |
| <input type="checkbox"/> | 2 | Misc. Rev Internal |
| <input type="checkbox"/> | 2.1 | Misc. Rev Internal |
| <input type="checkbox"/> | 2.2 | Escalation/Contingency |
| <input type="checkbox"/> | 2.2.1 | General Project Risk |
| <input checked="" type="checkbox"/> | 2.3 | Directs |
| <input type="checkbox"/> | 2.3.1 | Direct Labour |
| <input type="checkbox"/> | 2.3.1... | Grading Work |
| <input type="checkbox"/> | 2.3... | Resurface Existing Acces |
| <input type="checkbox"/> | 2.3... | Maintain Access Road |
| <input type="checkbox"/> | 2.3... | Clear & Grub Bench B & V |

Task details

| Resources | Forecast (T/O) qty | UoM |
|-----------|--------------------|------|
| | 1.00 | PLS |
| | 1.00 | PLS |
| | 1.00 | PLS |
| | 1.00 | Each |
| | 52.45 | K\$ |
| | 1.00 | PLS |
| | 1.00 | PLS |
| | | LS |
| | | 2 |
| | | k |
| | 0.50 | HA |

Copy

Paste

Insert copied cost items

New cost item

New subordinate cost item

Delete cost items(s)

Insert above

Insert below

Insert as subordinate

You can also view the pasted cost items in the Resources tab of the Cost item details slide-out panel.

3.3.7 DESIGN TOTAL QTY AND MAN-HOURS COLUMNS IN CBS

Control displays the sum of the Forecast T/O quantity from the associated InEight Design items against the attributed cost items. You can compare the Design total quantity and Design total man-hours to the Forecast (T/O) quantity and Forecast hours columns, to make sure the values match up with what is in Design.

| Design total qty Forecast T/O qty as determined and pulled from the Design application (Quantity item - Forecast TO qty) | | Design total MHrs Current estimate man hours as determined and pulled from the Design application (Quantity item - CE MHrs) | |
|---|------------------|--|-----------------|
| Forecast remaining cost | Design total qty | Design total MHrs | Forecast method |
| \$ 52,598,900.46 | 53,898.000 | 0.993 | Rollup |
| \$ 5,760,886.07 | 370.000 | 0.651 | Rollup |

3.3.8 CREATE COST ITEMS IN INEIGHT CHANGE

You can also create cost items with resources in Change, and then have them created in Control upon the approval of a contract adjustment. This reduces the amount of extra steps needed for creating cost items in multiple areas.

Creating cost items in Change is performed by first creating an issue with your newly created cost items, then executing your change order.

Executed Change order sent to Control

Change management > CCO-Demo 22.2-New scope

| Executed ... | Cost | Billing mark... | Markup | Margin | Deductions | Net va... | CCO status | Pricing status | Proposal status |
|--------------|------------|-----------------|----------|--------|------------|------------|------------|----------------|-----------------|
| \$6,116.00 | \$5,560.00 | \$0.00 | \$556.00 | 10.00% | \$0.00 | \$6,116... | Executed | None | None |

Actions DETAILS PRICING SUPPORTING DOCUMENTS WORKFLOW ASSIGNMENTS

Cancel Save

| Pricing summary | ROM | Estimate | Proposal | Agreed |
|-----------------------------|-----|----------|------------|--------|
| Direct cost total | | | | |
| Labor | | | | |
| Type labor name | | | | |
| Issue 75 - New scope | | | | |
| Labor cost item pricing | | | \$5,150.00 | |
| Labor subtotal | | | | |
| Materials | | | | |
| Type material name | | | | |
| Issue 75 - New scope | | | | |
| Materials cost item pricing | | | \$410.00 | |

In Control, go into the Change Register and click on the change order to review the new cost items that originated from Change.

CBSACS

PAY ITEMSCHANGE REGISTERAUDIT LOG

Actions

| Ch... | ID | Description | CCO | Cre... date | Issue # |
|-------|------|-------------------------|-----------|----------------|------------|
| 16... | 28.0 | New scope | Demo 22.2 | 02/28/2022 | 75 |
| 16... | 27.0 | Budget Move: IWO/... | | 11/29/2021 | |
| 16... | 26.0 | Budget Allowance M... | | 11/29/2021 | |
| 16... | 25.0 | Buyout Gain: PVS; M... | | 11/23/2021 | |
| 16... | 24.0 | Budget Move: Temp ... | | 11/04/2021 | |
| 16... | 23.0 | Budget Move: Temp ... | | 11/04/2021 | |
| 16... | 22.1 | Budget Move: Morol... | | 11/04/2021 | |
| 16... | 22.0 | Budget Move: Morol... | | 11/02/2021 | |
| 16... | 21.0 | Budget Move: Adjust... | | 11/01/2021 | |
| 16... | 20.0 | Budget Move: BTA m... | | 11/01/2021 | |
| 16... | 19.0 | Budget Move: Distrib... | | 10/29/2021 | |
| 16... | 18.0 | Temp Entrance: Lab... | | 09/30/2021 | 02 |
| 16... | 17.2 | Buyout Adjustment: ... | | 09/23/2021 | |
| 16... | 17.1 | Buyout Adjustment: ... | | 09/23/2021 | |

28.0

New scope

TypeContract adjustment (Cost ite...

StatusCCO-Approved

Originated on02/28/2022

Originated byMorgan Smith

Last changed on02/28/2022

Last changed byMorgan Smith

Approved on02/28/2022

Approved byMorgan Smith

Approval probability100.00 %

Pay item details

| Pay item number | Description | Current billing method | Adjusted current price | Adjusted current unit price | Adjusted current pay qty | Locked date |
|-----------------|--------------|------------------------|------------------------|-----------------------------|--------------------------|-------------|
| 2 | Amendment #2 | Fixed final price | \$ 6,116.00 | \$ 0.00 | 6,116.00 | |
| | | | \$ 6,116.00 | \$ 0.00 | | |

Cost item details

| CBS position | Description | WBS phase code | Adjusted CB total cost | Adjusted CB total Mhrs | Adjusted CB total Qty | Locked date |
|--------------|-------------------------|----------------|------------------------|------------------------|-----------------------|-------------|
| 4.36 | New scope - Plug values | 1353 | \$ 5,150.00 | 50.00 | 1.00 | 02/28/2022 |
| 4.37 | New scope - Resources | 1354 | \$ 410.00 | 0.00 | 1.00 | 02/28/2022 |

Review

Revise

Revise the change order to make any further adjustments, such as associating pay items to your cost items. Notice how the cost category assignments have all come over to Control that originated from the change document.

Change register > 28.0 - Contract adj...

CCO total budget\$ 5,560.00CCO unassigned budget\$ 0.00Net budget change\$ 5,560.00Net quantity changeYesNet man hour change50.00Markup\$ 0.00Fee\$ 0.00Net contract change\$ 0.00CCO agreed price\$ 6,116.00CCO unassigned price\$ 6,116.00Approval probability100.00% - Executed Change Order

DetailsCost ItemsPay ItemsSummary

Assign cost to

| CBS position | Description | WBS phase code | CB total cost | Adjusted CB total cost | Markup % | Marku |
|-------------------------------------|-------------------------|----------------|---------------|------------------------|----------|-------|
| Unassigned cost items | | | | | | |
| <input checked="" type="checkbox"/> | New scope - Plug values | | \$ 0.00 | \$ 5,150.00 | | |
| <input type="checkbox"/> | New scope - Resources | | \$ 0.00 | \$ 410.00 | | |

New scope - Plug values

CB total cost\$ 0.00Pending budget cost\$ 0.00CB total Mhrs0.00CB total quantity0.00

| Cost category | CB total cost | Pending |
|------------------------|---------------|-------------|
| Total | \$ 0.00 | \$ 5,150.00 |
| Labor | \$ 0.00 | \$ 50.00 |
| Construction Equipment | \$ 0.00 | \$ 0.00 |
| FOM Rented Equipment | \$ 0.00 | \$ 0.00 |
| Supplies | \$ 0.00 | \$ 0.00 |
| Materials | \$ 0.00 | \$ 5,100.00 |
| Subcontract | \$ 0.00 | \$ 0.00 |
| Fees | \$ 0.00 | \$ 0.00 |
| Allowance | \$ 0.00 | \$ 0.00 |
| G & A | \$ 0.00 | \$ 0.00 |
| Undefined | \$ 0.00 | \$ 0.00 |
| Totals | \$ 0.00 | \$ 5,150.00 |

Subtotals 2

\$ 0.00\$ 5,560.00

Cancel

Draft

Back

Next

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Approving the change order creates the new cost items with the resources specified in Change, and places them within the hierarchy specified in the contract adjustment, and if none is specified, then they are placed at the bottom of the CBS.

The screenshot displays the 'CHANGE REGISTER' and 'Tasks' panels. The 'CHANGE REGISTER' table has columns: ID, Description, Crea... date, Last cha... by, Last cha... on, Notes, Status, Cha... man... tag 1, Cha... man... tag 2, and Cha... man... tag 3. The 'Last cha... by' column has a dropdown menu with options: Details, Revise, Approve, and Review. The 'Approve' option is highlighted with a red box. A red arrow points from this box to the 'Tasks' panel. The 'Tasks' panel has columns: CBS position, Description, and WBS phase code. The last two rows of the 'Tasks' panel are highlighted with a red box: '4.36 New scope - Plug values' and '4.37 New scope - Resources'.

| ID | Description | Crea... date | Last cha... by | Last cha... on | Notes | Status | Cha... man... tag 1 | Cha... man... tag 2 | Cha... man... tag 3 |
|------|------------------------|--------------|----------------|----------------|-------|-------------|---------------------|---------------------|---------------------|
| 28.0 | New scope | 02/28/2022 | | 02/28/2022 | | CCO-Pending | | | |
| 27.0 | Budget Move: IWO/... | 11/29/2021 | Details | 11/29/2021 | | Approved | | | |
| 26.0 | Budget Allowance M... | 11/29/2021 | Revise | 11/29/2021 | | Approved | | | |
| 25.0 | Buyout Gain: PVS; M... | 11/23/2021 | Approve | 11/23/2021 | | Approved | | | |
| 24.0 | Budget Move: Temp ... | 11/04/2021 | Review | 11/04/2021 | | Approved | | | |
| 23.0 | Budget Move: Temp ... | 11/04/2021 | | 11/04/2021 | | Approved | | | |
| 22.1 | Budget Move: Morol... | 11/04/2021 | | 11/04/2021 | | Draft | | | |

| CBS position | Description | WBS phase code |
|--------------|------------------------------------|----------------|
| 4.13 | Visqueen Material - Available | 1229 |
| 4.14 | LICENSES, PERMITS, & BONDS | 1039 |
| 4.15 | Security Personnel IWO - Available | 1320 |
| 4.16 | Available | 1169 |
| 4.17 | Available | 1171 |
| 4.18 | Available | 1172 |
| 4.19 | Available | 1183 |
| 4.20 | Available | 1158 |
| 4.21 | Available | 1349 |
| 4.22 | Available | 1143 |
| 4.23 | Available | 1147 |
| 4.24 | Available | 1150 |
| 4.25 | Available | 1126 |
| 4.26 | Available | 1127 |
| 4.27 | Available | 1131 |
| 4.28 | Available | 1132 |
| 4.29 | Available | 1136 |
| 4.30 | Available | 1107 |
| 4.31 | Available | 1110 |
| 4.32 | Available | 1339 |
| 4.33 | Construction Equipment | 1070 |
| 4.34 | FINISH CARPENTRY | 1188 |
| 4.35 | SHEAR CORE WALLS | 1121 |
| 4.36 | New scope - Plug values | 1353 |
| 4.37 | New scope - Resources | 1354 |

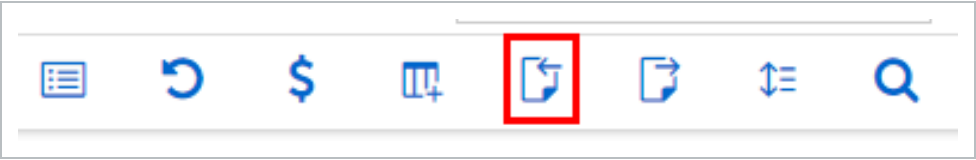
Subtotals 41

3.4 COST ITEM EXCEL IMPORT

When you need to add multiple cost items to your project, adding them manually can be tedious and time consuming. To save time, if you can export your cost items to Microsoft Excel (e.g., export to Excel

from your estimating software), you can import them into Control, allowing you to update your estimate in bulk, without needing to manually enter data into individual cells.

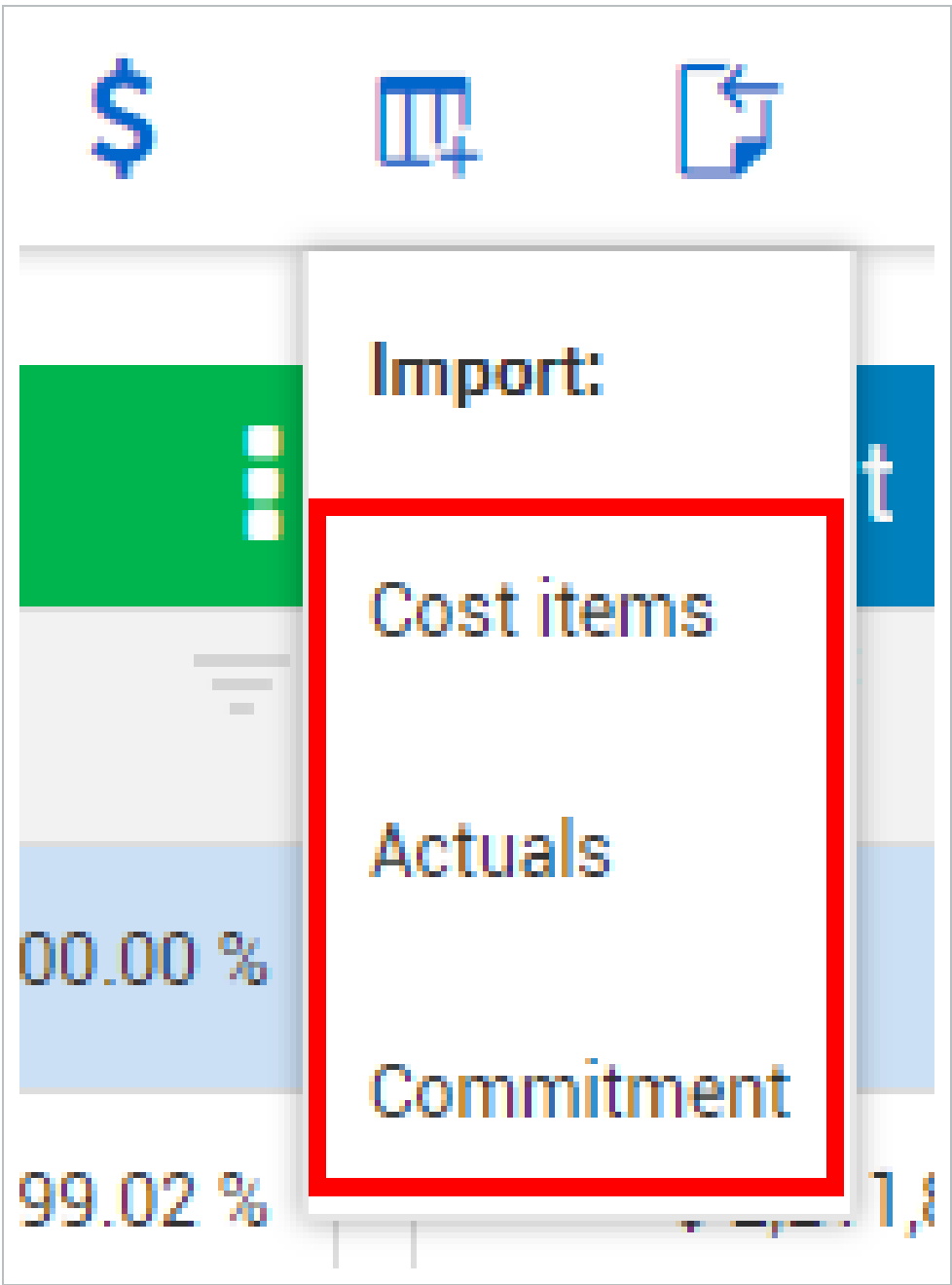
Click the **Import** icon on the right toolbar of the Control > **Workspaces** page to go access the Excel import feature.



The table below indicates the data you can import into Control from Excel.

| Data Type | CBS Columns |
|------------------|---|
| Tasks | CBS position, Description, UoM, code-related fields, user-defined fields, other settings found in the Task details data block in Control. |
| Schedule | Schedule ID, schedule dates, Scheduled, Schedule plug days, Plug days, Cost curve, Roll up schedule |
| Current Estimate | CE final MHrs, final costs, total equipment hours, M Hr/Unit, units/M Hr, equipment hour/unit, labor cost/M Hr, equipment cost/M Hr, Secondary Qty, Scales 1, 2, and 3. |
| Cost Categories | Total and unit costs. |

When you click on the **Import** icon on the CBS tab of the Workspaces page, you have three import type options. You can import cost items, actuals, or a schedule.



After you make a selection, the Import CBS data window opens.

Overview - Import CBS Dialog box

| Title | | Description |
|-------|-------------------|---|
| 1 | Import from Excel | You can either drag and drop or browse to the file to import. Microsoft Excel files (.xlsx, .xls) and Comma Separated Value (.csv) files can be |

Overview - Import CBS Dialog box (continued)

| Title | | Description |
|-------|-----------------------------|--|
| | | imported. |
| 2 | Options | You can add new cost items and update cost items that already exist in the project, choose to only update existing cost items, or only add new. |
| 3 | Cost item matching criteria | When adding and updating cost items, the structure in the spreadsheet you are importing from may be in a different order than the structure in Control. By specifying a code for matching your cost items, the import routine will know which cost items in the spreadsheet are new when adding new items, and which cost items to update with data from the spreadsheet when updating cost items. |
| 4 | Information message | This information provides a description of available functionality and instructions for proceeding to the next step. |

Import CBS data

1

Import from Excel (.xlsx, .xls) or Comma separated value (.csv)

Drag and drop the file here
or browse

Browse

2

Options

* Import type

Cost items and cost item attributes

Update existing and new items

3

Cost item matching criteria

WBS phase code

Update existing items

New items

4

i

Once the import file is read, Cost item match options and field mapping can be specified. Mapping uses row 1 headers from the source document. New cost items are inserted to the bottom of the CBS.

Clicking Next opens the Map columns dialog box, where you can map your Excel columns to the appropriate column in Control.

Overview - Map Columns Window

| Title | | Description |
|-------|---------------|--|
| 1 | Template | After you map the import file columns to the CBS columns in Control, you can save your settings as a template for future use. This is helpful when you need to make scope changes or updates on a regular basis. |
| 2 | Control field | The names of the column headers in Control that you can map your data to. |
| 3 | Mapped | A green checkmark indicates the column in your import file is mapped correctly to the CBS column. The Green key indicates the matching code |

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Overview - Map Columns Window (continued)

| Title | | Description |
|-------|--------------|---|
| | | you specified is locked. |
| 4 | File columns | The names of the column headers in your import file that you can map to the CBS columns in Control. |

1

Template

Unsaved template



| Control field | 2 | Mapped | 3 | File columns | 4 |
|----------------|---|--------|---|---------------------|---|
| Cost segment | | | | Blank-do not import | |
| Description | | | ✓ | Description | |
| Optional code | | | | Blank-do not import | |
| WBS phase code | | | | Blank-do not import | |
| Allow as-built | | | | Blank-do not import | |
| CBS position | | | ✓ | CBS Position | |
| UoM | | | | Blank-do not import | |

* Required fields

Reset

Cancel

Back

Next

3.4.1 FORECAST EXCEL IMPORT

When manually importing cost items by either updating existing cost items or importing new cost items, you can also import forecast values via Excel. How the fields are mapped in Excel determines which CBS forecast columns are populated.




Examples of some forecast columns that can be mapped via the Excel CBS import cost item process include, Forecast total cost, Forecast total MHrs, and Forecast total unit cost. Cost categories can also be selected for importing into Control.

Import CBS data - ALL PERMISSION LC_12102021054633.xlsx

Map columns

Template

Unsaved template



| Control field | Mapped | File columns |
|-----------------------------|--------|---------------------|
| Live Forecast | | |
| Forecast method | | Blank-do not import |
| Forecast total Cost | | Blank-do not import |
| Forecast total Mhrs | | Blank-do not import |
| Forecast total Mhr/Unit | | Blank-do not import |
| Forecast total productivity | | Blank-do not import |
| Forecast total unit cost | | Blank-do not import |
| Forecast remaining cost | | Blank-do not import |
| Forecast remaining Mhrs | | Blank-do not import |

* Required fields

Reset

Cancel

Back

Next

3.4.2 SPREADSHEET RULES

For the import process to work correctly, the items in your Excel spreadsheet must be formatted in a certain way so that Control can recognize the items. The following table indicates important spreadsheet rules to follow to make sure your data imports successfully.

| Attribute | Rules |
|-----------|---|
| Import | Reads the first worksheet within the referenced workbook. |

| Attribute | Rules |
|---------------------------|--|
| function | |
| First row of data | Considered to be the header row of the data. This imports as titles which are referenced during the mapping process. The import stops reading headers if it encounters a blank header cell. |
| Numbers | Needs to be the actual number, and not the summation of cells. Values cannot contain the \$ symbol or other currency symbols. |
| Second row of data | Considered the first row of data to be imported. |

NOTE

If you make changes in the spreadsheet, you must save the spreadsheet before importing (only saved data will be imported).

Below is a list of items to be aware of during the population of the import template.

1. The Excel file should not be open while simultaneously using the import wizard.
 - a. If there are any edits made to the spreadsheet, it must be saved and closed prior to importing.
2. CBS positions cannot be duplicates. They must be unique to each cost item.
 - a. The system will show an error if there are any duplicates.
3. The WBS phase codes are not required during the import but must also be unique per cost item.
4. Cost categories are spelling and case sensitive, and must match directly to the cost categories spelling.
 - a. The cost categories list can be exported from the import wizard.
5. The Excel sheet cannot contain any blank cells during the import. Blank cells show an error and cause the import to stall.
6. Make sure any blank columns from an export file are removed before importing again.
7. Date formats must match spreadsheet date formats. The Import Wizard will prompt you to chose a date format used in the spreadsheet.
 - a. The Import wizard will prompt you to chose a date format prior to initiating the import.

3.4.3 BEST PRACTICES AND RECOMMENDATIONS

1. Use WBS phase code as the matching criteria for updating existing items.
 - a. WBS phase code are tied 1:1 for each cost item. The CBS position can be changed, but the WBS phase code remains the same regardless of CBS position.
2. Set up the views for exporting of data to match the import template created. Views are customizable for flexibility in what is being imported/exported.
3. Import template mapping is unique to each individual user. Master mapping cannot be set at a global level. It is recommended to provide users with a step-by-step import mapping document to set up data mapping initially during the on-boarding of InEight.
4. When exporting data in Control, current system drops trailing zeros on CBS positions. Example: 1.10 exports as 1.1.
 - a. One way to get around this is opening data as a CSV file in Excel.
5. Once you have downloaded the export file, proceed to the following steps.
 - Open blank Excel sheet
 - Navigate to **Data** tab
 - Click **Get Data > From File > From Text/CSV**
 - Choose downloaded export file
 - Click **Import**
 - Click **Load**

Your data will now be imported into the sheet where updates are made. Once you have completed your updates, you may save and re-import the same file.

3.4.4 CBS HIERARCHY

If you select CBS position as the matching criteria for the import, the import routine recognizes the hierarchy of your structure by the numbering of the codes.

| A2 | | | 1.1.1.5 |
|----|--------------|-------------|------------------|
| | A | B | C |
| 1 | CBS position | Description | Forecast T/O qty |
| 2 | 1.1.1.5 | Parent | 1 |
| 3 | 1.1.1.5.1 | Child 1 | 10 |
| 4 | 1.1.1.5.2 | Child 2 | 1 |
| 5 | 1.1.1.5.2.1 | Child 2.1 | 15 |
| 6 | 1.1.1.5.2.2 | Child 2.2 | 20 |
| 7 | 1.1.1.5.3 | Child 3 | 1 |

After the import is complete, if the CBS position for the new cost items match existing cost items in the CBS, your new CBS cost items will import as you have defined them. The existing CBS cost items will shift down and be relabeled to match the next corresponding number.

When adding new cost items to an existing CBS position, a warning message displays informing you the CBS positions you have picked already exist. The message then asks you to confirm if you would like to continue with this import.

3.4.4.1 CBS PREDICTIVE HIERARCHY

New cost items created via the import process automatically adjust the CBS structure hierarchy to match your import as needed and predict the movements in the current hierarchy, and the hierarchy that is being added via the Excel import.

| Tasks | | | |
|--------------------------|--------------|--------------------|----------------|
| <input type="checkbox"/> | CBS position | Description | WBS phase code |
| <input type="checkbox"/> | 1 | A - Road materials | 1000 |
| <input type="checkbox"/> | 1.1 | B - Rock | 1001 |
| <input type="checkbox"/> | 1.1.1 | C - Mix | 1002 |

For example, you have three cost items that you want to import, as shown below. Positions 1 and 1.1 already exist in the CBS, and position 2.1.2 is new.

| | A | B |
|---|--------------|------------------|
| 1 | CBS position | Description |
| 2 | 1 | D - Maintenance |
| 3 | 1.1 | E - Equipment |
| 4 | 2.1.2 | F - Subcontracts |

The import process imports Excel CBS positions 1 and 1.1, and places 2.1.2 at the bottom of the hierarchy.

| Tasks | | | |
|--------------------------|--------------|--------------------|----------------|
| <input type="checkbox"/> | CBS position | Description | WBS phase code |
| <input type="checkbox"/> | 1 | D - Maintenance | 1003 |
| <input type="checkbox"/> | 1.1 | E - Equipment | 1004 |
| <input type="checkbox"/> | 2 | A - Road materials | 1000 |
| <input type="checkbox"/> | 2.1 | B - Rock | 1001 |
| <input type="checkbox"/> | 2.1.1 | C - Mix | 1002 |
| <input type="checkbox"/> | 2.1.2 | F - Subcontracts | 1005 |

The following steps walk you through the import process.

NOTE

The following steps are only applicable when importing new cost items.

Options

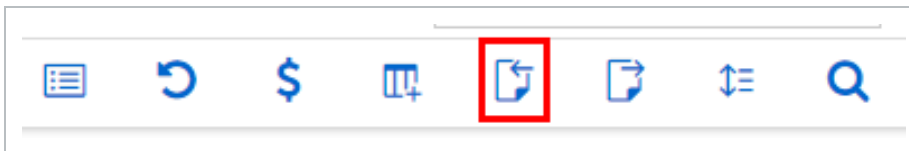
* Import type

Cost items and cost item attributes

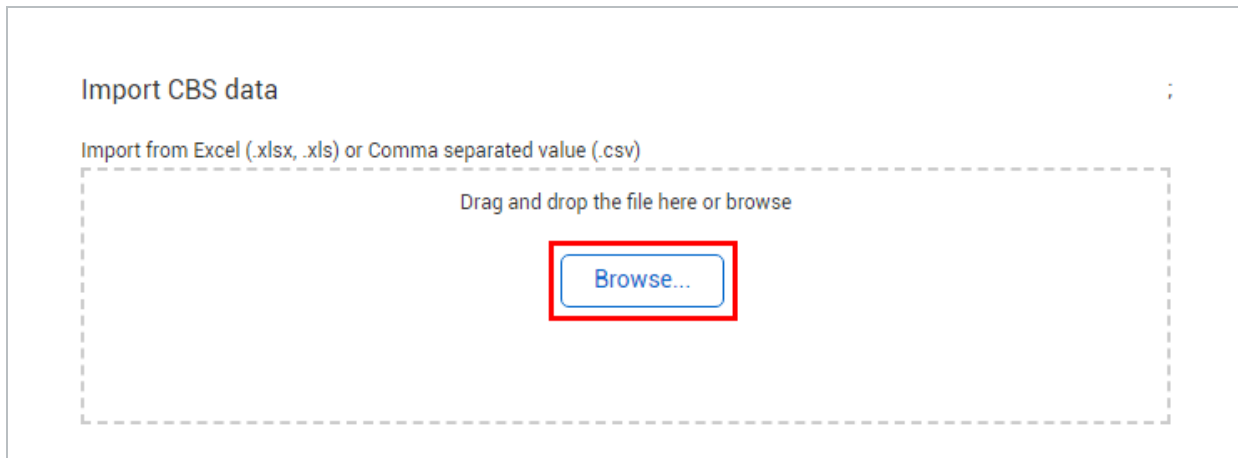
- ☐ Update existing and new items
- ☐ Update existing items
- ☒ New items

IMPORT CBS DATA

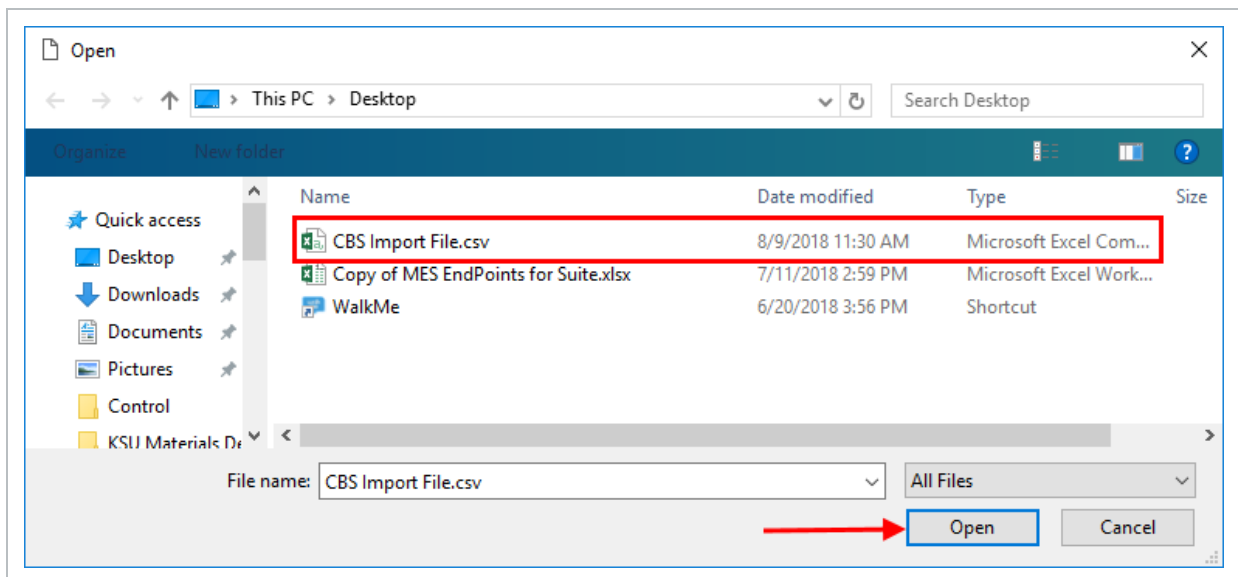
1. From the Control > Workspaces page, on the CBS tab, click on the **Import** icon on the right toolbar.



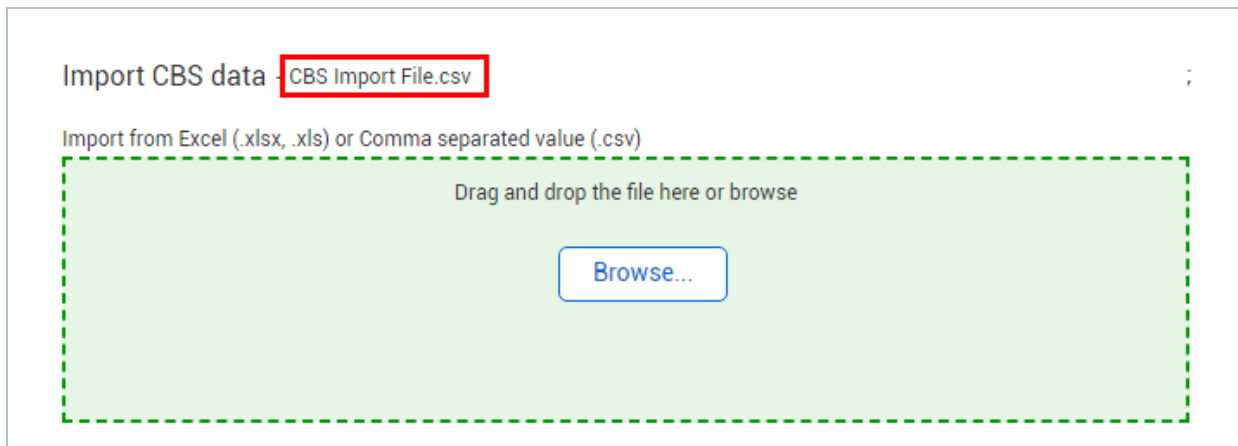
2. Select **Cost Items** when the Import CBS data window appears.
3. Click on the **Browse** button to select a file to import.



4. Browse to the Excel file you wish to import.
 - The file and its location should be indicated by your instructor if you're in a classroom setting, otherwise you can select one of your own
5. Select the import file and click **Open**.



- The import file is now selected



Import CBS data **CBS Import File.csv** ;

Import from Excel (.xlsx, .xls) or Comma separated value (.csv)

Drag and drop the file here or browse

Browse...

6. Under Options, select **New Items** (if not already selected).
7. For the Cost item matching criteria, select **Cost items and cost item attributes** from the drop-down list.



Options

* Import type

Cost items and cost item attributes ▼

☐ Update existing and new items

☐ Update existing items

☒ New items

8. Click **Next**.
 - This takes you to the **Map columns** window
 - Note that the File columns fields are set to **Blank-do not import by default**
9. Under File columns, click in the field on the same row as the UoM CBS column, then click again to expand the drop-down list for that field.

Map columns

Template

Unsaved template

| Control field | Mapped | File columns |
|----------------|--------|--|
| WBS phase code | | Blank-do not import |
| Allow as-built | | Blank-do not import |
| CBS position | | Blank-do not import |
| UoM | | <div>Blank-do not import</div> <div><div></div></div> <div>Blank-do not import</div> <div>CBS Position</div> <div>Description</div> <div>CE materials total cost</div> <div>CE subcontract total cost</div> <div>UOM</div> |

| Account code | | |
| Pay item assignment | | |

* Required fields

Reset

Cancel

10. Select UOM from the drop-down list to map the UOM column in the Excel file to the UoM CBS column.
11. Repeat the selection process to select the appropriate File columns to map to the following CBS columns:
- CBS position

Description

WBS Phase Code

Forecast (T/O) quantity




CE Final MHrs



CE final cost

- A green check mark indicates successful mapping of your file columns

Import CBS data - cost item import.xlsx

Map columns

Template Unsaved template   


| Control field  | Mapped  | File columns |
|---|--|---------------------|
| CE equipment cost/Hr | | Blank-do not import |
| CE equipment-Hrs/Unit | | Blank-do not import |
| CE final cost | | Blank-do not import |
| CE final Mhrs | ✓ | CE Final Mhrs |
| CE final unit cost | ✓ | CE final cost |
| CE labor cost/MHr | | Blank-do not import |
| CE Mhrs/Unit | | Blank-do not import |

* Required fields

Reset Cancel Back Next



12. To save these settings for future use, click in the Template field and type **Steel Structure Template**.

Map columns

Steel Structure Template  

| Order | Data type | CBS columns | Mapped | File columns |
|-------|-----------|-------------|--------|--------------|
|-------|-----------|-------------|--------|--------------|

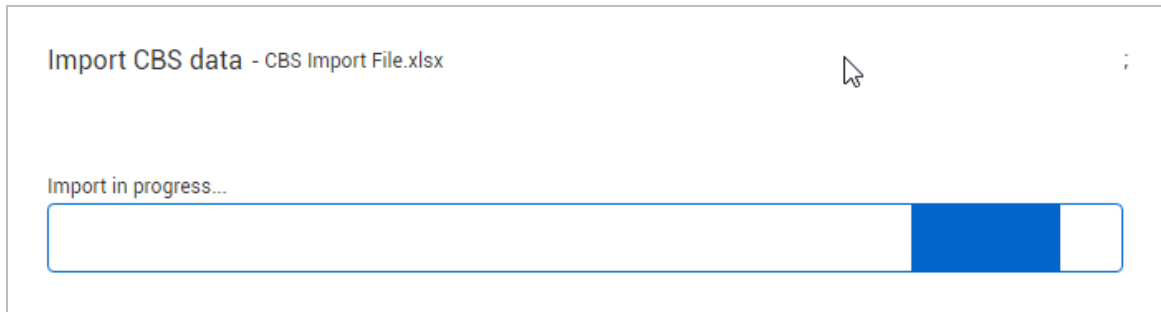
13. Click the **Save** icon to save the template.

Steel Structure Template  

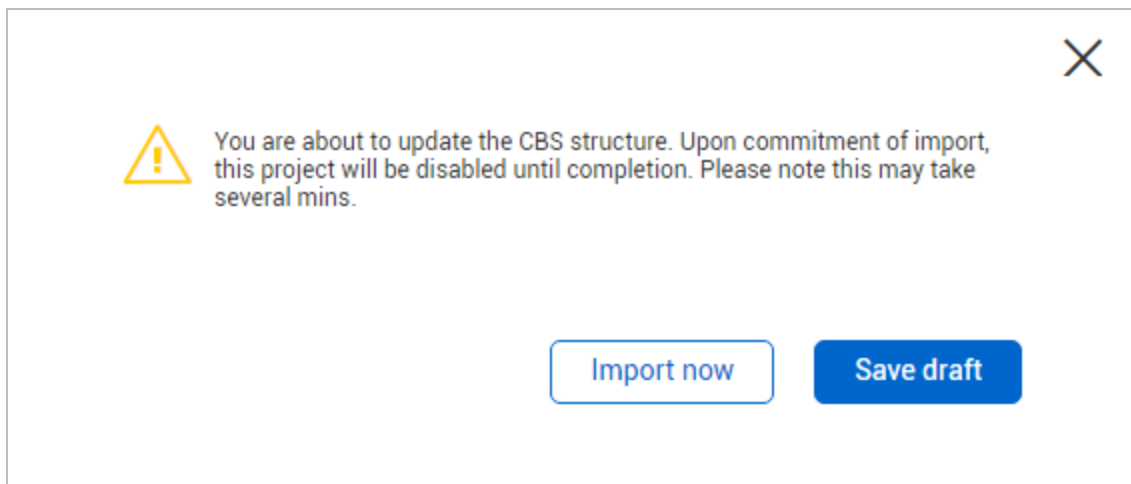
| Order | Data type | CBS columns | Mapped | File columns |
|-------|-----------|-------------|--------|--------------|
|-------|-----------|-------------|--------|--------------|

14. Click **Next**.

- A progress bar appears informing you the import is in progress

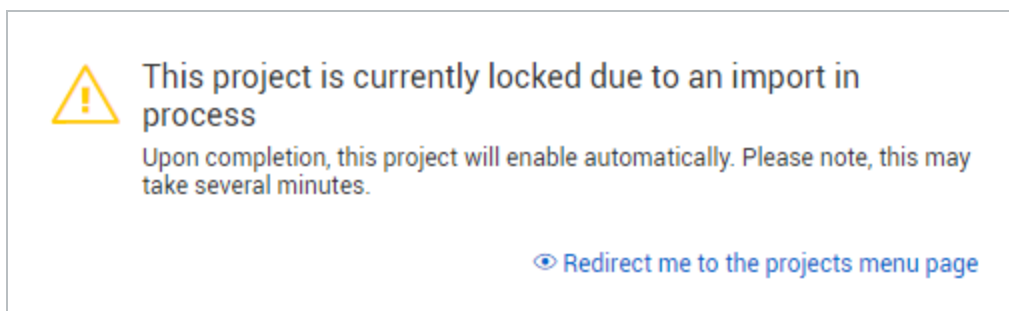


- A prompt appears, indicating the project will be disabled from use during the importing process

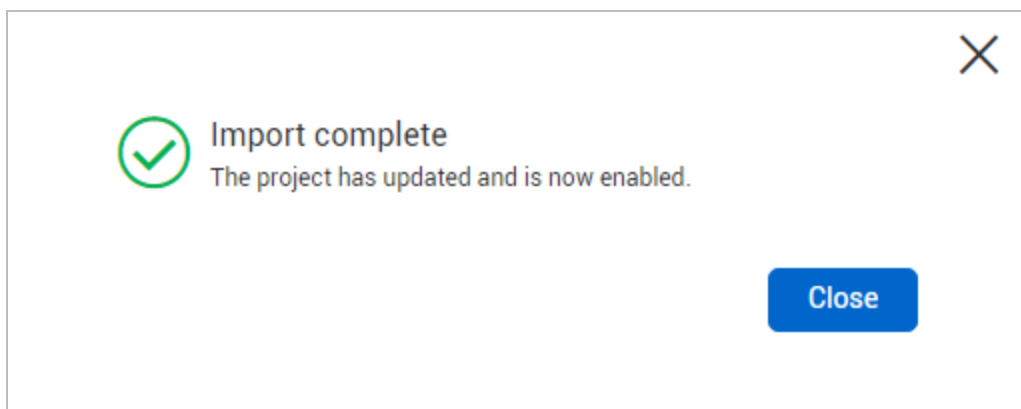


15. Click **Import now**.

- A prompt appears informing you that the project is currently locked for the importing process

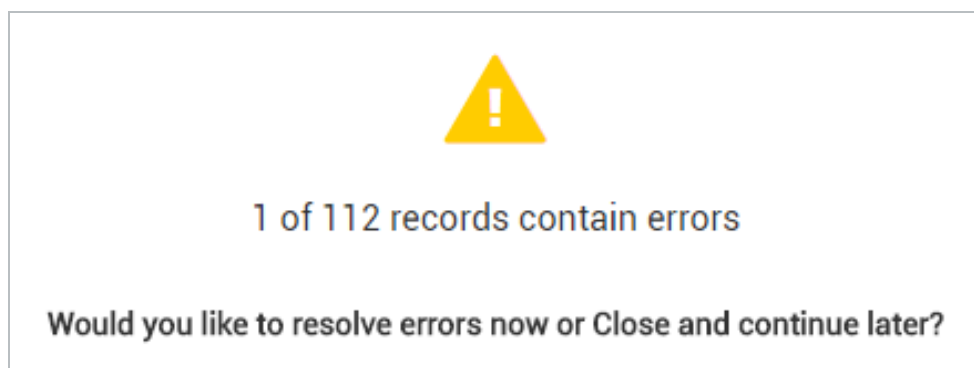


- Once completed, you will receive the following prompt, informing you the data imported successfully



3.4.5 RESOLVING IMPORT ERRORS

When conducting the import, you may run into errors. This will be indicated when you attend to run the import routine by the following prompt:



The prompt window includes a Review errors and items for import link, which you can click on to resolve any issues prior to final import. An error resolution page opens where you can identify and resolve your errors.

[Audit log](#) > [Import history](#) > [CBS Import File.xlsx](#)

[Find previous error](#) 1 errors remaini... [Find next error](#)

[Cancel import](#) [Import](#)

| Status Details (🔗 CBS position) | | Import Columns ⚠️ | | | | |
|---------------------------------|--------------------------|--------------------------|--------------|----------------------------|----------------|---------------|
| Import status | CBS match status | Import method | CBS position | Description | WBS phase code | CE final Mhrs |
| Pending | No match found, new item | Add new items and upd... | | Bolted Connections | | 1000 |
| Pending | No match found, new item | Add new items and upd... | | Module 01 - Erect Steel... | | 16000 |
| Pending | No match found, new item | Add new items and upd... | | Structural Steel | | 0 |
| Pending | No match found, new item | Add new items and upd... | | Structural Steel | | 0 |
| Pending | No match found, new item | Add new items and upd... | | Module 001 - Erect Ste... | | 0 |
| Error | No match found, new item | Add new items and upd... | | Structural Steel | | 0 |
| Pending | No match found, new item | Add new items and upd... | | Materials | | 0 |
| Pending | No match found, new item | Add new items and upd... | | Enriment | | 0 |

NOTE

There can be situations where the cost item Excel import process will successfully process some cost items, but fail to import other cost items. In this situation the process will show as failed. For example, you imported 100 cost items, and 90 of the cost items import successfully. There are 10 cost items that did not import successfully. In this scenario you would need to resolve the import errors.

3.4.6 EXCEL IMPORT FOR COMMITTED COST

Importing committed cost mainly helps to keep track of subcontract cost items where you would have a purchase order that would drive all of your cost.

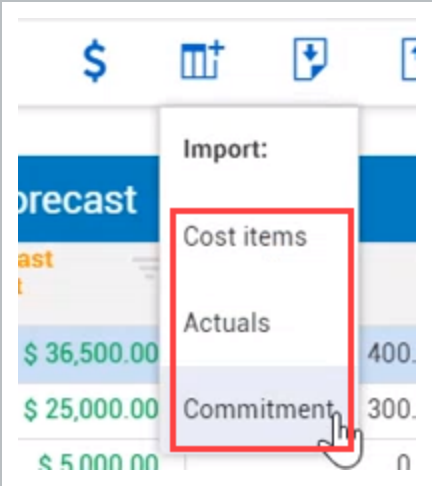
You can import two types of committed cost:

- Open/Remaining Committed Cost
- Total committed cost

Open/Remaining Committed Cost is the cost you still have left to pay on the purchase order. Total committed cost is the total purchase order amount for the purchase order.

Committed cost were previously located in different areas of Control. You can have Open and Total committed cost columns in your CBS. The same columns are also in the Commitments tab of the Actual Details Slideout where you can make manual edits to the committed costs. Columns in CBS for Open and Total committed costs only reflects the manual edits you made in the Actual Details Slideout. Open and Total committed costs are also shown in cost item details slideout cost categories tab.

You can import committed costs using the import icon on the CBS and selecting **Commitment**.



3.4.6.2 GENERATING THE COMMITMENT COST EXCEL SPREADSHEET

To bring in committed cost from the excel import, you first need an existing value in your CBS that matches the Excel Spreadsheet value. This can be one of two options:

- WBS phase code
- CBS position

You will also need the **Type** of committed cost you want to import, either Open/Remaining Committed Cost or Total commitment.

| Type | | | | | |
|------|----------------|---|------|-----------------|------------------|
| | A | B | C | D | E |
| 1 | WBS phase code | | Cost | Category | Type |
| 2 | 1003 | | 100 | Undefined | Open commitment |
| 3 | 1003 | | 100 | Undefined | Total commitment |
| 4 | 1004 | | 450 | Undefined labor | Open commitment |
| 5 | 1004 | | 750 | Undefined labor | Total commitment |

NOTE

Open/Remaining Committed Cost and Total commitment types need to be spelled exactly word for word as it is written in the screenshot. If you shorten any of the wording in the Type column, the system will not accept the import and you will receive an error.

Each Type of committed cost has to be its own line item on the Excel spreadsheet. You can do multiple transactions for one cost item, but only one commitment type per line item. if they are different types, you need to separate them out into different line items.

D3

fx

Undefined

| | A | B | C | D | E | F |
|---|----------------|---|------|-----------------|------------------|---|
| 1 | WBS phase code | | Cost | Category | Type | |
| 2 | 1003 | | 100 | Undefined | Open commitment | |
| 3 | 1003 | | 100 | Undefined | Total commitment | |
| 4 | 1003 | | 100 | Undefined labor | Total commitment | |
| 5 | 1004 | | 450 | Undefined labor | Open commitment | |
| 6 | 1004 | | 750 | Undefined labor | Total commitment | |

Each column needs to be created and defined if you are to do a Commitment Excel Import. You must include a Cost column and a Category column as shown in the above image.

NOTE

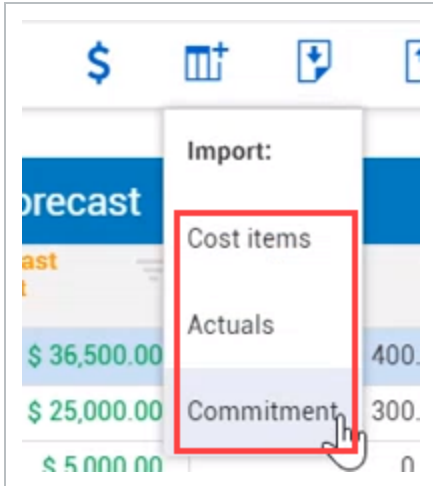
Open/Remaining Committed Cost should never be greater than your total.
Open/Remaining Committed Cost cost should either be equal or less than the Total commitment cost.

3.4.6.3 IMPORTING COMMITMENT DATA

Follow the step by step to Import commitment data.

IMPORT COMMITMENT COSTS

1. From Control's CBS tab, select the import icon. Then select **Commitment**.



2. After you have created your Excel spreadsheet with your commitment costs, select **Browse** from the Import from Excel window. Then select the Excel file name you saved.
3. After you return to the Import commitment data window, under the Options section, select the **Import type** drop down arrow. If it is not already selected, select the **Commitment values** option.

Options

* Import type

Commitment values

Select one

Cost items and cost item attributes

Actuals values

Commitment values

4. Select the Cost item matching criteria drop down and choose either WBS phase code or CBS position.

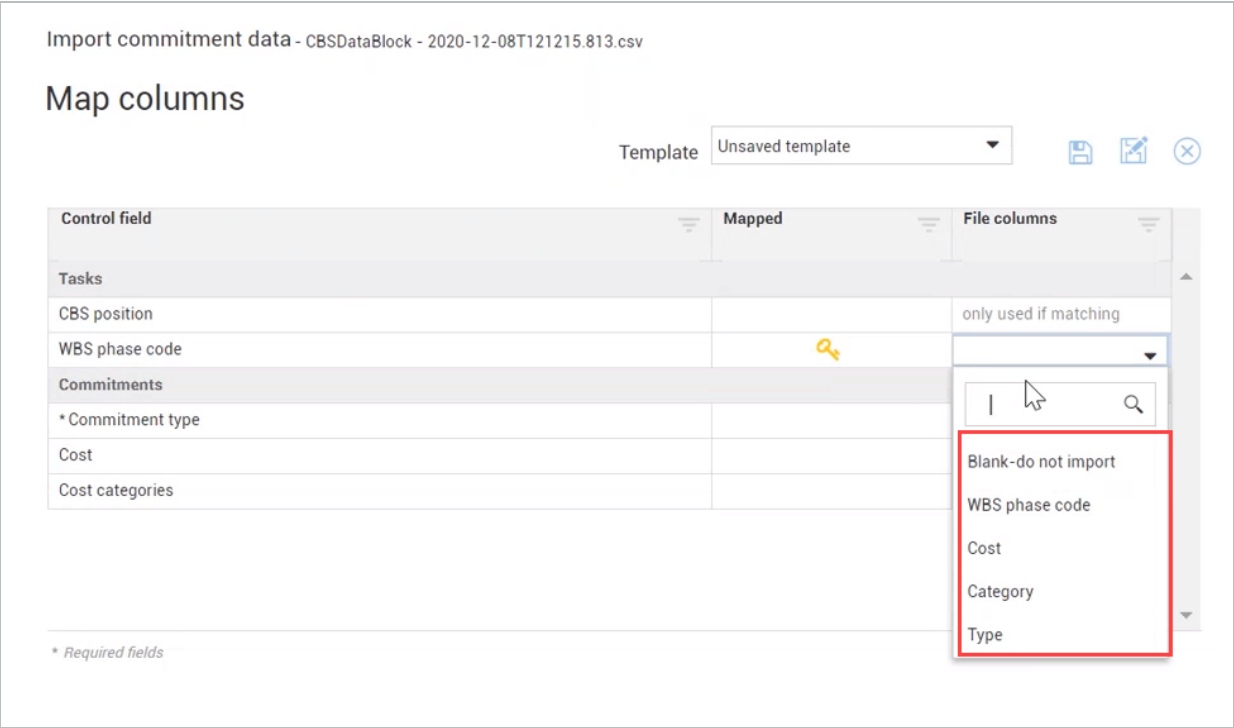
Cost item matching criteria

WBS phase code

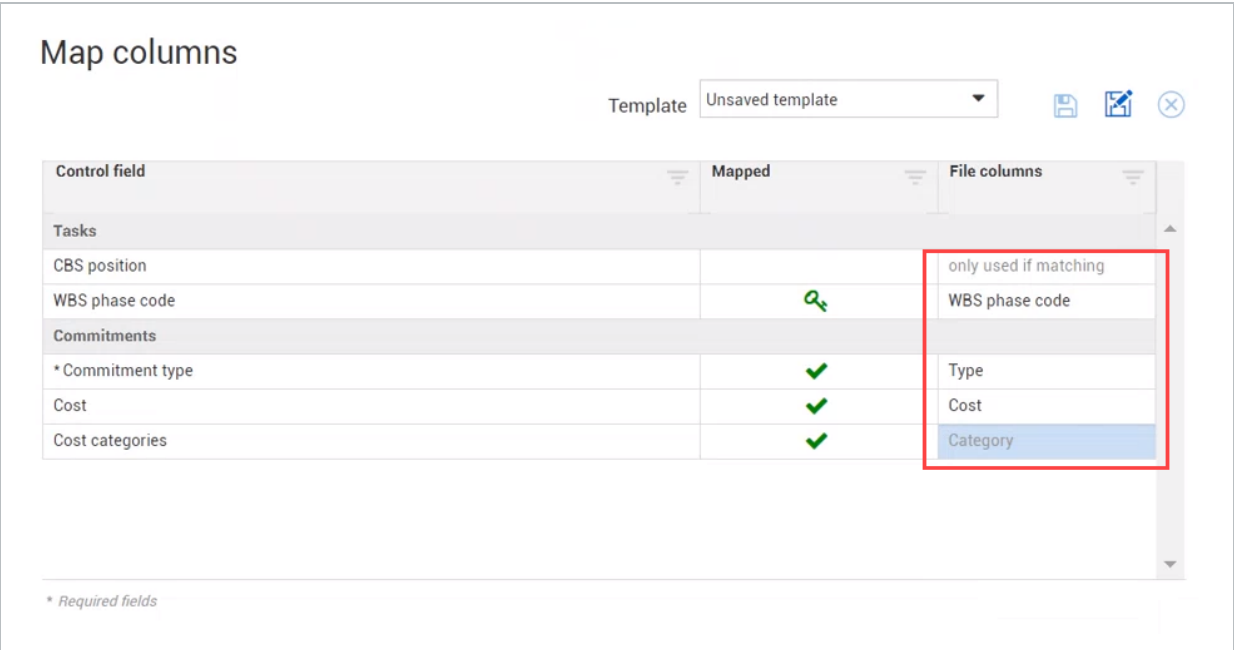
WBS phase code

CBS position

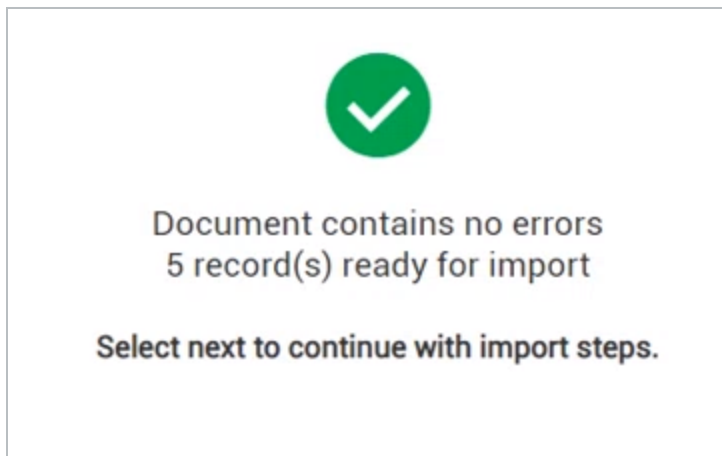
5. After selecting the drop down options, select **Next** in the bottom right corner.
6. From the Map columns screen, select the columns you are importing from your Excel spreadsheet.



7. The Control field should match the File columns. For example, Commitment type in Control field should match Type in File columns as shown below. Once done, select **Next**.



8. If there are no errors in the mapping stage, you should see a green check mark on the next screen, indicating everything is ready to be imported.



If you receive any errors in the mapping stage, you will receive an error with a download option to download a word document that shows you all the errors.

```
Import commitments CBS data: CBSDataBlock - 2020-12-08T121215.813.csv
File Import attempted on: 12/8/2020 9:04:55 PM
```

```
The following errors were detected while attempting to import commitment
values into control.
```

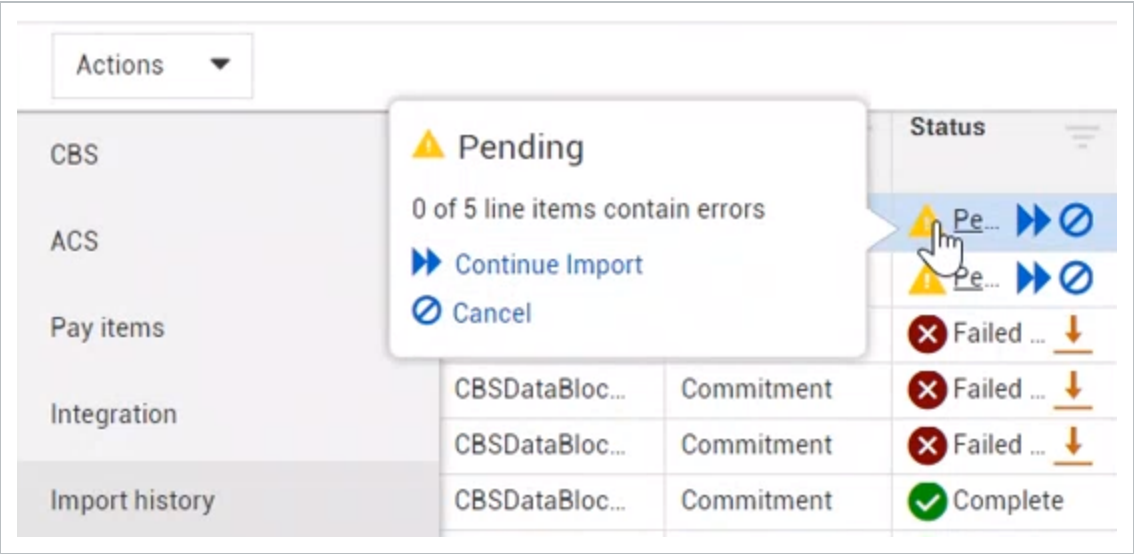
```
Review the errors below, once all the errors have been resolved,
reattempt the import to Control.
```

```
Error 1: Invalid commitment type. (this error affects 2 WBS/CBS items out
of 2 total attempted imported WBS/CBS items and 4 rows out of 4 total
attempted imported rows)
```

```
WBS: 1003
CBS: 1.3
Row: 1, 2
```

```
WBS: 1004
CBS: 1.4
Row: 3, 4
```

9. Click **Next** and then select **Import now**. This will create a line item in the Import history section of the Audit Log tab.
10. From Control, go to the Audit Log tab. Then select **Import history**. Hover over the yellow triangle to view the information on the pending import item.



NOTE After the pending import is Complete, the committed costs populate in the Cost Categories Details tab, as well as the CBS. It the costs also appear in the Commitments tab from the Actuals Details Slideout and populates into the new Open and Total cost committed columns.

If the imported commitment costs fail to import, the Aduit Log Import history would show that the import failed completely.

REVIEW

1. Which of the following is how can you identify a terminal cost item on the CBS register page? (Select all that apply.)
 - a. The row is highlighted a different color
 - b. A symbol displays on certain cost item fields
 - c. The row is indented
 - d. The 'Is Terminal' column is checked
2. When moving a cost item to be above another cost item at the same level, which icon should display when you drag and drop the cost item?
 - a. The one with a subordinate bar
 - b. The one with three equal bars
 - c. The one with an equal sign
 - d. The one with a plus sign
3. If you make changes to your spreadsheet, you must _____ the spreadsheet prior to importing it into Control.
 - a. close
 - b. copy
 - c. save
 - d. refresh

SUMMARY

As a result of this lesson, you can:

- Explain the Cost Breakdown Structure and its purpose
- Create, arrange and delete cost items
- Import cost items

This page intentionally left blank.

COST ITEM MANAGEMENT

LESSON DURATION: 30 MINUTES

LESSON OBJECTIVES

After completing this lesson, you will be able to:

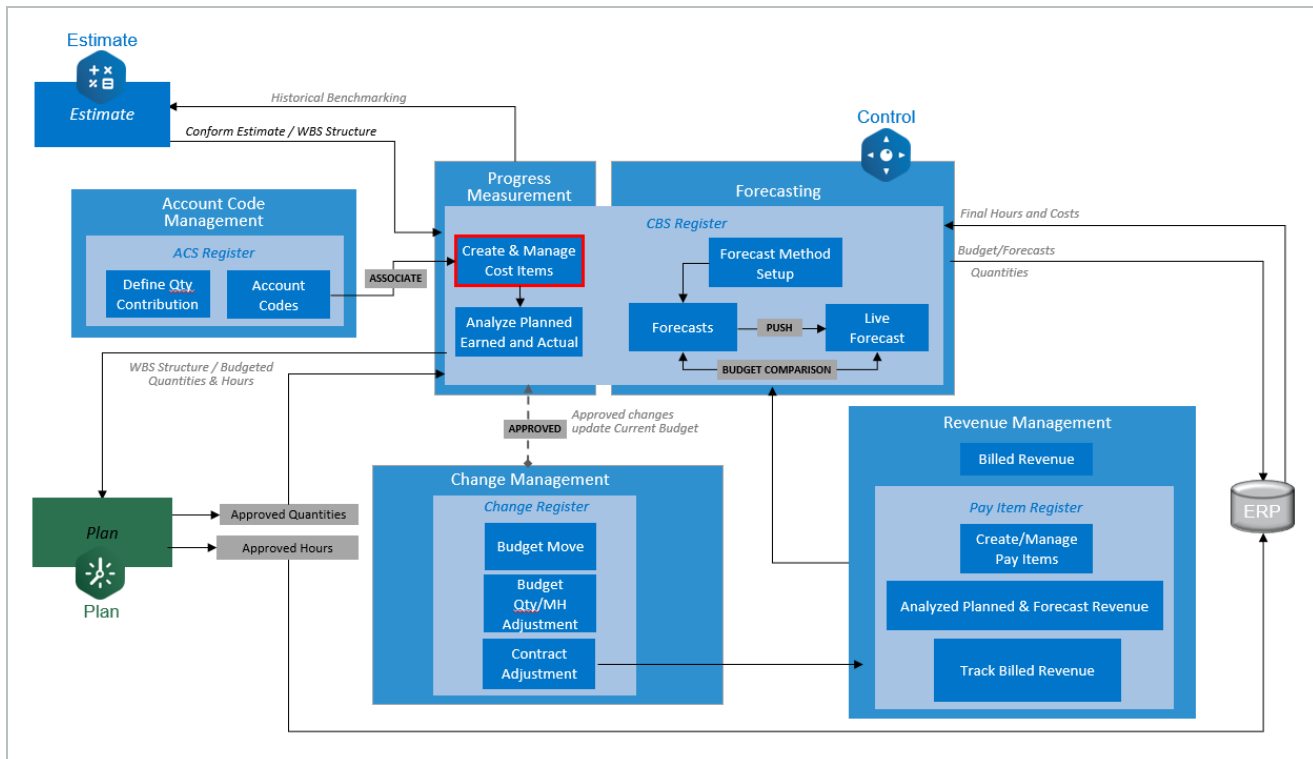
- Manage estimate resources
- Gain visibility into resource billing rates
- Manage cost item details
- Lock the budget

LESSON TOPICS

| | |
|---|-----|
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| | |
|---------------|-----|
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4.1 INEIGHT CONTROL WORKFLOW - COST ITEM MANAGEMENT



4.2 ESTIMATE RESOURCES

InEight Control refers to labor, equipment, material, installed equipment, and supplies as resources. You will use these resources as the basic building blocks for detailing the estimated costs which creates your budget.

The Project library contains all resources used to estimate costs for the cost items within the CBS.

TIP

Most of your CBS cost detail will import directly from InEight Estimate, but you may need to create additional cost item detail for conforming your budget and creating change orders.

Estimate resources in the Project library are organized into seven resource types:

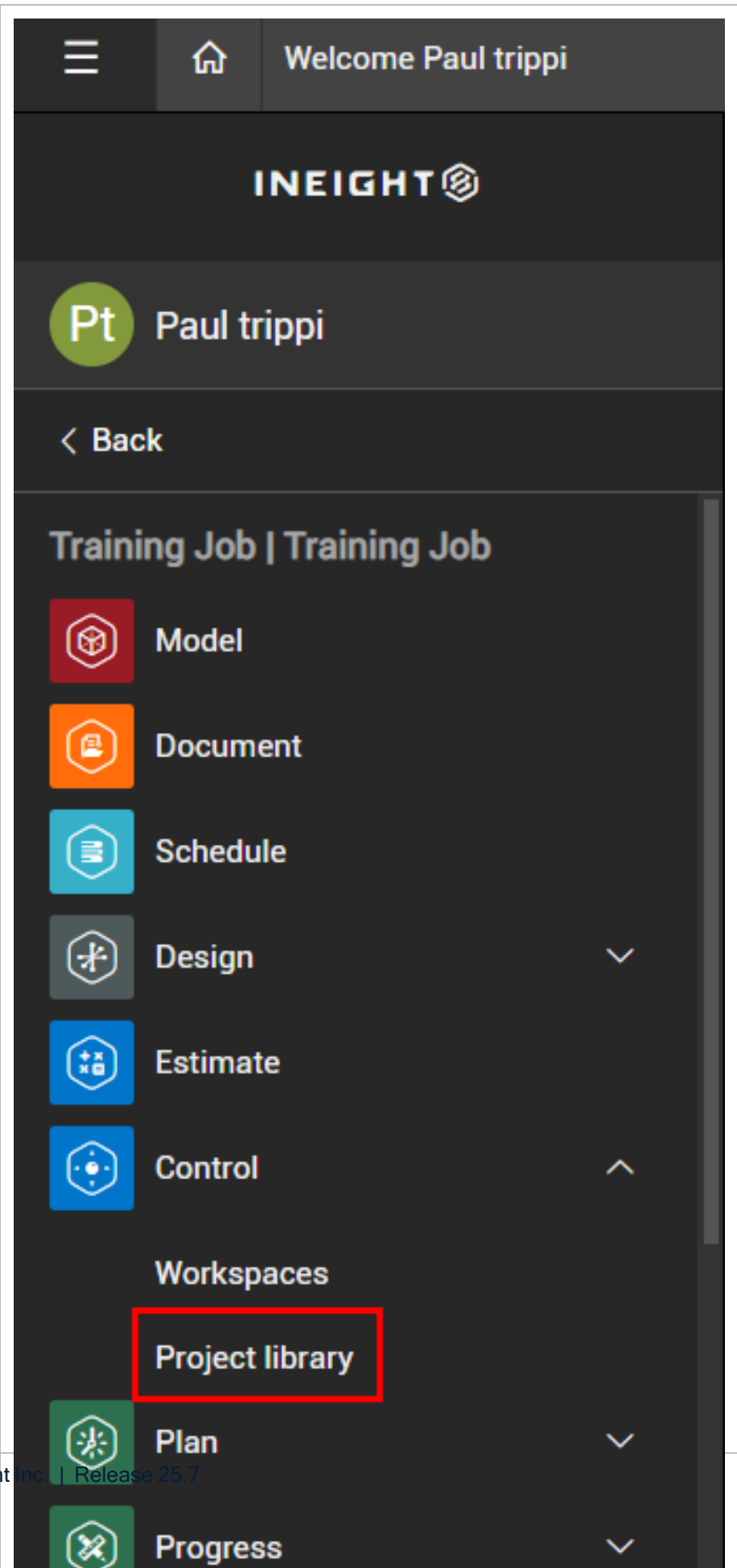
| Resource | Description |
|--------------------------------------|--|
| Labor | The human resources that do the work, classified by trade (e.g., pipefitters, electricians, iron workers). |
| Construction Equipment | Owned construction equipment. |
| Rented Construction Equipment | Construction equipment rented from a third party. |
| Installed Material | Materials that will remain installed on site after the project is completed, (e.g., concrete, piping, aggregate). |
| Installed Equipment | Equipment that will remain installed on site after the project is completed, (e.g., boilers, heat exchangers, vessels, cooling towers). |
| Supplies | Expendable items that will not be permanently installed (e.g., small tools, consumables). |
| Unique | Resources that are of a “unique” nature and do not fit well into the other types (e.g., dump fees, hauling charges and equipment rented by the month, and subcontracted work). |

TIP

Estimate resources are the equivalent of the Resource Rate Register in InEight Estimate.

You can access the Estimate resources page from the home page slide-out menu:

1. From **Menu > Control > Workspaces > Project Library** and then selecting the Estimate Resources tab.



Training Job | Training Job / Control / Project library

ESTIMATE RESOURCESREVENUE

| Labor | | Resource code | Description | Default Quanti... | Unit of m... | Utiliza... count | C l co (S |
|-------------------------------|--------------------------|---------------|----------------------|-------------------|--------------|------------------|-----------|
| Construction equipment | <input type="checkbox"/> | LC1 | Carpenter Apprentice | 1.00 | Hour | 594.37 | |
| | <input type="checkbox"/> | LC2 | Carpenter Journeyman | 1.00 | Hour | 1,188.73 | |
| Rented construction equipment | <input type="checkbox"/> | LC3 | Carpenter Foreman | 1.00 | Hour | 594.37 | |

2. Another way to access Estimate Resources is from the CBS page. Highlight a **line item** and hovering over the number in the Resource column for that cost item, as shown below.

Steel Structure Training Job105099

ActionsCBSACS

Tasks ?

| | CBS Position | Description |
|--------------------------|--------------|--------------|
| <input type="checkbox"/> | 1 | Job Overhead |
| <input type="checkbox"/> | 2 | Earthwork |
| <input type="checkbox"/> | 3 | Concrete |

Task Details < •

| Resource | Foreca (TO) Quanti |
|----------|--------------------|
| 1 | 10,00 |
| 1 | 10,00 |

- As a result, the Resource Summary window appears, where you can select **Resource Library** to open the Project library

| | | |
|--------------------------|-----|---------------------|
| <input type="checkbox"/> | 3 | Concrete |
| <input type="checkbox"/> | 4 | Structural Steel |
| <input type="checkbox"/> | 4.1 | Erect Steel - Heavy |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light |
| <input type="checkbox"/> | 4.3 | Bolted Connections |

Resource Summary

| Row # | Code | Description | Quantity | UOM | Work Hrs | C E-Unit Cost | CE - Total Cost |
|-------|------|---------------|----------|------|----------|---------------|-----------------|
| 1 | L001 | General Labor | 1 | Hour | 14000 | 50 | 700000 |

Resource Library

Assign Resource

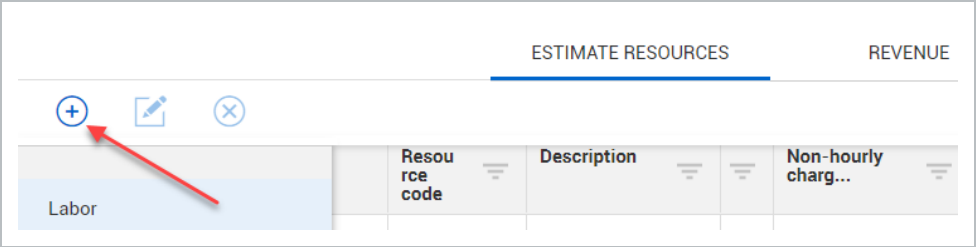
View More...

Overview - Estimate Resources

| | Resource | Description |
|---|-------------------------|---|
| 1 | Resource Type | The seven resource categories for organizing your resources. |
| 2 | Resource Code | Alphanumeric label to quickly identify resources. |
| 3 | Description | Additional label to provide more resource detail. |
| 4 | Default Quantity | The quantity the resource will have by default when it is assigned to a cost item. |
| 5 | Unit of Measure | The unit the resource is measured by. |
| 6 | Utilization Count | The number of units of that resource being used in the project. |
| 7 | C E-Unit Cost (Scale 1) | The resource's rate per unit. |
| 8 | Cost Driver | Tells you what drives the cost for that resource when it is assigned to a cost item (cost, quantity, or fixed). |
| 9 | Account Code | Code assigned to resources for accounting and benchmarking purposes. |

| ESTIMATE RESOURCES | | | | | REVENUE | | | |
|-------------------------------|---------------|-----------------------|------------------|------------|-------------------|-----------------------|-------------|--------------|
| | Resource code | Description | Default quantity | Unit of... | Utilization co... | C E-unit cost (Sca... | Cost driver | Account code |
| Labor | 1.C.01.1.05 | Laborer | 0 | Hour | 12381.81818 | \$ 35.00 | CI Duration | |
| Construction equipment | 1.C.01.1.06 | Crane Operator | 0 | Hour | 5100 | \$ 65.00 | CI Duration | |
| Rented construction equipment | 1.C.01.1.07 | Civil Operator | 0 | Hour | 1454.54545 | \$ 65.00 | CI Duration | |
| Installed material | 1.C.04.1.02 | Concrete Foreman | 0 | Hour | 3000 | \$ 65.00 | CI Duration | |
| Installed equipment | 1.C.04.1.03 | Concrete Journeyman | 0 | Hour | 9000 | \$ 55.00 | CI Duration | |
| Supplies | 1.C.04.1.04 | Concrete Apprentice | 0 | Hour | 9000 | \$ 45.00 | CI Duration | |
| Unique | 1.C.05.1.02 | Ironworker Foreman | 0 | Hour | 2100 | \$ 65.00 | CI Duration | |
| | 1.C.05.1.03 | Ironworker Journeyman | 0 | Hour | 6300 | \$ 55.00 | CI Duration | |
| | 1.C.05.1.04 | Ironworker Apprentice | 0 | Hour | 6300 | \$ 45.00 | CI Duration | |
| | 1.C.05.1.08 | Civil Foreman | 0 | Hour | 1047.27272 | \$ 65.00 | CI Duration | |
| | 1.C.05.1.09 | Civil Journeyman | 0 | Hour | 1454.54545 | \$ 57.50 | CI Duration | |
| | 1.C.05.1.23 | Civil Apprentice | 0 | Hour | 2181.81818 | \$ 45.00 | CI Duration | |
| | L001 | General Labor | 0 | Hour | 0 | \$ 50.00 | CI Duration | |

You can add additional estimate resources to the library by selecting the **Add estimate resource** icon.



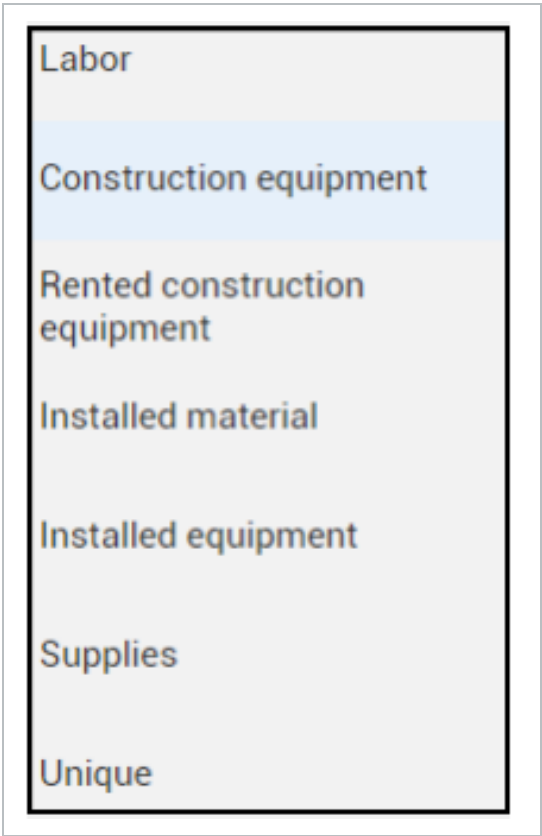
- The Add labor estimate resource screen opens.

The 'Add labor estimate resource' dialog box is shown. It has a title bar with a close button (X) and a help icon. The main area is divided into two tabs: 'SETUP' and 'RESOURCE RATES'. The 'SETUP' tab is active, showing the following fields:

- * Code: [Text input field]
- * Description: [Text input field] 1000
- Account code: [Text input field]
- * Cost driver: [Dropdown menu] CI Duration
- * Cost curve: [Dropdown menu] Employed Cost Item
- Tag 1: [Dropdown menu]
- Tag 2: [Dropdown menu]
- Tag 3: [Dropdown menu]
- User defined 1: [Text input field]
- User defined 2: [Text input field]
- User defined 3: [Text input field]
- User defined 4: [Text input field]
- User defined 5: [Text input field]
- User defined 6: [Text input field]
- User defined 7: [Text input field]
- User defined 8: [Text input field]
- User defined 9: [Text input field]
- User defined 10: [Text input field]
- * Productivity Factor: [Text input field] 1
- * Default Quantity: [Text input field] 0

At the bottom right, there are two buttons: 'Cancel' and 'Add'.

To add a resource to the correct resource type, make sure you are on the appropriate resource type tab (Labor, Construction Equipment, etc.) before clicking on the Add icon.



4.2.1 RESOURCE BILLABLE RATES

Within the Resource Rates tab, you can import, modify and add billable rates to estimate resources. This is particularly helpful on time and material or cost plus contracts to drive accurate invoicing.

Resource billing rates are also used for Forecast final revenue, as it will rely on the billing rates of the resources on the cost items that are assigned to pay items. These values generate revenue forecast for cost items that are associated to a cost plus or time & material (billing method) pay item.

Add labor estimate resource

* Code: Lab001-PB * Description: Welder

99

SETUP RESOURCE RATES

| | | | |
|-----------------------|----------|---------|---------|
| Allowance | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| G & A | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Undefined | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Billing rate | \$ 50.00 | \$ 0.00 | \$ 0.00 |
| Billing rate markup | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Billing rate markup % | 0.00% | 0.00% | 0.00% |

CREATE A LABOR RESOURCE

1. In the Steel Structure Training Job, select **Menu > Control > Workspaces** and make sure you are on the CBS tab.
2. Hover over the number under the Resource column of the Task Details data block for a **subordinate cost item**.
3. Select **Resource Library** from the Resource summary window.
4. With the Labor resource type selected, click on the **Add estimate resource** icon.
5. Fill in the blanks with the following:
 - Code: **Lab001-XX** (XX your initials)
 - Description: **Welder**
6. Scroll down to Default Quantity and change the value from 0 to **1**.
7. Select the **Resource Rates** tab.
8. Select the **Labor** cost category and type **50.00** in the Scale 1 unit cost.
9. Scroll down to the Resource Rates and enter in values for the following **Billing Rates**:

- Scale 1
- Scale 2
- Scale 3

1. Click **Add** to add the new resource to the register of estimated resources.

Now that you have created a resource, you will add this resource to the Erect Steel – Heavy cost item in your Project.

ADD RESOURCE TO JOB

1. From the Steel Structural Training Job, make sure you are in the CBS.
2. Right click on your **subordinate cost item**.
3. Select **Cost item details**.
4. Select the **Resources** tab.
5. Select **Add estimate resource**.
6. Click **Add**.

4.3 COST ITEM DETAILS

The cost item detail slide out panel contains many different fields to edit and enter cost item-related information. To access this screen, select the cost item and right-click to open the menu. Select **Cost item details**. There are four tabs to select from:

- Details tab
- Attributes tab
- Cost Categories tab
- Current Estimate Resources
- Forecast Resources tab

| DETAILS | ATTRIBUTES | COST CATEGORIES | CURRENT ESTIMATE RESOURCES | FORECAST RESOURCES |
|---------|------------|-----------------|-------------------------------|--------------------|
|---------|------------|-----------------|-------------------------------|--------------------|

NOTE

All editable cells in the cost item detail slide-out panel are single click.

4.3.1 DETAILS TAB

The Details tab contains the values and settings related to the cost detail of the item.

1069
Earthwork

| DETAILS | ATTRIBUTES | COST CATEGORIES | CURRENT ESTIMATE RESOURCES | FORECAST RESOURCES |
|-------------------------|------------------------|---------------------|-------------------------------|---------------------|
| Forecast T/O qty | UoM | CE unit cost | CE total cost | CBS position |
| 10,000.00 | CY | \$ 40.00 | \$ 400,000.00 | 2 |
| Last changed on | Last changed by | | | |
| 06/08/2022 09:53 AM | Service Account | | | |

Description
Earthwork

Account code
51

* Cost source
Detail

* Forecast T/O qty
10,000.00

* UoM
CY

☐ As-built lock

CE total cost
\$ 400,000.00

CE unit cost
\$ 40.00

☒ Live forecast method
Current estimate

CE total Mhrs
8,000.00

CE total equipment Hrs
0.00

CE labor cost/Mhrs
\$ 50.00

CE Mhr/Unit
0.80

CE Units/Mhrs
1.25

* Cost segment
Direct Cost

* Allow as-built
All

Pay item assignment
001

* Currency
USD \$

* Quantity driver

☐ CBS contribute qty

☐ Hide in plan/Progress

☐ Pay item contribute qty

Below is an explanation of some of the key settings on the Details tab.

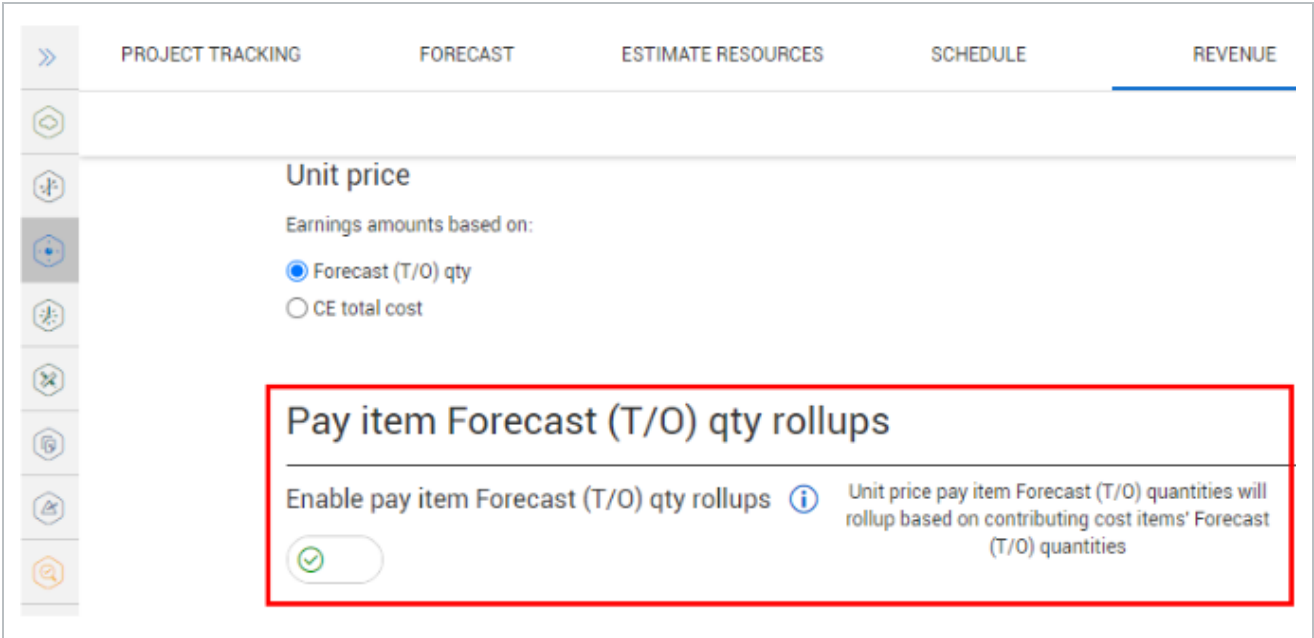
| Term | Function |
|--------------------------------------|---|
| Cost source | <p>Indicates how costs are entered on the cost item.</p> <ul style="list-style-type: none"> • Detail - Resources and duration defined to determine costs • Plug - Unit and total costs entered at the cost category level |
| Live Forecast method | Determines the Forecast Method for the cost item. (See <i>Lesson 9 - Forecasting</i> for more Forecast Method details). |
| Cost segment | <p>Categorizes whether the cost item is a direct or indirect cost.</p> <ul style="list-style-type: none"> • Direct Cost - costs that directly pertain to the deliverables (pay items) of the job • Job Overhead - Overhead costs associated with running and managing the job (e.g., management, jobsite facilities) • Business Overhead - Overhead costs associated with running the business (not directly related to running the job) • Subcontract - subcontract associated costs |
| Allow as-built | <p>Determines whether you can enter actual costs and quantities for a cost item.</p> <ul style="list-style-type: none"> • None - Cost item does not accept cost or quantities. This is typically seen in Superior cost items • All - Allows a cost item to accept both direct costs and quantities • Quantities - Cost item only accepts quantities • Cost - Cost item only accepts costs, man hours, and equipment hours. |
| Quantity driver | <p>Superior cost item will have the Forecast T/O qty update when the superior cost item (parent cost item) receives an update. The change to the qty will be the original value multiplied by the same multiplier that was applied to the superior cost item.</p> <p>For example: if the superior cost item qty doubles, the item with Superior CI will double as well. Cost items with Fixed as the selection will not be affected by changes to the parent cost item.</p> |
| Cost item contribute quantity | Checked cost items will have the Forecast T/O qty roll-up to the parent cost item if the UoM on both of the items are the same. |
| Pay item contribute quantity | Checking this box lets you choose which cost items contribute to the Pay item's forecast (T/O) quantity and can affect earnings rules for the associated pay item. This field is only visible if you have the Enable Pay item Forecast (T/O) |

| Term | Function |
|------|---|
| | quantity rollups setting turned on in Settings > Control > Revenue . |

4.3.1.1 PAY ITEM CONTRIBUTE QUANTITY

The Pay item contribute qty function works only when the Pay item Forecast (T/O) qty rollups toggle is set to *On* in Settings > Control > **Revenue**. If you have a unit price pay item, its forecast (T/O) quantity is the sum of all the contributing cost items forecast (T/O) quantities.

This function lets you define which cost items roll up their quantities to a pay ite



In the CBS, you can quickly modify the pay item contribute quantity either in bulk or by selecting a single cost item.

Tasks

| | | |
|-------------------------------------|--|---------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> CBS position | De... |
| <input checked="" type="checkbox"/> | 3 | Misc. i |
| <input checked="" type="checkbox"/> | 3.1 | Misc. i |
| <input checked="" type="checkbox"/> | 3.1.6 | B/C 88 |
| <input type="checkbox"/> | 3.1.6.1 | 8888 C |
| <input type="checkbox"/> | 3.1.6.2 | 8888 C |
| <input type="checkbox"/> | 3.1.6.3 | 8888 C |
| <input type="checkbox"/> | 3.1.6.4 | Bower |
| <input type="checkbox"/> | 3.1.6.5 | |

Multiple cost items selected

DETAILS

ATTRIBUTES

COST CATEGORIES

CURRENT ESTIMATE RESOURCES

Last changed on

Last changed by

05/23/2022 11:49 PM

rakesh.gunda-ptr@inei...

Description

Account code

* Cost source

(Varies)

Detail

* Forecast T/O qty

* UoM

* As-built lock

1.00000000000

PLS

☐

CE total cost

CE unit cost

☒ Live forecast method

\$ 0.00000000000

\$ 0.00000000000

Rollup

CE total MHrs

CE total equipment Hrs

CE labor cost/MHrs

0.00000000000

0.00000000000

\$ 0.00000000000

CE Mhr/Unit

CE Units/MHrs

* Cost segment

0.00000000000

0.00000000000

(Varies)

* Allow as-built

Pay item assignment

* Currency

None

2

CAD \$

* Quantity driver

☐ CBS contribute qty

☐ Hide in plan/Progress

Superior CI

☒ Pay item contribute qty

Selecting the Pay item contribute qty check box updates both the Current forecast (T/O) and the Update earning rules, only if Earnings rules are set to calculate based on Forecast (T/O) qty value in Pay items.

Drag a column

| Pay item position | Pay item number | Descri... | Line num... | Row num... | Current price | Current forecast (T/O) qty |
|-------------------|-----------------|-----------|-------------|------------|-----------------|----------------------------|
| 1 | 2 | 2 | 2 | 2 | \$ 100.00000000 | 3.000000000000 |
| 2 | 4 | D4 | 4 | 4 | \$ 1,000.000000 | |
| 2.1 | 1 | | 1 | 1 | \$ 1,000.000000 | 0.000000000000 |

Pay item ID
2

Description
2

Calculate earning amounts by:
☒ Forecast (T/O) qty
☐ CE total cost

| CBS Position | Descri... | Pay item contrib... quantity | Earning % |
|--------------|-------------------|-------------------------------------|-------------------|
| 3 | Misc. Rev Ext... | <input checked="" type="checkbox"/> | 5.000000000000 % |
| 3.1 | Misc. Rev Ext... | <input checked="" type="checkbox"/> | 0.000000000000 % |
| 3.1.6 | B/C 8888 Osle... | <input checked="" type="checkbox"/> | 0.000000000000 % |
| 3.1.6.5 | | <input type="checkbox"/> | 0.000000000000 % |
| 3.1.6.1 | 8888 Osler La... | <input type="checkbox"/> | 15.000000000000 % |
| 3.1.6.4 | Bowen Island ... | <input type="checkbox"/> | 0.000000000000 % |
| 3.1.6.2 | 8888 Osler Eq... | <input type="checkbox"/> | 0.000000000000 % |
| 3.1.6.3 | 8888 Osler 3rd... | <input type="checkbox"/> | 0.000000000000 % |
| | | | 20.000000000000 % |

☐ Default Earning Rules

Deselecting the Pay item contribute qty check box in the CBS also updates both the Current forecast (T/O) and the Update earning rules.

Drag a column

| Pay item position | Pay item number | Descri... | Line num... | Row num... | Current price | Current forecast (T/O) qty |
|-------------------|-----------------|-----------|-------------|------------|-----------------|----------------------------|
| 1 | 2 | 2 | 2 | 2 | \$ 100.00000000 | 0.000000000000 |
| 2 | 4 | D4 | 4 | 4 | \$ 1,000.000000 | |
| 2.1 | 1 | | 1 | 1 | \$ 1,000.000000 | 0.000000000000 |

Pay item ID
2

Description
2

Calculate earning amounts by:
☒ Forecast (T/O) qty
☐ CE total cost

| CBS Position | Descri... | Pay item contrib... quantity | Earning % |
|--------------|-------------------|------------------------------|-------------------|
| 3 | Misc. Rev Ext... | <input type="checkbox"/> | 5.000000000000 % |
| 3.1 | Misc. Rev Ext... | <input type="checkbox"/> | 0.000000000000 % |
| 3.1.6 | B/C 8888 Osle... | <input type="checkbox"/> | 0.000000000000 % |
| 3.1.6.5 | | <input type="checkbox"/> | 0.000000000000 % |
| 3.1.6.1 | 8888 Osler La... | <input type="checkbox"/> | 15.000000000000 % |
| 3.1.6.4 | Bowen Island ... | <input type="checkbox"/> | 0.000000000000 % |
| 3.1.6.2 | 8888 Osler Eq... | <input type="checkbox"/> | 0.000000000000 % |
| 3.1.6.3 | 8888 Osler 3rd... | <input type="checkbox"/> | 0.000000000000 % |
| | | | 20.000000000000 % |

☐ Default Earning Rules

4.3.2 ATTRIBUTES TAB

The Attributes tab allows you to tag the new cost item with user-defined entries.

1. **User-Defined Fields** –free text fields that you can type values into manually
2. **Tags** – Many of these fields are validated fields (known as tags), meaning you can choose from options in a drop-down list

1074
Erect Steel - Heavy

DETAILS ATTRIBUTES COST CATEGORIES RESOURCES

CBS tag 16
CBS tag 17
CBS tag 18
CBS tag 19
CBS tag 20
CBS tag 22
CBS tag 23
CBS tag 25
CBS user defined 1
CBS user defined 3
CBS user defined 4
CBS user defined 6
CBS user defined 7
CBS user defined 9
CBS user defined 10
CBS user defined 12
CBS user defined 13
CBS user defined 15

Hand Place
Machine Finish
Other
Shoulder Barrier - Walls
Cut Off Pile
Splice Pile
Clear

Some of these tags and their drop-down values are defined at the organizational level and others are customizable via the Project Settings under the Configure tag list value.

4.3.3 COST CATEGORIES TAB

The Cost Categories tab allows you to view your current budget, actuals, live forecast and forecast remaining cost, broken down into more detailed cost categories (e.g., labor, construction equipment, supplies, materials, etc.).

The header in the Cost Categories tab shows the **% Complete**, **Live forecast method**, and the **Latest actuals in forecast values**.

| DETAILS | | ATTRIBUTES | COST CATEGORIES | | RESOURCES |
|-------------------|------------------------|-----------------------------------|------------------|-------------------|---------------------------|
| % Complete | ★ Live forecast method | Latest actuals in forecast values | | | |
| 297.77777778 % | Committed cost ▼ | 08/21/2020 | | | |
| | | TOTAL | PER UNIT | | |
| Cost category | Current budget | Total cost (to date) | Current estimate | ★ Live forecast | ★ Forecast remaining cost |
| ^ Total | \$ 100.00000 | \$ 30,565.15556 | \$ 100.00000 | \$ 31,565.15556 | \$ 1,000.00000 |
| v Labor | \$ 0.00000 | \$ 44,111.00000 | \$ 0.00000 | \$ 45,111.00000 | \$ 1,000.00000 |
| v Construction... | \$ 0.41477 | \$ 0.02304 | \$ 0.41477 | \$ 0.02304 | \$ 0.00000 |
| v FOM Rented ... | \$ 0.04148 | \$ 0.00230 | \$ 0.04148 | \$ 0.00230 | \$ 0.00000 |
| v Supplies | \$ 0.00000 | (\$ 14,000.00000) | \$ 0.00000 | (\$ 14,000.00000) | \$ 0.00000 |
| v Materials | \$ 0.00000 | (\$ 51.40000) | \$ 0.00000 | (\$ 51.40000) | \$ 0.00000 |
| v Subcontract | \$ 0.00000 | \$ 0.00000 | \$ 0.00000 | \$ 0.00000 | \$ 0.00000 |
| v Fees | \$ 99.54376 | \$ 5.53021 | \$ 99.54376 | \$ 5.53021 | \$ 0.00000 |

If you have the correct permissions, you can change the Live forecast method. You can also change the view of the Cost Categories values to show either **Total** or **Per Unit** cost.

1004

Permittss

DETAILS

ATTRIBUTES

COST CATEGORIES

% Complete

★ Live forecast method

Latest actuals in forecast values

297.77777778 %

Committed cost ▼

Current budget

Current estimate

Average performance

None

Committed cost

08/21/2020

TOTAL

PER UNIT

Cost category

Total cost (to date)

Current estimate

★ Live forecast

★ F

^ Total

▼ Labor

▼ Construction

\$ 30,565.15556

\$ 100.00000

\$ 31,565.15556

\$ 44,111.00000

\$ 0.00000

\$ 45,111.00000

\$ 0.02304

\$ 0.41477

\$ 0.02304

This is also where you enter the estimated cost into the different cost categories for the plug cost source.

You can expand the labor category and enter your cost at the appropriate level (e.g., Labor Base wages). You need to enter the cost under the appropriate level of the category. For example, if you

enter the cost at the Labor category level, the cost will appear in Undefined Labor level because you did not enter it at a specific sub-category level.

| DETAILS | ATTRIBUTES | COST CATEGORIES | | RESOURCES | |
|---------------------------|-----------------|----------------------|------------------|-----------------|---------------------------|
| 4.1 - Erect Steel - Heavy | | | | | |
| Cost category | Current Budget | Total Cost (To Date) | Current Estimate | ★ Live Forecast | ★ Forecast Remaining Cost |
| ▸ Total | \$800,000.00 | \$0.00 | \$800,000.00 | \$800,000.00 | \$800,000.00 |
| ▸ Labor | \$800,000.00 | \$0.00 | \$800,000.00 | \$800,000.00 | \$800,000.00 |
| Labor Base | \$800,000.00 | \$0.00 | \$800,000.00 | \$800,000.00 | \$800,000.00 |
| ▸ Labor Burden | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Undefined Labor | Undefined Labor | | \$0.00 | \$0.00 | \$0.00 |
| ▸ Construction Equipment | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

The following Step by Step walks you through adding costs to the Cost Categories tab of the Cost item details slide out panel.

ENTER COSTS IN COST CATEGORIES

1. Within the InEight Control main page, on the CBS tab, right click on the cost item you created.
2. Select **Cost Item Details** to open the Cost item details slide out panel.
3. Click on the **Cost Categories** sub tab.
4. Under the Current Estimate column, expand the **Labor** cost category.
5. In the Current Estimate column, enter a value in the Current Estimate column for Labor Base, then press the **Tab** key.

4.3.4 CURRENT ESTIMATE RESOURCES TAB

The Current Estimate Resources tab is where you can view and manage the CE resources for terminal cost items.

From the Current Estimate Resources tab you can view and manage:

- Cost item details
- Current estimate resources
- Productivity and overall settings

- Resource details

DETAILS

ATTRIBUTES

COST CATEGORIES

CURRENT ESTIMATE RESOURCES

FORECAST RESOURCES

Cost item details

Forecast T/O qty

UoM

CE total cost

CE remaining cost

CBS position

Cost source

10,000.00

CY

\$ 1,000,000.00

\$ 1,000,000.00

5.2

Detail

Current estimate resources

| <input checked="" type="checkbox"/> | Row # | Code | Description | Quantity | UoM | Work hours | CE unit cost |
|-------------------------------------|-------|--------|---------------------------|----------|-----|------------|--------------|
| <input checked="" type="checkbox"/> | 1 | C01.04 | Concrete Bulk Commodities | 10000 | CY | | 0 |

Productivity and overall settings

Remaining

Total

Remaining hours

0.00

Remaining units/hour

0.00

Remaining hours/unit

0.00

Remaining man hours

0.00

Remaining units/man hour

0.00

Remaining man hours/unit

0.00

Resource details

C01.04

Concrete Bulk Commodities

When

☒

☐

| Cost category | Amount |
|-----------------------|-----------|
| ▼ Total | \$ 100.00 |
| Billing rate | \$ 100.00 |
| Billing rate markup | \$ 0.00 |
| Billing rate markup % | 0.00 % |
| Charge rate | \$ 100.00 |
| Markup amount | \$ 0.00 |
| Markup % | 0.00 % |

TIP

To see a total sum of the resources in Current estimate resources, you must have the Cost Source set to **Detail**.

DETAILS

ATTRIBUTES

COST CATEGORIES

CURRENT ESTIMATE RESOURCES

FORECAST RESOURCES

Cost item details

Forecast T/O qty

UoM

CE total cost

CE remaining cost

CBS position

Cost source

800.00

Ton

\$ 800,000.00

\$ 800,000.00

4.1

Detail

Detail

Plug

Current estimate resources

Productivity and overall settings

Resource details

NOTE

When the cost item’s cost source is set to **Plug**, you will not use the Current Estimate Resources tab. Instead, costs are “plugged” or entered directly into cost categories on the Cost Categories tab of the cost item.

4.3.4.2 COST DRIVER

Each type of resource has a default cost driver. For example, Labor resources are duration driven so their default cost driver is CI Duration, meaning their costs are driven by the duration of the cost item. If you want a resource to only be assigned to a specific cost item or work activity for half the time, you can change its quantity to .5 and it will be driven by half of the cost item’s hours.

1005

Erect Steel - Light

DETAILS

ATTRIBUTES

COST CATEGORIES

CURRENT ESTIMATE RESOURCES

FORECAST RESOURCES

Cost item details

Forecast T/O qty

UoM

CE total cost

CE remaining cost

CBS position

Cost source

200.00

Ton

\$ 155,000.00

\$ 155,000.00

4.2

Detail

Current estimate resources

| <input type="checkbox"/> | Row # | Code | Description | Quantity | UoM | Work hours | CE unit cost |
|--------------------------|-------|-------------|-----------------------|----------|------|------------|--------------|
| <input type="checkbox"/> | 1 | 1.C.01.1.05 | Laborer | 2 | Each | 800 | |
| <input type="checkbox"/> | 2 | 1.C.05.1.04 | Ironworker Apprentice | 0.5 | Each | 200 | |
| <input type="checkbox"/> | 3 | 1.C.01.1.06 | Crane Operator | 1 | Each | 400 | |
| <input type="checkbox"/> | 4 | 1.C.05.1.03 | Ironworker Journeyman | 3 | Each | 1200 | |
| <input type="checkbox"/> | 5 | 1.C.05.1.02 | Ironworker Foreman | 1 | Each | 400 | |

NOTE

Updating the total quantity of a resource with CI quantity as the cost driver will not auto-update the hours.

To enter work hours manually for the employed resource, you can change the Cost Driver option to CI Quantity or Fixed.

DETAILS

ATTRIBUTES

COST CATEGORIES

CURRENT ESTIMATE RESOURCES

FORECAST RESOURCES

Cost item details

Forecast T/O qty

UoM

CE total cost

CE remaining cost

CBS position

Cost source

800.00

Ton

\$ 800,000.00

\$ 800,000.00

4.1

Detail

Current estimate resources

| <input type="checkbox"/> | Row # | Code | Description | | CE total cost | Cost driver | Cost curve |
|-------------------------------------|-------|-------------|-----------------------|-------|---------------|-------------|-----------------|
| <input checked="" type="checkbox"/> | 1 | 1.C.05.1.04 | Ironworker Apprentice | 45.00 | \$ 216,000.00 | CI Duration | Employed Cos... |
| <input type="checkbox"/> | 2 | 1.C.05.1.02 | Ironworker Foreman | 65.00 | \$ 104,000.00 | | Employed Cos... |
| <input type="checkbox"/> | 3 | 1.C.05.1.03 | Ironworker Journeyman | 55.00 | \$ 264,000.00 | | Employed Cos... |
| <input type="checkbox"/> | 4 | 1.C.01.1.05 | Laborer | 35.00 | \$ 112,000.00 | | Employed Cos... |
| <input type="checkbox"/> | 5 | 1.C.01.1.06 | Crane Operator | 65.00 | \$ 104,000.00 | | Employed Cos... |

NOTE

If you change the Cost Driver to CI Quantity, the fields below will not be editable. It causes the adjusted duration to become zero or read-only. However, it can be editable if it does make a cost impact.

With CI Quantity as your cost driver for your resources, you can adjust the Work Hours manually, where previously that column was read-only. For example, perhaps you want your Laborer to work specifically 80 hours. The Forecast (T/O) Qty is very significant when it comes to quantity driven resources. It determines how the cost is driven and what affects the cost of that specific line item.

For example, perhaps there is a scope change and you need to change the Forecast (T/O) Qty from 900 to 350.

1074

Erect Steel - Heavy

DETAILS

ATTRIBUTES

Forecast T/O qty

900.00

UoM

Ton

CE unit cost

\$ 1,000.00

Last changed on

07/02/2025 06:51 AM

Last changed by

Toby Stow

Description

Erect Steel - Heavy

Account code

62.03.02.00

• Forecast T/O qty

900.00

• UoM

Ton

A dialog box shows to choose whether it will affect the CE unit cost or CE total cost. Typically, you keep the unit cost constant and adjust the total cost.

✕

⚠

Proportionally adjust CE unit cost or CE total cost ?

You can modify Forecast T/O qty by proportionally adjusting CE unit cost or CE total cost. Specify the value you would like to modify:

☐ CE unit cost

\$1,000.00

☒ CE total cost

\$350,000.00

Cancel

OK

Note that the Welder’s work hours adjust because they are driven by the Forecast (T/O) quantity of the cost item.

When the Cost Driver is set on Fixed, you can only update the resource’s hours by typing into the resource itself and updating the work hours directly.

Many of the numbers are tied to equations under the Productivity resources below. If you edit the numbers, it will have an impact on the resources depending on the cost driver.

4.3.5 FORECAST RESOURCES TAB

The Forecast Resources tab is where you can view and manage estimate resources assigned to a cost item.

From the Resources tab you can view and manage the:

- Forecast details live forecast method
- Add new resources and adjust duration-driven resources by changing their productivity
- View and adjust resource rates of assigned resources

The screenshot displays the 'Forecast Resources' tab within a software interface. The interface is divided into several sections, each with a red border and a collapse arrow:

- Forecast details:** Contains summary statistics:

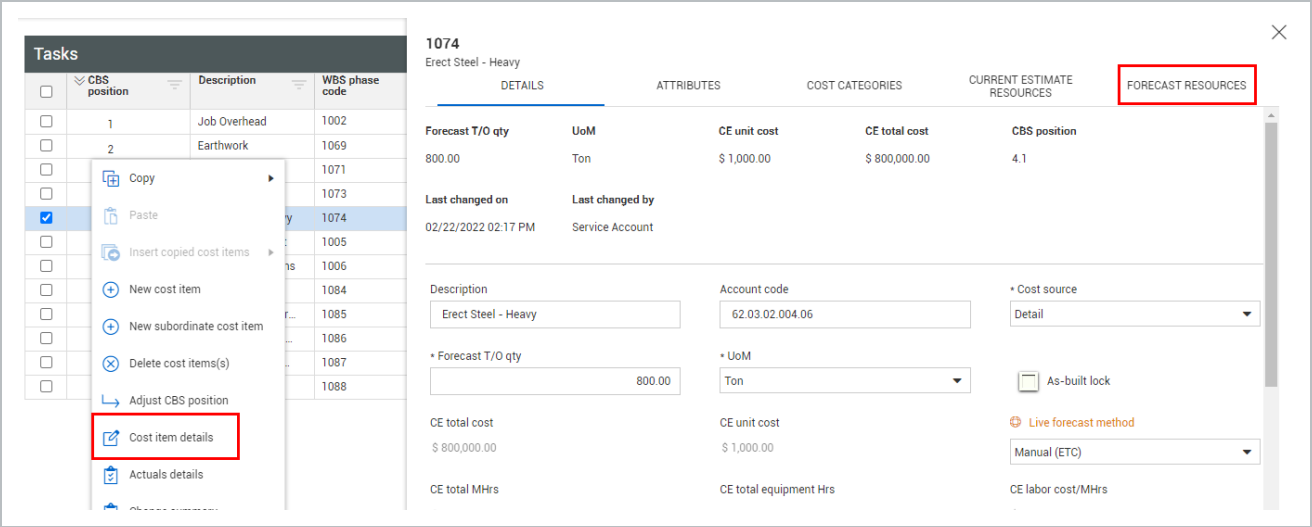
| Forecast total cost | Forecast remaining cost | Forecast total Mhrs | Forecast remaining Mhrs | Live forecast method |
|---------------------|-------------------------|---------------------|-------------------------|----------------------|
| \$ 0.00 | \$ 0.00 | 0.00 | 0.00 | Manual (ETC) |
- Resources:** A table listing assigned resources:

| Row # | Code | Description | Estim... | Remaini... qty | UOM | Remaini... work hrs |
|-------|-------------|-------------|----------|----------------|------|---------------------|
| 1 | 1.C.01.1.05 | Laborer | Labor | 0.00 | Hour | |
- Productivity and overall settings:** A grid of input fields for productivity metrics:

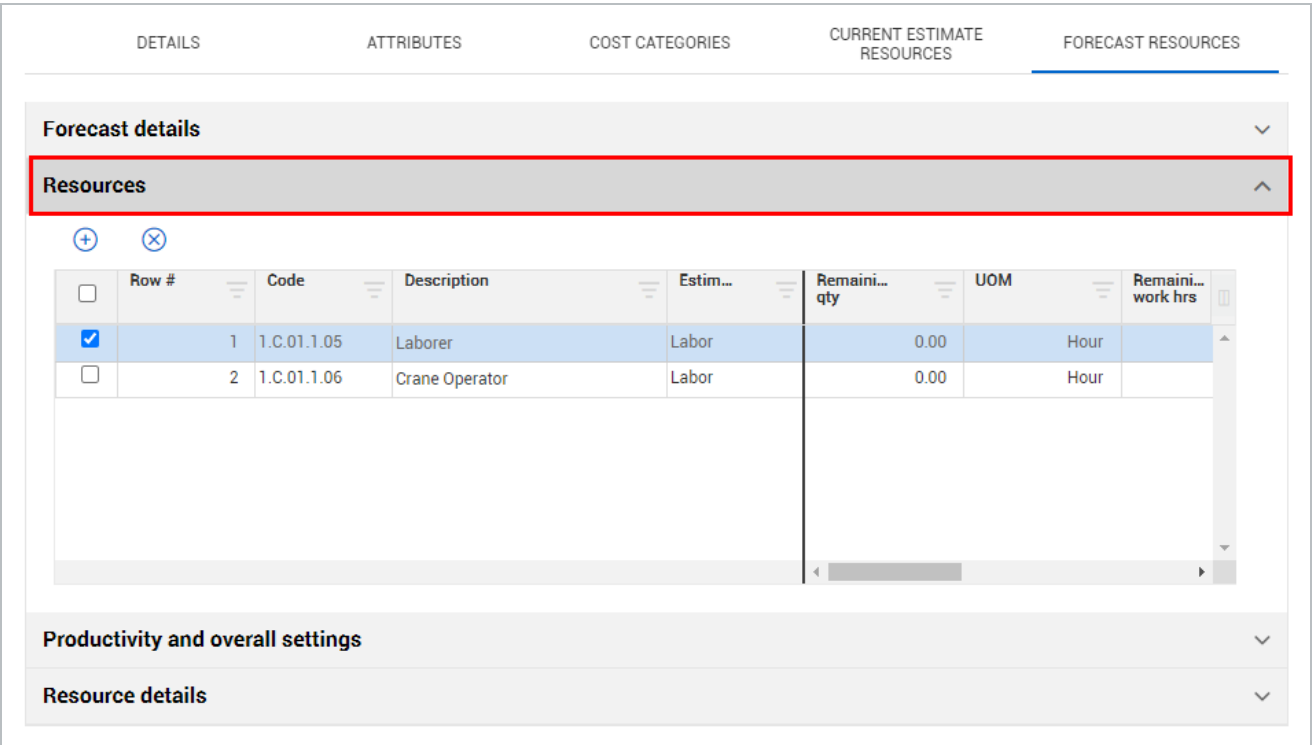
| Remaining hours | Remaining units/hour | Remaining hours/unit |
|---------------------------|--------------------------------|--------------------------------|
| 0.00 | 0.00 | 0.00 |
| Remaining man hours | Remaining units/man hour | Remaining man hours/unit |
| 0.00 | 0.00 | 0.00 |
| Remaining equipment hours | Remaining units/equipment hour | Remaining equipment hours/unit |
| 0.00 | 0.00 | 0.00 |
- Resource details:** A table showing unit costs for different scales:

| Cost category | Scale 1 unit cost | Scale 2 unit cost | Scale 3 unit cost |
|---------------|-------------------|-------------------|-------------------|
| ✓ Total | \$ 35.00 | \$ 30.00 | \$ 40.00 |

Like the Details, Attributes, and Cost Categories tabs, you access the Forecast Resources tab from the Cost Item Details slide out panel.



The Forecast Resources tab shows as an accordion menu where you can select a specific drop down menu you want to view.



4.3.5.3 PRODUCTIVITY AND OVERALL SETTINGS

If the resource’s cost driver is set to CI Duration, you can change any of the values on the Productivity tab under Adjusting duration driven resources below, and it will change the work hours of your

resources without you having to do the math yourself.

DETAILS

ATTRIBUTES

COST CATEGORIES

CURRENT ESTIMATE RESOURCES

FORECAST RESOURCES

Cost item details

Current estimate resources

Productivity and overall settings

Resource details

| Remaining | Total |
|---------------------------|--------------------------------|
| Remaining hours | Remaining units/hour |
| 1,600.00 | 0.50 |
| Remaining man hours | Remaining units/man hour |
| 16,000.00 | 0.05 |
| Remaining equipment hours | Remaining units/equipment hour |
| 0.00 | 0.00 |

When updating the quantity of duration driven labor resources

☒ Proportionally update Units\Man hours

☐ Proportionally update Hours

4.3.5.4 RESOURCE DETAILS

Resource Details shows the unit cost category breakdown of the selected resource listed above. The Resource rates tab expands to a unit breakdown on a selected item under resources. It is fully editable if you have the right permissions to do so.

Resource details

1.C.05.1.04

Ironworker Apprentice

| Cost category | Scale 1 unit cost | Scale 2 unit cost | Scale 3 unit cost |
|--------------------------|-------------------|-------------------|-------------------|
| ^ Total | \$ 45.00 | \$ 45.00 | \$ 60.00 |
| ▼ Labor | \$ 45.00 | \$ 45.00 | \$ 60.00 |
| ▼ Construction Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ▼ FOM Rented Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ▼ Supplies | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ▼ Materials | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ▼ Subcontract | \$ 0.00 | \$ 0.00 | \$ 0.00 |

▲ ORPHAN INDICATOR

If you change the resource rate of one of the assigned resources, then a triangle will appear. The triangle is an **orphan indicator**. This means a value associated with this resource does not match the resource’s value in the Estimated resources in the Project library. When you hover over the triangle, it will give you a summary of all the differences between the library value and the orphaned value.

Most recent change in this item

| Attribute | Library value | Orphan value | Last changed by | Last changed on |
|-----------------------|---------------|--------------|------------------|---------------------|
| Total - Scale1 | 50.00 | 100.00 | Susan Cappelloni | 09/25/2017 02:24 PM |
| FOM Rented Equipm... | 0.00 | 50.00 | Susan Cappelloni | 09/25/2017 02:24 PM |
| Undefined FOM Rent... | 0.00 | 50.00 | Susan Cappelloni | 09/25/2017 02:24 PM |

3

2 Lab001 Welder

| Row # | Code | Description | Quantity | UOM | Work Hours | CE - Unit Cost | CE - Total Cost |
|-------|------|-------------|----------|------|------------|----------------|-----------------|
| 2 | lab1 | lab1 | 1 | Each | 27.78 | 60.00 | 10 |
| 3 | lab1 | lab1 | 1 | Each | 41.67 | \$60.00 | \$1,5 |

PRODUCTIVITY

CHARGE RATE

Unit cost charge rates

| Cost category | Scale 1 unit cost | Scale 2 unit cost | Scale 3 unit cost |
|---------------|-------------------|-------------------|-------------------|
| Total | \$70.00 | \$0.00 | \$0.00 |
| Labor | \$0.00 | \$0.00 | \$0.00 |

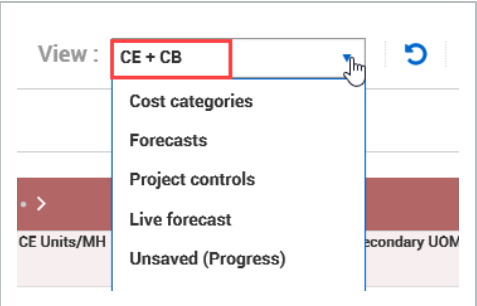
This is shown in case you want to change the values back to match the library. If you change the values back to match the library, the triangle will disappear.

4.3.5.5 COST ITEM MAN-HOURS

Aside from on the Cost Estimate Resources tab, you can also define productivity on the CBS register page. The following steps walk you through how to add the planned man-hours for a cost item from the CBS register page.

DEFINE COST ITEM MAN-HOURS

- 1. On your CBS register tab, make sure the Current estimate data block is displayed on the page, by selecting the **CE + CB** viewset.



- 2. Under the CE Total MHrs column, enter **16,000** for a cost item, then press the **Tab** key. Note – If the cost item is a “detail” cost source you will not be able to manually adjust this field.

▼ Steel Structure Training Job
105099

Actions CBS ACS PAY ITEMS CHANGE REGISTER AUDIT LOG

Tasks ?

| <input type="checkbox"/> | CBS Position | Description |
|--------------------------|--------------|---------------------|
| <input type="checkbox"/> | 3 | Concrete |
| <input type="checkbox"/> | ▼4 | Structural Steel |
| <input type="checkbox"/> | 4.1 | Erect Steel - Heavy |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light |

Task Details < . . . >

| Resource | Forecast (TQ) Quantity | UOM |
|----------|------------------------|-----|
| 1 | 10,000.00 | CY |
| | 1,000.00 | Ton |
| 1 | 800.00 | Ton |
| | 800.00 | Ton |

Current estimate

| CE total MHrs | CE total cost |
|---------------|----------------|
| 30,000.00 | \$1,500,000.00 |
| 20,000.00 | \$1,050,000.00 |
| 16,000.00 | \$800,000.00 |
| 1,000.00 | \$100,000.00 |

4.3.6 ISSUE TAGGING IN THE CBS

You can associate an issue to a cost item in the CBS. Issue Ids in Change have a hierarchy of issues and subordinate issues. Associated an issue to a cost item applies to parent-level issues. Child issues take on the cost item of the parent issue.

CBS ACS PAY ITEMS CHANGE REGISTER

Actions + ✎ ✕

Tasks

| <input type="checkbox"/> | CBS position | Description | WBS phase code |
|-------------------------------------|--------------|----------------|----------------|
| <input type="checkbox"/> | 30 | | 1 / 85 |
| <input type="checkbox"/> | 31 | | 1790 |
| <input type="checkbox"/> | 32 | Cost item 1 up | |
| <input type="checkbox"/> | 33 | Cost item 2 | |
| <input type="checkbox"/> | 34 | x | |
| <input type="checkbox"/> | 35 | Detail - labor | |
| <input type="checkbox"/> | 36 | Detail - CE | |
| <input type="checkbox"/> | 37 | Detail - other | |
| <input type="checkbox"/> | 38 | Detail - mix | |
| <input type="checkbox"/> | 39 | Plug | |
| <input type="checkbox"/> | 40 | plug2 | |
| <input type="checkbox"/> | 41 | Cost item 1 | 01 |
| <input type="checkbox"/> | 42 | Cost item 2 | 02 |
| <input type="checkbox"/> | 43 | Cost item 3 | 03 |
| <input type="checkbox"/> | 44 | Cost item 4 | 04 |
| <input checked="" type="checkbox"/> | 45 | | |

Subtotals 804 (1 rows selected)

| nt- | Last estimated actual man hours reversal | Last estimated actual equip hours reversal | Issue |
|--------|--|--|-------|
| 0.00 | | | |
| 0.00 | | | |
| 0.00 | | | |
| 0.00 | | | |
| 0.00 | | | |
| 100.00 | | | |
| 0.00 | | | |
| 10.00 | | | |
| 0.00 | | | |
| 0.00 | | | |
| 0.00 | | | |
| 0.00 | | | |
| 1.00 | 04/06/2021 1:18:1... | 03/29/2021 3:08:7... | |
| 0.00 | | | |
| 0.00 | | | |

Formula description: Document issue: N/A

When you click in the Issue column, the Assign issue dialog box is shown. The list of issues originates from the list of the issues in Change.

✕

Assign issue

Search...

| Select | Issue id | Issue name |
|-----------------------|----------|-------------|
| <input type="radio"/> | 7 | new5_copy67 |
| <input type="radio"/> | 8 | new5 |

Clear

Cancel

Assign

NOTE The Assign issue dialog box does not contain the full list of Issues that Change contains.

Home

Change

NEW ISSUE

7

ISSUE LOG

POTENTIAL CO LOG

| | Issue ID | PCO ID | Client CO ID | Issue name | Issue start date | Issue stat... | Assign |
|--------------------------|----------|--------|--------------|------------------|------------------|---------------|--------|
| <input type="checkbox"/> | ^ 12 | | | G Testing 2/1... | 02/17/2021 | Open | |
| <input type="checkbox"/> | 12.2 | | | G Testing 2/1... | 02/17/2021 | New | |
| <input type="checkbox"/> | 12.1 | | | G Testing 2/1... | 02/17/2021 | New | |
| <input type="checkbox"/> | 11 B | | | new6.(B). | 11/05/2020 | New | |
| <input type="checkbox"/> | 11 A | | | new6.(Original). | 11/05/2020 | New | |
| <input type="checkbox"/> | ^ 10 | | | new6 | 11/05/2020 | Open | |
| <input type="checkbox"/> | 10.1 | | | new6 | 11/05/2020 | New | |
| <input type="checkbox"/> | 9 | | new1 | new5cj. | 11/04/2020 | Executed | ✓ |
| <input type="checkbox"/> | ^ 8 | | | new5 | 11/04/2020 | Open | |

If a parent issue in Change becomes a subordinate while you already have that issue assigned to a cost item in the CBS, the cost item then changes Issue ID to match the parent item that the linked issue was then relocated under. For example, if the parent issue ID was a 2 in Change and it was moved under the parent issue ID 1, then the cost item previously linked to the parent 2 changes to the parent issue 1.

4.4 LOCK BUDGET

4.4.1 BUDGETS VS ESTIMATE

You can maintain an Original Budget, a Current Budget, and a Current Estimate, as is shown from the CBS tab of the Control main page, using a custom data block.

| Tasks | | Task Det... < + + + > | | | BM Budget View < + > | | |
|--------------|---------------------------|-----------------------|--------------------|-----------|----------------------|------------------|------------------|
| CBS Position | Description | WBS Phase Code | Forecast at TO Qty | UOM | OB - Total Cost | C B - Total Cost | C E - Final Cost |
| 1 | Job Overhead | 1002 | 1.00 | Lump Su.. | \$250,000.00 | \$250,000.00 | \$250,000.00 |
| 2 | Earthwork | 1069 | 10,000.0.. | CY | \$400,000.00 | \$400,001.00 | \$400,000.00 |
| ▼3 | Concrete | 1071 | 10,000.0.. | CY | \$0.00 | \$8,000.00 | \$5,000.00 |
| ▼3.1 | Concrete Footings | 1089 | 1,000.00 | CY | \$0.00 | \$8,000.00 | \$5,000.00 |
| 3.1.1 | Place/Strip Footing Forma | 1090 | 500.00 | SF | \$0.00 | \$8,000.00 | \$5,000.00 |
| 3.1.2 | Pour Footings | 1091 | 0.00 | CY | \$0.00 | \$0.00 | \$0.00 |

4.4.1.1 ORIGINAL BUDGET

The Original Budget (OB) is a snapshot of the project plan in its original state, prior to execution. It is a baseline used for comparison as the project progresses. You cannot edit your Original Budget values; they are read-only in the CBS register, available for reference only.

Once set, the Original Budget never changes.

In the CBS register, you can find the OB values for man-hours, quantities, and costs.

| Tasks | | Task Det... < + + + > | | | BM Budget View < + > | | |
|--------------|-------------------|-----------------------|--------------------|-----------|----------------------|------------------|------------------|
| CBS Position | Description | WBS Phase Code | Forecast at TO Qty | UOM | OB - Total Cost | C B - Total Cost | C E - Final Cost |
| 1 | Job Overhead | 1002 | 1.00 | Lump Su.. | \$250,000.00 | \$250,000.00 | \$250,000.00 |
| 2 | Earthwork | 1069 | 10,000.0.. | CY | \$400,000.00 | \$400,001.00 | \$400,000.00 |
| ▼3 | Concrete | 1071 | 10,000.0.. | CY | \$0.00 | \$8,000.00 | \$5,000.00 |
| ▼3.1 | Concrete Footings | 1089 | 1,000.00 | CY | \$0.00 | \$8,000.00 | \$5,000.00 |

4.4.1.2 CURRENT BUDGET

The **Current Budget (CB)** is the project's operational budget, including only project changes approved through a controlled process. The Current Budget is therefore the sum of your Original Budget, plus or minus any approved changes.

TIP

See the Change Management section for more details on managing and approving budget changes.

In the CBS register, you can find CB values for planned, earned and forecasted costs, hours and productivity.

| Tasks | | Task Det... | | | BM Budget View | | | |
|--------------|---------------------------|----------------|------------------|----------|----------------|----------------|---|----------------|
| CBS Position | Description | WBS Phase Code | Forecast TO City | UOM | O B-Total Cost | C B-Total Cost | Descr: Current Budget Total Cost Formula: N/A | C E-Final Cost |
| 1 | Job Overhead | 1002 | 1.00 | Lump Su. | \$250,000.00 | \$250,000.00 | | \$250,000.00 |
| 2 | Earthwork | 1069 | 10,000.0. | CY | \$400,000.00 | \$400,001.00 | | \$400,000.00 |
| 3 | Concrete | 1071 | 10,000.0. | CY | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1 | Concrete Footings | 1089 | 1,000.00 | CY | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1.1 | Place/Strip Footing Forms | 1090 | 500.00 | SF | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1.2 | Pour Footings | 1091 | 0.00 | CY | \$0.00 | \$0.00 | | \$0.00 |

4.4.1.3 CURRENT ESTIMATE

The **Current Estimate (CE)** represents the most up to date estimate of your work. You can update your Current Estimate quantities, hours, and costs at any time in the CBS register, with no required approval process or work flow.

You can use the Current Estimate as a sand box to build out change orders and do what-if analysis to plan for potential changes, without worrying about affecting the Current or Original Budgets.

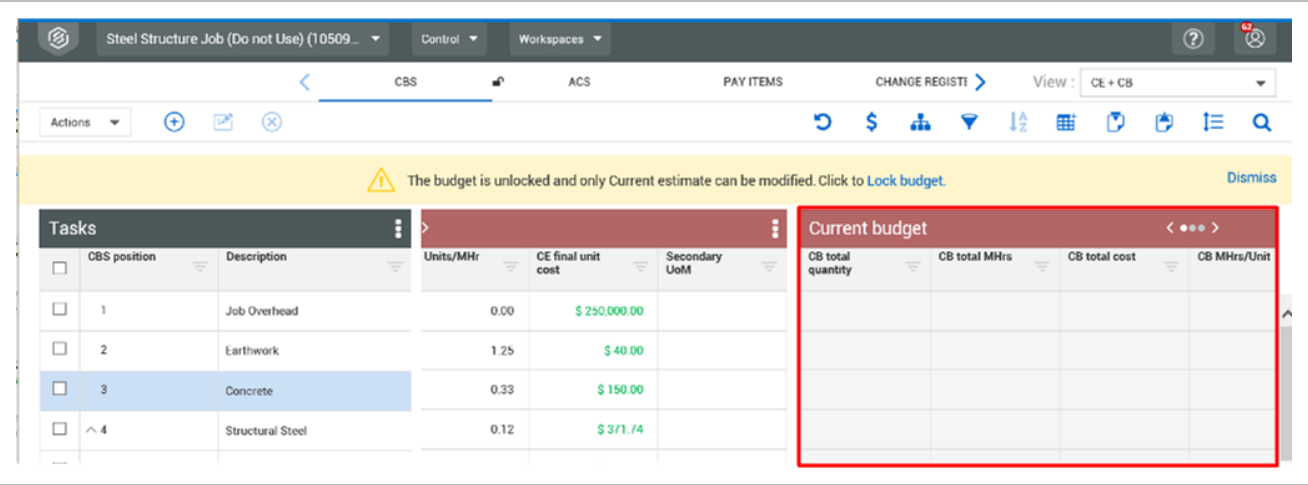
| Tasks | | Task Det... | | | BM Budget View | | | |
|--------------|---------------------------|----------------|------------------|----------|----------------|----------------|---|----------------|
| CBS Position | Description | WBS Phase Code | Forecast TO City | UOM | O B-Total Cost | C B-Total Cost | Descr: Current Estimate Final Cost Formula: N/A | C E-Final Cost |
| 1 | Job Overhead | 1002 | 1.00 | Lump Su. | \$250,000.00 | \$250,000.00 | | \$250,000.00 |
| 2 | Earthwork | 1069 | 10,000.0. | CY | \$400,000.00 | \$400,001.00 | | \$400,000.00 |
| 3 | Concrete | 1071 | 10,000.0. | CY | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1 | Concrete Footings | 1089 | 1,000.00 | CY | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1.1 | Place/Strip Footing Forms | 1090 | 500.00 | SF | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1.2 | Pour Footings | 1091 | 0.00 | CY | \$0.00 | \$0.00 | | \$0.00 |

NOTE

All editable cells in the Current Estimate CBS grid are single click.

4.4.2 LOCK BUDGET AND PRICE

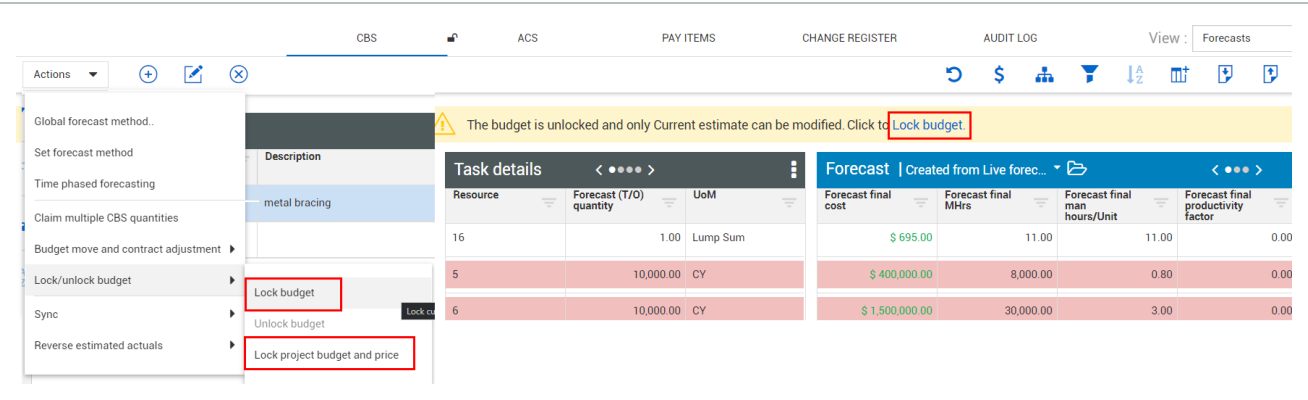
When you first create your project, your cost breakdown structure is unlocked, meaning you can make changes to your current estimate, but there is no locked down budget for tracking purposes. Your Original Budget and Current Budget data blocks therefore contains no values.






Locking your budget creates an Original and Current Budget based on your Current Estimate values. Keep in mind that:

- Your Original Budget cannot change
- Your Current Budget can only change via approved change orders (see *Lesson 7 – Change Management*)
- During project execution, you can compare your actual costs and man-hours to your Original and Current Budgets to track you progress

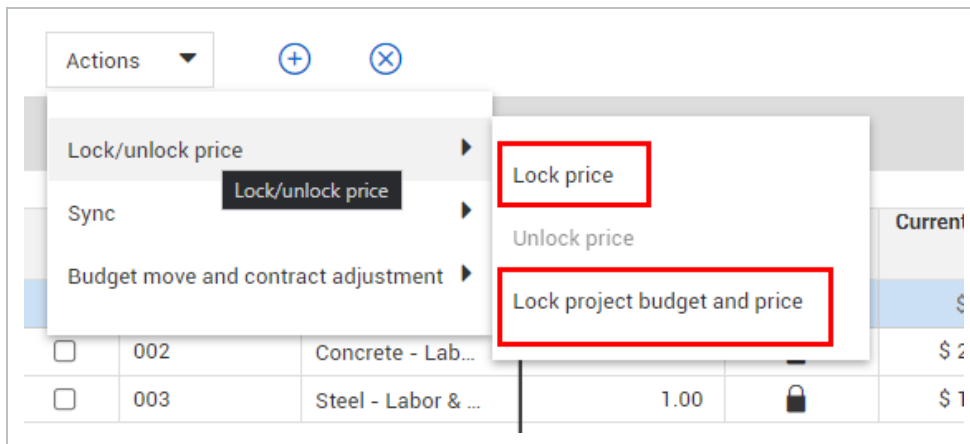
In the CBS you can lock the budget by selecting Actions > Lock/unlock budget > **Lock Budget** or **Lock project budget and price**.






The Budget Lock Status columns then changes to a locked symbol.

| <input type="checkbox"/> | Pay item number | Description | Current forecast (T/O) qty | Price lock status |
|--------------------------|-----------------|---------------------|----------------------------|--|
| <input type="checkbox"/> | 001 | Earthwork - Lab... | 1.00 |  |
| <input type="checkbox"/> | 002 | Concrete - Lab... | 1.00 |  |
| <input type="checkbox"/> | 003 | Steel - Labor & ... | 1.00 |  |

In Pay Items, you can also lock your price and budget for pay items by selecting Actions > Lock/unlock price>**Lock Price** or **Lock project budget and price**.



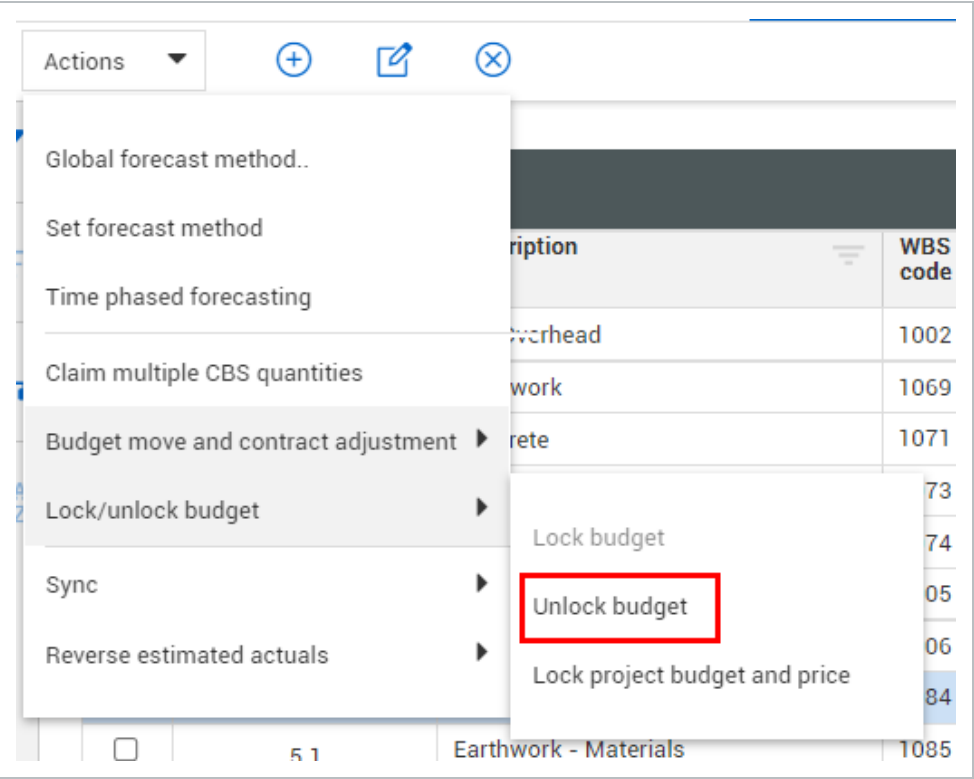
The Price Lock Status columns then changes to locked.

| <input type="checkbox"/> | Pay item number | Description | Current forecast (T/O) qty | Price lock status |
|--------------------------|-----------------|---------------------|----------------------------|--|
| <input type="checkbox"/> | 001 | Earthwork - Lab... | 1.00 |  |
| <input type="checkbox"/> | 002 | Concrete - Lab... | 1.00 |  |
| <input type="checkbox"/> | 003 | Steel - Labor & ... | 1.00 |  |

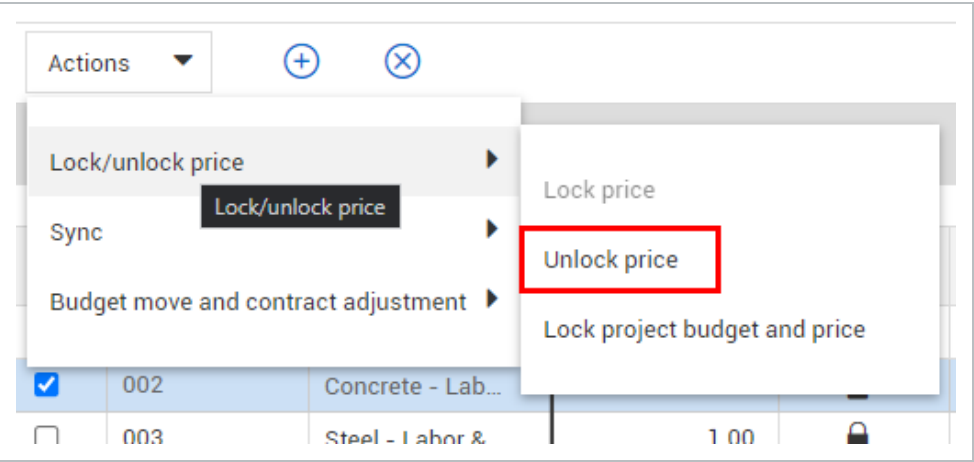
4.4.3 UNLOCK BUDGET AND PRICE

After you lock your budget, in rare instances, it might be necessary to unlock your Original and Current Budgets, though this is typically not recommended. For example, after initial import of your estimate into Control, you might need to make further adjustments to your cost breakdown structure to

conform your estimate to the working plan for the project. Normally, unlocking your budget is the exception, not the rule.



In Pay Items, like locking the budget for cost items, you unlock the price from the Actions menu.



REVIEW

1. When you first import or create your cost breakdown structure, by default your budget is:
 - a. Locked
 - b. Unlocked
 - c. Suspended
 - d. Auto-filled

2. Under the Cost Details tab, what are the three types of cost segments that you can choose from?
 - a. Direct Cost, Job Overhead, Business Overhead
 - b. Detail, Plug, Quote
 - c. Superior, Subordinate, Terminal
 - d. Fixed, Superior CI

3. The Resources tab is where you can:
 - a. Adjust the unit rate of your project's resources
 - b. Adjust Man-Hours
 - c. Adjust and add equipment costs
 - d. All of the above
 - e. None of the above

SUMMARY

As a result of this lesson, you can:

- Manage estimate resources
- Gain visibility into resource billing rates

- Manage cost item details
- Lock the budget

PROGRESS MEASUREMENT

LESSON DURATION: 60 MINUTES

LESSON OBJECTIVES

After completing this lesson, you will be able to:

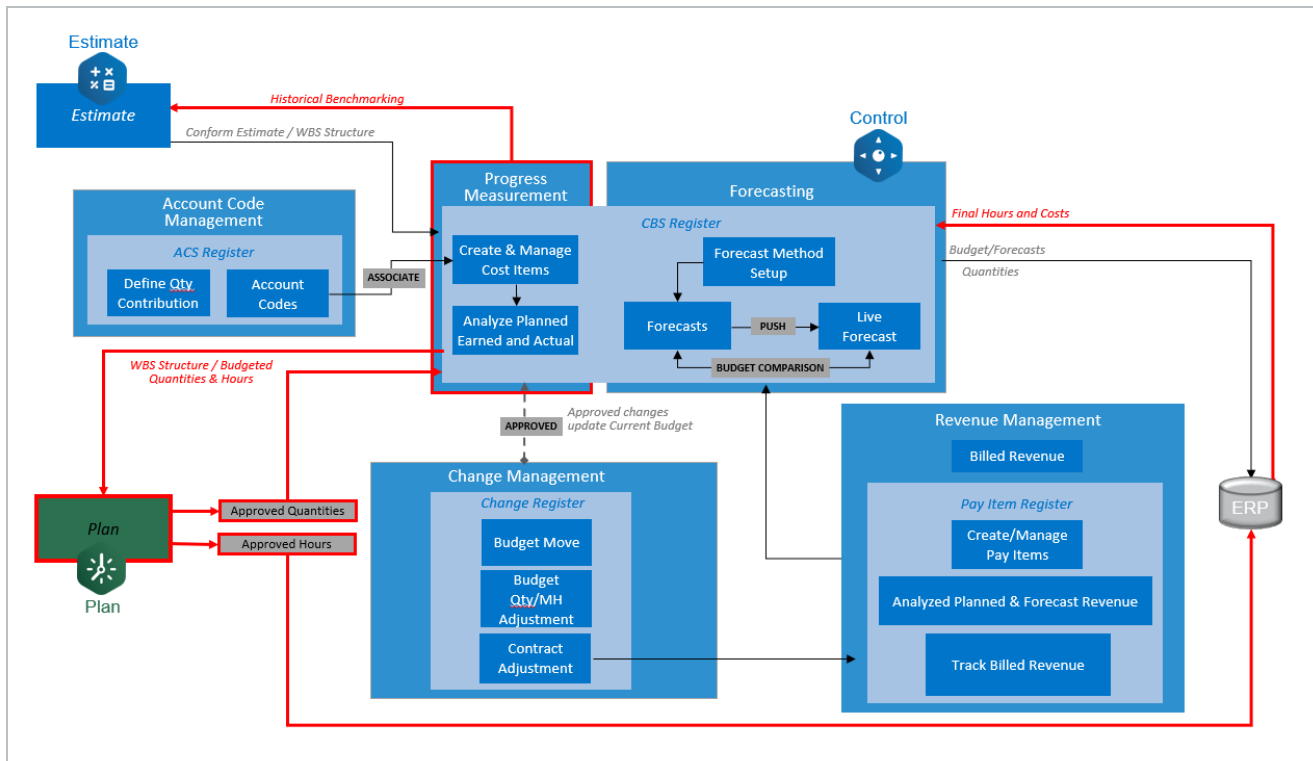
- Define the measurements for analyzing the progress of a project
- Set up a Date Range for progress data
- Get Plan quantities, actual costs, and actual man-hours using the Sync feature
- Explain the settings used for managing progress data shared between applications
- Add and adjust actuals manually
- View actuals history

LESSON TOPICS

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5.1 INEIGHT CONTROL WORKFLOW - PROGRESS MEASUREMENT



5.2 PROGRESS MEASUREMENT OVERVIEW

One of the standard forms of contract payment terms in the construction industry is based on the value of specific contract deliverables. It is also based on the work completed during the previous month towards those pay items. Throughout the life of a project, you will want to track the progress of work completed.

It is important to identify and define a few key terms related to progress measuring, and to identify how to utilize InEight Control as a tool for accessing and maintaining critical job factors.

5.2.1 BUDGETS VS ESTIMATE

Within InEight Control, you can maintain an Original Budget, a Current Budget, and a Current Estimate, as is shown from the CBS tab of the Control main page by using a custom data block.

| Tasks | | Task Det... < + > | | | BM Budget View < + > | | |
|--------------|---------------------------|-------------------|---------------------|-----------|----------------------|----------------|----------------|
| CBS Position | Description | WBS Phase Code | Forecast at TO City | UOM | O B-Total Cost | C B-Total Cost | C E-Final Cost |
| 1 | Job Overhead | 1002 | 1.00 | Lump Su.. | \$250,000.00 | \$250,000.00 | \$250,000.00 |
| 2 | Earthwork | 1069 | 10,000.0.. | CY | \$400,000.00 | \$400,001.00 | \$400,000.00 |
| 3 | Concrete | 1071 | 10,000.0.. | CY | \$0.00 | \$8,000.00 | \$5,000.00 |
| 3.1 | Concrete Footings | 1089 | 1,000.00 | CY | \$0.00 | \$8,000.00 | \$5,000.00 |
| 3.1.1 | Place/Strip Footing Forma | 1090 | 500.00 | SF | \$0.00 | \$8,000.00 | \$5,000.00 |
| 3.1.2 | Pour Footings | 1091 | 0.00 | CY | \$0.00 | \$0.00 | \$0.00 |

5.2.1.1 ORIGINAL BUDGET

The **Original Budget (OB)** is a snapshot of the project plan in its original state, prior to execution. It is a baseline used for comparison as the project progresses. You cannot edit your Original Budget values; they are read-only in the CBS register, available for reference only.

Once set, the Original Budget never changes.

Within the CBS register of InEight Control, you will find the Original Budget (OB) values for man-hours, quantities, and costs.

| Tasks | | Task Det... < + > | | | BM Budget View < + > | | |
|--------------|-------------------|-------------------|---------------------|-----------|----------------------|----------------|----------------|
| CBS Position | Description | WBS Phase Code | Forecast at TO City | UOM | O B-Total Cost | C B-Total Cost | C E-Final Cost |
| 1 | Job Overhead | 1002 | 1.00 | Lump Su.. | \$250,000.00 | \$250,000.00 | \$250,000.00 |
| 2 | Earthwork | 1069 | 10,000.0.. | CY | \$400,000.00 | \$400,001.00 | \$400,000.00 |
| 3 | Concrete | 1071 | 10,000.0.. | CY | \$0.00 | \$8,000.00 | \$5,000.00 |
| 3.1 | Concrete Footings | 1089 | 1,000.00 | CY | \$0.00 | \$8,000.00 | \$5,000.00 |

5.2.1.2 CURRENT BUDGET

The **Current Budget (CB)** is the project's operational budget, including only project changes approved through a controlled process. The Current Budget is therefore the sum of your Original Budget, plus or minus any approved changes.

TIP

See the Change Management lesson for more details on managing and approving budget changes.

Within the CBS register of InEight Control, you will find Current Budget (CB) values for planned, earned and forecasted costs, hours and productivity.

| Tasks | | | Task Details | | | BM Budget View | | | |
|--------------|---------------------------|--|----------------|-----------------|----------|------------------|------------------|--|------------------|
| CBS Position | Description | | WBS Phase Code | Forecast TO Qty | UOM | O B - Total Cost | C B - Total Cost | Descr: Current Budget Total Cost Formula: N/A | C E - Final Cost |
| 1 | Job Overhead | | 1002 | 1.00 | Lump Su. | \$250,000.00 | \$250,000.00 | | \$250,000.00 |
| 2 | Earthwork | | 1069 | 10,000.00 | CY | \$400,000.00 | \$400,001.00 | | \$400,000.00 |
| 3 | Concrete | | 1071 | 10,000.00 | CY | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1 | Concrete Footings | | 1089 | 1,000.00 | CY | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1.1 | Place/Strip Footing Forms | | 1090 | 500.00 | SF | \$0.00 | \$8,000.00 | | \$5,000.00 |
| 3.1.2 | Pour Footings | | 1091 | 0.00 | CY | \$0.00 | \$0.00 | | \$0.00 |

FORECAST (T/O) - CB QTY DELTA COLUMN

The Forecast (T/O) - CB qty delta column shows you the difference between the Forecast (T/O) quantity and the current budget total quantity columns.

The calculation for this formula is *[Forecast (T/O) qty] - [CB total qty]*.

| CBS | | | | ACS |
|--|--------------|---------------------------------|----------------|-------------------------------|
| <div> <div>Actions</div> <div> <div></div> <div></div> <div></div> </div> </div> | | | | |
| Tasks | | | | Current estimate |
| <input type="checkbox"/> | CBS position | Description | WBS phase code | Forecast (T/O) - CB qty delta |
| <input type="checkbox"/> | 3.4.2.2.1 | STS - Direct MHR | 1056 | 522.0 |
| <input type="checkbox"/> | 3.5.2.3 | SC Xaxlip Traffic Control Su... | 1071 | 466.0 |
| <input type="checkbox"/> | 3.5.1.5 | PM Soil Anchors | 1067 | 101.5 |
| <input type="checkbox"/> | 3.4.1.2.2 | Drill / Install / Grout Anchors | 1014 | 101.5 |
| <input type="checkbox"/> | 3.4.1.2.3 | Build & Move Anchors | 1015 | 101.5 |

You can filter on non-zero CBS records, which makes you aware to update either the Forecast T/O Quantity or CB Total Quantity.

The screenshot shows a table with the following data:

| Forecast (T/O) - CB qty delta | Forecast method | Fore total co |
|----------------------------------|--------------------|------------------|
| 751,86 | | |
| 52 | | |
| 46 | | |
| 10 | | |
| 10 | | |
| 10 | | |
| 10 | | |

A filter dialog is open over the table, titled "Show items with value that:". It contains the following settings:

- Operator: Greater than
- Value: 0
- Logic: AND
- Operator: Equal
- Value: (empty)

Buttons for "Clear" and "Apply" are at the bottom of the dialog.

5.2.1.3 CURRENT ESTIMATE

The **Current Estimate (CE)** represents the most up to date estimate of your work. You can update your Current Estimate quantities, hours, and costs at any time in the CBS register, with no required approval process or work flow.

You can use the Current Estimate as a “sand box” to build out change orders and do what-if analysis to plan for potential changes, without worrying about affecting the Current or Original Budgets.

| Tasks | | | Task Details | | | BM Budget View | | | |
|--------------|---------------------------|--|----------------|---------------------|----------|----------------|----------------|----------------|---|
| CBS Position | Description | | WBS Phase Code | Forecast at TO City | UOM | O B-Total Cost | C B-Total Cost | C E-Final Cost | Descr: Current Estimate Final Cost Formula: N/A |
| 1 | Job Overhead | | 1002 | 1.00 | Lump Su. | \$250,000.00 | \$250,000.00 | \$250,000.00 | |
| 2 | Earthwork | | 1069 | 10,000.00 | CY | \$400,000.00 | \$400,001.00 | \$400,000.00 | |
| 3 | Concrete | | 1071 | 10,000.00 | CY | \$0.00 | \$8,000.00 | \$5,000.00 | |
| 3.1 | Concrete Footings | | 1089 | 1,000.00 | CY | \$0.00 | \$8,000.00 | \$5,000.00 | |
| 3.1.1 | Place/Strip Footing Forms | | 1090 | 500.00 | SF | \$0.00 | \$8,000.00 | \$5,000.00 | |
| 3.1.2 | Pour Footings | | 1091 | 0.00 | CY | \$0.00 | \$0.00 | \$0.00 | |

Within the CBS register of InEight Control, you will find a wealth of columns for measuring and analyzing your project progress. InEight Control uses its own terminology for these measurements that match up well with common Earned Value Management terminology. Before comparing these terms, the following section reviews some Earned Value Management basics.

5.2.1.4 UPDATING FORECAST (T/O) QUANTITY

The different ways to update the Forecast (T/O) quantity include:

1. Direct entry into data block.
2. Direct entry into Cost item details slideout.
3. Excel import.
4. Undo.
5. Copy/paste into data block.
6. Rolldown from assigned pay item (need to have this setting enabled).
7. Cost item API.
8. Selective import.
9. Rolldown from parent (Qty driver is Superior CI).
10. Rollup from children (Contribute qty is checked).

UPDATING CE UNIT COST FOR CE TOTAL COST

When you update the Forecast (T/O) on both the CE and the Forecast, you are prompted to update either the CE unit cost for CE total cost. You can also choose to update either the CE labor cost/Mhr or CE total MHrs, and either CE construction equipment cost/hr or CE total equipment hrs (if applicable).

This will then update the Forecast values because Forecast is based off Remaining qty * selected unit cost, and your Remaining qty will update with a Forecast (T/O) qty change. This also affects your % complete (Qty claimed / Forecast (T/O) qty) which impacts all the earned value columns. It will also update the Forecasted revenue values as well (based on the % complete).


ENSURING TOTAL QUANTITY ALIGNMENT BETWEEN CONTROL AND PLAN

You can easily filter the Forecast (T/O) - Plan component qty delta column. There is also a menu option in the Actions menu to update the Forecast (T/O) qty to match the Plan qty - Update Forecast (T/O) qty with Plan component total qty

5.2.2 PLANNED VALUE (PV)

Planned Value (PV) are the costs and hours you have estimated and scheduled for the project. Think of PV as your approved budget of scheduled items. In Control, your PV includes the following columns:

- CE Total Cost
- CE Total MHrs
- CB Total Cost
- CB Total MHrs

| Actuals 11/17/2018 to 08/07/2023  | | | |
|--|---------------|-----------------|---------------|
| CE total cost | CE total MHrs | CB total cost | CB total MHrs |
| \$ 0.00 | 0.00 | \$ 0.00 | 0.00 |
| \$ 2,474,580.57 | 8,370.48 | \$ 2,780,589.58 | 8,088.50 |
| \$ 0.00 | 0.00 | \$ 0.00 | 0.00 |
| \$ 52,449.00 | 0.00 | \$ 52,449.00 | 0.00 |

5.2.3 EARNED VALUE (EV)

Earned Value (EV) Measures the amount of money you merit in return for the work performed up to that point. You can use EV to measure how much of your planned costs and hours you *should* have spent so far, according to the percent of work completed. It uses the below formula to calculate this:

Planned Value x % of work completed = Earned Value

In InEight Control, your EV includes the following columns:

- CE cost earned
- CE MHrs earned
- CB cost earned
- CB MHrs earned

CBS

< ● ● ● ● >

Forecast (T/O) qty

| | |
|------|----|
| 1.00 | |
| 1.00 | PL |
| 1.00 | |

PAY ITEMS

CHANGE REGISTER

MHRS LOG

Current estimate

| CE cost earned | CE MHrs earned | CB cost earned | CB MHrs earned | CE total |
|-----------------|----------------|-----------------|----------------|----------|
| \$ 0.00 | 0.00 | \$ 0.00 | 0.00 | |
| \$ 2,469,579.10 | 8,370.48 | \$ 2,766,947.48 | 8,088.50 | |
| \$ 0.00 | 0.00 | \$ 0.00 | 0.00 | |

CB MHrs earned



Current budget man hours earned

Formula

[% complete] × [CB total MHrs]

5.2.4 SCHEDULE PERFORMANCE INDEX

Schedule performance index (SPI) measures how close the work is being completed according to the designated schedule. It is Earned value/Planned value, and is calculated as earned current budget cost/CB planned value (to date)

| CBS | | ACS | PAY ITEMS |
|--|----------------------------|--------------------|-----------|
| | | | |
| Task details < ● ● ● ● >   | | | |
| SPI | CB planned value (to date) | Forecast (T/O) qty | UoM |
| 0.00 | \$ 250,000.00 | 1.00 | Lump Sum |
| 0.80 | \$ 40.00 | 10,000.00 | CY |
| 3.00 | \$ 150.00 | 10,000.00 | CY |
| 5.00 | \$ 1,516.28 | 1,000.00 | Ton |
| 0.00 | \$ 25,666.00 | 800.00 | Ton |
| 20.00 | \$ 1,000.00 | 200.00 | Ton |
| 0.50 | \$ 24.98 | 2,000.00 | Ea |
| 0.00 | \$ 1,750,000.00 | 1.00 | Each |
| 0.00 | \$ 25.00 | 10,000.00 | CY |
| 0.00 | \$ 100.00 | 10,000.00 | CY |
| 0.00 | \$ 500.00 | 1,000.00 | Ton |
| 0.00 | \$ 0.00 | 1.00 | PLS |

The SPI calculation uses the time phased budget values as planned values. To accommodate the time phased budget values, the planned value includes the cumulative time phased budget planned value to date.

5.2.5 ACTUAL COST (AC)

Actual Cost (AC) refers to the costs you incur when you perform the work.

InEight Control, AC is known as Total Cost (To Date). In addition, InEight Control refers to actual man-hours as MH (To Date).

Tasks

| CBS Position | Description |
|--------------|---------------------------|
| 1 | Job Overhead |
| 2 | Earthwork |
| 3 | Concrete |
| 3.1 | Concrete Footings |
| 3.1.1 | Place/Strip Footing Forms |
| 3.1.2 | Pour Footings |

Task Details < * * * * >

| WBS Phase Code | Forecast at TO City | UOM |
|----------------|---------------------|----------|
| 1002 | 1.00 | Lump Su. |
| 1069 | 10,000.0. | CY |
| 1071 | 10,000.0. | CY |
| 1089 | 1,000.00 | CY |
| 1090 | 500.00 | SF |
| 1091 | 0.00 | CY |

Actuals 4/25/2017 to 4/25/2017 < * * * >

| Qty Complete (To Date) | MH/Unit (To Date) | C B-MH G/L (To Date) | Total Cost (To Date) | Descr: Total Cost (To Date) Formula: N/A | % Complete |
|------------------------|-------------------|----------------------|----------------------|--|------------|
| 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 % |
| 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 % |
| 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 % |
| 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 % |
| 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 % |
| 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 % |

5.2.6 VARIANCE

Variance is the difference between EV and AC, expressed in the following equation:

$$\text{Earned Value} - \text{Actual Cost} = \text{Variance}$$

It indicates if you are performing better or worse than planned up to that point. InEight Control uses the term Gain/Loss (G/L) rather than variance, including the following columns:

- CE actual cost G/L (to date)
- CE MHrs G/L (to date)
- CB actual cost G/L (to date)
- CB MHrs G/L (to date)

5.2.7 REMAINING

Remaining is a general finance term for money that is not yet used. InEight Control uses the following terms:

- CE remaining cost
- CB remaining cost

These terms refer to a very specific relationship expressed in the equation:

$$\text{Planned Value} - \text{Actual Cost} = \text{Remaining Value}$$

In other words, it is the difference between what you originally planned and what you have spent so far, to help you understand how much cost or how many man-hours you have left.

| | | Actuals 5/3/2017 to 5/19/2017 | | | | | | |
|------|-----------|-------------------------------|-------------------|----------------------|----------------------|------------------------------|---|--|
| | UOM | Qty Complete (To Date) | MH/Unit (To Date) | C B-MH G/L (To Date) | Total Cost (To Date) | C B-Total Cost G/L (To Date) | Descr: Current Budget Total Cost Gain or Loss (To Date) Formula: C B-Earned Total Cost (To Date) - Total Cost (To Date) | |
| .00 | Lump S... | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| 1.00 | CY | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| 1.00 | PLS | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| 1.00 | PLS | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| 1.00 | PLS | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| 1.00 | PLS | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| 1.00 | PLS | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| 1.00 | PLS | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| 1.00 | PLS | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | | |
| | | | | | \$1,000.00 | | | |

The table below summarizes each EVM term with its equivalent term in InEight Control and what it measures.

| EVM Term | InEight Control Term | What it measures |
|--------------------|--|---|
| Planned Value (PV) | CE total cost CE total MHrs CB total cost CB total MHrs | Budget of scheduled values |
| Earned Value (EV) | CE cost earned CE MHrs earned CB cost earned CB MHrs earned | Planned Value x Percent Complete |
| Actual Cost (AC) | Actual cost (to date) Actual MHrs (to date) | Actual/expended values |
| Variance | CE actual cost G/L (to date) CE MHrs G/L (to date) CB actual cost G/L (to date) CB MHrs G/L (to date) | Difference between Earned Value and Actual Cost |

| EVM Term | InEight Control Term | What it measures |
|-----------|--|--|
| Remaining | CE remaining cost CB remaining cost | Difference between Planned Value and Actual Cost |

The following displays Planned vs. Earned vs. Actual values within a custom data block of the CBS register of InEight Control:

| Tasks | | BM Budget View | | | | | |
|--------------|---------------------------|------------------|------------------|------------------|-----------------------------------|----------------------|----------------------|
| CBS Position | Description | O B - Total Cost | C B - Total Cost | C E - Final Cost | C B - Earned Total Cost (To Date) | Total Cost (To Date) | C B - Remaining Cost |
| 1 | Job Overhead | \$250,000.00 | \$250,000.00 | \$250,000.00 | \$0.00 | \$0.00 | \$250,000.00 |
| 2 | Earthwork | \$400,000.00 | \$400,001.00 | \$400,000.00 | \$0.00 | \$0.00 | \$400,001.00 |
| 3 | Concrete | \$0.00 | \$8,000.00 | \$5,000.00 | \$0.00 | \$0.00 | \$8,000.00 |
| 3.1 | Concrete Footings | \$0.00 | \$8,000.00 | \$5,000.00 | \$0.00 | \$0.00 | \$8,000.00 |
| 3.1.1 | Place/Strip Footing Forms | \$0.00 | \$8,000.00 | \$5,000.00 | \$0.00 | \$0.00 | \$8,000.00 |
| 3.1.2 | Pour Footings | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

5.2.8 PRODUCTIVITY

If you are the contractor building a project, you will need to monitor the performance of your crews, including how productive they are and how much they are being paid.

Productivity is a measure of effectiveness. The rate of output per unit of input. An example would be if you have estimated that you can install a light switch in 1 hour and it takes you 1.5 hours you are not being very productive. In InEight **CB-PF** is productivity and can be measured with the following equation:

$$\text{Productivity} = \frac{\text{Earned MH}}{\text{Actual MH}}$$

$$0.667 = \frac{1}{1.5}$$

| Tasks | | Task Details | | | Actuals 4/25/2017 to 4/25/2017 | | | | | | |
|--------------|---------------------------|----------------|------------------|----------|--------------------------------|--------------|----------|---|-----------|-------------------------|--------------|
| CBS Position | Description | WBS Phase Code | Forecast TO City | UOM | Units/MH (To Date) | MH (To Date) | C B - PF | Descr: Current Budget Productivity Factor Formula: C B-MH Earned (To Date) / MH (To Date) | (To Date) | Labor Cost/MH (To Date) | CF (To Date) |
| 1 | Job Overhead | 1002 | 1.00 | Lump Su. | 0.00 | 0.00 | | | \$0.00 | \$0.00 | 0.00 |
| 2 | Earthwork | 1069 | 10,000.00 | CY | 0.00 | 0.00 | 0.00 | | \$0.00 | \$0.00 | 0.00 |
| 3 | Concrete | 1071 | 10,000.00 | CY | 0.00 | 0.00 | 0.00 | | \$0.00 | \$0.00 | 0.00 |
| 3.1 | Concrete Footings | 1089 | 1,000.00 | CY | 0.00 | 0.00 | 0.00 | | \$0.00 | \$0.00 | 0.00 |
| 3.1.1 | Place/Strip Footing Forms | 1090 | 500.00 | SF | 0.00 | 0.00 | 0.00 | | \$0.00 | \$0.00 | 0.00 |
| 3.1.2 | Pour Footings | 1091 | 0.00 | CY | 0.00 | 0.00 | 0.00 | | \$0.00 | \$0.00 | 0.00 |

5.2.8.5 COMPENSATION FACTOR (CF)

Compensation is the amount of money paid to an employee for their hours worked. **Compensation Factor** is a numerical value comparing the budgeted compensation to the actual compensation. An example would be if you had budgeted using master electricians (making \$35/hour) to install light switches, but you actually used 2nd year apprentices (making \$26/hour) where you would have a compensation factor that is off. In InEight, Compensation Factor is displayed as **CF (To Date)**. You can calculate it as follows:

$$\text{Compensation Factor} = \frac{\text{Budgeted MH Cost}}{\text{Actual MH Cost}}$$

$$1.35 = \frac{\$35}{\$26}$$

| Tasks | | | Task Det... < + + + > | | | Actuals 4/25/2017 to 4/25/2017 | | | | | | | Descc Compensation Factor (To Date) Formula: C-B-Labor Unit Cost / Labor Unit Cost (To Date) |
|--------------|---------------------------|--|-----------------------|---------------------|----------|--------------------------------|--------------|---------|---------------------|-------------------------|--------------|--|---|
| CBS Position | Description | | WBS Phase Code | Forecast at TO City | UOM | Units/MH (To Date) | MH (To Date) | C B- PF | Unit Cost (To Date) | Labor Cost/MH (To Date) | CF (To Date) | | |
| 1 | Job Overhead | | 1002 | 1.00 | Lump Su. | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 | | |
| 2 | Earthwork | | 1069 | 10,000.0 | CY | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 | | |
| 3 | Concrete | | 1071 | 10,000.0 | CY | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 | | |
| 3.1 | Concrete Footings | | 1089 | 1,000.00 | CY | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 | | |
| 3.1.1 | Place/Strip Footing Forms | | 1090 | 500.00 | SF | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 | | |
| 3.1.2 | Pour Footings | | 1091 | 0.00 | CY | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 | 0.00 | | |

5.2.8.6 LABOR EFFICIENCY INDEX (LEI)

Labor Efficiency Index (LEI) is a numerical value assigned to indicate the effectiveness of resource utilization. You can calculate LEI using the following formula:

$$\text{Labor Efficiency Index} = \text{Productivity} \times \text{Compensation Factor}$$

$$.90 = .67 \times 1.35$$

NOTE

If LEI is greater than 1, it means that you are using your resource effectively.

If LEI is lower than 1, it means your resources are being used poorly.

5.2.9 INEIGHT PLAN QUANTITY

The Plan component total qty column shows the sum of the component quantities from Plan and Control and lets you update the Forecast (T/O) qty to match this value.

CBSACS

Actions

Plan component total qty
Sum of component quantities from Plan

| Tasks | Actuals | 11 |
|--|----------------------|---|
| <input type="checkbox"/> CBS positionDescriptionWBS phase code | Actual qty (to date) | Plan component total qtyActual Mhrs date) |
| <input type="checkbox"/> 2.6.2.8.2Craft Labour Supp...1093 | 4,827.00 | 4,827.00 |
| <input type="checkbox"/> 2.3.1.2.2Drill / Install / Gro...1014 | 1,501.45 | 1,501.45 |
| <input type="checkbox"/> 2.3.1.2.3Build & Move Anc...1015 | 1,501.45 | 1,501.45 |

Using the Install conduit cost item as an example, it is assigned to WBS phase code 1139 in the CBS.

Actions

| Tasks | CBS position | Description | WBS phase code |
|--------------------------|--------------|----------------------|----------------|
| <input type="checkbox"/> | 3.1.4 | B/C CN Pier 11 | 1128 |
| <input type="checkbox"/> | 3.1.5 | B/C Turcot | 1129 |
| <input type="checkbox"/> | 3.1.6 | B/C 8888 Osler Pi... | 1130 |

Forecast

109

| | | | |
|-------------------------------------|---|-----------------|------|
| <input checked="" type="checkbox"/> | 5 | Install conduit | 1139 |
|-------------------------------------|---|-----------------|------|

In Plan, WBS phase code 1139 is assigned to components Conduit material with a quantity of 150 and Install conduit with a quantity of 120.

| Component details | | | | |
|-------------------------------------|------------------|-----------------|-----------|------|
| | Name | Claiming scheme | Quantity | WBS |
| <input type="checkbox"/> | Road Subgrade | Road Subgrade | 293.60000 | 1008 |
| <input checked="" type="checkbox"/> | Conduit material | Conduit | 150.00000 | 1139 |
| <input checked="" type="checkbox"/> | Install conduit | Electrical | 120.00000 | 1139 |

In the CBS, the Plan component total qty for the Install conduit is 270, which is a total of the two WBS 1139 components in Plan.

| Tasks | | | | Actuals 11/17/20 |
|-------------------------------------|--------------|-----------------|----------------|--------------------------|
| <input type="checkbox"/> | CBS position | Description | WBS phase code | Plan component total qty |
| <input type="checkbox"/> | 3.1.4 | B/C CN Pier 11 | 1128 | 1.00 |
| <input type="checkbox"/> | 4.0 | JOR 1 | 1109 | 1.00 |
| <input checked="" type="checkbox"/> | 5 | Install conduit | 1139 | 270.00 |

The Forecast (T/O) - Plan component qty column is the difference between the Forecast (T/O) and the Plan component quantity.

| 103961 Ten Mile Slide - Phase 2 (Carrying) / Control / Workspaces | | | | |
|---|--------------|-----------------|----------------|-------------------------------------|
| CBS | | | | |
| Actions | | | | |
| Tasks | | | | Actuals 11/17/2018 to 06/23/20 |
| <input type="checkbox"/> | CBS position | Description | WBS phase code | Forecast (T/O) qty |
| <input checked="" type="checkbox"/> | 5 | Install conduit | 1139 | 100.00 |
| | | | | Plan component total qty |
| | | | | 270.00 |
| | | | | Forecast (T/O) - Plan component qty |
| | | | | -170.00 |

Forecast (T/O) - Plan component qty delta

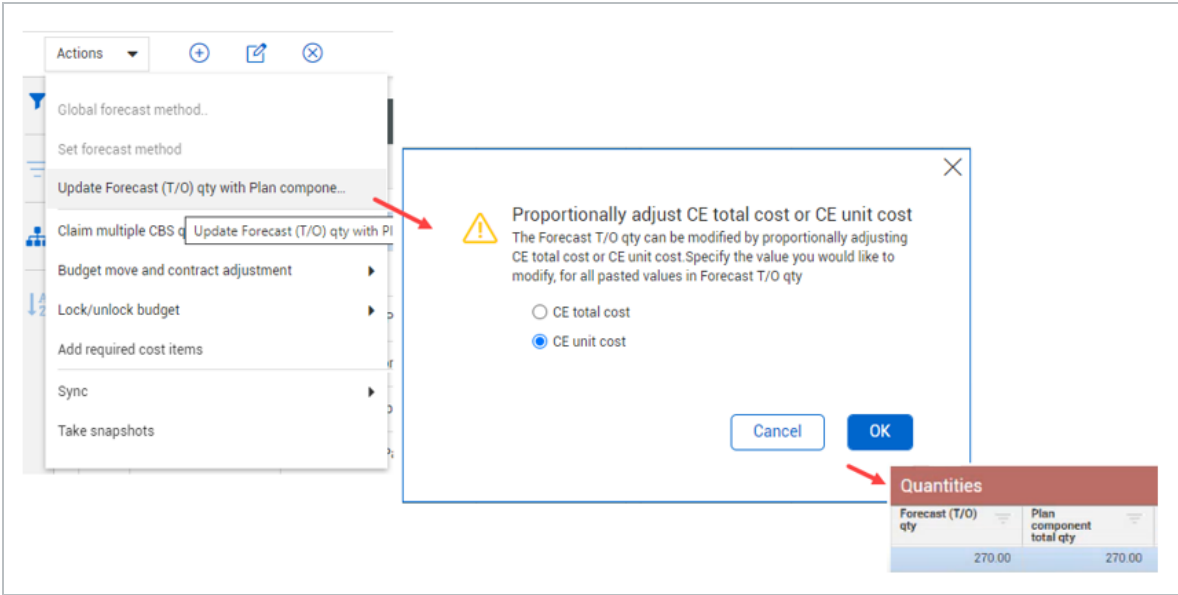
Difference between Forecast (T/O) qty and Plan component total quantity columns

Formula

[Forecast (T/O) qty] - [Plan component total qty]

5.2.9.7 UPDATE FORECAST (T/O) QUANTITY WITH PLAN COMPONENTS

The Update Forecast (T/O) qty with Plan component total quantity option located under the Actions drop-down, copies the Plan component total quantity over to the Forecast (T/O) quantity. You can also right-click in the context menu to see this option.

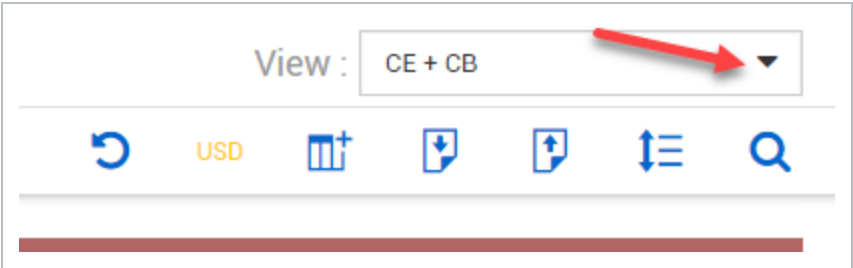


5.3 DATE RANGE SETUP

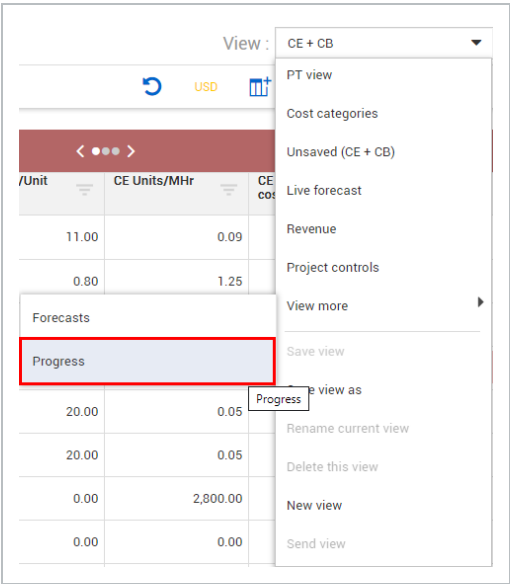
InEight Control gives you flexibility in the form of a Date Range option. The following Step by Step walks through how the Date Range setup feature works.

DATE RANGE SETUP

- 1. Click the **View drop-down** to change your view.



- 2. Select the **Progress** viewset from the View drop-down list.



- 3. In the Actuals data block, select the **left calendar field** on the date range chooser and choose the first day of this month.

| Actuals | | | | | | | 6/15/2018 to 7/3/2018 | | | |
|------------------------|------|----|------|----|------|----|-----------------------|--------------------|----------------------|--|
| June 2018 | | | | | | | | | | |
| Qty complete (to date) | Su | Mo | Tu | We | Th | Fr | Sa | MHrs G/L (to date) | Total cost (to date) | |
| | 27 | 28 | 29 | 30 | 31 | 1 | 2 | 0.00 | \$ 0.00 | |
| | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 0.00 | \$ 0.00 | |
| | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 0.00 | \$ 0.00 | |
| | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 0.00 | \$ 0.00 | |
| | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 0.00 | \$ 0.00 | |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 0.00 | \$ 0.00 | |
| Tuesday, July 03, 2018 | | | | | | | | | | |
| | 0.00 | | 0.00 | | 0.00 | | \$ 0.00 | | | |


- To manually select your date range, click into the date cells along the header of the Actuals data block and select your desired to and from dates
4. Select the **right calendar field** on the date range chooser and select the last day of this month.
 5. Select the **calendar** icon.

Actuals

6/15/2018

to

7/3/2018



<

●

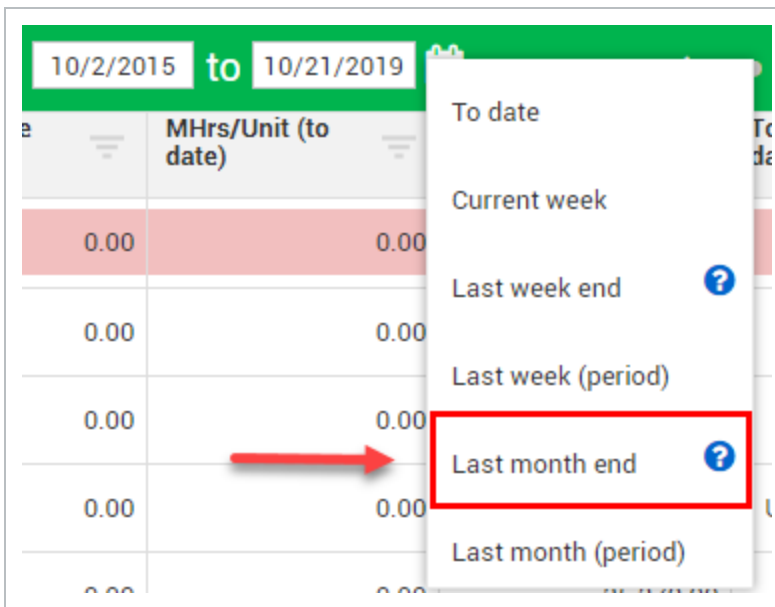
●

●

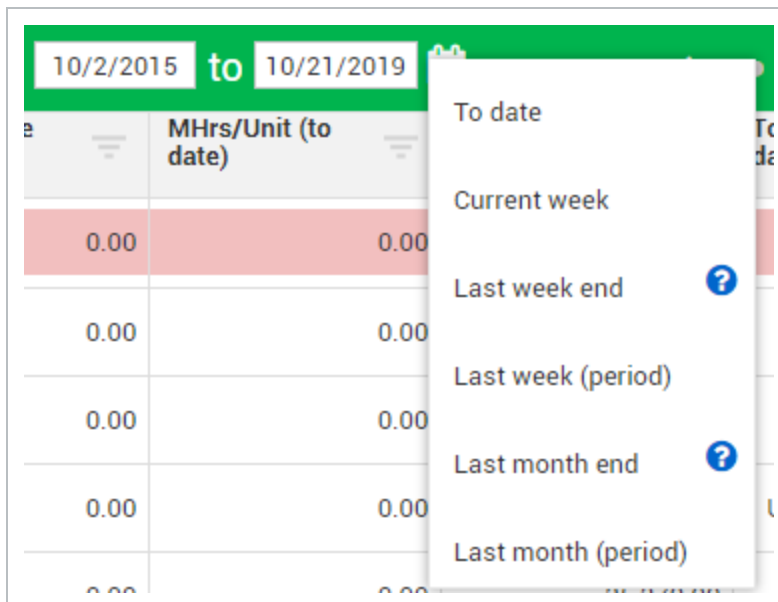
>

| Qty complete (to date) | MHrs/Unit (to date) | CB MHrs G/L (to date) | Total cost (to date) |
|------------------------|---------------------|-----------------------|----------------------|
| 0.00 | 0.00 | 0.00 | \$ 0.00 |
| 0.00 | 0.00 | 0.00 | \$ 0.00 |

6. Select **Last month end** from the calendar.



- To select your date range from the pre-set list, click on the **calendar** icon within the Actuals data block header and select the desired date option

**TIP**

Both week and month end date rules are determined during project setup within the Fiscal Calendar setting. (See lesson [12.1 Project Settings on page 495](#) for more information.)

5.4 MANAGE ACTUALS

In Control, you can choose from four methods for tracking actual values:

- Sync – Lets you connect directly with other systems to update data in real time.
- Import – Allows you to upload spreadsheet data.
- Manual entry – You can input data directly into the system.
- API – Allows you to connect data from external sources, such as an ERP.

These methods help ensure that project records are accurate and up to date. The following topics provide more details on methods for managing actuals:

[Actuals by Sync](#)

[Actuals by Import](#)

[Actuals by Manual Entry](#)

[Actuals by API](#)

5.5 ACTUALS BY SYNC

Update Control data in real time by connecting with InEight applications and other external systems.

5.5.1 SYNC QUANTITIES

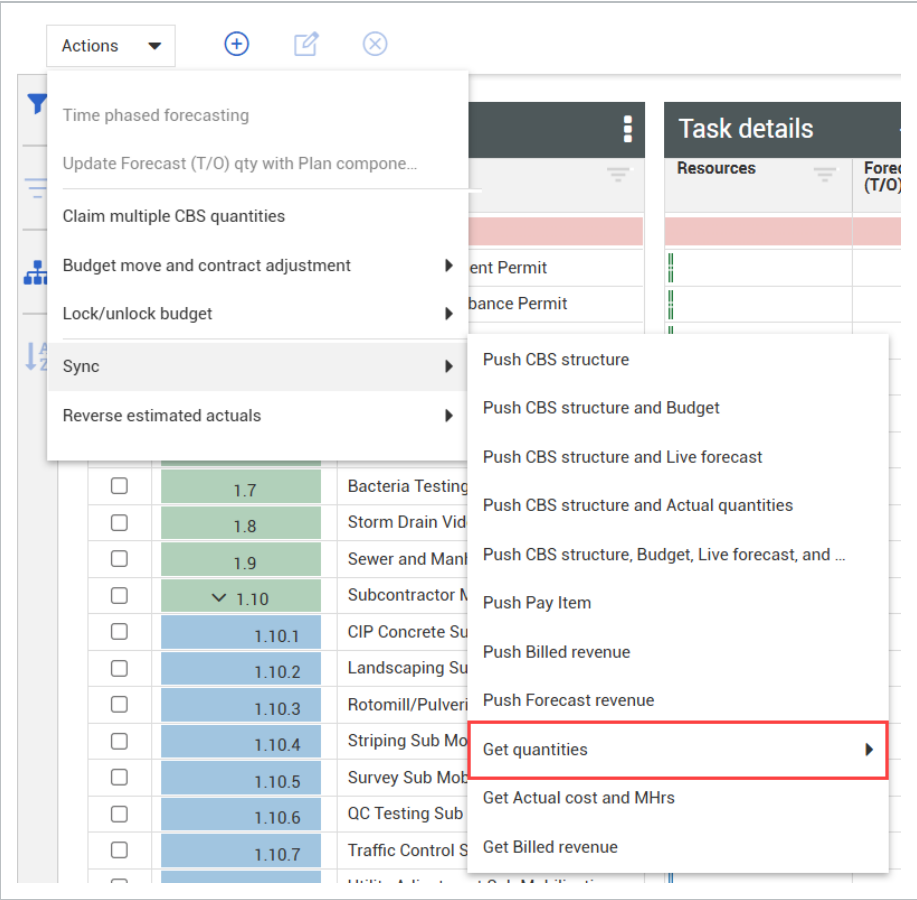
A quantities sync lets you to bring actuals from other InEight applications into Control. Quantities are brought into Control through a Get Quantities sync. The Actual qty (to date) column is updated when the sync is complete.

| Actuals 05/30/2025 to 06/26/2025 | | | |
|----------------------------------|----------------------------|-----------------------|--|
| Actual qty (to date) | Actual MHrs/unit (to date) | CB MHrs G/L (to date) | |
| 0.17 | 122.77 | 0.00 | |
| 1.00 | 0.00 | 0.00 | |
| 0.28 | 0.00 | 0.00 | |
| 0.53 | 0.00 | 0.00 | |
| 750.00 | 0.00 | 0.00 | |
| 200.00 | 0.00 | 0.00 | |
| 1.00 | 0.00 | 0.00 | |
| 0.00 | 0.00 | 0.00 | |

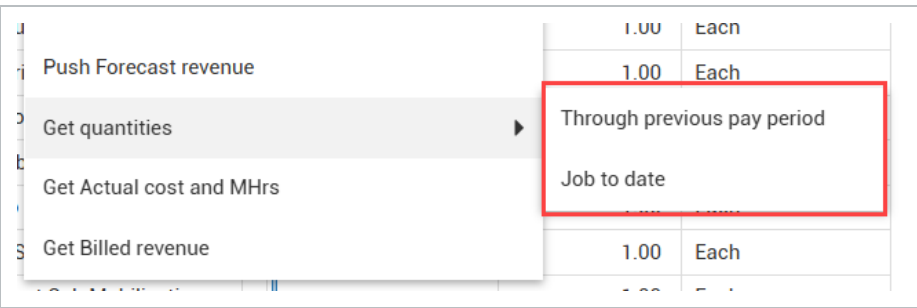
Sync operations are accessed from the Actions menu in the CBS.

PERFORMING A GET QUANTITIES SYNC

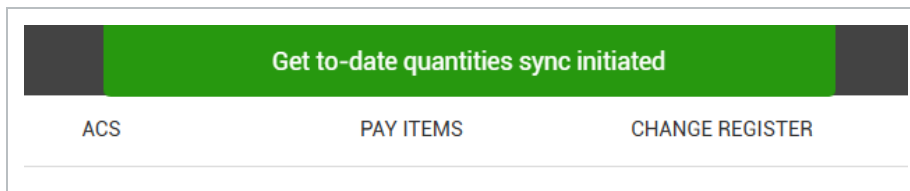
- 1. From the Actions menu, choose **Sync > Get quantities**.



- 2. Choose the time period for the sync (Through previous pay period or Job to date).



- 3. A status message notifies you that the sync has initiated.

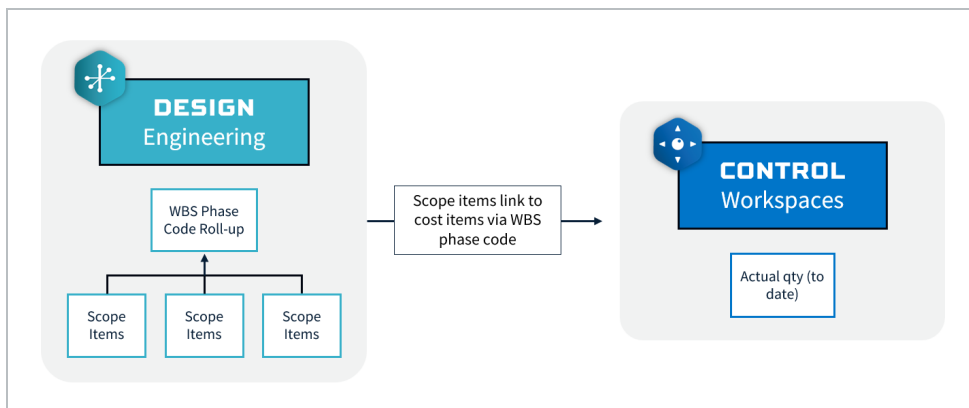


5.5.1.1 TYPES OF GET QUANTITIES SYNCs

Depending on your project configurations, the Get Quantities sync can bring in values from InEight Design, InEight Plan, or InEight Contract. Each of these applications tracks quantities differently, depending on its role in the project lifecycle.

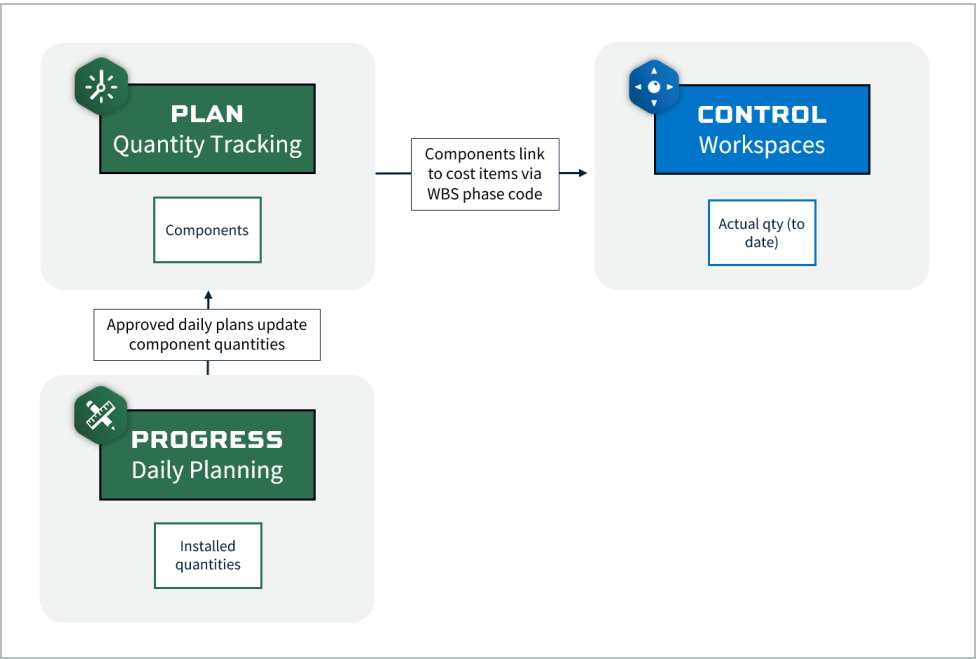
InEight Design

In InEight Design, engineering deliverables are broken down and tracked as scope items. As work on scope items is completed, team members can claim partial or total quantity values. Scope items are linked to cost items through the WBS phase code. As a result of a Get Quantities sync, scope item quantities update the actual quantity for their associated cost items.



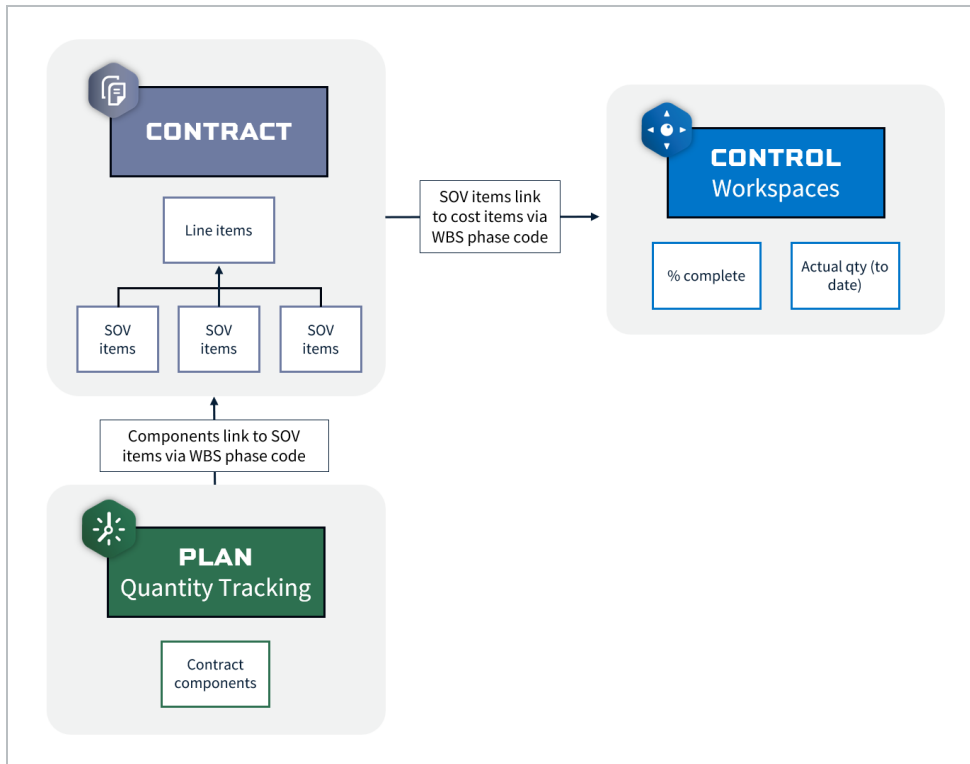
InEight Plan

Quantities from InEight Plan represent completed progress in the field. Quantities can be captured directly in the Quantity Tracking module, or they can be captured through approved daily plans from InEight Progress. Components are linked to cost items through the WBS phase code. As a result of a Get Quantities sync, component quantities update the actual quantity for their associated cost items.




InEight Contract


Quantities from InEight Contract represent completed progress associated with a third-party contract. Contract line items can be broken down into schedule of value items to track field progress. These SOV items can be claimed directly in InEight Contract, or they can be claimed as contract components in InEight Plan. SOV items are linked to cost items through the WBS phase code. As a result of a Get Quantities sync, SOV quantities update the percent complete and actual quantity for their associated cost items.



To update complete from InEight Contract, you must enable the settings for the project in Control > Project Tracking > **Actuals**. Switch the **Update % complete from Contract** toggle to *On*.

After the Update % complete from Contract setting is enabled, select from the **Calculate percent complete for individual cost items as a percentage of** drop-down list to define how you want to calculate the percent complete for cost items.

Update % complete from Contract 



Calculate percent complete for individual cost items as a percentage of

Current budget total cost

Current budget total cost

Committed total cost

Forecast total cost

Current estimate total cost

NOTE

The calculation for this option is: (updated % complete on the cost item) = (SOV unit price) x (Claimed qty in Contract or Plan) ÷ (Denominator in settings). Actual qty (to date) = % complete * Forecast (T/O) qty OR CB total qty (depending on settings).

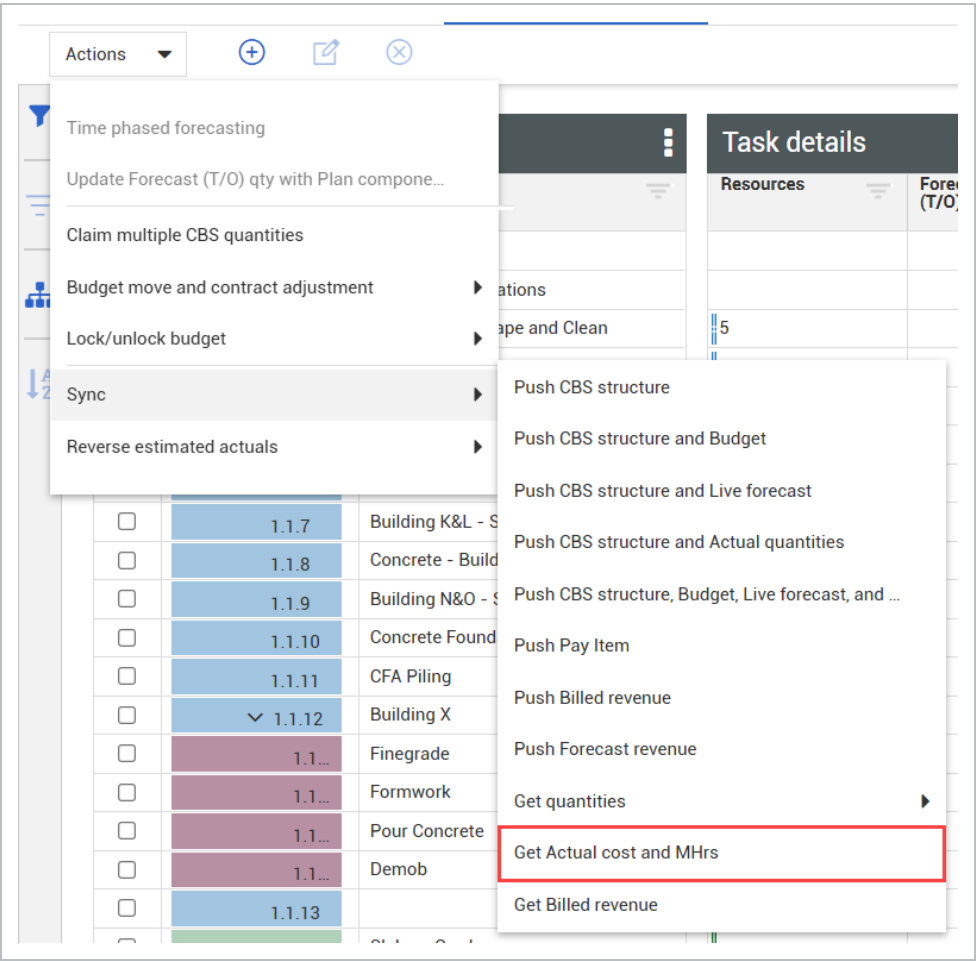
5.5.2 SYNC HOURS AND COSTS

If your project uses external systems to capture man-hours and costs, those values can be brought into Control through a sync. If your project uses an ERP system, you can bring in man-hours and costs by performing a Get Actual Cost and MHrs sync. If you have values tracked through contracts, you can enable project settings to bring those values in from InEight Contract. Hours and costs brought into Control through a sync update which updates the Actual cost (to date) and Actual MHrs (to date) columns.

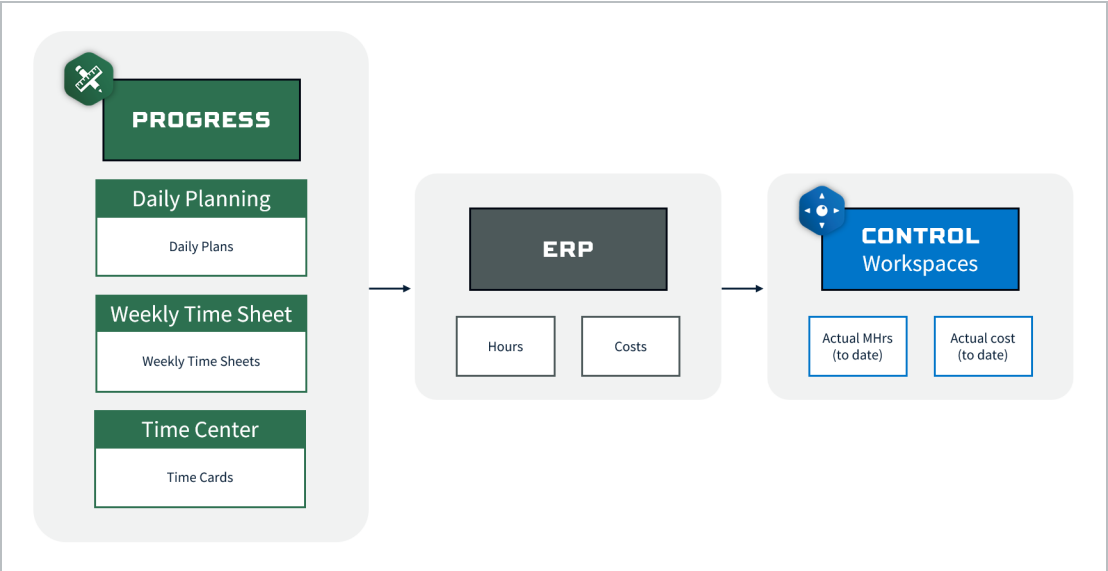
| Actuals 05/30/2025 to 06/26/2025 | |
|----------------------------------|-----------------------|
| Actual cost (to date) | Actual MHrs (to date) |
| \$ 583,998.84 | 1,935.50 |
| \$ 524,328.84 | 1,824.00 |
| \$ 0.00 | 0.00 |
| \$ 104,100.00 | 0.00 |
| \$ 12,800.00 | 0.00 |
| \$ 62,375.00 | 1,800.00 |

ERP

After man-hours and costs are verified in your ERP system, you can initiate a sync to bring those values into Control. Similar to the Get Quantities sync, the Get Actual Cost and MHrs sync is accessed from the Actions menu.



If your project captures work hours through InEight Progress, those hours and their associated costs are approved in Progress before being sent to the ERP.



InEight Contract

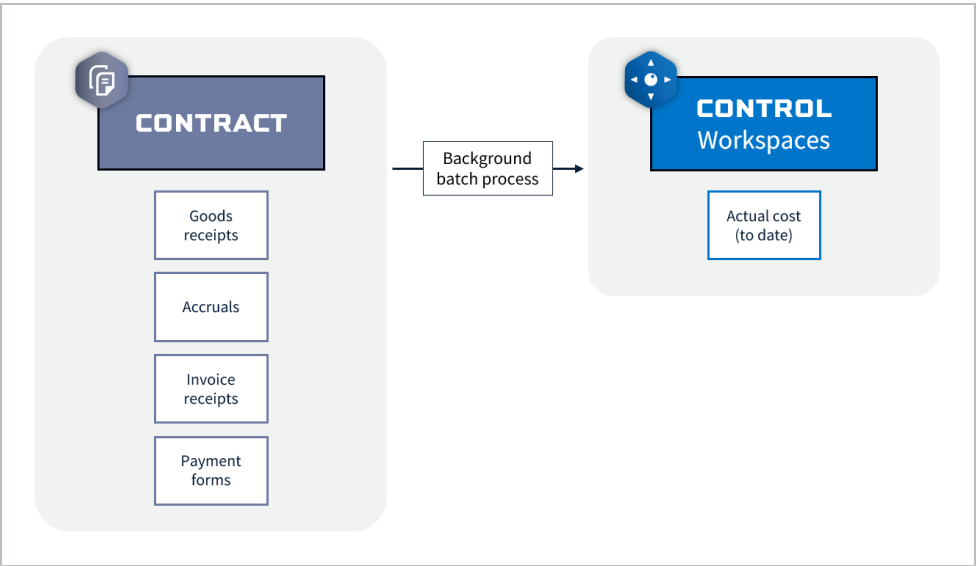
InEight Contract can record actual costs in the form of goods receipts, accruals, invoice receipts, or payment forms. You can configure your project settings to pull these actual costs into Control through a batch process.

In project settings, under Control > Project Tracking > **Actuals**, switch the **Get actual cost from Contract** toggle to *On*.

The screenshot shows the 'Actuals' configuration page in the InEight Control interface. The page is part of the 'PROJECT TRACKING' section. It contains several settings for calculating and updating actual costs:

- Calculate percent complete for individual cost items as a percentage of:** A dropdown menu is set to 'Forecast (T/O) qty'. To the right, there is a toggle labeled 'Cap percent complete at 100%' which is currently turned on (Yes).
- Calculate percent complete for roll-up items such as superior cost items and account code by:** A dropdown menu is set to 'Cost'. To the right, there is a dropdown menu labeled 'Roll-up percent complete weighted by' set to 'Current Budget'.
- Calculate man hours earned at the parent level by:** Two radio button options are shown:
 - ☒ The summation of man hours earned from direct child items
 - ☐ The total man hours multiplied by percent complete
- Get actual cost from Contract:** This setting is highlighted with a red box. It includes an information icon (i) and a toggle switch that is currently turned on (green checkmark).
- Update % complete from Contract:** This setting includes an information icon (i) and a toggle switch that is currently turned off (grey).
- Drive committed cost values from Contract:** This setting includes an information icon (i) and a toggle switch that is currently turned off (grey).

After you enable this setting, Contract values update the actual cost for the associated cost items. Note that it may take up to 15 minutes for the background batch process to complete.



5.5.3 AUDIT LOG

You can check the status of a sync in the Audit Log on the Integration tab.

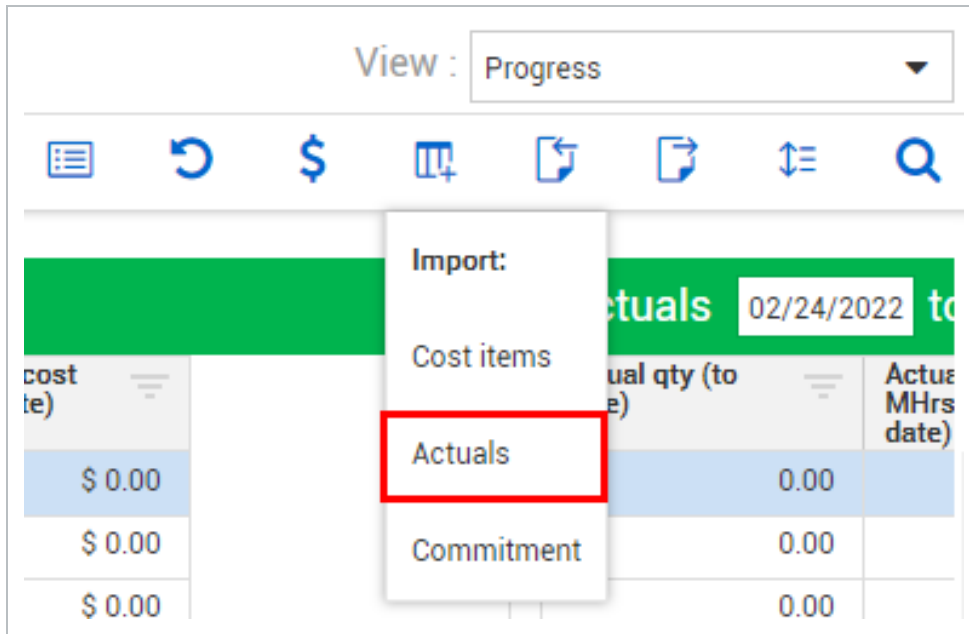
| CBS ACS PAY ITEMS CHANGE REGISTER AUDIT LOG | | | | | | | | |
|---|-------------------------------|--------------------------|-----------|--------------------|---------------------|---------------------|--------------------------------------|--|
| Actions | | | | | | | | |
| | Audit ID | Interface | Status | Processing details | Start | Finish | Log Handle | |
| CBS | <input type="checkbox"/> 2150 | Quantities - Job to date | Succeeded | 2 of 2 | 10/16/2024 12:15 PM | 10/16/2024 12:15 PM | 3941e926-52ed-461c-bc23-1f48d56f41cb | |
| ACS | <input type="checkbox"/> 1710 | Budget | Failed | Failed at 1 | 03/10/2023 12:33 PM | 03/10/2023 12:48 PM | ef916a4f-5ed8-4563-8ed7-7fe1fa37bf3a | |
| Pay items | <input type="checkbox"/> 1709 | CBS | Succeeded | 4 of 4 | 03/10/2023 12:33 PM | 03/20/2023 05:30 AM | 6eae0491-75b8-4f3f-8908-a1bfbb1bffd4 | |
| Integration | <input type="checkbox"/> 1706 | Quantities - Job to date | Succeeded | 2 of 2 | 02/23/2023 12:26 PM | 02/23/2023 12:26 PM | 3073f971-f99a-4eeb-b9d5-a14ee876543a | |
| | <input type="checkbox"/> 1705 | Quantities - Job to date | Succeeded | 2 of 2 | 02/23/2023 12:04 PM | 02/23/2023 12:04 PM | 43c1d5ec-d32f-4357-bf70-90edf8d375bf | |
| | <input type="checkbox"/> 1704 | Quantities - Job to date | Succeeded | 2 of 2 | 02/23/2023 11:49 AM | 02/23/2023 11:49 AM | 5f805be3-8d6f-45e1-a269-283a6f43742c | |
| Import history | <input type="checkbox"/> 1661 | ActualMHCost | InProcess | 0 of 3 | 12/07/2022 03:26 PM | | de1ffc21-8ae0-41f1-8399-e93c29a86b56 | |

5.6 ACTUALS BY IMPORT

You can import actual costs, man-hours and quantities by using an Excel or CSV file.

An actuals import is similar to claiming actuals in Control. After you upload a spreadsheet containing actuals, those values are added to any existing actuals for the specified cost items. Your spreadsheet values should represent new claiming on a cost item rather than the total sum to date.

From the CBS tab in Control Workspaces, you can access the Import function by clicking the **Import** icon, and then selecting **Actuals**.



After you add the import file, you can select the matching criteria in the Map columns dialog box. The Map columns dialog box has a select number of Control fields which pertain to actuals. The table below shows details of the available fields.

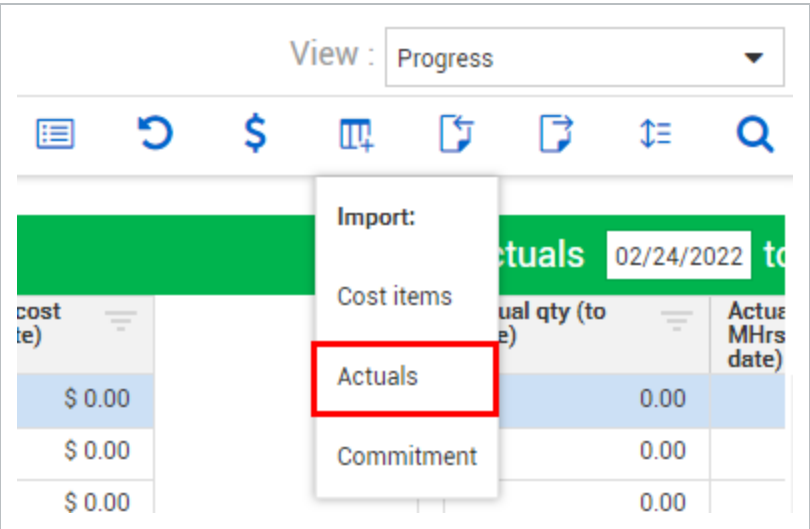
| Control field | Details |
|---------------------|--|
| WBS phase code | The unique WBS phase code. Can be used as the cost item matching criteria. Required to select this or CBS position as the cost item matching criteria. |
| CBS position | The position in the CBS hierarchy. Can be used as the cost item matching criteria. Required to select this or WBS phase code as the cost item matching criteria. |
| Posting date | Required field. Control will prompt you to specify the date format used in your import file. |
| Notes | Text field for any notes that pertain to this specific claiming update. |
| Claimed quantities | Quantities in this field will be added to the Actual qty (to date) field for the specified cost items. |
| Number of man hours | Values in this field will be added to the Actual Mhrs (to date) field for the specified cost items. |
| Number of equipment | Values in this field will be added to the Actual eqp hrs (to date) field for |

| Control field | Details |
|--------------------------|--|
| hours | the specified cost items. |
| Cost | Values in this field will be added to the Actual cost (to date) field for the specified cost items. |
| Cost categories | You can download a list of your project's cost categories from the Import actuals data dialog box. The values in the import file must match the Control values exactly. |
| Actuals user defined 1-2 | Use these fields to enter dates based on customized field labels set up in Platform > Suite Administration > Custom labels. |
| Actuals user defined 3-6 | Use these free text fields to enter any variable attribute based on customized field labels set up in Platform > Suite Administration > Custom labels. |
| Estimate Resource | You can specify estimate resources to be included with this claiming update. Use the resource code for the estimate resource as the value for this field. This update will be visible from the Actuals Details tab in Actuals History. |

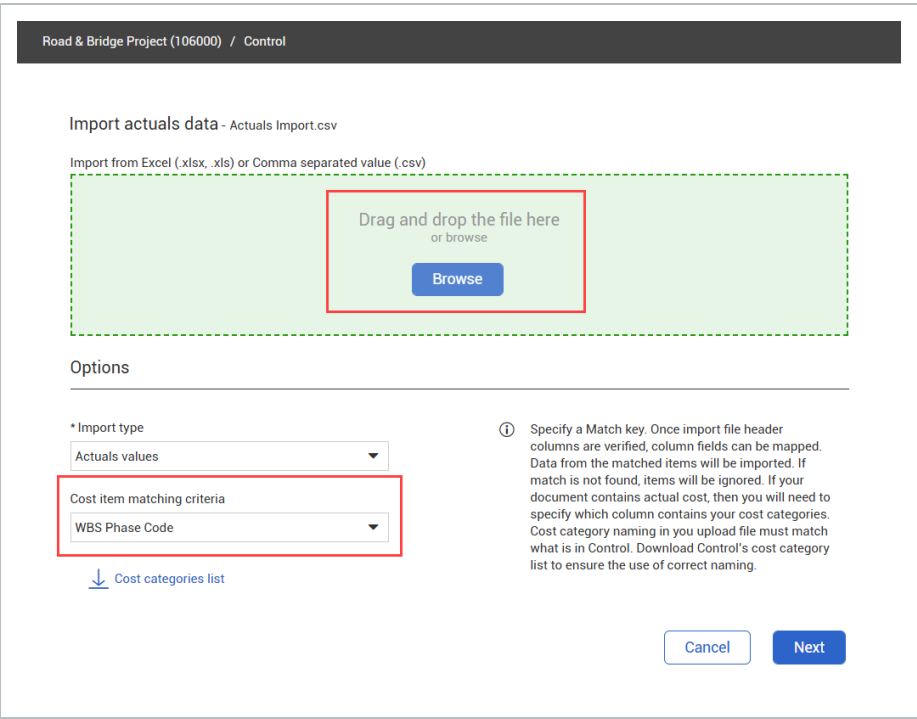
Follow the steps below to import actuals.

IMPORT ACTUALS

1. Prepare the import file.
2. From the CBS, click Import > **Actuals**.



3. In the Import actuals data dialog box, add the import file, and then select the cost item matching criteria.



4. Map the Control fields to the file columns.

Import actuals data - Actuals Import.csv

Map columns

Template

Unsaved template

| Control field | Mapped | File columns |
|---------------------------|--------|-----------------------|
| Tasks | | |
| * WBS phase code | q | WBS phase code |
| CBS position | | only used if matching |
| Actuals | | |
| * Posting date | ✓ | Date |
| Notes | | Blank-do not import |
| Claimed quantities | ✓ | Actual qty (to date) |
| Number of man hours | ✓ | MHrs |
| Number of equipment hours | ✓ | Equipment |
| Cost | ✓ | Cost |

* Required fields

Reset

Cancel

Back

Next

5. Select the date format used in the import file.

Mapped

File columns

Select date...

MM/DD/YYYY

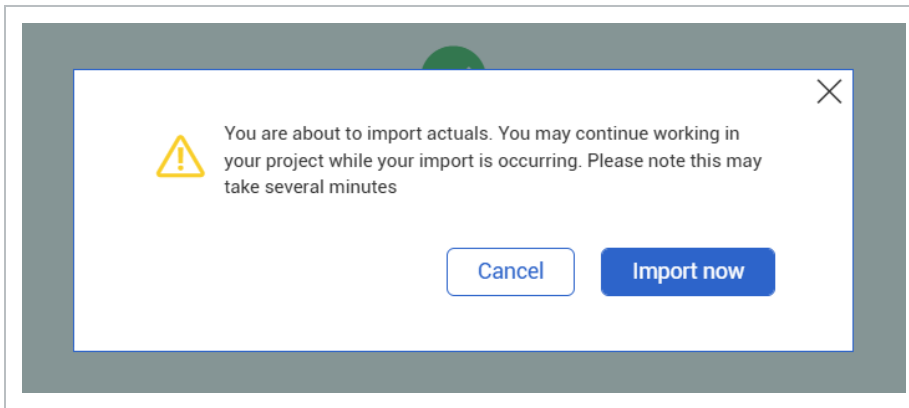
Choose date format currently displayed in file. Selected format will be converted to match user settings.

Cancel

Back

Next

6. The import file will be checked for errors. If the file contains no errors, click **Next**.
If the import contains errors, download the error file for more information.
7. Click **Import now** to complete the import.



Visit [Cost Item Excel Import](#) for more information on performing an import.

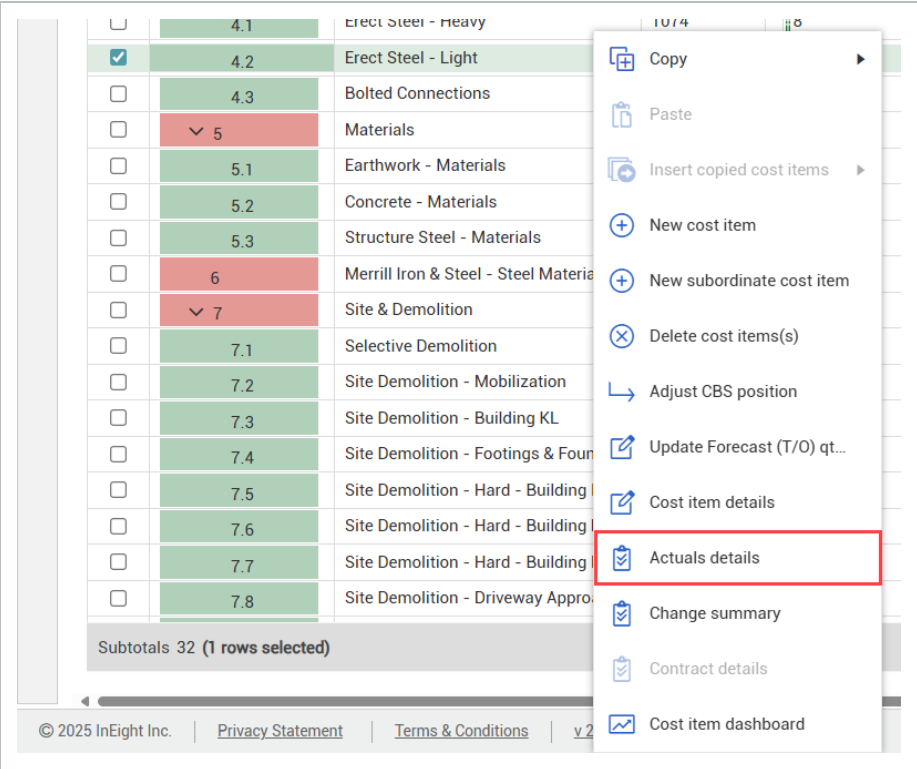
5.7 ACTUALS BY MANUAL ENTRY

In some situations, you may need to enter actuals directly in InEight Control. This can be helpful when field data is delayed, incomplete, or needs correction. Manual entry also gives you greater flexibility when tracking progress tied to lump sum or indirect costs, or when values include confidential or sensitive data.

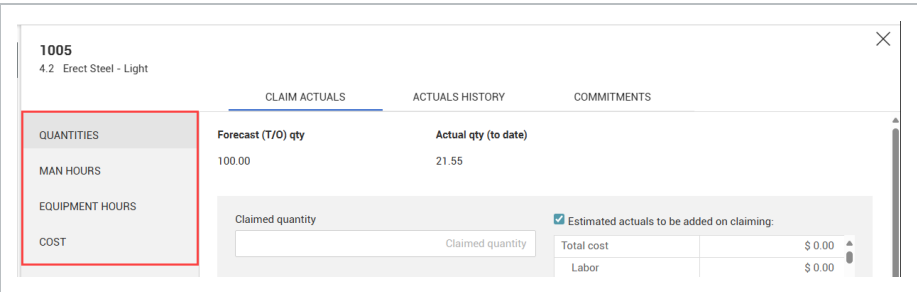
The steps below outline how to claim actuals by manual entry.

CLAIM ACTUALS BY MANUAL ENTRY

1. From the CBS, right-click a cost item, and then select **Actuals details**.



2. On the Claim Actuals tab of the slide-out panel, select the type of actuals from the tabs on the left.



3. Enter the quantity, hours, or cost to be claimed.

CLAIM ACTUALS

ACTUALS HISTORY

COMMITMENTS

QUANTITIES

MAN HOURS

EQUIPMENT HOURS

COST

Forecast (T/O) qty

100.00

Actual qty (to date)

21.55

Claimed quantity

15.00

Posted date

06/30/2025

☒ Estimated actuals to be

Total cost

Labor

Construction Equipmen

ENM Rented Equipment

4. Enter additional details as needed.

CLAIM ACTUALS

ACTUALS HISTORY

COMMITMENTS

Posted date

06/30/2025

Start date

06/23/2025

Area

South

Actuals user defined 5

Actuals user defined 5

Estimate resource

Estimate resource

Notes

Notes

4000

Finish date

06/27/2025

Actuals user defined 4

Actuals user defined 4

Actuals user defined 6

Actuals user defined 6

Labor

\$ 0.00

Construction Equipment

\$ 0.00

ENM Rented Equipment

\$ n nn

5. When finished, click **Apply**.

5.7.1 CLAIM QUANTITIES

Track completed progress progress on a cost item by entering a claim on the Quantities tab in the Actuals details slide-out panel.

Before claiming quantities for a cost item, make sure the *Hide in Plan, Progress, and Design* column is checked. This option prevents conflicts by making the cost item unavailable for claiming outside of Control.

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Tasks

| | | | |
|--------------------------|--------------|--------------|----------------|
| <input type="checkbox"/> | CBS position | Description | WBS phase code |
| <input type="checkbox"/> | 2 | Construction | 1011 |
| <input type="checkbox"/> | 2.1 | Bridge Work | 1012 |

Task details

| | |
|-------------------------------------|--------------------------|
| Hide in Plan, Progress, and Design | Is terminal |
| <input type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> |

See the table below for details on the available fields on the Quantities tab.

CLAIM ACTUALS

ACTUALS HISTORY

COMMITMENTS

QUANTITIES

MAN HOURS

EQUIPMENT HOURS

COST

Forecast (T/O) qty

Actual qty (to date)

4,331.00

2,576.45

Claimed quantity

Posted date

Claimed quantity

07/01/2025

Actuals user defined 1

Actuals user defined 2

Actuals user defined 3

Actuals user defined 4

Actuals user defined 5

Actuals user defined 6

Estimate resource

Estimate resource

Notes

4000

Notes

| Field | Details |
|--------------------------|--|
| Forecast (T/O) qty | Shows the forecast takeoff quantity for the cost item. |
| Actual qty (to date) | Shows the actual quantity claimed to date for the cost item. |
| Claimed quantity | Required field. Enter the quantity you wish to claim for this entry. |
| Posted date | Select a posting date for this claiming entry. |
| Actuals user defined 1-2 | Use these fields to enter dates based on customized field labels set up in Platform > Suite Administration > Custom labels . |
| Actuals user defined 3-6 | Use these free text fields to enter any variable attribute based on customized field labels set up in Platform > Suite Administration > Custom labels . |

(continued)

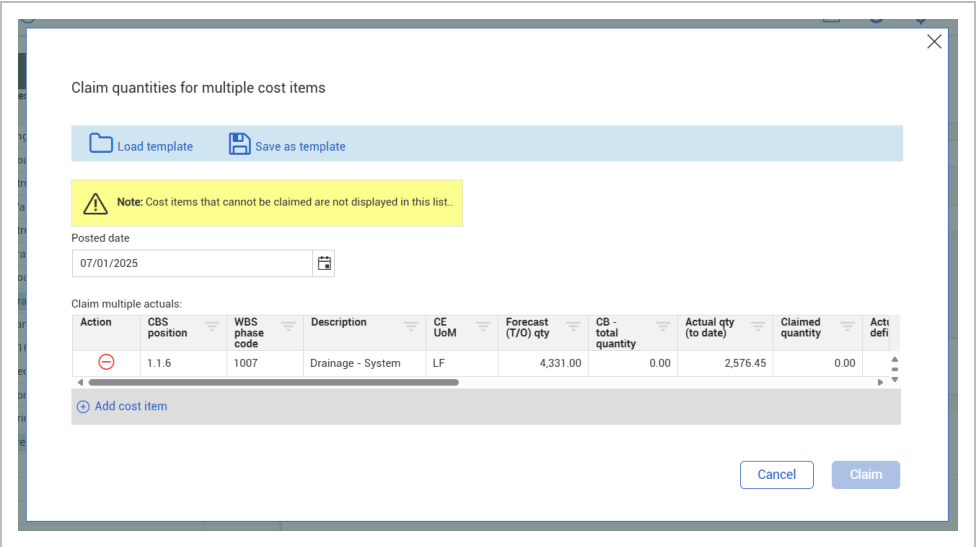
| Field | Details |
|-------------------|---|
| Estimate resource | You can select a resource from the Project library. You can only select one resource per entry. |
| Notes | Enter any notes pertinent to this claiming entry. |

NOTE

You can enter negative quantities when claiming in Control.

5.7.1.1 CLAIM QUANTITIES FOR MULTIPLE COST ITEMS

Select Claim quantities for multiple cost items to claim actuals for multiple cost items on the same posting date. The Claim quantities for multiple cost items window shows the same fields that are found on the Quantities claiming tab in a grid format.



Follow the steps below to complete a manual claim for multiple cost items.

CLAIM QUANTITIES FOR MULTIPLE COST ITEMS


- 1. From Claim Actuals > Quantities of the Actuals Details slide-out panel, click **Claim quantities for multiple cost items**.

Notes

4000

Notes

+ Add claimed quantity

 Claim quantities for multiple cost items

Cancel

Apply

2. Select the posting date for this claim.

×

Claim quantities for multiple cost items

Load template

Save as template

⚠

Note: Cost items that cannot be claimed are not displayed in this list.

Posted date

07/01/2025

📅

| JULY 2025 | | | | | | |
|-----------|----|----|----|----|----|----|
| SU | MO | TU | WE | TH | FR | SA |
| 29 | 30 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |

TUESDAY, JULY 1, 2025

| Description | CE UoM | Forecast (T/O) qty | CB - total quantity | Actual qty (to date) |
|-------------------|--------|--------------------|---------------------|----------------------|
| Drainage - System | LF | 4,331.00 | 0.00 | 2,576.45 |

Cancel

Claim

3. Click **Add cost item** to add additional cost items to claim on this posting date.

Claim quantities for multiple cost items

Load template Save as template

Note: Cost items that cannot be claimed are not displayed in this list.

Posted date
07/01/2025

Claim multiple actuals:

| Action | CBS position | WBS phase code | Description | CE UoM | Forecast (T/O) qty | CB - total quantity | Actual qty (to date) | Claimed quantity | Act defi |
|--------|--------------|----------------|-------------------|--------|--------------------|---------------------|----------------------|------------------|----------|
| - | 1.1.6 | 1007 | Drainage - System | LF | 4,331.00 | 0.00 | 2,576.45 | 0.00 | |

+ Add cost item

Cancel Claim

4. Click the checkbox to select cost items. When you are finished, click **Add**.

Add CBS items

Notes : Cost items that cannot be claimed are not displayed in this list .

Search...

Tasks

| <input type="checkbox"/> | CBS position | WBS phase code | Descrip... | CE UoM | Forecast (T/O) qty | CB - total quantity | Actual qty (to date) | Claimed quantity |
|-------------------------------------|--------------|----------------|-------------------|--------|--------------------|---------------------|----------------------|------------------|
| <input type="checkbox"/> | 1.1.1 | 1002 | Structural So... | SF | 35,210.00 | 0.00 | 29,150.00 | 0 |
| <input type="checkbox"/> | 1.1.2 | 1003 | Walls - SB Ra... | SF | 13,000.00 | 0.00 | 13,000.00 | 0 |
| <input type="checkbox"/> | 1.1.3 | 1004 | Structural - S... | SF | 640.00 | 0.00 | 640.00 | 0 |
| <input type="checkbox"/> | 1.1.4 | 1005 | Traffic Model ... | LF | 2,454.00 | 0.00 | 2,208.60 | 0 |
| <input checked="" type="checkbox"/> | 1.1.5 | 1006 | Roadway - Cl... | LF | 3,000.00 | 0.00 | 2,550.00 | 0 |
| <input type="checkbox"/> | 1.1.7 | 1008 | Landscape - ... | Acre | 1.00 | 0.00 | 1.00 | 0 |
| <input type="checkbox"/> | 1.1.8 | 1009 | D16 408 Permit | Each | 1.00 | 0.00 | 1.00 | 0 |
| <input type="checkbox"/> | 1.1.9 | 1010 | Geo Report | Each | 2.00 | 0.00 | 2.00 | 0 |
| <input checked="" type="checkbox"/> | 2.1.1 | 1013 | Erect Structur... | Ton | 1,500.00 | 0.00 | 0.00 | 0 |

2 items selected

Cancel

Add

5. Click inside the **Claimed quantity** field to enter a quantity for each cost item.

Claim quantities for multiple cost items

Load template

Save as template

Note: Cost items that cannot be claimed are not displayed in this list.

Posted date

07/01/2025

Claim multiple actuals:

| Description | CE UoM | Forecast (T/O) qty | CB - total quantity | Actual qty (to date) | Claimed quantity | Actuals user defined 1 | Actuals user defined 2 |
|------------------------------------|--------|--------------------|---------------------|----------------------|------------------|------------------------|------------------------|
| Drainage - System | LF | 4,331.00 | 0.00 | 2,576.45 | 1,000.00 | | |
| Roadway - Civil Design | LF | 3,000.00 | 0.00 | 2,550.00 | 500.00 | | |
| Erect Structural Steel for Bridges | Ton | 1,500.00 | 0.00 | 0.00 | 300 | | |

Add cost item

Cancel

Claim

6. Enter additional details as necessary.

Claim quantities for multiple cost items

Load template

Save as template

Note: Cost items that cannot be claimed are not displayed in this list.

Posted date

07/01/2025

Claim multiple actuals:

| Actuals user defined 2 | Actuals user defined 3 | Actuals user defined 4 | Actuals user defined 5 | Actuals user defined 6 | Estimate resource | Notes |
|------------------------|------------------------|------------------------|------------------------|------------------------|-------------------|---------------------|
| | | | | | | Storm event on 6/30 |
| | | | | | | |
| | | | | | | |

Add cost item

Cancel

Claim

7. When finished, click **Claim**.

Note that you can also claim quantities for multiple cost items by selecting the cost items in the CBS register, and then opening the Actions menu and choosing **Claim multiple CBS quantities**.

Actions

Update Forecast (T/O) qty with Plan compone...

Claim multiple CBS quantities

Budget move and contract adjustment

Lock/unlock budget

Sync

| | | | WBS phase code |
|-------------------------------------|-------|--------------------------------------|----------------|
| | | | 1000 |
| | | d Bridge | 1001 |
| | | Bound Ramp/Bri... | 1002 |
| | | y/Bridge | 1003 |
| <input type="checkbox"/> | 1.1.3 | Structural - SB Ramp/Bridge Misc ... | 1004 |
| <input checked="" type="checkbox"/> | 1.1.4 | Traffic Model - Development/Anal... | 1005 |
| <input checked="" type="checkbox"/> | 1.1.5 | Roadway - Civil Design | 1006 |
| <input checked="" type="checkbox"/> | 1.1.6 | Drainage - System | 1007 |
| <input type="checkbox"/> | 1.1.7 | Landscape - SB Ramp/Bridge | 1008 |

5.7.2 CLAIM MAN-HOURS

Claim work hours for a specific employee or for a crew on the Man Hours tab in the Actuals details slide-out panel.

To claim hours for a crew, enter the total number of hours worked in the Number of hours field and leave the Employee name and Employee ID number fields blank.

See the table below for details on the available fields on the Man Hours tab.

CLAIM ACTUALS

ACTUALS HISTORY

COMMITMENTS

QUANTITIES

MAN HOURS

EQUIPMENT HOURS

COST

CE total MHRs

MHRs(to date)

12,000.00

0.00

Number of hours

Posted date

Number of hours

07/01/2025

Employee name

Employee ID number

Employee name

Employee ID number

Actuals user defined 1

Actuals user defined 2

Actuals user defined 3

Actuals user defined 4

Actuals user defined 3

Actuals user defined 4

Actuals user defined 5

Actuals user defined 6

Actuals user defined 5

Actuals user defined 6

Estimate resource

Estimate resource

Notes

4000

Notes

| Field | Details |
|-----------------|--|
| CE total MHRs | Shows the Current Estimate total man-hours for the cost item. |
| MHRs (to date) | Shows the actual man-hours claimed to date for the cost item. |
| Number of hours | Required field. Enter the hours you wish to claim for this entry. |
| Posted date | Select a posting date for this claiming entry. |
| Employee name | If entering hours for a single employee, enter the employee name. Make sure that the entry matches the name in the employee record. |
| Employee ID | If entering hours for a single employee, enter the ID number. Make sure that the entry matches the ID number in the employee record. |

| Field | Details |
|--------------------------|--|
| Actuals user defined 1-2 | Use these fields to enter dates based on customized field labels set up in Platform > Suite Administration > Custom labels . |
| Actuals user defined 3-6 | Use these free text fields to enter any variable attribute based on customized field labels set up in Platform > Suite Administration > Custom labels . |
| Estimate resource | You can select a resource from the Project library. You can only select one resource per entry. |
| Notes | Enter any notes pertinent to this claiming entry. |

5.7.3 CLAIM EQUIPMENT HOURS

Claim hours for an equipment item on the Equipment Hours tab in the Actuals details slide-out panel. See the table below for details on the available fields on the Equipment Hours tab.

CLAIM ACTUALS

ACTUALS HISTORY

COMMITMENTS

QUANTITIES

MAN HOURS

EQUIPMENT HOURS

COST

CE total equipment Hrs

1,800.00

Equipment Hrs (to date)

0.00

Equipment ID #

Equipment ID #

Posted date

07/01/2025

Hours used

Hours used

Actuals user defined 1

Actuals user defined 2

Actuals user defined 3

Actuals user defined 4

Actuals user defined 5

Actuals user defined 6

Estimate resource

Estimate resource

Notes

Notes

4000

| Field | Details |
|------------------------|---|
| CE total equipment Hrs | Shows the Current Estimate total man-hours for the cost item. |
| Equipment Hrs (to | Shows the actual equipment hours claimed to date for the cost item. |

| Field | Details |
|--------------------------|--|
| date) | |
| Equipment ID # | You can enter the ID for the equipment item. Make sure that the entry matches the ID number in the equipment record. |
| Posted date | Select a posting date for this claiming entry. |
| Hours used | Required field. Enter the hours you wish to claim for this entry. |
| Actuals user defined 1-2 | Use these fields to enter dates based on customized field labels set up in Platform > Suite Administration > Custom labels . |
| Actuals user defined 3-6 | Use these free text fields to enter any variable attribute based on customized field labels set up in Platform > Suite Administration > Custom labels . |
| Estimate resource | You can select a resource from the Project library. You can only select one resource per entry. |
| Notes | Enter any notes pertinent to this claiming entry. |

5.7.4 CLAIM COST

Claim cost for a cost item on the Cost tab in the Actuals details slide-out panel. See the table below for details on the available fields on the Cost tab.

CLAIM ACTUALS

ACTUALS HISTORY

COMMITMENTS

QUANTITIES

MAN HOURS

EQUIPMENT HOURS

COST

CE total cost

\$ 50,000.00

Actual cost (to date)

\$ 5,221.75

Claimed cost

Claimed cost

Cost category

Posted date

07/01/2025

Actuals user defined 1

Actuals user defined 2

Actuals user defined 3

Actuals user defined 3

Actuals user defined 4

Actuals user defined 4

Actuals user defined 5

Actuals user defined 5

Actuals user defined 6

Actuals user defined 6

Estimate resource

Estimate resource

Notes

4000

Notes

| Field | Details |
|--------------------------|--|
| CE total cost | Shows the Current Estimate total cost for the cost item. |
| Actual cost (to date) | Shows the actual cost claimed to date for the cost item. |
| Claimed cost | Required field. Enter the cost you wish to claim for this entry. |
| Cost category | Required field. Select the cost category for this entry. |
| Posted date | Select a posting date for this claiming entry. |
| Actuals user defined 1-2 | Use these fields to enter dates based on customized field labels set up in Platform > Suite Administration > Custom labels . |
| Actuals user defined 3-6 | Use these free text fields to enter any variable attribute based on customized field labels set up in Platform > Suite Administration > Custom labels . |
| Estimate resource | You can select a resource from the Project library. You can only select one resource per entry. |
| Notes | Enter any notes pertinent to this claiming entry. |

5.7.5 ADD ADDITIONAL CLAIMING ENTRIES

You can record separate claiming entries for a single cost item from the Actuals Details slide-out panel. Click the Add icon from the bottom of the slide-out panel to add additional entry fields.

The screenshot shows a slide-out panel for 'Actuals Details'. At the top, there is a 'Notes' section with a text area and a character count of '4000'. Below the notes section, there is a button labeled '+ Add claimed quantity' which is highlighted with a red rectangular box. To the right of this button is a link that says 'Claim quantities for multiple cost items' with a small icon. At the bottom right of the panel, there are two buttons: 'Cancel' and 'Apply'.

5.7.6 USER-DEFINED FIELDS

There are 6 user-defined fields you can use when you claim actuals in Control. These field labels can be customized to fit your business practices. Examples of custom labels include “Start Date”, “Area”, or “Category”. An additional field is available to select a resource from the Project library.

The screenshot shows a web form for manual entry of actuals. At the top, there are fields for 'Number of hours' (with a placeholder 'Number of hours') and 'Posted date' (with a date picker showing '07/01/2025'). Below these are 'Employee name' and 'Employee ID number' fields. A red rectangular box highlights a section containing six 'Actuals user defined' fields (1 through 6) and an 'Estimate resource' field. Each of these fields has a placeholder text 'Actuals user defined X' and a date picker icon. Below the highlighted section is a 'Notes' field with a character limit of 4000.

Custom labels for the user-defined fields can be set up in Platform > Suite Administration > **Custom labels**.

| User-defined field | Type | Description |
|--------------------------|-----------|---|
| Actuals user defined 1-2 | Date | Use this field to enter dates, such as start and finish dates. |
| Actuals user defined 3-6 | Free text | Use these fields to enter any variable attribute based on your business processes. |
| Estimate resource | Choice | Select a resource from the Project library. You can only select one resource per transaction. |

5.8 ACTUALS BY API

Your organization can set up API integrations to synchronize actuals between InEight Control and an ERP or other external system. Refer to the [Control Integration Specification](#) document for more details.

5.9 ESTIMATED ACTUALS

Estimated actuals lets you track costs, quantities, man-hours, and equipment hours on a cost item before these values are validated through the ERP system. This provides more up-to-date visibility on progress and increases forecast accuracy. Estimated actuals can be generated in Control through quantity claims, or brought in from approved daily plans in Progress. After actuals are validated in the ERP system, you can reverse the estimated actuals and maintain the confirmed actuals.

To view estimated actuals in Control, you must first enable the feature in Control's project settings. To enable, go to the Project Tracking tab in settings, and under Estimated actuals, switch the **Turn on estimated actuals** toggle to *ON*, and then select the applicable cost categories under Control and Progress.

Turn on estimated actuals: ☒

| Actual type | Enable estimated actuals for: | |
|------------------------------|-------------------------------------|-------------------------------------|
| | Control | Progress |
| Labor cost | <input type="radio"/> | <input checked="" type="checkbox"/> |
| Labor man hours | <input type="radio"/> | <input checked="" type="checkbox"/> |
| Construction Equipment cost | <input type="radio"/> | <input checked="" type="checkbox"/> |
| Construction equipment hours | <input type="radio"/> | <input checked="" type="checkbox"/> |
| FOM Rented Equipment cost | <input type="radio"/> | |
| Supplies cost | <input checked="" type="checkbox"/> | |
| Materials cost | <input checked="" type="checkbox"/> | |
| Subcontract cost | <input checked="" type="checkbox"/> | |
| Fees cost | <input type="radio"/> | |
| Allowance cost | <input type="radio"/> | |
| G & A cost | <input type="radio"/> | |
| Undefined cost | <input type="radio"/> | |

When you enable estimated actuals, you can add relevant columns to a data block to view estimated actuals.

| Estimated Actuals | | | | | | | | | | | |
|-----------------------|----------------------------|----------------------------|----------------------|-----------------------|----------------------------|----------------------------|----------------------|----------------------------|--|--|--|
| Confirmed actual cost | Confirmed actual equipment | Confirmed actual man hours | Confirmed actual qty | Estimated actual cost | Estimated actual equipment | Estimated actual man hours | Estimated actual qty | Last estimated actual cost | Last estimated actual eqp hours reversal | Last estimated actual man hours reversal | |
| \$ 0.00 | 0.00 | 0.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | | | | |
| \$ 92,300.00 | 0.00 | 2,030.00 | 2,150.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | | | | |
| \$ 103,500.00 | 0.00 | 1,890.00 | 695.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | | | | |
| \$ 76,300.00 | 0.00 | 1,620.00 | 0.00 | \$ 33,537.35 | 151.00 | 580.50 | 0.00 | | | | |
| \$ 51,300.00 | 0.00 | 1,060.00 | 80.00 | \$ 26,761.60 | 120.00 | 500.00 | 0.00 | | | | |
| \$ 20,500.00 | 0.00 | 400.00 | 21.00 | \$ 6,054.00 | 11.00 | 0.00 | 0.55 | 05/14/2025 3:... | | 05/14/2025 3:13.5... | |
| \$ 4,500.00 | 0.00 | 160.00 | 44.00 | \$ 721.75 | 20.00 | 80.50 | 0.00 | 05/06/2025 1:... | | | |

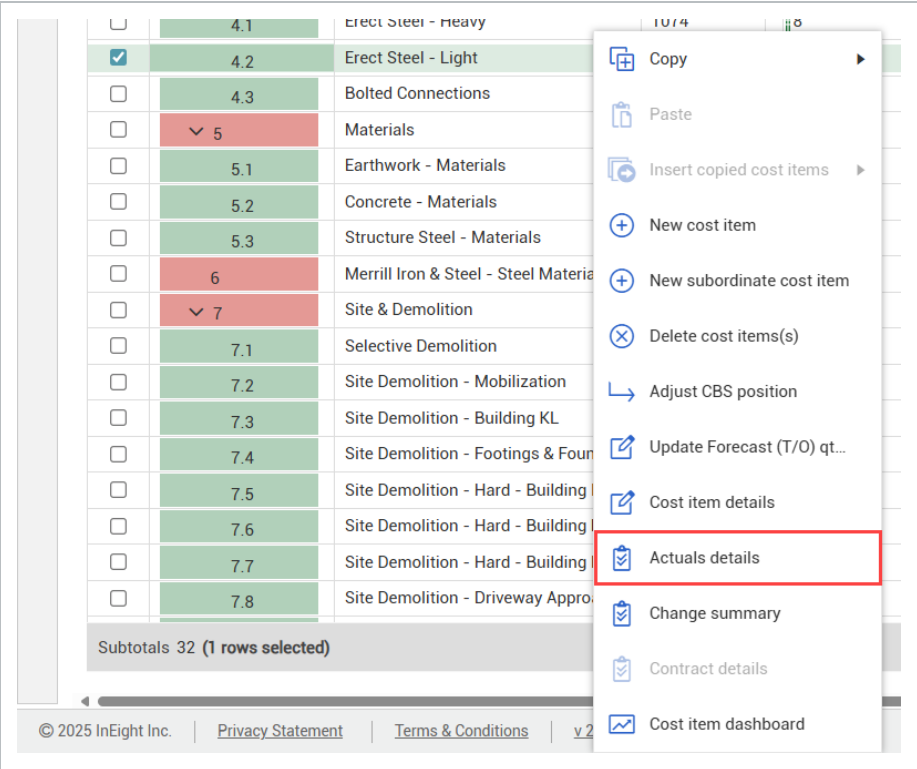
The following table shows columns related to estimated actuals.

| Column | Description |
|--|---|
| Confirmed actual cost | The expended cost verified through the ERP system. |
| Confirmed actual equipment | The expended equipment cost verified through the ERP system. |
| Confirmed actual man hours | The number of labor hours verified through the ERP system. |
| Confirmed actual qty | The cost item quantity verified through the ERP system. |
| Estimated actual cost | Recorded actual cost that has not yet been confirmed through the ERP system. |
| Estimated actual equipment | Recorded equipment cost that has not yet been confirmed through the ERP system. |
| Estimated actual man hours | Recorded labor hours that have not yet been confirmed through the ERP system. |
| Estimated actual qty | Recorded cost item quantity that has not yet been confirmed through the ERP system. |
| Last estimated actual cost reversal | The date and time the last Reverse estimated actuals > Reverse estimated actual cost action was performed. |
| Last estimated actual man hours reversal | The date and time the last Reverse estimated actuals > Reverse estimated actual man-hours and labor cost action was performed. |
| Last estimated actual eqp hours reversal | The date and time the last Reverse estimated actuals > Reverse estimated actual equipment hours and construction cost action was performed. |

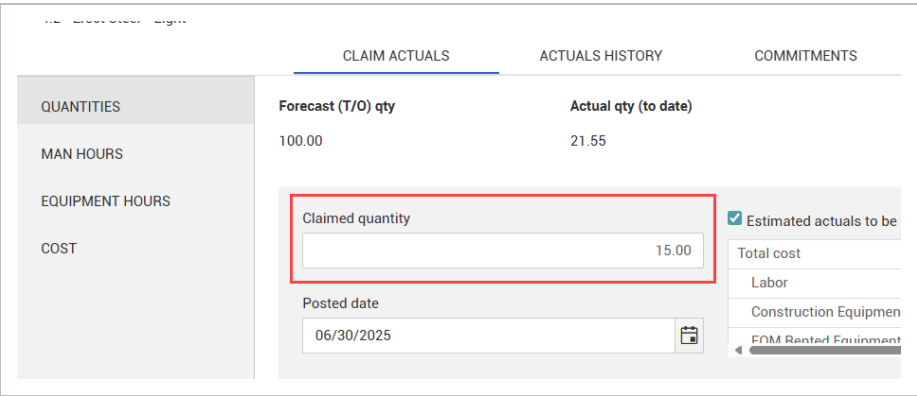
5.9.1 CLAIM ESTIMATED ACTUALS IN CONTROL

CLAIM ESTIMATED ACTUALS

1. From the CBS, right-click a cost item, and then select **Actuals details**.



2. From the Quantities tab, enter a claimed quantity.



- 3. When you select Estimated actuals to be added on claiming, cost category values automatically populate based on the claimed quantity entered using Current Estimate unit rates.

Claimed quantity

15.00

Posted date

07/01/2025

☒ Estimated actuals to be added on claiming:

Total cost

\$ 375.00

Labor

\$ 375.00

Construction Equipment

\$ 0.00

ENM Rented Equipment

\$ 0.00

- 4. Click **Apply** when you are done.

The estimated values for the cost item can now be viewed in the relevant columns.

| Estimated Actuals | | | | | | |
|-----------------------|----------------------------|----------------------|-----------------------|----------------------------|----------------------------|------------------|
| Confirmed actual cost | Confirmed actual man hours | Confirmed actual qty | Estimated actual cost | Estimated actual equipment | Estimated actual man hours | Estimated actual |
| \$ 0.00 | 0.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | |
| \$ 92,300.00 | 2,030.00 | 2,150.00 | \$ 0.00 | 0.00 | 0.00 | |
| \$ 103,500.00 | 1,890.00 | 695.00 | \$ 0.00 | 0.00 | 0.00 | |
| \$ 0.00 | 0.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | |
| \$ 76,300.00 | 1,620.00 | 0.00 | \$ 28,703.85 | 140.00 | 610.50 | |
| \$ 51,300.00 | 1,060.00 | 80.00 | \$ 26,761.60 | 120.00 | 500.00 | |
| \$ 20,500.00 | 400.00 | 21.00 | \$ 1,220.50 | 0.00 | 30.00 | |
| \$ 4,500.00 | 160.00 | 44.00 | \$ 721.75 | 20.00 | 80.50 | |

5.9.2 ESTIMATED ACTUALS FROM PROGRESS

With the correct settings enabled, estimated actuals can be brought in from Progress based on approved daily plans.

Note in the example below, prior to the creation of a new daily plan, the estimated actuals for this cost item have a value of 0.

Steel Structure Training Job 2 | 1... / Control / Workspaces

CBS ACS PAY ITEMS CHANGE REGISTER AUDIT LOG View : Unsaved (Progress)

Actions

Tasks

| | CBS position | Description | WBS phase code |
|--|--------------|---------------------|----------------|
| | 1 | Job Overhead | 1002 |
| | 2 | Earthwork | 1069 |
| | 3 | Concrete | 1071 |
| | 4 | Bolted Connections | 1110 |
| | 5 | Structural Steel | 1073 |
| | 5.1 | Erect Steel - Heavy | 1074 |
| | 5.2 | Erect Steel - Light | 1005 |
| | 5.3 | Bolted Connections | 1006 |
| | 6 | Materials | 1084 |

Estimated Actuals

| Confirmed actual cost | Confirmed actual equipment | Confirmed actual man hours | Confirmed actual qty | Estimated actual cost | Estimated actual equipment | Estimated actual man hours | Estimated actual qty | Last estimated actual cost |
|-----------------------|----------------------------|----------------------------|----------------------|-----------------------|----------------------------|----------------------------|----------------------|----------------------------|
| \$ 0.00 | 0.00 | 0.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | |
| \$ 92,300.00 | 0.00 | 2,030.00 | 2,150.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | |
| \$ 103,500.00 | 0.00 | 1,890.00 | 695.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | |
| \$ 0.00 | 0.00 | 0.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | |
| \$ 76,300.00 | 0.00 | 1,620.00 | 0.00 | \$ 28,703.85 | 140.00 | 610.50 | 0.00 | |
| \$ 51,300.00 | 0.00 | 1,060.00 | 80.00 | \$ 26,761.60 | 120.00 | 500.00 | 0.00 | |
| \$ 20,500.00 | 0.00 | 400.00 | 21.00 | 0.00 | 0.00 | 0.00 | 0.00 | 05/14/2025 2... |
| \$ 4,500.00 | 0.00 | 160.00 | 44.00 | \$ 721.75 | 20.00 | 80.50 | 0.00 | 05/06/2025 1... |
| \$ 604,400.00 | 0.00 | 0.00 | 0.00 | (\$ 250,000.00) | 0.00 | 0.00 | 0.00 | |

In Progress, labor hours and equipment hours are tracked on the Time Sheet tab of a daily plan.

Steel Structure Training Job 2 | 1... / Progress / Daily planning

Daily Plans > Erect Steel Module 12 - 05/14/2025 (Execution) - Plan ID 63

OVERVIEW DETAILS TIME SHEET QUANTITIES NOTES / ISSUES

+

Add tasks and resources

+

Add maintenance

−

Clear hours

1005

Erect Steel - Light

:32

:

:11

Alejandro Ramirez

Laborers - Laborer Journeyman

IN8-10023

MH :8

ST: 8

Maria Popova

Iron Worker - Iron Worker (Stru...

IN8-10013

MH :8

ST: 8

Grove-RT880E Crane

MC-10000000

MH :8

Operated: 8

Quantities are tracked on the Quantities tab of a daily plan.

TIME SHEET
QUANTITIES
NOTES / ISSUES
PRODUCTIVITY
SIGN IN/SIGN OUT

Submit

1005 - Erect Steel - Light

Module 12 - F22: Cross Brace Assembly
Module 12 - F22: Cross Brace Assembly

| Complete | Claim % | Step | Quantity | UoM | To date quantity | Planned quantity | Installed quantity |
|-------------------------------------|---------|-----------------------|----------|-----|------------------|------------------|--------------------|
| <input checked="" type="checkbox"/> | | 15 Shakeout/Transport | 0.30000 | Ton | 0 | 0 | 0.30000 |
| <input checked="" type="checkbox"/> | | 45 Erect/Bolt Up | 0.30000 | Ton | 0 | 0 | 0.30000 |
| <input checked="" type="checkbox"/> | | 30 Final Torque | 0.30000 | Ton | 0 | 0 | 0.30000 |
| <input type="checkbox"/> | | 10 QC Verification | 0.30000 | Ton | 0 | 0 | 0 |
| | | Component total | 0.30000 | Ton | 0.00000 | 0.00000 | 0.27000 |

Module 12 - E24: Beam Assembly
Module 12 - E24: Beam Assembly

Module 12 - E23: Cross Brace Assembly
Module 12 - E23: Cross Brace Assembly

After the daily plan is submitted and approved in Progress, the estimated actuals values automatically update in Control.

Steel Structure Training Job 2 | 1... / Control / Workspaces

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

View : Unsaved (Progress)

Actions

</

Estimated actuals values are only general estimates. They are not confirmed until synced with an ERP or an external payroll system.

5.9.3 REVERSE ESTIMATED ACTUALS

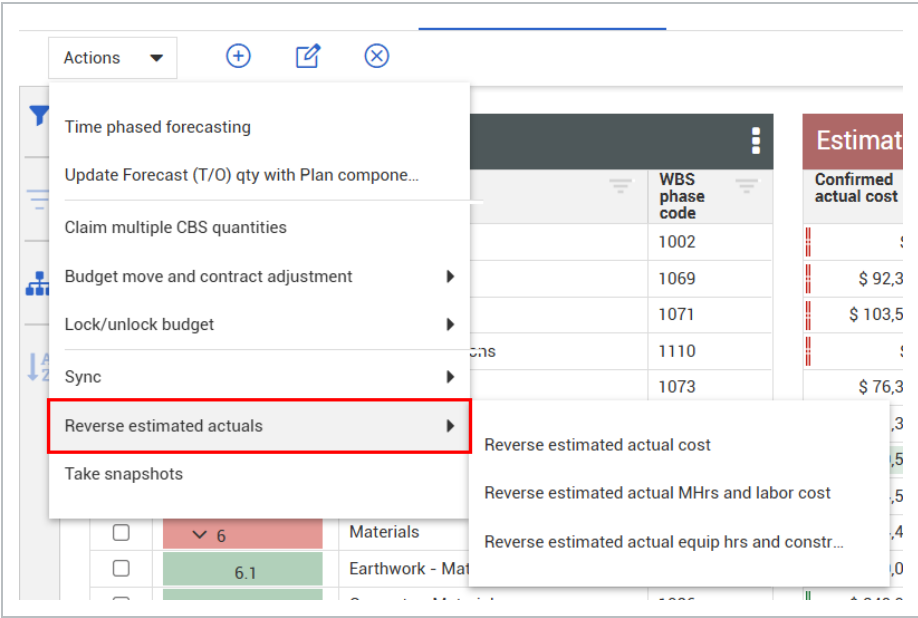
After actuals are reviewed and confirmed in your ERP system, they are brought into Control through a sync. These values are then reflected as “confirmed” actuals. Following this process, you can reverse the estimated actuals, since the confirmed actuals now reflect the most up-to-date information.

NOTE

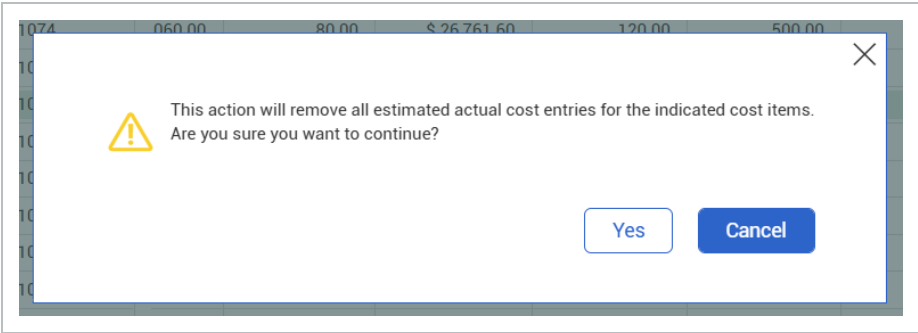
If you keep the estimated values without reversing after syncing with the ERP system, those values are detected as double values.

REVERSE ESTIMATED ACTUALS

- 1. From the CBS, select the cost items which have recorded estimated actuals.
- 2. From the Actions menu, select **Reverse estimated actuals**, and then select the appropriate type of reversal.



- 3. Click **Yes** to confirm the reversal.

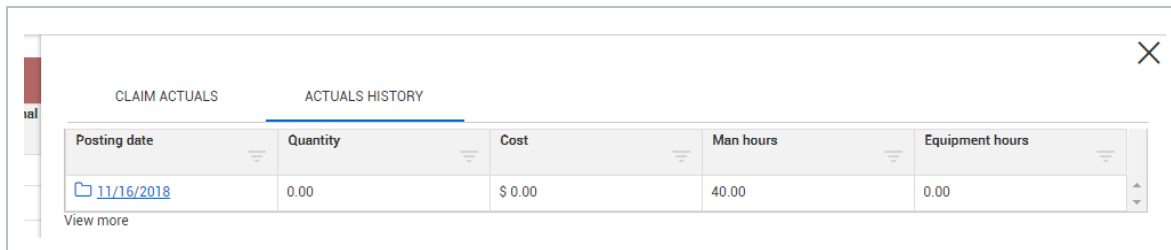


- 4. In the CBS, the estimated values are reset to 0.

5.10 ACTUALS HISTORY

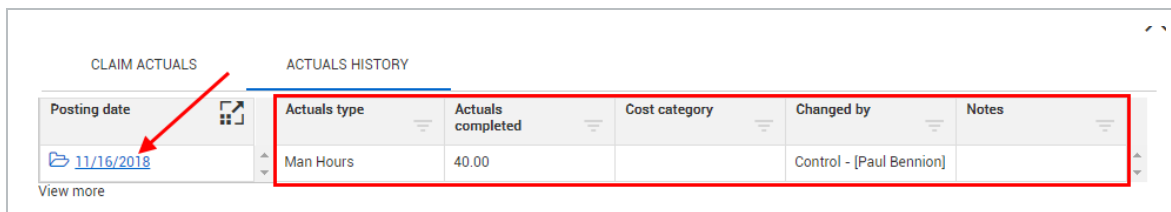
Once progress is tracked against a cost item, you can view its actuals claim history. You can view actuals history of a cost item by right clicking on a cost item and selecting **Actuals details** from the menu. On the resulting slide out panel, you can view the history of when actual quantities, costs, and man-hours were posted by clicking on the Actuals History tab of the cost item.

The Actuals history tab displays and groups the actual claim history by posting date. Within in each posting date folder you can view as-built progress details of quantity, cost, man-hours, and equipment hours of the specific cost item selected in the CBS.



| Posting date | Quantity | Cost | Man hours | Equipment hours |
|--------------|----------|---------|-----------|-----------------|
| 11/16/2018 | 0.00 | \$ 0.00 | 40.00 | 0.00 |

In addition, by clicking on the posting date link, you can view more specific claim history details such as actuals type, cost category, employee change by, and notes.



| Actuals type | Actuals completed | Cost category | Changed by | Notes |
|--------------|-------------------|---------------|--------------------------|-------|
| Man Hours | 40.00 | | Control - [Paul Bennion] | |

5.11 PROGRESS CONTROL SETTINGS

InEight Control integrates with several other programs. Within the tool, a few specific columns allow you to manage the information that is sent to other InEight applications and to your ERP system. Below is a table of the key columns and their functions.

| Column Name | Function |
|----------------|--|
| Allow As-Built | Allows you to choose whether a cost item accepts actual cost, quantities, both, or none. Once this item receives actual costs, quantities, or man-hours, this setting |

| Column Name | Function |
|---------------------------|--|
| | cannot be adjusted (changed from All to None). |
| As-built lock | <p>Once you lock the ERP status, your ERP does not allow the WBS to be progressed.</p> <p>Example use cases for locking ERP status:</p> <ul style="list-style-type: none"> • Work will not begin for two more years • Foreman is not allowed to claim more quantity because work is 100% complete • Work is complete and you do not want people mistakenly charging cost to completed to cost items |
| Hide in Plan and Progress | <p>Allows the user to choose whether to have a cost item available to use in InEight Plan and InEight Progress.</p> <p>Example use case for Hiding in Plan and Progress:</p> <ul style="list-style-type: none"> • Indirect staff cost codes should not be available for direct labor to charge |

The steps below walk you through the various columns and discuss options for changing the settings.

PROGRESS CONTROL SETTINGS

For this step you will need to have a subordinate available to use.

1. On the Control main page CBS tab, select the **Progress** view.
2. Navigate to the **Task Details** data block.
3. Select the second **Data Panel** in the Task Details data block.
4. Double click in the **Allow As-Built** field of the subordinate cost item and select the drop-down arrow.
5. Select **All**.
6. Navigate to the **Third Panel** of the Task Detail data block.
7. Select the **Hide in Plan and Progress** check box of the cost item.

5.12 VENDOR WORK HOURS FROM PROGRESS

5.12.1 VENDOR MHRS FROM PROGRESS

You can see the subcontract man-hours in Control for cost items that derive from InEight Progress. Subcontract performance can be tracked in Progress with data coming into Control for increased transparency, improved monitoring, and analysis.

In addition to assigning a vendor to a cost item, and viewing the assigned vendors from InEight Contract, you can also see the claimed MHrs originating from Progress in Control > **Workspaces**, upon approval in Progress.

After the claimed vendor hours are approved in Progress, the Actual vendor MHrs (to date) and Actual columns populate with the claimed hours. This helps to find and focus on the true causes of any issues and support the ongoing work in the best way possible.

103614 | PATH Substation / Control / Workspaces

CBS

ACS

PAY ITEMS

Actions

Tasks

</

The Actuals Details slide-out panel shows the number of hours worked by the assigned vendor.

The screenshot shows the 'Control' workspace interface. On the left, a 'Tasks' table lists various tasks with columns for CBS position, Description, and WBS phase code. A context menu is open over the 'Financial Results Analysis' task (CBS position 1, Description 'Financial Results Analysis', WBS phase code 1000). The menu includes options like 'Copy', 'Paste', 'Insert copied cost items', 'New cost item', 'New subordinate cost item', 'Delete cost item(s)', 'Adjust CBS position', 'Cost item details', 'Actuals details', 'Change summary', 'Contract details', and 'Cost item dashboard'. A red arrow points from the 'Actuals details' option to the 'Actuals' tab in the table header. The table header also includes 'CLAIM ACTUALS', 'ACTUALS HISTORY', and 'COMMITMENTS'.

| Posting date | Confirmed man hours | Vendor man hours | Total man hours | Estimated equipment hours | Confirmed equipment hours |
|--------------|---------------------|------------------|-----------------|---------------------------|---------------------------|
| 06/10/2022 | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 |
| 06/07/2022 | 0.000 | 33.000 | 0.000 | 0.000 | 0.000 |
| 06/03/2022 | 0.000 | 8.000 | 0.000 | 0.000 | 0.000 |
| 08/09/2020 | 16.500 | 0.000 | 16.500 | 0.000 | 0.000 |
| 08/04/2020 | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 |
| 07/29/2020 | 0.000 | 0.000 | 0.000 | 0.000 | 0.000 |

In Progress > Daily Plans > **Timesheet**, the new Vendor tab lets you choose which vendors to include on your daily time sheet as selected vendors to claim hours.

The screenshot shows the 'Daily Plans' interface. The 'Daily Plan 1 - 05/20/2022 (Awaiting Approval) - Plan ID 1835891' is selected. The 'TIME SHEET' tab is active. Below the tabs, there are icons for 'TASK', 'EMPLOYEE', 'EQUIPMENT', and 'VENDOR'. The 'VENDOR' tab is highlighted with a red box. To the right of the 'VENDOR' tab is a search bar labeled 'Search vendor'. Below the search bar, there is a list of vendors under the heading 'RECENT'. A red arrow points to the 'ADD TO DAILY PLAN' button.

| TASK | EMPLOYEE | EQUIPMENT | VENDOR |
|---|----------|-----------|--------|
| RECENT | | | |
| ALL | | | |
| 0000001008-Midwest Aviation | | | |
| 0000001036-Kiewit Infrastructure West Co. | | | |

Only those vendors that are assigned in Control > Workspaces can claim hours against a timesheet Progress's daily plan. In Progress, if a vendor is not assigned to a cost item in Control, the vendor hours task block is disabled and hours cannot be claimed.

103614 | - PATH Substation

/ Progress / Daily plan

Daily Plans

> Install Roof - 04/07/2022 (Awaiting Approval) - Plan ID 1835468

+

Add tasks and resources

-

Clear hours

2002

Install Roof

Construction

0000001042

Σ: 0

Independent Roofi...

0010000758

Σ: 20

Midwest Aviation

0000001008

Σ: 0

ST 10

OT 5

DT 5

Vendor not assigned in Control

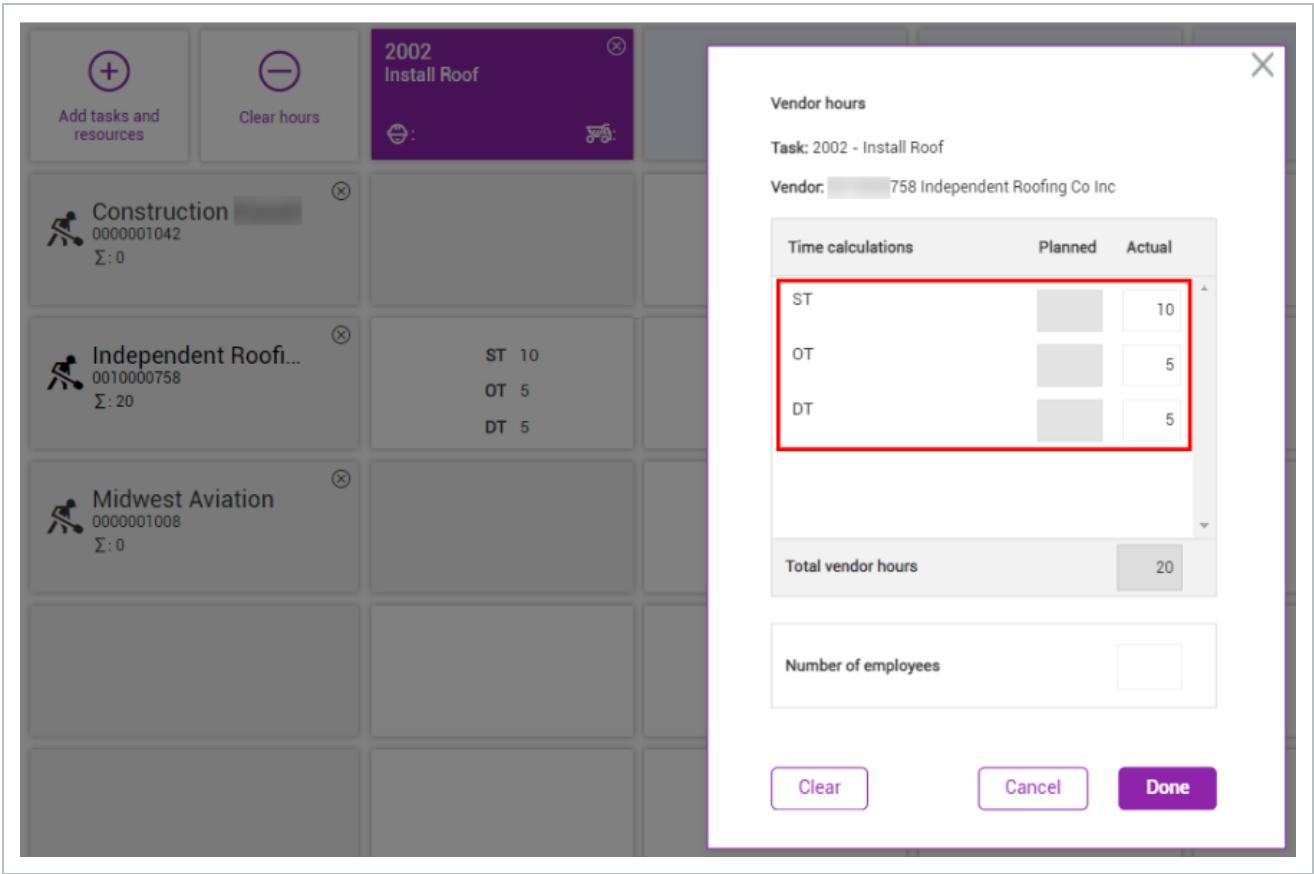
Vendor is assigned in Control

Vendor not assigned in Control

If a vendor is assigned to a cost item in Control, the vendor can claim actual hours.

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InEight Inc. | Release 25.7



5.12.2 ASSIGN VENDOR COLUMN IN THE CBS

You can assign a vendor to a cost item, and also view the assigned vendors from InEight Contract.

If a vendor is assigned via a contract, the vendor name is automatically assigned to a cost item and cannot be removed.

Tasks

| <input type="checkbox"/> | CBS position | Description |
|--------------------------|--------------|-------------------------------------|
| <input type="checkbox"/> | 1 | Financial Results Analysis |
| <input type="checkbox"/> | 2 | Misc. Rev Internal |
| <input type="checkbox"/> | 2.1 | Misc. Rev Internal |
| <input type="checkbox"/> | 2.2 | Escalation/Contingency |
| <input type="checkbox"/> | 2.2.1 | General Project Risk |
| <input type="checkbox"/> | 2.3 | Directs |
| <input type="checkbox"/> | 2.3.1 | Direct Labour |
| <input type="checkbox"/> | 2.3.1.1 | Grading Work |
| <input type="checkbox"/> | 2.3.1.1.1 | Resurface Existing Access road |
| <input type="checkbox"/> | 2.3.1.1.2 | Maintain Access Road |
| <input type="checkbox"/> | 2.3.1.1.3 | Clear & Grub Bench B & West Layd... |
| <input type="checkbox"/> | 2.3.1.1.4 | Type D Excavation LD/PL/CP to E... |
| <input type="checkbox"/> | 2.3.1.1.5 | Road Subgrade Prep/Place/Finish... |

Assigned Vendors

Assigned vendor

Finance Group Inc.

Mining Grou...Midwest Aviation

Power Cons...Engineering ...Finance Gro...

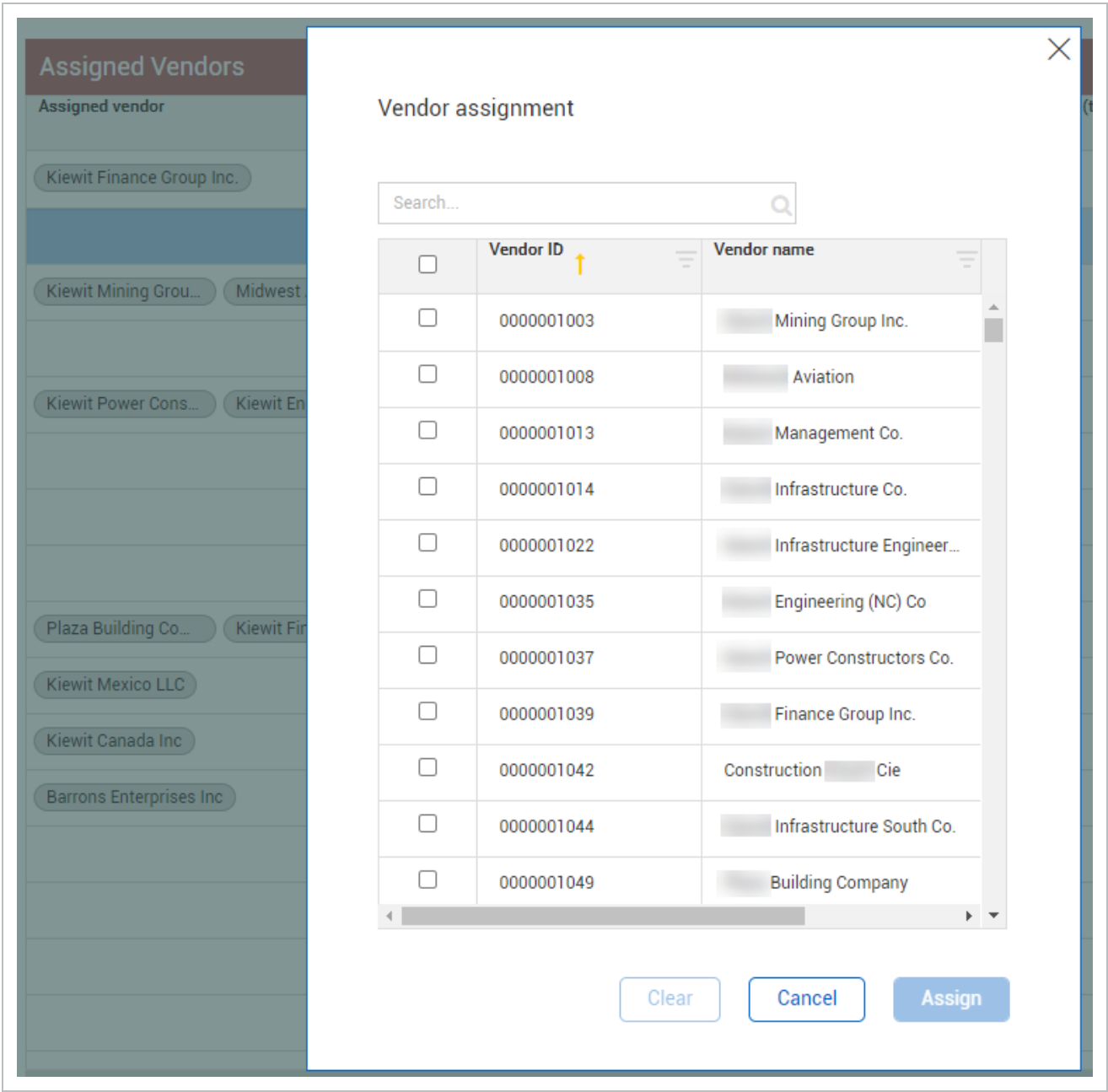
Plaza Building Co...Finance Gro...Construction Kiewi...Infrastructur...

Mexico LLC

Canada Inc

Enterprises Inc

Clicking in an Assigned vendor field lets you add new vendors. Vendors originate from the master data library for the entire organization.



5.13 TRACK OPEN/REMAINING AND TOTAL COMMITTED COSTS

Additional information about purchase orders and contracts (for any particular task) can be viewed and updated within CBS columns. This provides users with a more comprehensive data set in one location.

Committed costs are the purchase orders or subcontract commitments that a cost item may have against it. To determine open and total commitments, look at the agreed or pending purchase order amounts that are associated to any particular cost item. This information is typically exported from your ERP or accounting system.

Open/Remaining committed cost: Total committed cost - Actual cost (amount that still needs to be paid for a cost item).

Total committed cost: The summation of all purchase order and/or contract obligation amounts assigned to a cost item.

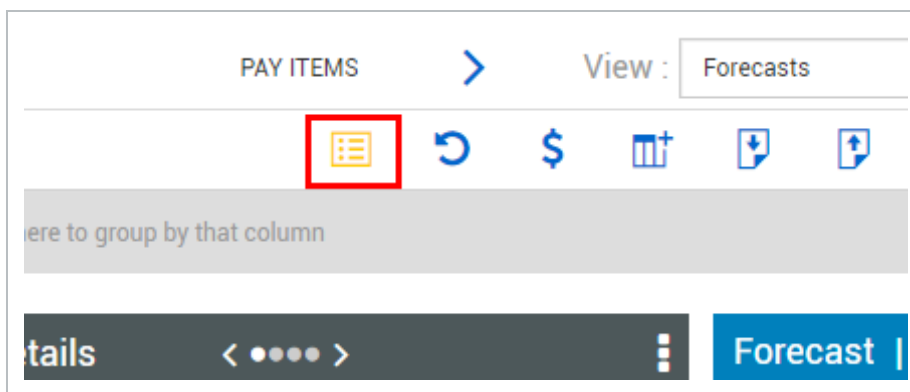
Open/Remaining committed cost adjustment: A debit or credit to the existing Open committed/Remaining cost value.

New open committed cost: Open/Remaining committed cost + Open/Remaining committed cost adjustment.

However, there is also the option to use a generic API to push committed cost values into InEight Control. If your organization does not have an ERP system, you can configure the endpoints in APIM and push over your committed cost values.

VIEWING OPEN/REMAINING AND TOTAL COMMITTED COSTS

1. On the CBS register tab, select the **Group Columns** icon to the right of the page. The icon will turn yellow when turned on.



- Tasks, Task details and Commitments data block need to be present on this screen

- If the Commitments data block has not been created, create a custom data block using the Data Icon and include columns Remaining committed cost, and Total committed cost. Insert this data block into your view.

2. Drag the **UOM** column from the Task details data block, and drop it into the grey bar area

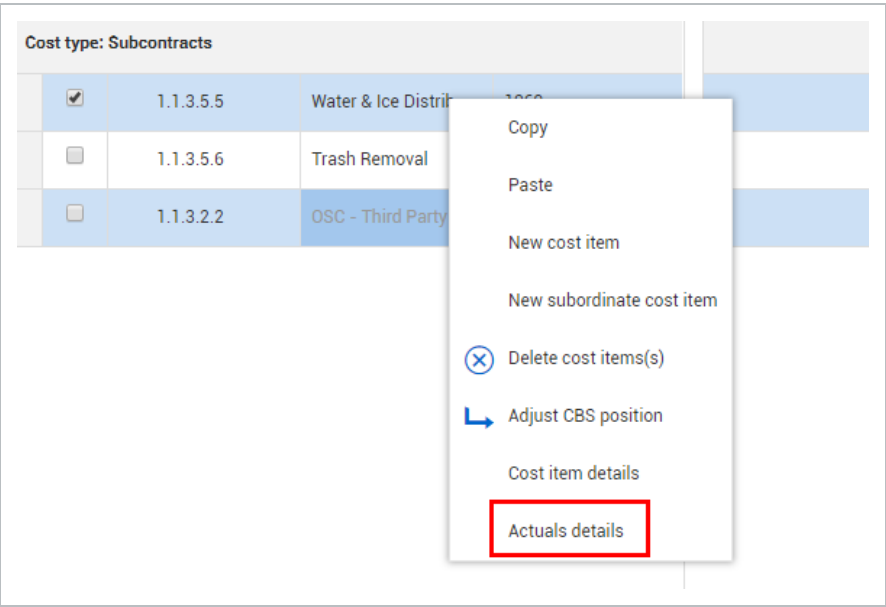
Drag a column header and drop it here to group by that column

| Tasks | | | | Task details | | | commi... | |
|-------|--------------|-----------------|----------------|--------------|-------------------------|----------|---------------------|----------------------|
| | CBS position | Description | WBS phase code | Resource | Forecast (T/O) quantity | UoM | Open committed cost | Total committed cost |
| | 1 | Job Overhe... | 1002 | 16 | 1.00 | Lump Sum | \$ 0.00 | \$ 0.00 |
| | 2 | Earthwork | 1069 | 5 | 10,000.00 | CY | \$ 0.00 | \$ 0.00 |
| | 3 | Concrete | 1071 | 6 | 10,000.00 | CY | \$ 0.00 | \$ 0.00 |
| | 4 | Structural S... | 1073 | | 1,000.00 | Ton | \$ 0.00 | \$ 0.00 |
| | 4.1 | Erect Steel ... | 1074 | 6 | 400.00 | Ton | \$ 0.00 | \$ 0.00 |
| | 4.2 | Erect Steel ... | 1005 | 5 | 200.00 | Ton | \$ 0.00 | \$ 0.00 |

- Notice how UOM's are now visible by groups.

| Tasks | | | | Task details | | | commi... | |
|---------------|--------------|----------------|----------------|--------------|-------------------------|----------|---------------------|----------------------|
| | CBS position | Description | WBS phase code | Resource | Forecast (T/O) quantity | UoM | Open committed cost | Total committed cost |
| UoM: CY | | | | | | | | |
| | 2 | Earthwork | 1069 | 5 | 10,000.00 | CY | \$ 0.00 | \$ 0.00 |
| | 3 | Concrete | 1071 | 6 | 10,000.00 | CY | \$ 0.00 | \$ 0.00 |
| | 5.1 | Heavy Steel | 1085 | 1 | 10,000.00 | CY | \$ 0.00 | \$ 0.00 |
| | 5.2 | Concrete - ... | 1086 | 1 | 10,000.00 | CY | \$ 0.00 | \$ 0.00 |
| UoM: Ea | | | | | | | | |
| | 4.4 | Bolted Con... | 1006 | 8 | 2,000.00 | Ea | \$ 0.00 | \$ 0.00 |
| UoM: Each | | | | | | | | |
| | 5 | Materials | 1084 | | 1.00 | Each | \$ 0.00 | \$ 0.00 |
| UoM: Lump Sum | | | | | | | | |
| | 1 | Job Overhe... | 1002 | 16 | 1.00 | Lump Sum | \$ 0.00 | \$ 0.00 |
| | 7 | Equipment | 1091 | | 1.00 | Lump Sum | \$ 0.00 | \$ 0.00 |
| | 24 | Equipment | 1112 | | 1.00 | Lump Sum | \$ 0.00 | \$ 0.00 |

3. To view a more granular level of information, navigate into the **context menu** for a cost item, and select **Actuals details**.



4. Once in the Actuals details, navigate to the Commitments tab.
- Here is a more concentrated view of the cost category breakdown of the Open and Total commitments
 - It's also possible to update information. *For example:* the below cost item for Water & Ice Distribution, the New total committed cost is showing that a contract was signed

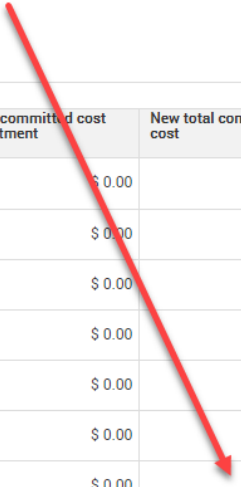
for \$1,267.87.

1069
1.1.3.5.5 Water & Ice Distribution

CLAIM ACTUALS ACTUALS HISTORY **COMMITMENTS**

Open committed cost **Total committed cost**
\$ 700.00 \$ 1,267.87

| Cost category | Open committed cost adjustment | New open committed cost | Total committed cost adjustment | New total committed cost |
|--------------------------|--------------------------------|-------------------------|---------------------------------|--------------------------|
| ^ Total | \$ 0.00 | \$ 700.00 | \$ 0.00 | \$ 1,267.87 |
| ∨ Labor | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ Construction Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ FOM Rented Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ Supplies | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ Materials | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ Subcontract | \$ 0.00 | \$ 700.00 | \$ 0.00 | \$ 1,267.87 |



- There is \$700.00 left remaining to pay the full \$1,267.87 subcontract, as shown in the New open committed costs column

1069
1.1.3.5.5 Water & Ice Distribution

CLAIM ACTUALS ACTUALS HISTORY COMMITMENTS

Open committed cost **Total committed cost**
\$ 700.00 \$ 1,267.87

| Cost category | Open committed cost adjustment | New open committed cost | Total committed cost adjustment | New total committed cost |
|--------------------------|--------------------------------|-------------------------|---------------------------------|--------------------------|
| ^ Total | \$ 0.00 | \$ 700.00 | \$ 0.00 | \$ 1,267.87 |
| ∨ Labor | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ Construction Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ FOM Rented Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ Supplies | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ Materials | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| ∨ Subcontract | \$ 0.00 | \$ 700.00 | \$ 0.00 | \$ 1,267.87 |

- Assuming a bill of \$100.00 was just paid, it's possible to update the Open committed cost adjustment field with this value. Notice how the New open/remaining committed cost decreases to \$600.00, after making an adjustment of \$-100.00 to the Open committed cost adjustment field.

1069
1.1.3.5.5 Water & Ice Distribution

CLAIM ACTUALS ACTUALS HISTORY COMMITMENTS

| | | | | |
|---|--|--|--|--|
| Open committed cost \$ 700.00 | Total committed cost \$ 1,267.87 | | | |
|---|--|--|--|--|

| Cost category | Open committed cost adjustment | New open committed cost | Total committed cost adjustment | New total committed cost |
|--------------------------|--------------------------------|-------------------------|---------------------------------|--------------------------|
| ^ Total | (\$ 100.00) | \$ 600.00 | \$ 100.00 | \$ 1,367.87 |
| v Labor | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| v Construction Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| v FOM Rented Equipment | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| v Supplies | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| v Materials | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| v Subcontract | (\$ 100.00) | \$ 600.00 | \$ 100.00 | \$ 1,367.87 |

5. Select **Apply** to apply the above changes.

| Tasks | | | | Task details | | | Commi... | |
|-------------------------------------|--------------|------------------------|----------------|-------------------------|-----|--------------|---------------------|----------------------|
| | CBS position | Description | WBS phase code | Forecast (T/O) quantity | UoM | Cost type | Open committed cost | Total committed cost |
| Cost type: Subcontracts | | | | | | | | |
| <input type="checkbox"/> | 1.1.3.2.2 | OSC - Third Party I... | 1054 | 13.00 | MWk | Subcontracts | \$ 7,525.23 | \$ 13,000.00 |
| <input checked="" type="checkbox"/> | 1.1.3.5.5 | Water & Ice Distrib... | 1069 | 3,489.55 | DMH | Subcontracts | \$ 600.00 | \$ 1,367.87 |
| <input type="checkbox"/> | 1.1.3.5.6 | Trash Removal | 1070 | 3,489.55 | DMH | Subcontracts | \$ 309.00 | \$ 873.24 |

6. Back on the CBS, you can now see your new updated values for this cost item.

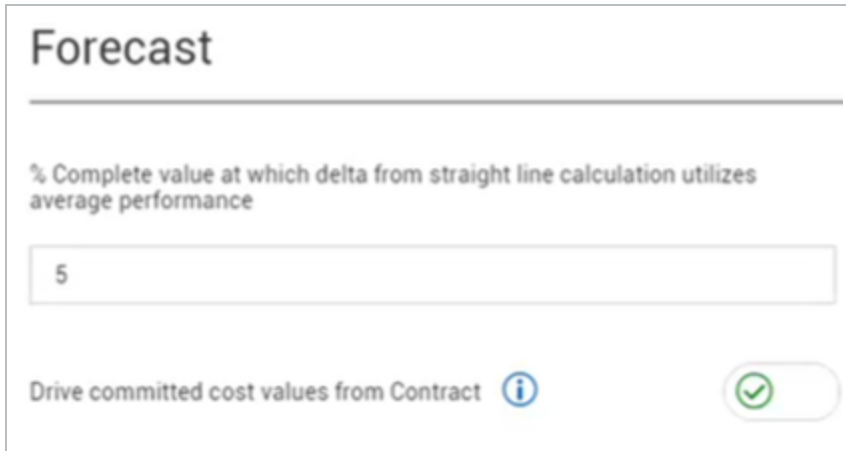
NOTE

Both the Open/Remaining committed cost and the Total committed cost values can be edited in the Actuals details slideout > Commitments tab (with the right permissions).

5.14 COMMITTED COST FROM CONTRACT

When the Drive committed cost values setting is on, your committed cost is then derived from Contracts.

When the switch is off, your committed cost is driven from the ERP. Regardless of the state of the switch, you can always manually enter your committed cost directly in the product or via a Microsoft Excel import.



With the setting on, all of your committed cost values initially zero out, and then pull over all of your committed cost values that exist in InEight Contract.

For example, if you have a cost item that is associated with a contract, those values are pulled over from Contract and populate the total committed cost and open/remaining committed cost columns.

The calculation is *Forecast final cost = your Total committed cost*; *Forecast remaining cost = your Open/Remaining Committed Cost*.

In a contract on the Line items tab, change your view to Progress. Take note of the WBS phase code and then view the Gross amount. The gross amount for the cost item is the exact amount for the total committed cost, which includes your line item amount, plus tax.

Total gross amount is your line item amount plus tax. That is going to be your total committed cost value. The calculation for that: *Total committed cost = Line item amount + Tax* (this is also called Gross amount in Contract)

If you have a cost item that is associated with multiple line items in a single contract or across multiple contracts, the total committed cost for that cost item is the gross amount for all the line items that cost item is associated with.

If the WBS element is associated to three different line items, the sum of those three gross amounts is the total committed cost value. A best practice is to associate a single cost item to a single line item.

To get your Open/Remaining Committed Cost, calculate what you still have to pay for your remaining commitments. It is your total committed costs minus what you have already paid. You track payments in contract in three different ways:

- goods receipts
- accruals
- invoices

Invoices are generated in your payment forms.

The calculation is *Open/Remaining Committed Cost = Total committed cost - Max(Goods receipt amount, Invoice amount) - Accrual amount*.

EXERCISE 5.1 – PROGRESS MEASUREMENT

The purpose of this exercise is to give you more familiarity with the InEight Control progress measurement terminology.

1. From the CBS register in InEight Control, create a new viewset with one or more custom data blocks that contain the planned, earned, and actual measurements you would want to see in your project.
2. Add additional productivity measurements (e.g., CF, LEI) as desired.

Congratulations, you have completed this exercise!

REVIEW

1. How can you determine what your productivity is for a specific timeframe?
 - a. Excel Spreadsheet (Date Range Select)
 - b. Forecast Final MH (Date Range Select)
 - c. CB Total MH (Date Range Select)
 - d. Actuals CB Productivity Factor (Date Range Select)

2. What term describes your Original Budget plus or minus approved changes?
 - a. Current Actuals
 - b. Current Budget
 - c. Current Estimate
 - d. Current Cost Changes

3. How can you view the actuals history of a cost item?
 - a. Select the Actuals History viewset
 - b. Right clicking on a cost item and selecting Cost item details
 - c. Right clicking on a cost item and selecting Actuals details
 - d. Selecting Actuals History from the Actions menu

SUMMARY

As a result of this lesson, you can now:

- Define the measurements for analyzing the progress of a project
- Set up a Date Range for progress data
- Get Plan quantities, actual costs, and actual man-hours using the Sync feature
- Explain the settings used for managing progress data shared between applications

- Add and adjust actuals manually
- View actuals history

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CHAPTER 6 – FORECASTING

LESSON DURATION: 45 MINUTES

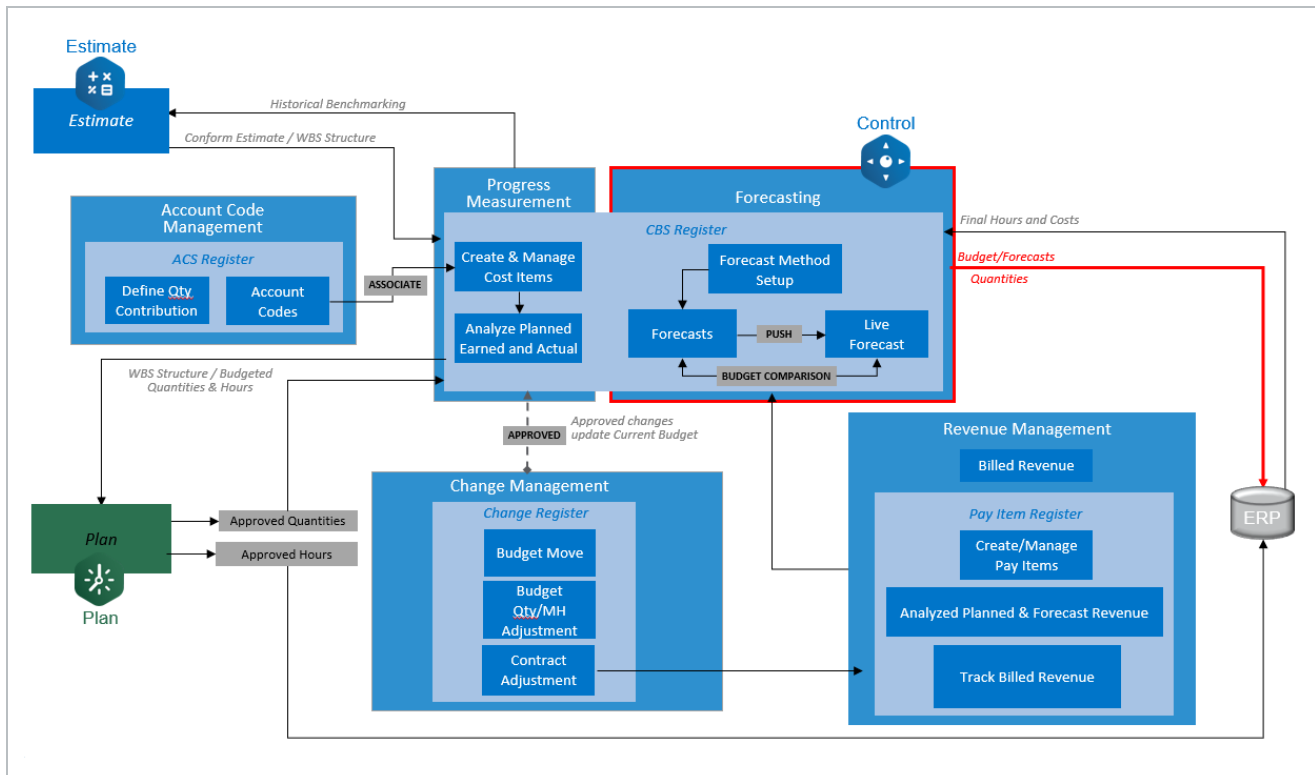
LESSON OBJECTIVES

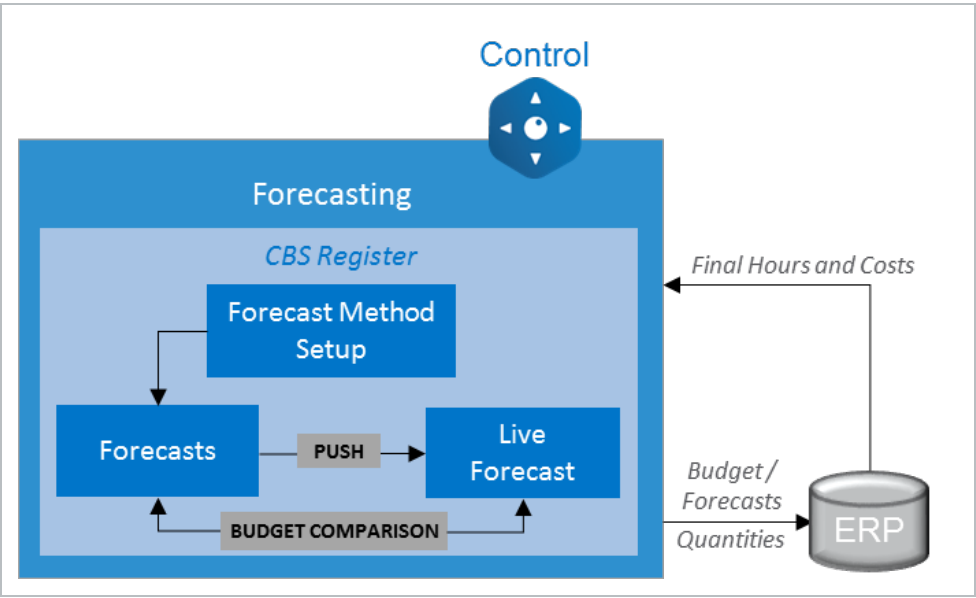
After completing this lesson, you will be able to:

- Differentiate and utilize InEight forecasting methods
- Manage forecasts
- Manage Time Phased Forecasting
- Push to Live Forecast
- View the Fiscal Calendar settings

LESSON TOPICS

CHAPTER 6 – INEIGHT CONTROL WORKFLOW - FORECASTING





CHAPTER 6 – FORECASTING OVERVIEW

6.0.1 FORECAST DATA BLOCK

All forecasting is done using the Forecast data block.

| Forecast InEight Control | | | | | |
|----------------------------|-------------------|------------------------------|-------------------|--------------------------|------------------|
| Forecast Final Cost | Forecast Final MH | Forecast Final Man Hour/Unit | Forecast Final PF | Forecast Final Unit Cost | Forecast Method |
| \$250,000.00 | 0.00 | 0.00 | 0.00 | \$250,000.00 | Current estimate |
| \$360,000.00 | 7,200.00 | 0.72 | 1.11 | \$36.00 | Current budget |
| \$1,500,000.00 | 30,000.00 | 3.00 | 1.00 | \$150.00 | Current estimate |
| \$1,000,000.00 | 24,000.00 | 30.00 | 0.83 | \$1,250.00 | Rollup |
| \$800,000.00 | 20,000.00 | 25.00 | 0.80 | \$1,000.00 | Manual (EAC) |

The Forecast data block contains columns for determining the Forecast Final Unit Cost, Forecast Final Cost, Forecast Final MHrs, and productivity, as well as the Forecast Method. Further in the lesson, you will learn the details of how to input a forecast.

TIP

The Control main page includes a default Forecasts viewset that contains the Forecast data block.

6.0.2 PRIVATE FORECASTS

The Control application allows you to create multiple private forecasts as needed, giving you flexibility to try out different forecasting methods and “what if” scenarios. The Manage Forecasts section of this lesson walks you through how to save and share your forecasts with others on your project.

You can access all the forecasts you have access to via the drop-down on the Forecast data block header.

This shows you all your forecasts, as well as any other forecasts that have been shared with you.

6.0.3 LIVE FORECAST

In Control, the Live Forecast is the official project forecast used for financial reporting and is shared with all members of the project automatically. Data from other forecasts can be pushed to the Live Forecast to keep it up to date. The Live Forecast is managed using its own data block.

| ★ Live forecast This Month < ● ● ● ● ● > 11/15/2018 | | | | | | |
|---|---------------------|-------------------------------|-------------------------------|-------------------------|------------------|--|
| Forecast final cost | Forecast final Mhrs | Forecast final man hours/Unit | Forecast final productivit... | Forecast remaining cost | Forecast method | |
| \$ 1,500,000.00 | 30,000.00 | 3.00 | 1.00 | \$ 1,500,000.00 | Current estimate | |
| \$ 1,097,500.00 | 22,390.00 | 22.39 | 0.94 | \$ 1,097,500.00 | Rollup | |
| \$ 800,000.00 | 16,000.00 | 20.00 | 1.00 | \$ 800,000.00 | Current estimate | |
| \$ 200,000.00 | 4,440.00 | 22.20 | 0.90 | \$ 200,000.00 | Current estimate | |
| \$ 97,500.00 | 1,950.00 | 0.98 | 0.51 | \$ 97,500.00 | Current estimate | |

TIP

The Control main page includes a default Forecasts viewset that contains the Forecast data block.

Only users with the right permissions have access to update the Live Forecast. Updating the Live Forecast is covered in greater detail further in the lesson.

6.0.3.1 LIVE FORECAST GRID NAVIGATION

You can access the cost categories slide-out panel quickly by clicking the **Live Forecast View Cost Categories** icon.

| Live forecast | | |
|---|-----------------------|---------------------------------|
| ★ Forecast final cost | ★ Forecast final MHrs | ★ Forecast final man hours/Unit |
| \$ 36,500.00 | 400.00 | 400.00 |
| \$ 25,000.00 | 300.00 | 0.03 |
|  \$ 5,000.00 | 0.00 | 0.00 |
| \$ 5,000.00 | 100.00 | 0.01 |
| \$ 1,500.00 | 0.00 | 0.00 |

Clicking the icon takes you directly to the cost categories slide-out panel in the cost item details.

10019

Blue Top Aggregate Base


DETAILS

ATTRIBUTES

COST CATEGORIES

CURRENT ESTIMATE RESOURCES


% complete

 Live forecast method

Latest actuals in forecast values



0.00 %

Current estimate ▼

 02/24/2022

Total

Per unit

| Cost category | Current budget | Actual cost (to date) | Current estimate |  Live forecast |  Forecast remaining cost | |
|-------------------|----------------|-----------------------|------------------|---|---|--|
| ^ Total | \$ 24,106.42 | \$ 0.00 | \$ 24,106.42 | \$ 24,106.42 | \$ 24,106.42 | |
| ✓ Labor | \$ 16,874.42 | \$ 0.00 | \$ 16,874.42 | \$ 16,874.42 | \$ 16,874.42 | |
| ✓ Construction... | \$ 7,232.00 | \$ 0.00 | \$ 7,232.00 | \$ 7,232.00 | \$ 7,232.00 | |
| ✓ FOM Rented ... | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | |
| ✓ Supplies | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | |

CHAPTER 6 – FORECAST METHODS

The Forecast Method establishes the appropriate forecast unit cost, which is used to calculate the total forecast cost. The Forecast Method applies to individual cost items and can be changed at any time.

You can use several forecast production methods to calculate the cost of the remaining work associated with a cost item. This enables the control of forecasting on a cost item by cost item basis by controlling the calculation of the cost of the remaining work. The different methods available for forecasting are:

Forecast Methods

| Method | Calculation | Apply to |
|------------------------------|---|---------------------------------|
| Current Budget (CB) | Actual Total cost + (Current budget unit cost * Quantity remaining) | Terminal or superior cost items |
| Current Estimate (CE) | Actual Total cost + (Current estimate unit cost * Quantity remaining) | Terminal or superior cost items |
| Average Performance | Actual Total cost + (Actual unit cost * Quantity remaining) | Terminal or superior cost items |
| Manual | Manually entered forecast value | Terminal or Superior cost items |
| Rollup | The sum of subordinate forecast values | Superior cost items |
| Committed Cost | Actual Total cost + Open/Remaining committed cost | Terminal or superior cost items |
| None | The Forecast total cost will be 0 | Terminal or superior cost items |
| Contract | Line item gross amount + Draft vendor change order amount + Remaining to buy (value allocated to the first line item in the contract) | Terminal or superior cost items |
| Detailed ETC | Actual Total cost + sum (Forecast remaining cost) for all | Terminal |

Forecast Methods (continued)

| Method | Calculation | Apply to |
|--|--|---------------------------------|
| | assigned forecast resources. | cost items |
| Static manual time phased forecasting (TPF) | The sum of the manually distributed time phased forecast cost. | Terminal or superior cost items |
| Custom (customer specified) | Calculation specified by customer. | Terminal or superior cost items |

6.0.1 FORECAST METHOD ASSIGNMENT

There are three different ways to assign a forecast method:

- Globally to all cost items in the project
- Selection of multiple cost items
- Individual cost item

6.0.1.1 GLOBAL FORECAST METHOD

From the Actions menu, you can set the forecast method globally for all the cost items within the project.

NOTE

The Global forecast method only applies to the forecasted items of the user who performs the function. It does not apply to other users in the project.

The following steps walk you through applying a global Forecast Method.

SET GLOBAL FORECAST METHOD

1. From the CBS tab register, select the **View** menu.
2. Select the Project Controls viewset.
3. Click on the Actions drop-down menu and select Global Forecast Method.
4. Select the **Current Budget** Forecast Method.

5. Click **Apply**.**NOTE**

Only **terminal** cost items will adjust per the global Forecast Method selected. The parent item Forecast Method will stay as **Rollup**.

6. Click **Yes** on the prompt that appears.

6.0.1.2 FORECAST METHOD FOR SELECTED ITEMS

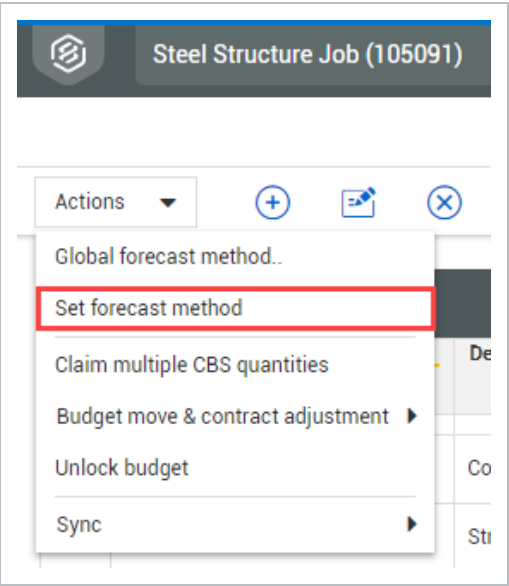
You can also set the forecast method for selected cost items, as shown in the steps below.

SET THE FORECAST METHOD FOR SELECTED ITEMS

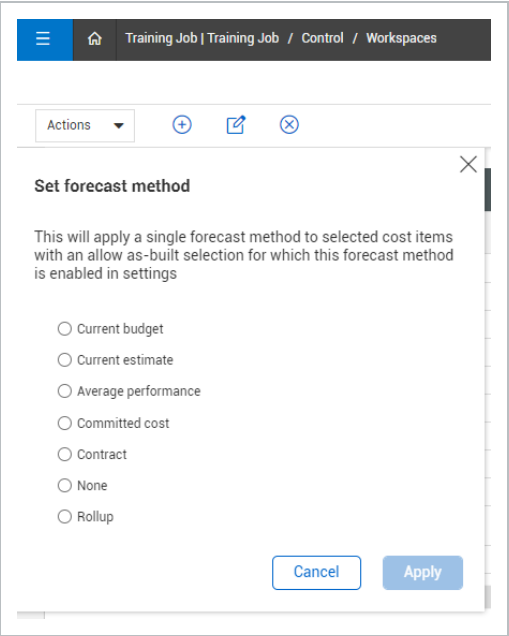
1. In the Tasks data block, select the **check box** next to the desired tasks.

| Tasks | Task Det. | Forecast Created from Live forecast | Forecast Created from Live forecast |
|-------------------------------------|---------------------------------|---------------------------------------|---------------------------------------|
| CBS Position | Description | Forecast Final Cost | Forecast Final MH |
| <input type="checkbox"/> | 1 Job Overhead | \$250,000.00 | 0.00 |
| <input checked="" type="checkbox"/> | 2 Earthwork | \$400,000.00 | 8,000.00 |
| <input type="checkbox"/> | 3 Concrete | \$1,500,000.00 | 30,000.00 |
| <input type="checkbox"/> | *4 Structural Steel | \$1,050,000.00 | 20,000.00 |
| <input checked="" type="checkbox"/> | 4.1 Erect Steel - Heavy | \$200,000.00 | 16,000.00 |
| <input checked="" type="checkbox"/> | 4.2 Erect Steel - Light | \$200,000.00 | 4,000.00 |
| <input type="checkbox"/> | 4.3 Bolted Connections | \$50,000.00 | 0.00 |
| <input type="checkbox"/> | *5 Materials | \$1,750,000.00 | 0.00 |
| <input type="checkbox"/> | 5.1 Earthwork - Materials | \$250,000.00 | 0.00 |
| <input type="checkbox"/> | 5.2 Concrete - Materials | \$1,000,000.00 | 0.00 |
| <input type="checkbox"/> | 5.3 Structure Steel - Materials | \$500,000.00 | 0.00 |
| Subtotals 11 | | \$4,950,000.00 | 58,000.00 |

2. Select the **Actions** drop-down menu and select **Set Forecast Method**.



3. On the resulting slide out panel, select your desired Forecast Method and click **Apply**.



6.0.1.3 FORECAST METHOD FOR INDIVIDUAL ITEMS

You may need to change the forecast method for a single cost item. The following Step by Step walks you through how to do so.

SET THE FORECAST METHOD FOR INDIVIDUAL ITEMS

1. In the **Forecast** data block, locate the **Forecast Method** column.
2. Double click on the Forecast Method field for the your desired cost item.
 - A dropdown menu appears where you can select your Forecast Method from a list

| Tasks ? | | st Created from Live forec... | | | | | | Ft Gr |
|---------------------|-------------------------------|---------------------------------|-----------------------|----------------------------------|--|-----------------------------|-----------------|----------|
| CBS Posi tion | Description | Final | Forecast Final MHI | Forecast Final Man-Hours/Unit | Forecast Final Productivity Factor | Forecast Final Unit Cost | Forecast Method | |
| 1 | Job Overhead | 50,000.00 | 0.00 | 0.00 | 0.00 | \$250,000.00 | Current budget | \$C |
| 2 | Earthwork | 00,000.00 | 8,000.00 | 0.80 | 1.00 | \$40.00 | Current budget | \$C |
| 3 | Concrete | 00,000.00 | 30,000.00 | 3.00 | 1.00 | \$150.00 | | \$C |
| 4 | Structural Steel | 83,768.50 | 19,977.80 | 19.98 | 1.00 | \$1,983.77 | | \$C |
| ... | Erect Steel - Heavy | 34,158.50 | 15,985.60 | 19.98 | 1.00 | \$1,167.70 | | \$C |
| ... | Module 01 - Erect Steel Heavy | 00,000.00 | 0.00 | 0.00 | 0.00 | \$1,000.00 | | \$C |

6.0.1.4 AVERAGE PERFORMANCE FORECAST METHOD

The average performance forecast method lets you use actuals for a specific time frame range to determine the unit cost and rate for the remaining work when calculating the remaining forecast. Forecasting using average performance lets you forecast the remainder of work based off completed work.

When Average performance is selected as the forecast method in the CBS, you can click the value in the Average performance settings column and select a date range to use for the actual rate of completion for the remainder of work.




This feature lets you identify a length of time you want to utilize a cost item's hours and quantities to determine the install rates for the remaining work.

Click an Average Performance Settings CBS record to access the Average Performance Settings window.

| Setting | Usage notes |
|--|--|
| Calculate average performance over all dates | The average performance for the cost item takes all the dates into account when calculating its average performance. |

| Setting | Usage notes |
|--|---|
| Calculate average performance based on most recent | You can determine how many weeks or months to calculate the average performance for a cost item. For example, you determine that the last 2 weeks performance best represents how to progress, then you would calculate two weeks of average performance. |
| Calculate average performance over a specified range | Selecting a date range uses only the specified time range for calculating the average performance. |
| Calculate average performance from date | You can select a specific date to calculate average performance. After the learning period for the selected cost item is complete, you can use the average performance for a specific date and onward. |


CBS ACS PAY ITEMS CHANGE REGISTER AUDIT LOG

Live forecast  Current live forecast  < ● ● ● ● > 12/09/2022 

| Forecast total cost | Forecast total MHRs | Forecast total MHRs/unit | Forecast total productivity | Forecast total unit cost | Average performance settings | Forecast method |
|---------------------|---------------------|--------------------------|-----------------------------|--------------------------|------------------------------|----------------------|
| \$ 0.00 | 0.000 | 0.000 | 0.00 | \$ 0.00 | | Current estimate |
| \$ 0.00 | 0.000 | | | | | Average performan... |
| \$ 163,666,612.31 | 1,017,083.274 | | | | | Rollup |
| \$ 21,571,218.86 | 460,634.593 | | | | | Rollup |
| \$ 4,452,118.42 | 93,085.219 | | | | | Rollup |
| \$ 3,383,946.62 | 75,655.414 | | | | | Rollup |
| \$ 3,366,937.00 | 75,286.823 | | | | | |
| \$ 17,835.60 | 402.441 | | | | | Current estimate |
| (\$ 825.97) | -33.850 | | | | | Current estimate |
| \$ 1,068,171.80 | 17,429.806 | | | | | Rollup |
| \$ 296,254.68 | 6,443.691 | | | | | Rollup |
| \$ 237,542.04 | 5,040.191 | | | | | Rollup |
| \$ 3,077.33 | 131.500 | | | | | Current estimate |
| \$ 58,712.08 | 1,289.778 | | | | | Rollup |
| \$ 41,063.15 | 877.278 | | | | | Average performan... |
| \$ 17,648.93 | 412.500 | | | | | Current estimate |
| \$ 105,200.25 | 2,167.250 | | | | | Rollup |
| \$ 27,149.09 | 586.250 | | | | | Current estimate |
| \$ 50,118.90 | 1,041.500 | 0.074 | 0.90 | \$ 3.55 | | Current estimate |



Average performance settings

☒ Calculate average performance over all dates


☐ Calculate average performance based on most recent:  This will be up to date through the most recent week ending date

1 Weeks

☐ Calculate average performance over a specified range:

From 12/31/1752  To 12/19/2022 

☐ Calculate average performance from date:

12/31/1752 

Cancel Apply

The average performance settings can also be accessed in the cost item details slide-out panel.

| Tasks | | | Actuals | |
|--|--------------|--------------------------|----------------------|--|
| | CBS position | Description | Actual qty (to date) | |
| <input type="checkbox"/> | 1 | Financial Results ... | | |
| <input type="checkbox"/> | 2 | Misc. Rev Internal | | |
| <input type="checkbox"/> | 2.1 | Misc. Rev Internal | | |
| <input type="checkbox"/> | 2.2 | Escalation/Contin... | | |
| <input type="checkbox"/> | 2.2.1 | General Project Ri... | | |
| <input type="checkbox"/> | 2.3 | Directs | | |
| <input type="checkbox"/> | 2.3.1 | Direct Labour | | |
| <input type="checkbox"/> | 2.3.1.1 | Grading Work | | |
| <input checked="" type="checkbox"/> | 2.3.1.1.1 | Resurface Existin... | 2 | |
| <input type="checkbox"/> | 2.3.1.1.2 | Maintain Access ... | | |
| <input type="checkbox"/> | 2.3.1.1.3 | Clear & Grub Benc... | | |
| <input type="checkbox"/> | 2.3.1.1.4 | Type D Excavatio... | 2 | |
| <input type="checkbox"/> | 2.3.1.1.5 | Road Subgrade Pr... | | |
| <input type="checkbox"/> | 2.3.1.1.6 | Culverts & Riprap ... | | |
| <input type="checkbox"/> | 2.3.1.1.7 | Rock / Boulder Ex... | | |
| <input type="checkbox"/> | 2.3.1.1.8 | Sump Excavation ... | | |
| <input type="checkbox"/> | 2.3.1.2 | PreCast Blocks & ... | | |
| <input type="checkbox"/> | 2.3.1.2.1 | Set / Place Pre-C... | | |
| <input type="checkbox"/> | 2.3.1.2.2 | Drill / Install / Gro... | 1 | |
| <input type="checkbox"/> | 2.3.1.2.3 | Build & Move Anc... | 1 | |
| <input type="checkbox"/> | 2.3.1.2.4 | Test Anchors | | |
| <input type="checkbox"/> | 2.3.1.2.5 | Relocate Existing ... | | |
| <input type="checkbox"/> | 2.3.1.2.6 | Anchor Re-Tensio... | | |
| <input type="checkbox"/> | 2.3.1.2.7 | Anchor Block Re-I... | | |
| Subtotals 151 (1 rows selected) | | | | |

1004 Resurface Existing Access road

DETAILS

Description
Resurface Existing Access road

* Forecast T/O qty

CE total cost
\$ 5,803.84

CE total MHRs
103.20

CE MHR/Unit
0.02

* Allow as-built
All

☒ As-built lock

☐ Hide in Plan, Progress, and Forecast

NT ESTIMATE RESOURCES FORECAST RESOURCES

* Cost source
Detail

Live forecast method
Average performance

Average performance settings

To date

☐ Calculate average performance over all dates

☐ Calculate average performance based on most recent: ⓘ

1 Weeks

☒ Calculate average performance over a specified range:

From 11/22/2018

To 01/10/2023

☐ Calculate average performance from date:
11/22/2018

Apply

As an example, if you choose to calculate the average performance based on the most recent three weeks, the Forecast remaining cost and Forecast remaining MHrs change based off the cost item's performance from the last three weeks.

| Tasks | | | CHANGE REGISTER | | | | |
|--|--------------|-------------|--|-------------------------|------------------------------|-------------------------|--------------------|
| <div> <div>Actions</div> <div> <div></div> <div></div> <div></div> </div> </div> | | | <div> <div></div> <div></div> <div></div> </div> | | | | |
| <input type="checkbox"/> | CBS position | Description | 12/09/2022 | | | | |
| <input type="checkbox"/> | 1 | Financial | Forecast total cost | Forecast remaining MHRs | Average performance settings | Forecast remaining cost | Forecast method |
| <input type="checkbox"/> | 2.1.1.1 | Site ... | \$ 0.00 | 0.000 | | \$ 0.00 | Current estimate |
| <input checked="" type="checkbox"/> | 2.1.1.1 | Site ... | \$ 2,469,443.93 | -2.409 | | (\$ 101.66) | Rollup |
| | | | \$ 2,452,434.31 | 0.000 | Last 3 weeks | \$ 0.00 | Average perform... |

The Forecast method and Average performance settings changes are also shown in the cost item details slide-out panel.

1396
Site Maintenance Crew

DETAILS

Forecast T/O qty **UoM**
75,181.000 MH

Last changed on **Last ch**
12/16/2022 09:54 AM

Description
Site Maintenance

*** Forecast T/O qty**
[Input field]

CE total cost

CE total MHrs

CURRENT ESTIMATE RESOURCES

FORECAST RESOURCES

CBS position
2.1.1.1.1

*** Cost source**
Detail

Live forecast method
Average performance

Average performance settings
Last 3 weeks

CE labor cost/MHrs

6.0.1.5 COMMITTED COST FORECAST METHOD

Committed Costs are obligations made for contract work or purchase orders that you have agreed to pay for. The Committed Cost forecast method provides you with the ability to use committed cost information to forecast your cost at completion.

| Forecast final unit cost | Forecast remaining cost | Forecast method |
|--------------------------|-------------------------|-----------------|
| (\$ 120,539,221.43) | (\$ 122,907,115.92) | Rollup |
| (\$ 142,040,228.20) | (\$ 142,445,305.28) | Rollup |
| (\$ 12,535.89) | (\$ 129,212.48) | Rollup |
| \$ 118.05 | \$ 10,805.00 | Committed cost |
| \$ 43.88 | \$ 8,676.00 | |
| \$ 9.18 | \$ 0.00 | |
| (\$ 14,869.35) | (\$ 148,693.48) | |
| \$ 0.00 | \$ 0.00 | |
| \$ 0.00 | \$ 0.00 | |

Forecasting cost items can be done in the live or private forecast, and can be forecasted at the parent or terminal levels. The Committed Cost Forecast method can only be used when cost items have an Allow as-built of All or Costs. When the Allow as-built values are set to None or Quantities, this forecast method cannot be used because cost and committed costs cannot be claimed.

The Committed Cost forecast is mostly utilized on cost items that are driven from purchase orders or contracts. It is not used when you're claiming quantities. For example, this forecast method isn't suitable for direct labor items where quantities are claimed to generate progress and crew performance. This forecast method works well for cost items that are tied to a contract or PO.

When Open/Remaining Committed Cost values are being entered, these values will also update the forecast values in the CBS. There is also an integration available that allows you to import committed cost data from your ERP, instead of manually entering in the data. For more information on Commitment Costs, visit subject Track Open/Remaining and Total Committed Costs within this topic3.3 Cost Item Setup on page 96

The following columns will help you view the Committed Cost forecast method:

Forecast total cost: Forecast cost at completion which is equal to the Open/Remaining committed cost plus any Actual cost to date.

Forecast remaining cost: This is the amount of money that remaining to be paid out. This column is equal to the Open/Remaining Committed Cost.

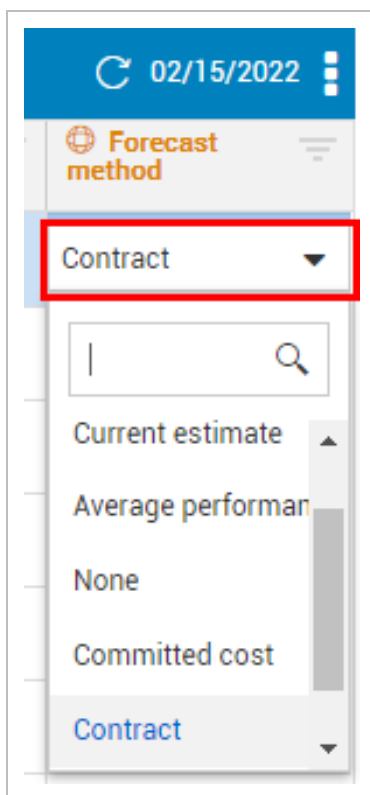
| Tasks | | As-built lock | | Allow as-built | Forecast Created from Live forec... | | | | | | |
|--------------|-------------|---------------|--|----------------|---------------------------------------|---------------------|------------------------------------|---------------------|--------------------------|-------------------------|-----------------|
| CBS position | Description | | | | Forecast final man hours/Unit | Forecast final cost | Forecast final productivity factor | Forecast final Mhrs | Forecast final unit cost | Forecast remaining cost | Forecast method |
| 1.1.1.1 | Permits | | | All | 1.00 | \$ 11,805.00 | 2,323.00 | 1.00 | \$ 118.05 | \$ 10,805.00 | Committed cost |

The Committed cost forecast method is most commonly used for costs that are associated to a purchase order tracked through an ERP system. This method doesn't focus on quantities or percent complete, but rather the progression of costs paid towards the final agreed upon PO value.”

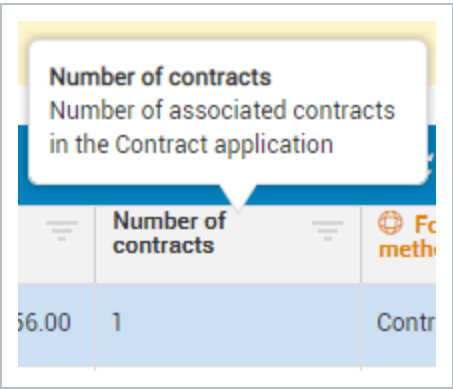
6.0.1.6 CONTRACT FORECAST METHOD

Using this forecast method, you can forecast by Contract values. This forecast method is only available in the forecast drop down for cost items that are assigned to a Contract.

NOTE Any modifications that you make in Contract automatically updates and comes into Control.



When a cost item is assigned to a contract, you have the option of adding the read-only column **Number of contracts** to your CBS. This column is an integer value that counts the number of contracts a particular cost item is associated to. You have to go into Contracts to see which Contract your cost item is associated to.



If the **Number of contracts** column is set to zero, the Contract Forecast Method becomes unavailable from the Live Forecast, Private Forecast, and the Cost Item Details slideout drop down for Live Forecast Method on the Details tab.

Contract Forecast Method pulls the cost that is associated to a specific cost item from Contracts. Cost items can be associated to the following if using Contract Forecast Method:

- Many different Contracts
- Many different line items across different Contracts

The cost item's Forecast Final Cost value sums up the line item amounts of all cost that is associated to a cost item from Contract.

UNAPPROVED CONTRACT LINE ITEMS

The line item price is included in the associated cost item's Contract forecast method when creating new line items in a Contract vendor change order.

After a new line item is saved, a batch process is initiated in the background that sends the line item's net price over to Control.

Actions

Line item ID

Type

Material

Description

Quantity

1.000

UoM

Each

Unit price

\$ 400.00

Per

1.000 Each

Is taxable

Save

The net price from Contract shows in Control's forecast total cost column, which also includes the tax from draft pending vendor change orders.

Contracts > 7400007066 > 2 - 2 CAD \$

VCO total

\$ 0.00

Remaining amount to allocate

\$ 0.00

Contract

responsible party

Vendor CO status

Draft

Approval status

Not applicable

Unit price

\$ 400.00

Net price

\$ 400.00

Tax

\$ 0.00

Retention

\$ 0.00

Quantity

1.000

Forecast

Forecast method

Forecast total cost

Current estimate

\$ 0

Rollup

\$ 0

None

\$ 0

Rollup

\$ 2,402,829

Manual (EAC)

\$ 0

Rollup

\$ 1,000

Contract

\$ 1,000

Forecast total cost was previously \$600

6.0.1.7 CUSTOM FORECAST METHOD

The Custom forecast method lets you specify a calculation for a forecast cost and manhours. For more information, refer to [Project Control settings](#) where Custom forecast methods can be configured.

- Scheduling
- Administration
 - Account Code Structure (ACS)
 - InEight Control Interfaces
 - Control Settings
 - Roles & Permissions
 - Project Settings**

Custom Forecast method calculations

You can create custom forecast methods at both the project and organization levels by configuring your own calculations.

To create a custom Forecast Method, click Add custom forecast method, and then enter the Forecast Method Name, Forecast Total Cost and Forecast Total Mhrs calculations. You can create a maximum of 10 custom organization and project level forecast methods each at one time.

Select the **Formula** icon to choose fields to include in your forecast formula.

- Project Tracking (organization & project level)
 - Tasks
 - Actuals
 - Estimated Actuals
 - Enabling actuals for Progress
 - Enabling actuals for Control
 - Estimated actuals process overview
 - Reversing estimates
 - Reversing Estimated Actuals
 - Time Phasing budget
- Forecast (organization & project level)
 - Time Phasing
 - Forecast
 - Custom Forecast method calculations**
 - Enable Forecast methods based on
 - Allow as-built selections
- Estimate Resources (organization & project level)
- Schedule (organization & project level)
- Revenue (project level)
 - Revenue and Cost Timing
 - Billing method default earnings rules
 - Pay item forecast takeoff quantity rollups
 - Pay item forecast takeoff quantity roll down
 - Markup
- Sync Integrations (project level)
- Others (project level)
 - Required Cost Items
 - Decimal Precision
- Others (org level)
 - Decomposed Cost Items

CHAPTER 6 – MANUAL FORECASTING

Scenario

Assume you have a structural steel installation code being performed by a subcontractor. They have notified the project team that the material cost of the steel has gone up due to a change of thickness of some of the column base plates. You will need to forecast an increase in the total subcontract cost of the code to reflect this change.

You also receive an update from the concrete superintendent that the code for a concrete pouring operation will now be using journeymen instead of apprentice concrete finishers. He has provided the total and you will update the total cost and the labor cost per man-hour.

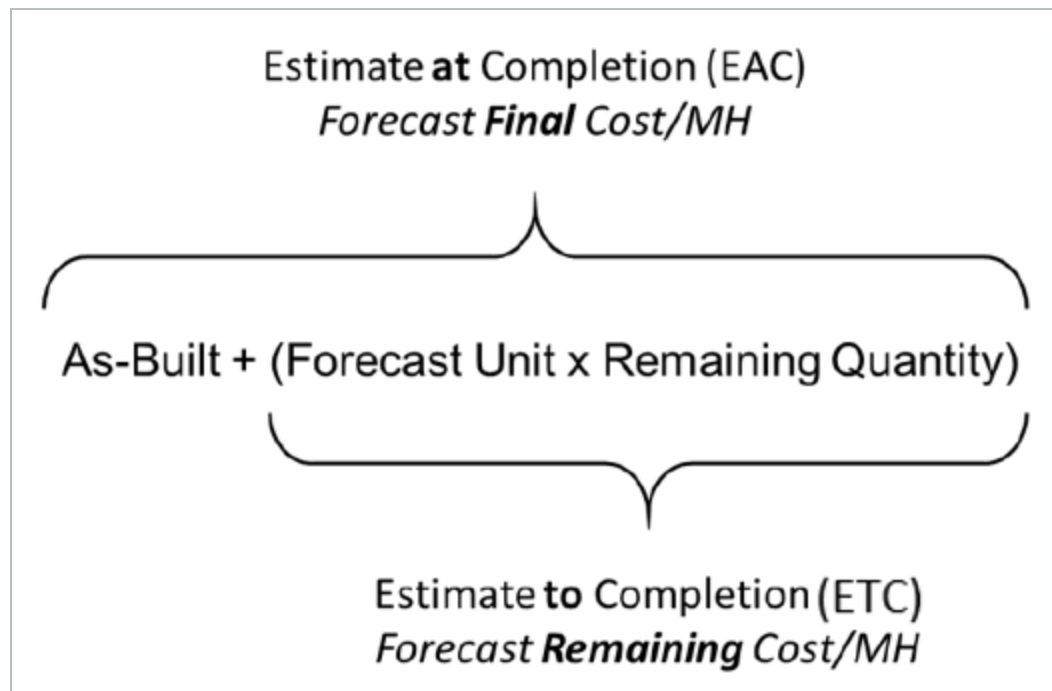
6.0.1 EAC VS. ETC

You can manually enter forecast values for both your Estimate at Completion (EAC) and Estimate to Completion (ETC) values.

Control uses different descriptions than EAC and ETC as indicated below.

| Forecast Term | Control Term | What it measures |
|------------------------------|--|--|
| Estimate at Completion (EAC) | Forecast Final Cost Forecast Final MHrs | As-built + (Forecast Unit Cost x Quantity Remaining) |
| Estimate to Completion (ETC) | Forecast Remaining Cost Forecast Remaining Man Hour | Forecast Unit Cost x Quantity Remaining |

The image below illustrates what EAC and ETC measure:



6.0.2 MANUAL EAC (ESTIMATE AT COMPLETE) FORECAST

You can use the Manual (Estimate at Completion) Forecast Method to make a simple, quick adjustment to the calculated forecast numbers, or to forecast the cost of the work remaining, while ignoring actual

costs in the calculation of the forecast.

When you enter a forecast cost at the total level, you can have forecast costs:

- Distributed to the cost categories, or
- Back calculated if forecast man-hours are adjusted

To set the forecast total or EAC forecast, type a value into one of the following cells within the forecasting data block:

- Forecast final cost
- Forecast final MHrs
- Forecast Final Man-hours per Unit
- Forecast Productivity Factor
- Forecast Final Cost per Unit

The next two Step by Steps walk you through how to define the Manual (EAC) forecast by adjusting the Forecast Final Cost and the Forecast Final Man-Hours.

- This will allow you to edit the dollar value manually

| Tasks | | | Task Details | | | Forecast Created from Live Forecast | | | | | | Forecast Created from Live Forecast | | |
|-----------|--------------|-----------------------------|----------------|---------------------|----------|---------------------------------------|-------------------|------------------------------|-------------------|--------------------------|---------------------|---------------------------------------|-------------------|-------------------|
| | CBS Position | Description | WBS Phase Code | Forecast at TO City | UOM | Forecast Final Cost | Forecast Final PM | Forecast Final Man Hour/Unit | Forecast Final PF | Forecast Final Unit Cost | Forecast Method | Forecast Final Cost | Forecast Final PM | Forecast Man Hour |
| | 1 | Job Overhead | 1000 | 1.00 | Lump Sum | \$250,000.00 | 0.00 | 0.00 | 0.00 | \$250,000.00 | Current estimate | \$250,000.00 | 0.00 | |
| | 2 | Earthwork | 1001 | 10,000.00 | CY | \$400,000.00 | 8,000.00 | 0.80 | 1.00 | \$40.00 | Current budget | \$400,000.00 | 8,000.00 | |
| | 3 | Concrete | 1002 | 10,000.00 | CY | \$1,500,000.00 | 30,000.00 | 3.00 | 1.00 | \$150.00 | Current estimate | \$1,500,000.00 | 30,000.00 | |
| | 4 | Structural Steel | 1003 | 1,000.00 | Ton | \$1,000,000.00 | 20,000.00 | 20.00 | 1.00 | \$1,000.00 | Rollup | \$1,050,000.00 | 20,000.00 | |
| | 4.1 | Erect Steel - Heavy | 1004 | 800.00 | Ton | \$800,000.00 | 16,000.00 | 20.00 | 1.00 | \$1,000.00 | Current budget | \$800,000.00 | 16,000.00 | |
| | 4.2 | Erect Steel - Light | 1005 | 200.00 | Ton | \$200,000.00 | 4,000.00 | 20.00 | 1.00 | \$1,000.00 | Current budget | \$200,000.00 | 4,000.00 | |
| | 4.3 | Bolted Connections | 1006 | 2,000.00 | Ea | \$0.00 | 0.00 | 0.00 | 0.00 | \$0.00 | Average performance | \$50,000.00 | 0.00 | |
| | 5 | Materials | 1007 | 1.00 | Each | \$1,750,000.00 | 0.00 | 0.00 | 0.00 | \$1,750,000.00 | Rollup | \$1,750,000.00 | 0.00 | |
| | 5.1 | Earthwork - Materials | 1008 | 10,000.00 | CY | \$250,000.00 | 0.00 | 0.00 | 0.00 | \$25.00 | Current estimate | \$250,000.00 | 0.00 | |
| | 5.2 | Concrete - Materials | 1009 | 10,000.00 | CY | \$1,000,000.00 | 0.00 | 0.00 | 0.00 | \$100.00 | Current estimate | \$1,000,000.00 | 0.00 | |
| | 5.3 | Structure Steel - Materials | 1010 | 1,000.00 | Ton | \$500,000.00 | 0.00 | 0.00 | 0.00 | \$500.00 | Current estimate | \$500,000.00 | 0.00 | |
| Subtotals | | 11 | | | | \$4,900,000.00 | \$8,000.00 | | | | | \$4,950,000.00 | \$8,000.00 | |

2. Change this value to **125,000**.

MENU

Control

▼ \$100000 - PK3 Inc

▼ Steel Structure Training Job

100098

View : Forecasts

Actions

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

Tasks

CBS Position

Description

1

Job Overhead

2

Earthwork

3

Concrete

4

Structural Steel

4.1

Erect Steel - Heavy

4.2

Erect Steel - Light

4.3

Bolted Connections

5

Materials

5.1

Earthwork - Materials

5.2

Concrete - Materials

5.3

Structure Steel - Materials

Task Det...

< >>>

WBS Phase Code

Forecast TO City

UOM

1000

1.00

Lump Su.

1001

10,000.00

CY

1002

10,000.00

CY

1003

1,000.00

Ton

1004

800.00

Ton

1005

200.00

Ton

1006

2,000.00

Ea

1007

1.00

Each

1008

10,000.00

CY

1009

10,000.00

CY

1010

1,000.00

Ton

Forecast | Created from Live foreca...

< >>>

Forecast Final Cost

Forecast Final MH

Forecast Final Man Hour/Unit

Forecast Final PF

Forecast Final Unit Cost

Forecast Method

\$250,000.00

0.00

0.00

0.00

\$250,000.00

Current estimate

\$400,000.00

8,000.00

0.80

1.00

\$40.00

Current budget

\$1,500,000.00

30,000.00

3.00

1.00

\$150.00

Current estimate

\$1,000,000.00

20,000.00

20.00

1.00

\$1,000.00

Rollup

\$800,000.00

16,000.00

20.00

1.00

\$1,000.00

Current budget

\$200,000.00

4,000.00

20.00

1.00

\$1,000.00

Current budget

\$0.00

0.00

0.00

0.00

\$0.00

Average performan...

\$1,750,000.00

0.00

0.00

0.00

\$1,750,000.00

Rollup

\$250,000.00

0.00

0.00

0.00

\$25.00

Current estimate

\$1,000,000.00

0.00

0.00

0.00

\$1,000.00

Current estimate

125000

0.00

0.00

0.00

\$500.00

Current estimate

Forecast | Created from Live foreca...

< >>>

Forecast Final Cost

Forecast Final MH

Forecast Man Hour

\$250,000.00

0.00

\$400,000.00

8,000.00

\$1,500,000.00

30,000.00

\$1,050,000.00

20,000.00

\$800,000.00

16,000.00

\$200,000.00

4,000.00

\$50,000.00

0.00

\$1,750,000.00

0.00

\$250,000.00

0.00

\$1,000,000.00

0.00

\$500,000.00

0.00

Subtotals

11

\$4,900,000.00

58,000.00

\$4,950,000.00

58,000.00

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INEIGHT

TIP

To revert to the original value when manually typing into the cell, press the Escape (Esc) key.

NOTE

All other cost categories proportionally adjust automatically once the labor is adjusted.

InEight Inc. | Release 25.7

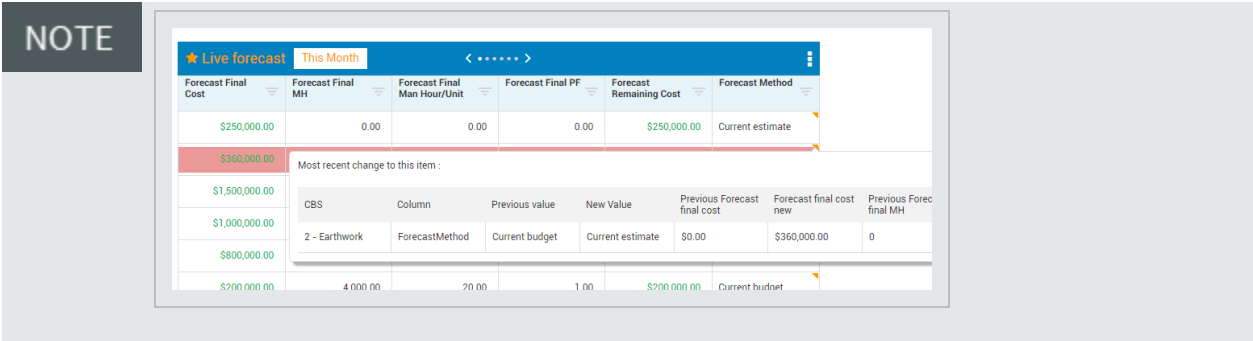
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NOTE

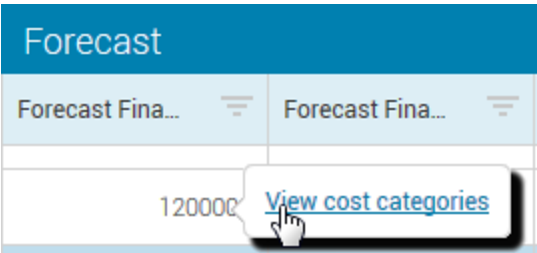
In the Forecast data block, blue dots indicate what the forecast driver is. A forecast driver is the manually edited value that the Forecast Final Cost is based off.

| Forecast Created | |
|---------------------|--|
| Forecast Final Cost | |
| \$250,000.00 | |
| \$400,000.00 | |
| \$1,500,000.00 | |
| \$1,000,000.00 | |
| \$800,000.00 | |
| \$200,000.00 | |
| \$0.00 | |
| \$1,375,000.00 | |
| \$250,000.00 | |
| \$1,000,000.00 | |
| \$125,000.00 | |

In the *Live forecast data block, orange triangles will appear in the top right-hand corner of the cell. These indicate what the forecast driver is and give a detail of the change when hovered over.



3. Hover over the **Forecast Final Cost** cell of the value you entered and select the **View cost categories** pop-up.



- You can see the adjustments that were made by cost category

6.0.2.1 PROPORTIONAL ADJUSTMENT

As you make changes, you may receive a prompt asking you how you would like to adjust other values affected by your change. For example, when you change your Forecast Final Cost, this will affect either:

- Forecast Final MH or
- Forecast Final \$/MH

×

Proportionally adjust Forecast Final MH or Forecast Final \$/MH ?

The Forecast Final Cost can be modified by proportionally adjusting Forecast Final MH or Forecast Final \$/MH. Specify the value you would like to modify:

☐ Forecast Final MH

0.000000000000

☐ Forecast Final \$/MH

0.000000000000

Cancel
OK

While one of those values will remain constant, the other will adjust as indicated in the table below:

| Forecasting - Proportional Adjustment Example | |
|--|--|
| Action | Result |
| Original Forecasted Values | Forecast Final Cost = \$1000 Forecast Final MH = 100 Forecast Final \$/MH = 10 |
| Manually adjust Forecast Final Cost | Forecast Final Cost changes from \$1000 to \$2000 |
| Resulting adjustment Option 1: Adjust Forecast Final MH | Forecast Final Cost / Original Forecast Final \$/MH = Adjusted Forecast Final MH $\$2000 / 10 = 200 \text{ MH}$ |
| Resulting adjustment Option 2: Adjust Forecast Final \$/MH | Forecast Final Cost / Original Forecast Final MH = Adjusted Forecast Final \$/MH $\$2000 / 100 = 20/\text{MH}$ |

6.0.3 MANUAL ETC (ESTIMATE TO COMPLETION) FORECAST

The Manual ETC (Estimate to Completion) forecast method can be used to make an adjustment to forecast the unit cost of the work remaining and adding it to the as-built costs in the calculation of the forecast.

To set the forecast remaining or ETC (Estimate to Complete) forecast, type a value into one of the following cells within the forecasting data block:

- Forecast Remaining Labor Cost/MHr
- Forecast Remaining Labor Cost
- Forecast Remaining Man-hours per Unit
- Forecast Remaining Productivity Factor
- Forecast Remaining Cost per Unit

This will set the unit cost and man hour factors. When applied to the remaining qty to deliver and added to the existing actuals this will equal your total forecast amounts.

6.0.3.2 DETAILED ETC FC METHOD

The Detailed ETC (estimate to completion) method lets you modify the crew makeup and production rates that drive the remaining forecast values (based on remaining quantities and hours).

For example, if you started your project and you used apprentices, and now you prefer to use journeymen, you can swap out resources for your forecast resources and use journeymen instead of apprentices.

In Control settings > Project Tracking, you can now enable forecast methods for terminal cost items when the allow-as built is set to all or cost for Detailed ETC. When the Detailed ETC forecast method is enabled, all existing Current Estimate Resources for that cost item are copied to the Forecast Resources tab in the CBS > Cost Item Details slide-out panel.

Terminal cost items

When Allow as-built is set to *All or Cost*

Enable the following Forecast methods for terminal cost items when Allow as-built is set to *All or Cost*

| | | | |
|---------------------|-------------------------------------|--------------|-------------------------------------|
| Current estimate | <input checked="" type="checkbox"/> | Manual (ETC) | <input checked="" type="checkbox"/> |
| Current budget | <input checked="" type="checkbox"/> | Manual (EAC) | <input checked="" type="checkbox"/> |
| Average performance | <input checked="" type="checkbox"/> | None | <input checked="" type="checkbox"/> |
| Committed cost | <input checked="" type="checkbox"/> | Contract | <input checked="" type="checkbox"/> |
| Detailed ETC | <input checked="" type="checkbox"/> | | |

Default Forecast method for terminal cost items when Allow as-built is set to *All or Cost*

Current estimate

Only enabled selections above are eligible. 'Manual (ETC)' and 'Manual (EAC)' cannot be default options.

When Allow as-built is set to *Quantity*

Enable the following Forecast methods for terminal cost items when Allow as-built is set to *Quantity*

| | | | |
|---------------------|-------------------------------------|--------------|-------------------------------------|
| Current estimate | <input checked="" type="checkbox"/> | Manual (ETC) | <input checked="" type="checkbox"/> |
| Current budget | <input checked="" type="checkbox"/> | Manual (EAC) | <input checked="" type="checkbox"/> |
| Average performance | <input checked="" type="checkbox"/> | None | <input checked="" type="checkbox"/> |

Default Forecast method for terminal cost items when Allow as-built is set to *Quantity*

Current estimate

Only enabled selections above are eligible. 'Manual (ETC)' and 'Manual (EAC)' cannot be default options.

When Allow as-built is set to *None*

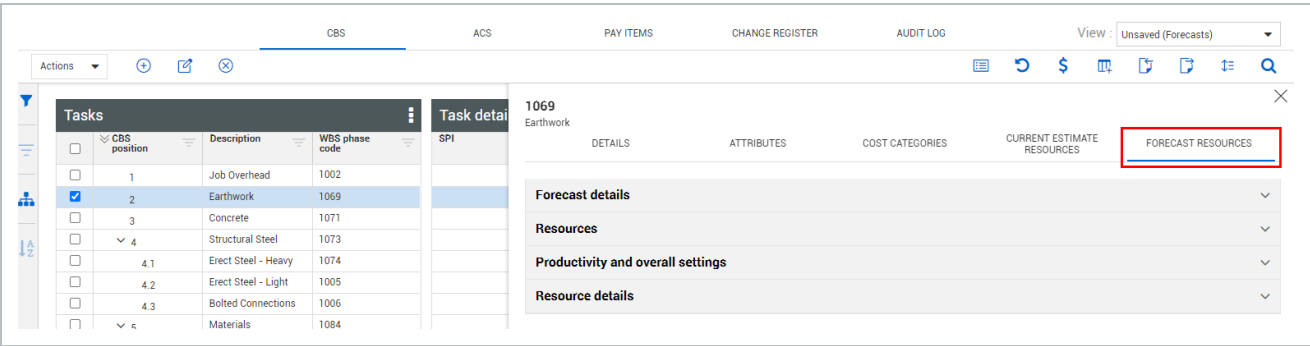
Enable the following Forecast methods for terminal cost items when Allow as-built is set to *None*

| | |
|------|-------------------------------------|
| None | <input checked="" type="checkbox"/> |
|------|-------------------------------------|

Default Forecast method for terminal cost items when Allow as-built is set to *None*

None

When the Detailed ETC setting is enabled, a new tab is available in Cost Item Details called Forecast Resources. This new tab is almost identical to the Current Estimate Resources tab, with the major difference being that the Forecast Resources tab contains forecast information. You can edit these resources and values separately from the current estimate resources for a cost item.



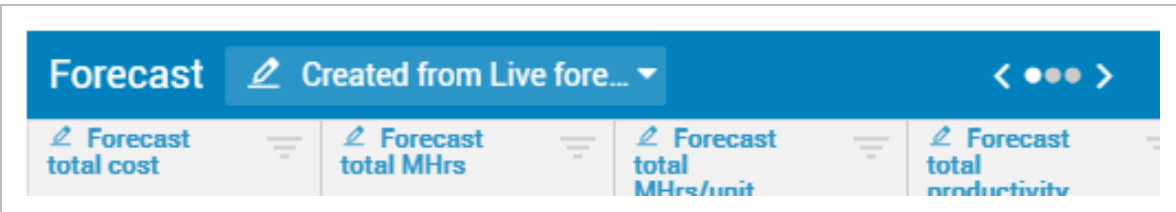
CHAPTER 6 – FORECAST MANAGEMENT

Scenario

Imagine you are covering the concrete portion of the Steel Structure project, and you want to do a “what if” forecast based on a potential change in the type of concrete to be used. This forecast will affect many codes and you do not want it to affect the forecast information for everyone else on the project. Also, your manager requested that you send him the new forecast so he can review the data and compare it to the Live Forecast, which will help decide which path to take.

Depending on the size of your project, you may have multiple engineers involved in forecasting project tasks. For example, a larger team may divide up responsibilities by discipline, with discipline-specific field engineers putting together information for a project manager.

InEight Control accommodates multiple people doing the forecasting, by allowing users to create and save their own forecasts, so they can forecast their items without affecting anyone else’s work. They can then share their forecasts with others as needed, accessing all the shared forecasts from the drop-down folder of the Forecast data block.

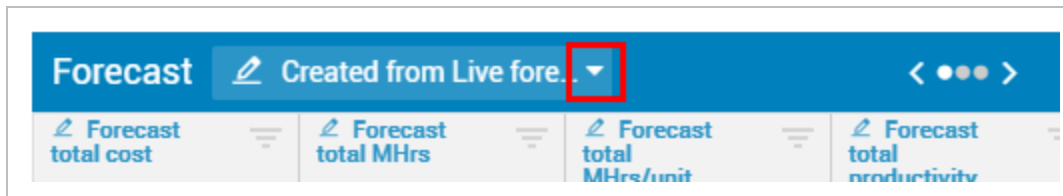


6.0.1 SAVE FORECASTS

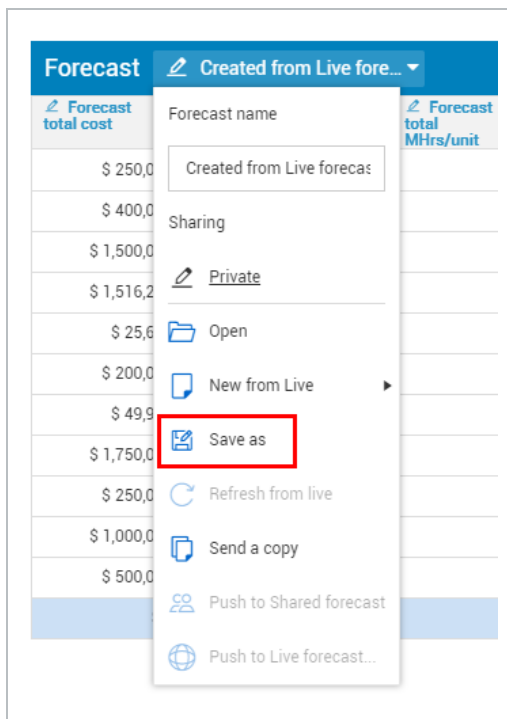
Once you have adjusted your forecast in the Forecast data block, you can save the forecast.

SAVE FORECASTS

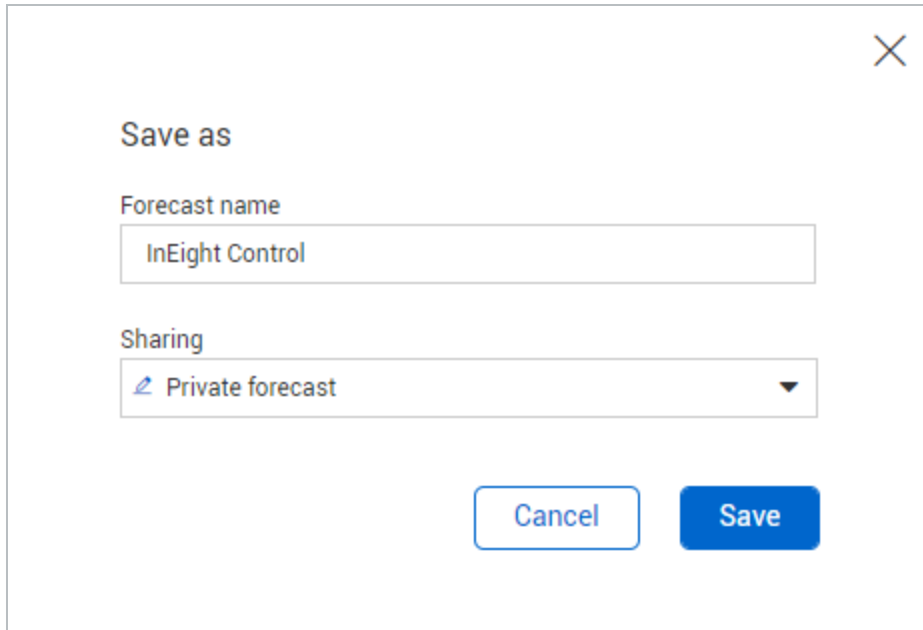
1. To save the forecast, click on the drop-down arrow in the center of the Forecast data block.



2. Select **Save as...** from the menu drop-down list.



3. In the Forecast Name field, type **InEight Control**. In the Sharing field, keep the forecast as private.

A dialog box titled "Save as" with a close button (X) in the top right corner. It contains a "Forecast name" input field with the text "InEight Control" and a "Sharing" dropdown menu currently set to "Private forecast". At the bottom are "Cancel" and "Save" buttons.

Save as

Forecast name

InEight Control

Sharing

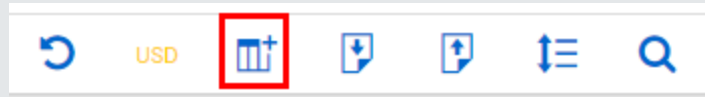
Private forecast

Cancel Save

4. Click **Save**.

NOTE

The Forecast data block now displays the saved forecast. Any changes made within this data block will be saved to that forecast. To get back to the Forecast data block, select the Add data blocks button and insert the Forecast data block.



Alternatively, you can revert to the Forecasts saved view.

6.0.2 LOAD FORECASTS

You can load existing shared forecasts, as shown in the Step by Step below.










6.0.3 PROJECT LEVEL SHARED FORECASTS

You can create up to five forecasts that are automatically shared with members assigned to the project. This lets you collaboratively work together with other team members to work on a forecast, prior to getting pushed to the live forecast. Other members can also edit and push the live forecast.

Selecting the Shared link lets you manage between private and shared access. All team members that share your forecast view can view and edit the forecast, and view any changes made update in real time.

SHARED FORECASTS

1. To share the forecast, click on the drop-down arrow in the center of the Forecast data block.

| Forecast  October 202  | | | |    | |
|--|---|--|--|---|--|
|  Forecast total cost |  Forecast total Mhrs |  Forecast total Mhrs/unit |  Forecast total productivity | | |
| \$ 250,000.00 | 0.00 | 0.00 | 0.00 | | |
| \$ 400,000.00 | 8,000.00 | 0.80 | 0.00 | | |
| \$ 1,500,000.00 | 30,000.00 | 3.00 | 0.00 | | |
| \$ 1,516,282.48 | 4,999.10 | 5.00 | 0.00 | | |

2. Select **Private** from the drop-down list.

Forecast

October 2021

| Forecast total cost | Forecast name | Forecast total MHrs/unit |
|---------------------|---------------|--------------------------|
| \$ 250,0 | October 2021 | 0.0 |
| \$ 400,0 | | 0.8 |
| \$ 1,500,0 | | 3.0 |
| \$ 1,516,2 | | 5.0 |
| \$ 25,6 | | 0.0 |
| \$ 200,0 | | 20.0 |
| \$ 49,9 | | 0.9 |
| \$ 1,750,0 | | 0.0 |
| \$ 250,0 | | 0.0 |
| \$ 1,000,0 | | 0.0 |
| \$ 500,0 | | 0.0 |

Sharing

Private

Private forecast information is only visible to you

Open

New from Live

Save as

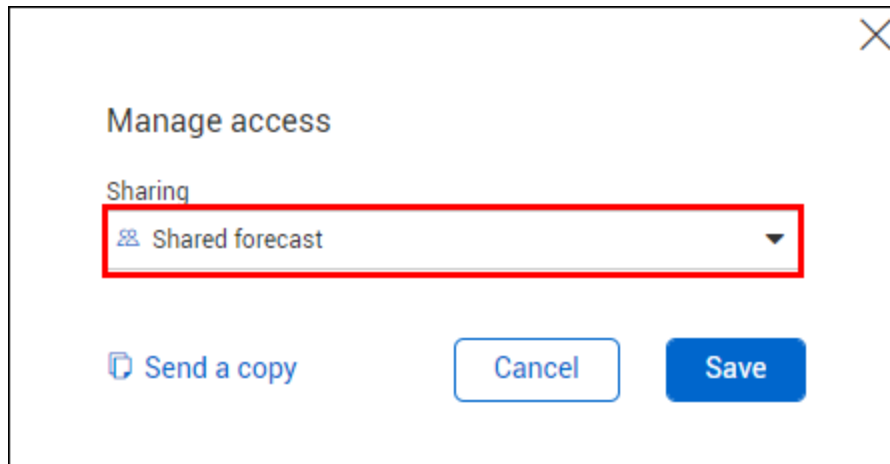
Refresh from live

Send a copy

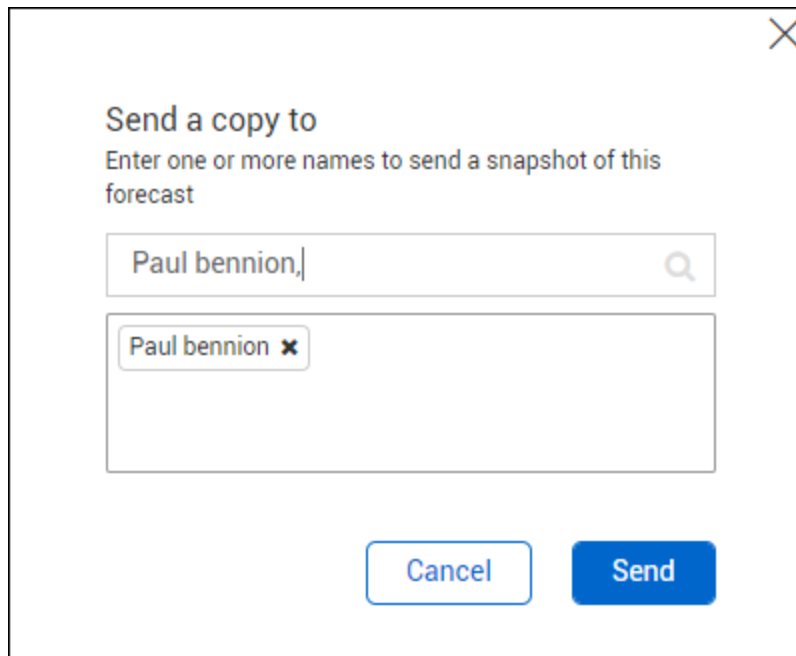
Push to Shared forecast

Push to Live forecast...

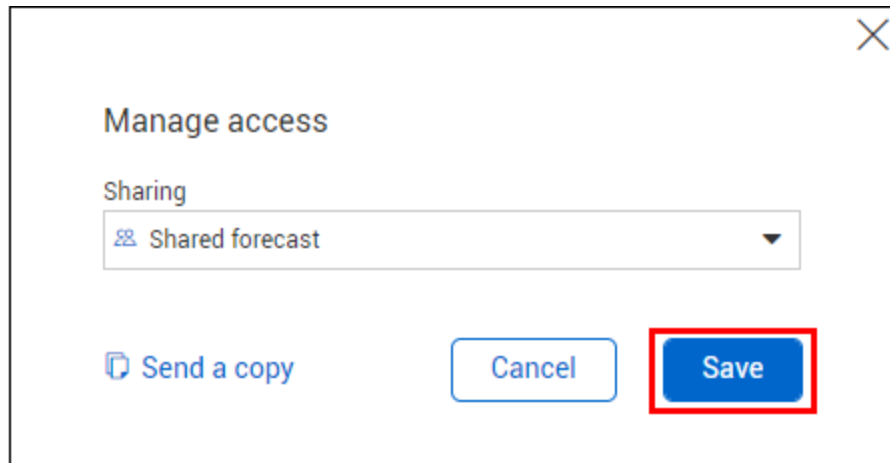
- The Shared forecast option automatically defaults in the drop-down selection



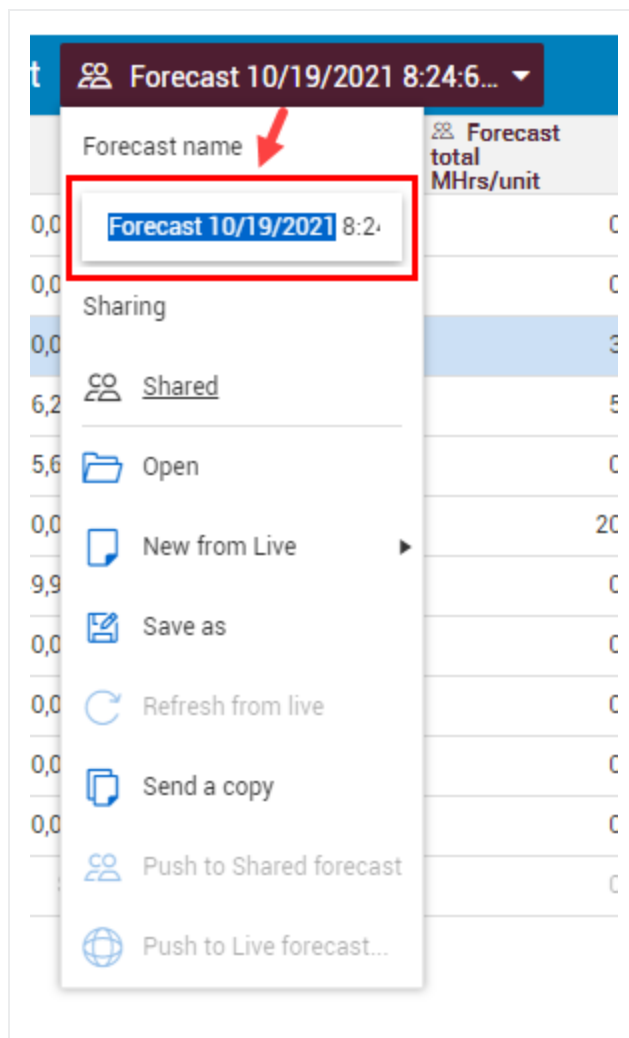
- You can also send a copy of the forecast to one or more team members



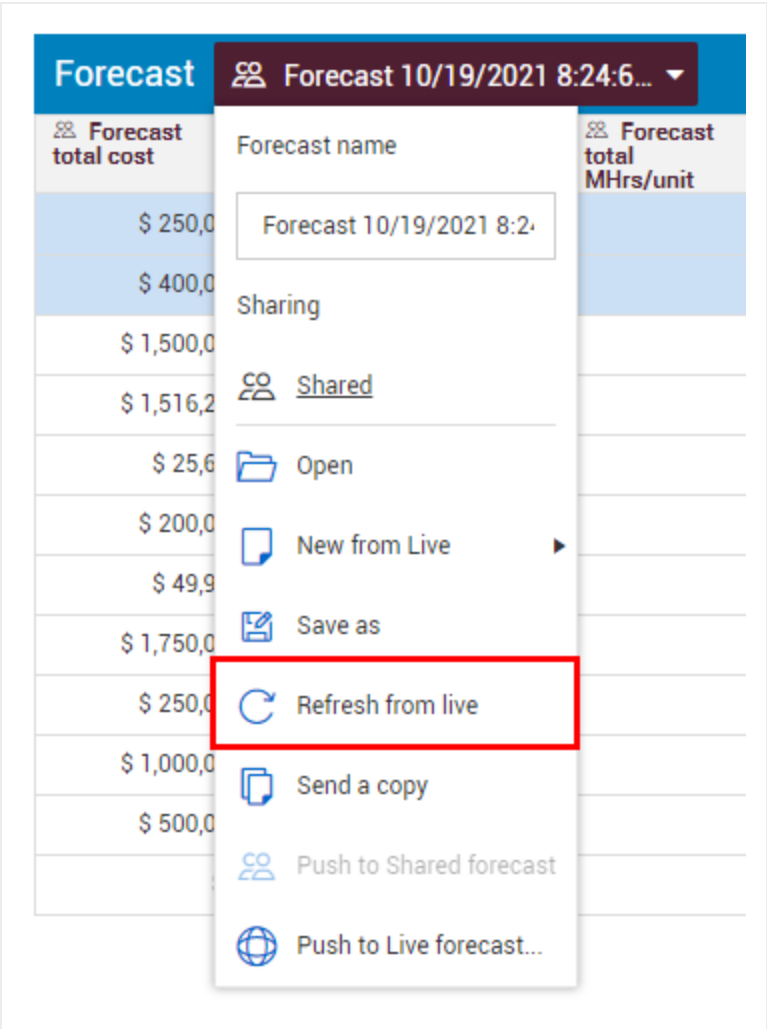
- Select Cancel on the Send a copy to dialog box, and then select Save on the Manage access dialog box



- Selecting Private access removes access for all team members
- Change the shared forecast name by clicking in the Forecast name field and typing in a new name



- Selecting Refresh from live lets you restore forecast values from the live forecast



TIP You can send forecasts to multiple people at once, by searching for and adding people to the list before clicking Send.

6.0.4 COMPARE FORECASTS

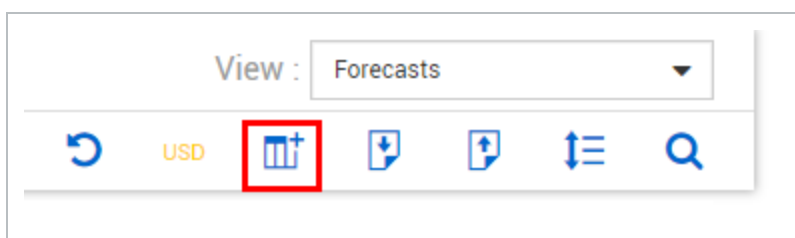
You can compare forecasts by inserting the Forecast Delta data block in your view and selecting two forecasts from the data block title bar to compare.

| Forecast Final Cost | Forecast Final MH | Forecast Final Man Hour/Unit | Forecast Final PF | Forecast Final Unit Cost | Forecast Remaining Cost |
|---------------------|-------------------|------------------------------|-------------------|--------------------------|-------------------------|
| \$0.00 | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 |
| \$50,000.00 | 0.00 | 0.00 | 0.00 | \$5.00 | \$50,000.00 |
| \$0.00 | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 |
| (\$10,000.00) | -1.00 | 0.00 | 0.00 | (\$10.00) | (\$10,000.00) |
| \$0.00 | 0.00 | 0.00 | 0.00 | \$0.00 | \$0.00 |

You can use all columns in the Forecast Delta data block to compare the live and saved forecasts.

COMPARE FORECASTS

1. Select the **Add data block** button on the top right-hand corner of the Control Workspaces page.



2. In the slide out panel on the left, select the **Forecast Delta** data block and drag it beside the **Forecast** data block.

Steel Structure Job (105091)ControlWorkspaces

CBSACSPLAY ITEMS

Actions

Add data block

Standard data blocks

Task details

Actuals

Current budget

Current estimate

Forecast

Forecast delta

Live forecast

Schedule

Cost category data blocks

Cost categories: Actuals

Cost categories: CB

Cost categories: CE

Cost categories: Forecast

Tasks

| | CBS position | Description |
|--|--------------|---------------------|
| | 1 | Job Overhead |
| | ^ 2 | Earthwork |
| | 2.1 | Earthwork Review |
| | 2.2 | Earthwork |
| | 3 | Concrete |
| | ^ 4 | Structural Steel |
| | 4.1 | Erect Steel - Heavy |

from Live forec...

| recast al MHrs | Forecast final man hours/Unit |
|----------------|-------------------------------|
| 0.00 | 0.00 |
| 8,320.00 | 0.83 |
| 320.00 | 320.00 |
| 8,000.00 | 0.80 |
| 30,000.00 | 3.00 |
| 37,000.00 | 37.00 |
| 16,000.00 | 45.71 |

3. Using the drop-down menus on the Forecast Delta data block, select both the first and second forecasts in their respective drop-down's.

Forec...October Fo...Live foreca...

Live forecast

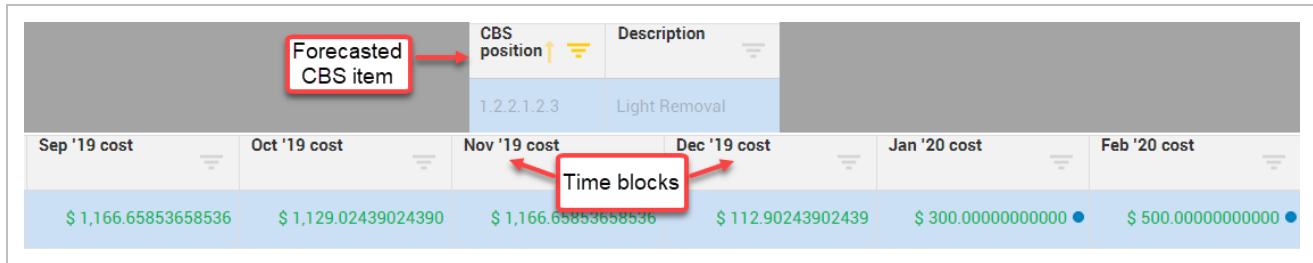
October Forecast

| ★ Forecast Fi... | ★ Forecast Fi... | ★ Forecast Fi... | ★ Forecast R... | ★ Forecast R... |
|------------------|------------------|------------------|-----------------|-----------------|
| 0 | 0 | 0 | 0 | 0 |
| (\$298,640.68) | (\$3,240.00) | (\$3,240.00) | (\$1.00) | (\$214,238.68) |
| (\$11,379.83) | (\$109.00) | (\$109.00) | 0.00961 | (\$11,379.80) |
| (\$10,565.51) | (\$80.00) | (\$80.00) | (\$1.00) | (\$2,449.51) |
| (\$814.32) | (\$29.00) | (\$7.25) | 0.20311 | (\$814.32) |

CHAPTER 6 – TIME PHASED FORECASTING

Projects are typically overwhelmed by escalating forecast values as the project progresses. What the business thought they were going to spend doesn't end up being very accurate at the end of a project.

One way to mitigate this is to take the forecast and break it down into more consumable, estimate related time blocks/periods, as shown in the screenshot below. This prompts the project engineers to think about what activities, bills, and costs are going to occur in smaller more mentally digestible time periods.

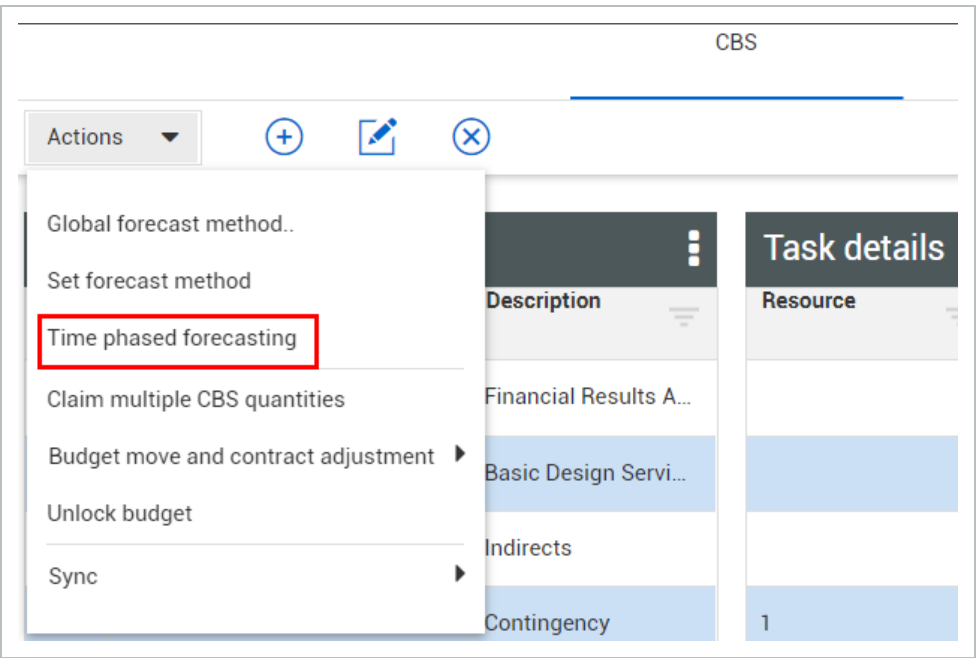


| Forecasted CBS item | | CBS position | Description | | |
|----------------------|----------------------|----------------------|--------------------|---------------------|---------------------|
| | | 1.2.2.1.2.3 | Light Removal | | |
| Sep '19 cost | Oct '19 cost | Nov '19 cost | Dec '19 cost | Jan '20 cost | Feb '20 cost |
| \$ 1,166.65853658536 | \$ 1,129.02439024390 | \$ 1,166.65853658536 | \$ 112.90243902439 | \$ 300.000000000000 | \$ 500.000000000000 |

Projects need to spread their estimate by periods to verify forecast accuracy vs. the actuals spent within that period. One of the key goals of time phased forecasting is to see when you are forecasting to spend allocated budget. You can then determine how accurate your forecast was versus the actuals spent within that period. Based on forecast accuracy, this gives you the opportunity to make manual adjustments within the Time phased forecasting register. It also provides the ability to have the system automatically distribute the forecast for you based upon certain criteria.


TPF gives you visibility into when you are going to spend dollars associated to a cost item in monthly time periods. TPF also helps with cash flow, enabling customers to provide more insight into how much money they need to pay employees and other bills.

After selecting a cost item from the CBS, TPF can be accessed from Control > Workspaces > Actions > Time phased forecasting. This is only if the project settings for TPF is enabled under the Forecast section.



The table below shows the columns from the Time Phased Forecasting page.

Overview - Time phased forecast

| | Resource | Description |
|---|---|--|
| 1 | Auto Distribute remaining forecast based on cost curve and start/end dates  | This will automatically distribute remaining forecast based on the cost curve being used, in addition to the Start and Finish dates. |
| 2 | CBS position | The CBS position identifier number. |
| 3 | Description | The description of the CBS. |
| 4 | WBS Phase code | Work Breakdown Structure code number. |
| 5 | Start | This is the scheduled start date for the cost item. |
| 6 | Finish | This is the scheduled finish date for the cost item. |
| 7 | Cost Curve | This is a graph/calculation of the costs of production as a function of total quantity produced. Cost curves can be created, viewed and maintained in Settings > Control > Schedule, in the Cost |

Overview - Time phased forecast (continued)

| | Resource | Description |
|----|--------------------------------------|---|
| | | Curves section on the page. |
| 8 | Forecast method | Forecast methods include: Current Budget, Current Estimate, Average Performance, Manual (EAC), None, and Rollup. |
| 9 | Forecast remaining cost | This is the unsettled balance of forecast. Cost that is projected to still be required to be paid out (varies depending on forecast method). |
| 10 | Forecast final cost | Total cost to date + Forecast remaining cost, cost item projected total cost at completion. |
| 11 | Phased Forecast Remaining Cost Delta | This is the remaining forecasted cost that has not yet been allocated to a monthly period. It is the difference between the Forecast remaining cost and the sum of forecasted cost currently represented in all remaining months on the TPF window. |
| 12 | Load more | This will load additional month columns to view in the TPF window. |
| 13 | <date> cost | The forecasted cost projected to be incurred during that individual month. |

| CBS > Time Phased Foreca... | | | | | | | | | | | |
|-----------------------------|----------------------|----------------|------------|------------|------------|------------------|-------------------------|---------------------|--------------------------------------|-----------|---------------|
| | 1 | | | | | | | | | | |
| CBS position | Description | WBS phase code | Start | Finish | Cost curve | Forecast method | Forecast remaining cost | Forecast final cost | Phased forecast remaining cost delta | Load m... | Jul '19 cost |
| 1 | Financial Results... | 1000 | 06/19/2019 | 12/31/2019 | Linear | Rollup | \$ 15,038,381.26 | \$ 15,038,381.26 | (\$ 15,038,381.26) | | \$ 35,544.88 |
| 1.1 | Commercial Cost | 1025 | 06/19/2019 | 12/31/2019 | Linear | Rollup | \$ 1,410,506.62 | \$ 1,410,506.62 | (\$ 1,410,506.62) | | \$ 984.78 |
| 1.1.1 | G & A Expense (7... | 1026 | 06/19/2019 | 06/19/2019 | Linear | Current estimate | \$ 1,090,208.12 | \$ 1,090,208.12 | (\$ 1,090,208.12) | | \$ 0.00 |
| 1.1.2 | P & P Bond (0.40... | 1027 | 06/19/2019 | 06/19/2019 | Linear | Current estimate | \$ 67,828.91 | \$ 67,828.91 | (\$ 67,828.91) | | \$ 0.00 |
| | | | | | | | | | | | Aug '19 cost |
| | | | | | | | | | | | \$ 116,944.26 |
| | | | | | | | | | | | \$ 5,507.29 |
| | | | | | | | | | | | \$ 0.00 |
| | | | | | | | | | | | \$ 0.00 |

TIP

There is a **Load More** column that exists in the middle/top of the page. When selected, additional monthly time buckets will be added to the page.

| | | |
|------------------|-----------|--------------|
| Forecast method | Load more | Jan '19 cost |
| Current estimate | | \$ 0.00 |

6.0.1 TPF REGISTER

The Time phased forecasting register allows you to time phase **auto spread** forecast remaining costs, which are based on cost curves, and start/end dates. You can also **manually override** specific months and change the distribution costs.

For example: you have \$250,000 to spend on a cost item (Forecast remaining cost). You can use Time Phased Forecasting to spread your dollars into monthly allocation buckets. This can be done by automatically spreading the \$250,000 forecast, or by manually overriding the forecast and entering your own values into the monthly buckets.

CBS > Time Phased Foreca...

| <input type="checkbox"/> | CE po | Descript | WE ph co | Start | Finis | Co: cur | Fo m | Forecast remaining cost | Forecast final cost | Phaser remain delta | |
|--------------------------|-------|------------------|----------|------------|------------|---------|-----------|-------------------------|---------------------|---------------------|--|
| <input type="checkbox"/> | 1 | Job Overhead | 1002 | 06/11/2019 | 11/25/2019 | Linear | ⚠ Curr... | \$ 250,000.00 | \$ 250,000.00 | | |
| <input type="checkbox"/> | 2 | Earthwork | 1069 | 11/26/2019 | 05/11/2020 | Linear | Curr... | \$ 800,000.00 | \$ 800,000.00 | | |
| <input type="checkbox"/> | 3 | Concrete | 1071 | 05/12/2020 | 10/26/2020 | Linear | ⚠ Curr... | \$ 3,000,000.00 | \$ 3,000,000.00 | | |
| <input type="checkbox"/> | 4 | Structural Steel | 1073 | 10/27/2020 | 04/12/2021 | Linear | Roll... | \$ 1,050,000.00 | \$ 1,050,000.00 | | |

Auto spread forecast

Manual override

| | Sep '19 remaining cost | Oct '19 cost | Nov '19 cost | Dec '19 cost | Jan '20 |
|--|------------------------|--------------|--------------|--------------|--------------|
| | 000.00 | \$ 0.00 | \$ 60,000.00 | \$ 25,000.00 | \$ 48,000.00 |
| | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 28,571.43 |
| | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

6.0.2 AUTO DISTRIBUTE

The **Auto distribute** icon allows you to have the system automatically allocate remaining forecast as determined by your **Actual Start** date, **Actual Finish** date, and **Cost Curve**.

CBS > Time Phased Foreca...

Auto distribute remaining forecast based on cost curve and start/end dates

| | CBS positio | | | | | | | | |
|-------------------------------------|-------------|---------|------|--------|--------|-----|---------|----------|--|
| <input checked="" type="checkbox"/> | 1.1 | Basi... | 1001 | 03/... | 09/... | L | Roll... | 10,0... | |
| <input checked="" type="checkbox"/> | 1.1.1 | Indi... | 1002 | 03/... | 09/... | L | Roll... | 12,1... | |
| <input checked="" type="checkbox"/> | 1.1.1.1 | Con... | 1003 | 07/... | 09/... | L ⚠ | Curr... | 126,... | |
| <input type="checkbox"/> | 1.1.1.2 | Job ... | 1009 | 06/... | 09/... | F ⚠ | Curr... | USD... | |
| <input type="checkbox"/> | 1.1.1.3 | Desi... | 1006 | 07/... | 07/... | L ⚠ | Curr... | (6,5... | |
| <input type="checkbox"/> | 1.1.1.4 | Job ... | 1004 | 03/... | 12/... | B | Roll... | (21... | |
| <input type="checkbox"/> | 1.1.1.4.1 | Desi... | 1005 | 03/... | 08/... | L ⚠ | Curr... | 30,1... | |

| Load m... | Jul '19 cost | Aug '19 cost | Aug '19 remaining cost |
|-----------|--------------------|------------------------|------------------------|
| | 1,092,364,798.677 | 12,310,649,399.471 | 12,567,815,504.198 |
| | 1,092,364,798.677 | 12,310,649,399.471 | 12,567,815,504.198 |
| | 19,187,552.694 | 1,641,816.243 | 102,472,320.000 |
| | USD 21,497,584.087 | USD 11,845,050,361.155 | USD 12,345,678,901.123 |
| | (136,936.199) | 3.116 | 0.000 |
| | 961,605.565 | (1,068,557.342) | (1,535,622.827) |
| | (86,894.355) | (253,032.894) | 30,158.730 |

The Auto distribute icon allows you to automatically distribute dollars into monthly allocation buckets. In this case, the allocating of dollars will begin on the **Start** date of May 2020 and stop allocating on **Finish** date month of October of 2020.

| Descript | WBS phase code | Start | Finist | Cos' curv | Forec rema cost | Phased forecast remaining... | Sep '20 cost | Oct '20 cost |
|----------|----------------|------------|------------|-----------|------------------------|------------------------------|---------------|---------------|
| Concrete | 1071 | 05/12/2020 | 10/26/2020 | Linear ⚠ | Curr... \$ 3,000,00... | \$ 0.00 | \$ 553,571.43 | \$ 535,714.29 |

6.0.3 MANUAL TIME PHASED FORECAST

Using the same example, it's also possible to manually forecast the allotted \$3,000 into your desired monthly buckets. By manually entering in \$400,000.00 into the Oct 2020 bucket, your Phased forecast remaining cost delta changes to \$135,714.29. This represents the remaining amount of dollars to still be forecasted.

| Descript | WBS phase code | Start | Finist | Cos' curv | Forec rema cost | Phased forecast remaining... | Aug '20 cost | Sep '20 cost | Oct '20 cost |
|----------|----------------|------------|------------|-----------|------------------------|------------------------------|---------------|---------------|---------------|
| Concrete | 1071 | 05/12/2020 | 10/26/2020 | Linear ⚠ | Curr... \$ 3,000,00... | (\$ 135,714.29) | \$ 535,714.29 | \$ 553,571.43 | \$ 400,000.00 |

On the right side of the screen, a blue circle displays by the forecast quantity when a manual override to the forecast quantity is performed. If you hover over the blue circle, it shows a description of the manual override.

| Sep '19 cost | Oct '19 cost | Nov '19 cost |
|---------------|---------------|--------------|
| \$ 238,134.05 | \$ 221,910.98 | \$ 1,266,... |
| \$ 10,723.09 | \$ 76,254.74 | \$ 3,... |
| \$ 0.00 | \$ 500.00 | |
| \$ 0.00 | | |
| \$ 0.00 | | |

Manual Override:

Changed by: paul trippi

Change date: 08/05/2019 04:29 PM

Value before: \$ 0.00

On the left side of the screen, a manual override to the forecast amount shows a warning symbol by the cost curve. Hovering over the warning sign shows that the cost item contains a manual change to the time phased months, and thus, the cost curve is no longer accurate.

| CBS position | Description | list | Cost curve | Forec meth | For re co |
|--------------|----------------------|---------|--|---------------|-----------|
| 1 | Financial Results... | 31/2019 | Linear | Rollup | \$ |
| 1.1 | Commercial Cost | 31/2019 | Linear | Rollup | \$ |
| 1.1.1 | G & A Expense (7... | 19/2019 | Linear | Current es... | \$ |
| 1.1.2 | P & P Bond (0.40... | 19/2 | Cost item contains manual time phased months | | |
| 1.1.3 | Builderal Risk Ins | 10/2019 | Linear | Current es... | \$ |

6.0.3.1 PROPORTIONAL MAN HOURS AND QUANTITY

In addition to Cost, Man hours and Quantity displays on the Time phased forecast grid. If you manually adjusted the cost for one of the months in the grid, a dialog box appears asking to proportionally adjust Man hours and the Quantity.

Proportionally adjust MHrs and/or Qty ?

The man hours and quantity can be modified proportionally for this fiscal period.

☒ Man hours

13.14

☒ Quantity

0.13

☐ Do this for all cost items and don't show this message again.

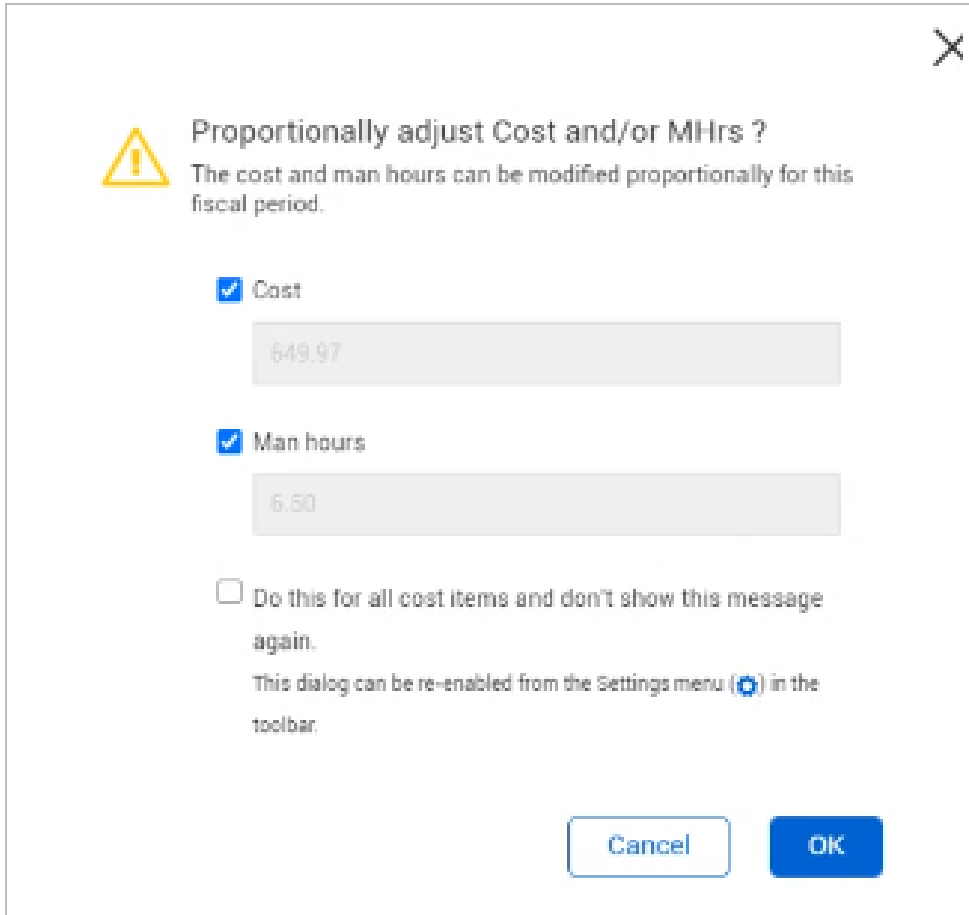
This dialog can be re-enabled from the Settings menu (⚙) in the toolbar.


Cancel

OK

If for example you doubled your cost in the Time phased forecast, it would also proportionally double your Man hours or Quantity. You can view the values that the man hours and quantity would proportionally adjust to in the read only cells.

If you manually adjusted Man hours or Quantity in the Time phased forecast grid, a dialog box appears asking to proportionally adjust cost and man hours .



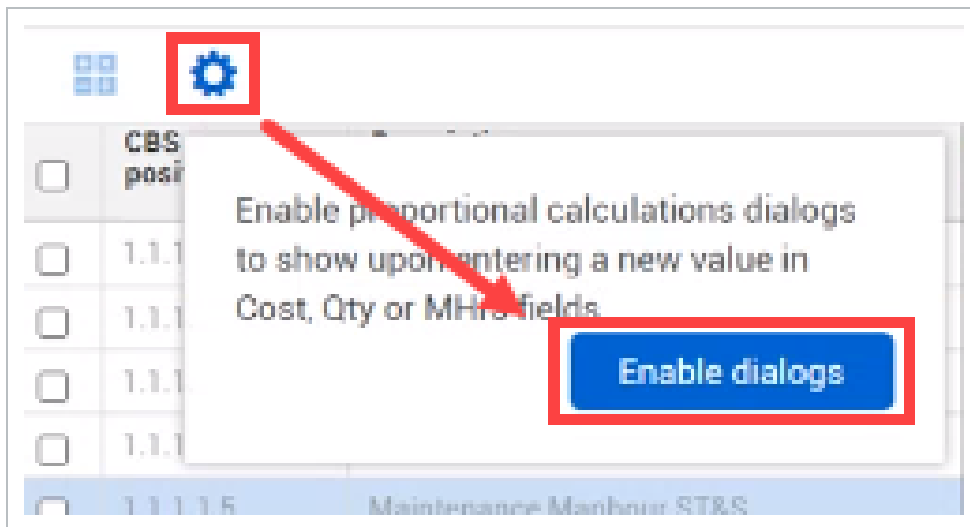
 **Proportionally adjust Cost and/or MHrs ?**
The cost and man hours can be modified proportionally for this fiscal period.

☒ **Cost**
649.97

☒ **Man hours**
6.50

☐ Do this for all cost items and don't show this message again.
This dialog can be re-enabled from the Settings menu (⚙️) in the toolbar.

Both dialog boxes have the option to adjust proportionally without showing the message again. If you selected this option and want to revert settings back to see the dialog again, in the Time phased forecast grid, go to the Settings icon and select **Enable dialogs**.



In the Time phase forecast grid, you can also select to export to Excel.

The screenshot shows a table with columns for 'qty', 'Cost', 'Mhrs', and 'Qty' for November 2020 and December 2020. An 'Export' button is visible in the top right corner, next to a 'Publish' button.

| qty | Cost | Mhrs | Qty | Cost | Mhrs |
|-------|----------------|--------|------|-------------|--------|
| -0.14 | (\$ 10,000.00) | 0.00 | 1.00 | \$ 2,542.37 | 0.00 |
| 0.00 | \$ 3,113.20 | 311.32 | 0.00 | \$ 5,322.80 | 532.28 |
| 0.00 | \$ 1,000.00 | 0.00 | 0.00 | \$ 0.00 | 0.00 |
| 0.00 | \$ 0.00 | 0.00 | 0.00 | \$ 0.00 | 0.00 |
| 0.29 | \$ 649.97 | 6.50 | 0.13 | \$ 2,542.37 | 25.42 |

Selecting this exports everything that is in your view to an Excel spreadsheet.

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S |
|------------|-------------|----------|-------|--------|------------|------------|------------|------------|-----------|-----------|-----------|-----------|----------|----------|----------|------------|------------|------------|
| CBS positi | Description | WBS phas | Start | Finish | Forecast n | Cost curve | Forecast n | Forecast n | Qty remai | Phased fo | Phased fo | Phased fo | March 20 | March 20 | March 20 | April 2020 | April 2020 | April 2020 |
| 1.1.1.1.1 | MAINTAIN | 1348 | ##### | ##### | Manual (E | Linear | 10000 | 100 | -1 | -12627.1 | -100 | 1.262712 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1.1.1.1.2 | FUEL AND | 1017 | ##### | ##### | Manual (E | Bell Shape | 10000 | 100 | -99 | 0.001005 | 900 | 99 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1.1.1.1.3 | GAS & DIE | 1018 | ##### | ##### | Manual (E | Front Load | 10000 | 100 | -220 | 1000 | -100 | 220 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1.1.1.1.4 | FUEL HOSI | 1474 | ##### | ##### | Manual (E | Back Load | 10000 | 100 | 1 | -1.7E-05 | -100 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1.1.1.1.5 | Maintenai | 1476 | ##### | ##### | Manual (E | Linear | 10000 | 100 | 1 | -535.826 | -5.35826 | 0.01142 | 0 | 0 | 0 | 0 | 0 | 0 |

6.0.4 STATIC MANUAL TIME PHASED FORECASTING (TPF)

Static manual TPF lets you distribute a time phased forecast in the future without causing a redistribution. All values entered in the TPF are constant, and any deltas based on current month actuals that do not equal what was forecasted for that month, must be spread manually.

To enable the static manual forecast method, the Forecasting and Push time phased forecast to Live forecast toggles must be set to *On* in Settings > Control > **Forecast**.

103961 Settings

PROJECT TRACKING FORECAST ESTIMATE RESOURCES SCHEDULE

Time phasing

Enable time phasing for the following:

- Forecasting ☒
- Push Time phased forecast to Live forecast ☒
- Commitments ☐

Save

The static manual forecast can be enabled on the Time phased forecasting page by first making a change to any of the distribution fields. After you click the **Publish** button, the Push these values to the Live forecast dialog box opens. When the Do not redistribute manual spread check box is selected, the values entered in whole months remain as-entered and are not automatically redistributed when actuals are incurred or months close.

CBS > Time phased forecasting

Mar 2023 - Sep 2023 Publish

| CBS position | Description | WBS phase code | Cost | Mhrs | Qty | Cost | Remaining c... | Mhrs | Remaining m... | Qty |
|--------------|-------------|----------------|---------|------|------|----------|----------------|------|----------------|-----|
| 3.1.1 | FWC B/C | 1119 | \$ 0.00 | 0.00 | 0.00 | \$ 20.00 | \$ 150.00 | 0.00 | 0.00 | 0.1 |

1

2

Push these values to the Live forecast?

Please review the changes below, and then click 'Yes' if you wish to push these values to the live forecast.

| CBS | Description | Current live forecast values | | Time phased forecast values | | | |
|-------|-------------|------------------------------|----------------------------------|-----------------------------|-----------------------------|-----------------|-----------------|
| | | Live forecast remaining cost | Live forecast remaining manhours | Forecast remaining cost | Forecast remaining manhours | Cost difference | Mhrs difference |
| 3.1.1 | FWC B/C | \$ 175.00 | 0 | \$ 225.00 | 0 | \$ 50.00 | 0 |




3

4

☒ Do not redistribute manual spread

Yes Cancel

The forecast method for the CBS record automatically changes to static manual TPF, and the forecast remaining cost and forecast total cost changes based on the distribution amount adjusted in TPF.

| Tasks | | | Live forecast  Current live forecast  04/11/2023  | | | | |
|-------------------------------------|--------------|--------------------|--|---------------------|-------------------------|------------------------------|--|
| <input type="checkbox"/> | CBS position | Description | Forecast remaining cost | Forecast total cost | Forecast remaining Mhrs | Forecast remaining unit cost | Forecast method |
| <input type="checkbox"/> | 3.1 | Misc. Rev External | \$ 2,375.00 | \$ 245,042.96 | 75.00 | \$ 9,500.00 | Rollup |
| <input checked="" type="checkbox"/> | 3.1.1 | FWC B/C | \$ 225.00 | \$ 325.00 | 0.00 | \$ 450.00 | Static manual TPF (estimate at completion) |

If costs are claimed for the CBS item, the forecast total cost remains the same, but the forecast remaining cost is reduced from the claimed actual quantity.

Tasks

| <input type="checkbox"/> | CBS position | Description |
|-------------------------------------|--------------|---------------------|
| <input type="checkbox"/> | 3.1 | Misc. Rev External |
| <input checked="" type="checkbox"/> | 3.1.1 | FWC B/C |
| <input type="checkbox"/> | 3.1.2 | Vantage Dewateri... |
| <input type="checkbox"/> | 3.1.2.1 | Craft Labor |
| <input type="checkbox"/> | 3.1.2.2 | Equipment |

CLAIM ACTUALS ACTUALS HISTORY COMMITMENTS

CE total cost Actual cost (to date)

\$ 100.00 \$ 100.00

Claimed cost

50

Cost category



333333

Posted date

04/21/2023

Tasks

| <input type="checkbox"/> | CBS position | Description |
|-------------------------------------|--------------|--------------------|
| <input type="checkbox"/> | 3.1 | Misc. Rev External |
| <input checked="" type="checkbox"/> | 3.1.1 | FWC B/C |

Live forecast  Current live 

| Forecast remaining cost | Forecast total cost |
|-------------------------|---------------------|
| \$ 2,325.00 | \$ 245,042.96 |
| \$ 175.00 | \$ 325.00 |

In TPF, the claimed amount now shows the phased forecast remaining cost, which represents the remaining amount that still needs to be spread. The phased forecast remaining cost now must be deducted somewhere from the TPF distribution.

| <input type="checkbox"/> | CBS position | Description | Forecast remain... cost | Forecast remaining Mhrs | Remaining qty | Phased forecast remaining cost |
|--------------------------|--------------|-------------|-------------------------|-------------------------|---------------|--------------------------------|
| <input type="checkbox"/> | 3.1.1 | FWC B/C | \$ 175.00 | 0.00 | 0.50 | \$ 50.00 |

| <input checked="" type="checkbox"/> | CBS position | Description | WBS phase code | Start | Cost | Remaining c... |
|-------------------------------------|--------------|-------------|----------------|------------|---------|----------------|
| <input checked="" type="checkbox"/> | 3.1.1 | FWC B/C | 1119 | 04/01/2023 | \$ 0.00 | -50 |

6.0.5 TIME PHASED FORECAST SETTINGS


Time phased forecast can be turned on in Settings > Control > **Project Settings**, in the Forecast section of the page.


If the setting is turned off, you will not see the Time phased forecasting option in the Actions drop-down, CBS tab, in the Control > Workspaces page.

6.0.5.2 ENABLE TIME PHASED FORECASTING


Time phasing

Enable time phasing for the following:

Forecasting 



Push Time phased forecast to Live forecast



Time phased forecasting provides the ability to spread forecast remaining values into the projects fiscal periods. Navigate to Project details to set the Start and End dates which define the earliest and latest project periods.

6.0.5.3 COST CURVES




Cost curves determine the proportion of money to be expended in a certain period of time. In the case of Time phased forecasting, the type of cost curve being used determines how forecast will be spread across the monthly forecasting buckets.

In addition, the fiscal calendar also influences how the forecast is spread.

Cost Curves are found in Settings > Control > Schedule, in the Cost Curves section of the page.

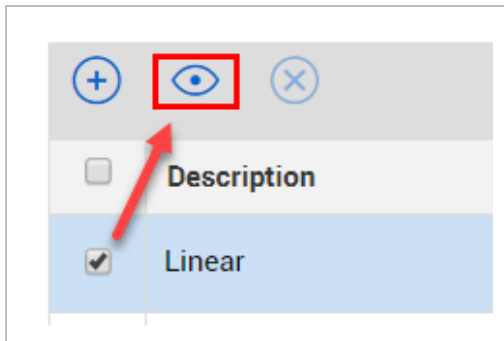
Cost curves

Customize cost curve tables

| <input type="checkbox"/> | Description | Data points |
|--------------------------|--------------|-------------|
| <input type="checkbox"/> | Linear | 20 |
| <input type="checkbox"/> | Front Loaded | 2 |
| <input type="checkbox"/> | Back Loaded | 2 |
| <input type="checkbox"/> | Bell Shaped | 21 |

By selecting a Cost Curve and selecting the View icon, you can view its default distribution.



In this case, the Linear Cost Curve settings displays the cost curve durations and values.

| Description | Number of points |
|-------------|------------------|
| Linear | 20 |

| From duration % | To duration % | Value % |
|-----------------|---------------|---------|
| 0.00% | 5.00% | 5.00% |
| 5.00% | 10.00% | 5.00% |
| 10.00% | 15.00% | 5.00% |
| 15.00% | 20.00% | 5.00% |
| 20.00% | 25.00% | 5.00% |
| Total | | 100.00% |

For example, using a **Linear Cost curve**, with a Start Date of 05/12/2020, the Forecast Remaining cost is \$3,000,000.00, with a Phased forecast remaining cost delta of \$0. This means that you are forecasting to spend \$3,000,000.00, and your Phased Forecast Remaining Delta is zero because your Time Phased Forecast is now fully met (you have fully forecasted \$3,000.000.00).

| CE po | Descript | WE ph: col | Start | Finish | Cost curve | Forecast | Forecast remaining cost | Forecast final cost | Phased forecast remaining cost delta |
|-------|----------|------------|------------|------------|------------|----------|-------------------------|---------------------|--------------------------------------|
| 3 | Concrete | 1071 | 05/12/2020 | 10/26/2020 | Linear | Curr... | \$ 3,000,000.00 | \$ 3,000,000.00 | \$ 0.00 |

Since your scheduled **Start** date is 05/12/2020, the system will start forecasting money on this cost item in May. Based on the Linear Cost curve and the fiscal calendar it will stop forecasting money in October 2020. This is based off your scheduled **Finish** date of 10/26/2020. Over the period of 6 months, your spend is totaling 3,000.000.00.

| May '20 cost | Jun '20 cost | Jul '20 cost | Aug '20 cost | Sep '20 cost | Oct '20 cost |
|---------------|---------------|---------------|---------------|---------------|---------------|
| \$ 339,285.71 | \$ 500,000.00 | \$ 500,000.00 | \$ 625,000.00 | \$ 500,000.00 | \$ 535,714.29 |

6.0.6 TIME PHASED FORECAST PREREQUISITES

There are certain **requirements** for a cost item to be eligible for time phased forecasting.

1. The Schedule data block must have a Start and Finish date.
2. The Schedule data block must have a Cost curve association.

6.0.7 TIME PHASED FORECAST VIEW

You may want to create a View in your Control Workspace similar to this one showing a Time Phased Forecast in comparison with the Live forecast. This shows the hours you are forecasting to spend money (TPF) vs. the Live forecast.

| Tasks | | | | TPF | | | | Live forecast This Month | | | | | | |
|--------------|---------|----------------|------|-----------------|------------|------------|-------------------------|-----------------------------------|-----------------|---------------------|-------------------------------|---------------------|-----------------------------|--------------------------|
| CB pos | Descrip | WBS phase code | | Start | Finish | Cost curve | Forecast remaining cost | * Phased forecast remaining co... | Forecast method | Forecast final cost | Forecast final man hours/Unit | Forecast final Mhrs | Forecast final productiv... | Forecast final unit cost |
| | 1 | Job Overh... | 1002 | 06/11/2019 | 11/25/2019 | Linear | \$ 250,000.00 | (\$ 0.00) | Current esti... | \$ 250,000.00 | 0.00 | 0.00 | 0.00 | \$ 250,000.00 |
| | 2 | Earthwork | 1069 | 11/26/2019 | 05/11/2020 | Linear | \$ 800,000.00 | (\$ 0.00) | Current esti... | \$ 800,000.00 | 1.60 | 16,000.00 | 1.00 | \$ 80.00 |
| | 3 | Concrete | 1071 | 05/12/2020 | 10/26/2020 | Linear | \$ 3,000,000.00 | \$ 320,000.00 | Current esti... | \$ 3,000,000.00 | 6.00 | 60,000.00 | 1.00 | \$ 300.00 |
| | ^ 4 | Structural ... | 1073 | 10/27/2020 | 04/12/2021 | Linear | \$ 1,050,000.00 | (\$ 1,050,000.00) | Rollup | \$ 1,050,000.00 | 21.00 | 21,000.00 | 1.00 | \$ 1,050.00 |
| | | Erect Steel... | 1074 | | | Linear | \$ 800,000.00 | (\$ 800,000.00) | Current esti... | \$ 800,000.00 | 20.00 | 16,000.00 | 1.00 | \$ 1,000.00 |
| | | Erect Steel... | 1005 | | | Linear | \$ 200,000.00 | (\$ 200,000.00) | Current esti... | \$ 200,000.00 | 20.00 | 4,000.00 | 1.00 | \$ 1,000.00 |
| | | Bolted Con... | 1006 | | | Linear | \$ 50,000.00 | (\$ 50,000.00) | Current esti... | \$ 50,000.00 | 0.50 | 1,000.00 | 1.00 | \$ 25.00 |
| | ^ 5 | Materials | 1084 | | | Linear | \$ 1,750,000.00 | (\$ 1,750,000.00) | Rollup | \$ 1,750,000.00 | 0.00 | 0.00 | 0.00 | \$ 1,750,000.00 |
| | | Earthwork ... | 1085 | | | Linear | \$ 250,000.00 | (\$ 250,000.00) | Current esti... | \$ 250,000.00 | 0.00 | 0.00 | 0.00 | \$ 25.00 |
| | | Concrete - ... | 1086 | | | Linear | \$ 1,000,000.00 | (\$ 1,000,000.00) | Current esti... | \$ 1,000,000.00 | 0.00 | 0.00 | 0.00 | \$ 100.00 |
| | | Structure ... | 1087 | | | Linear | \$ 500,000.00 | (\$ 500,000.00) | Current esti... | \$ 500,000.00 | 0.00 | 0.00 | 0.00 | \$ 500.00 |
| Subtotals 11 | | | | \$ 6,850,000.00 | | | | \$ 6,850,000.00 97,000.00 | | | | | | |

The following steps walk you through how to plan Time phased forecasting.

TIME PHASED FORECAST PLANNING

1. To start time phased forecasting, on the CBS tab, select your pre-determined **CBS items** as shown below.

| Tasks | | | Schedule | | | |
|-------------------------------------|--------------|---------------------|-------------------------------------|-------------|-------------------------------------|-----------|
| | CBS position | Description | Scheduled | Schedule ID | Schedule plug days | Plug days |
| <input checked="" type="checkbox"/> | 1 | Job Overhead | <input checked="" type="checkbox"/> | HD 0000003 | <input type="checkbox"/> | 0.00 |
| <input checked="" type="checkbox"/> | 2 | Earthwork | <input checked="" type="checkbox"/> | HD 0000019 | <input type="checkbox"/> | 90.91 |
| <input checked="" type="checkbox"/> | 3 | Concrete | <input checked="" type="checkbox"/> | HD 0000044 | <input type="checkbox"/> | 375.00 |
| <input checked="" type="checkbox"/> | 4 | Structural Steel | <input checked="" type="checkbox"/> | HD 0000046 | <input checked="" type="checkbox"/> | 262.50 |
| <input checked="" type="checkbox"/> | 4.1 | Erect Steel - Heavy | <input type="checkbox"/> | HD 0000064 | <input type="checkbox"/> | 200.00 |
| <input checked="" type="checkbox"/> | 4.2 | Erect Steel - Light | <input type="checkbox"/> | HD 0000105 | <input type="checkbox"/> | 50.00 |

2. Select **Time phased forecasting** from the Actions menu.

Actions

Global forecast method..

Set forecast method

Time phased forecasting

Claim multiple CBS quantities

Budget move and contract adjustment

Unlock budget

Sync

Fiscal calendar settings have been

| Description |
|--------------|
| Job Overhead |
| Earthwork |
| Concrete |

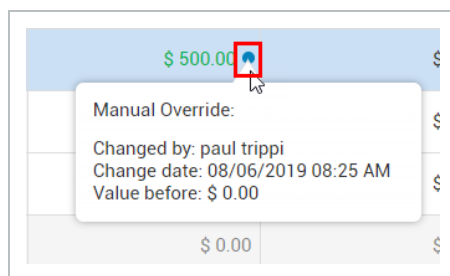
- This action opens the **Time Phased Forecast** window, where you can see the CBS on the left side of the screen, and its associated forecasting monthly allocation cost buckets on the right

| CBS > Time Phased Foreca... | | | | | | | | | | | | Publish | | | | |
|-----------------------------|-------|-------------------|----------|--------|------------|--------|---------|-------------------------|---------------------|---------------------|--------|--------------|--------------|------------------------|--------------|--------------|
| | CE po | Descript | Wl ph co | St | Finish | Co cur | Fo mi | Forecast remaining cost | Forecast final cost | Phased remain delta | Load m | Jul '19 cost | Aug '19 cost | Aug '19 remaining cost | Sep '19 cost | Oct '19 cost |
| <input type="checkbox"/> | 1 | Job Overhead | 1002 | 06/... | 11/25/2019 | Lin... | Curr... | \$ 250,000.00 | \$ 250,000.00 | | | \$ 0.00 | \$ 18,000.00 | \$ 18,000.00 | \$ 62,000.00 | |
| <input type="checkbox"/> | 2 | Earthwork | 1069 | 11/... | 05/11/2020 | Lin... | Curr... | \$ 800,000.00 | \$ 800,000.00 | | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | |
| <input type="checkbox"/> | 3 | Concrete | 1071 | 05/... | 10/26/2020 | Lin... | Curr... | \$ 3,000,000.00 | \$ 3,000,000.00 | | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | |
| <input type="checkbox"/> | 4.1 | Erect Steel - ... | 1074 | | | Lin... | Curr... | \$ 800,000.00 | \$ 800,000.00 | | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | |
| <input type="checkbox"/> | 4.2 | Erect Steel - ... | 1005 | | | Lin... | Curr... | \$ 200,000.00 | \$ 200,000.00 | | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | |
| <input type="checkbox"/> | 4 | Structural St... | 1073 | 10/... | 04/12/2021 | Lin... | Roll... | \$ 1,050,000.00 | \$ 1,050,000.00 | | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | |

3. For one of your cost items, type in **\$500** in one of the monthly bucket fields.

| | Feb '20 cost | Mar '20 cost | Apr '20 cost |
|------------|---------------|---------------|---------------|
| \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| 147,619.05 | \$ 147,619.05 | \$ 138,095.24 | \$ 147,619.05 |
| \$ 0.00 | \$ 0.00 | \$ 500.00 | \$ 0.00 |
| \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

- Notice how the field now has a blue circle next to the \$500.00. If you hover over it, you see the value before, after, and the date the change was made

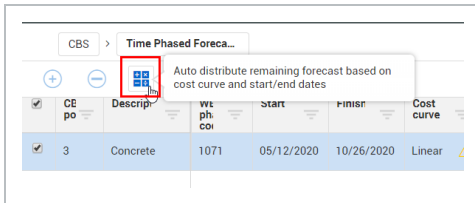


- Because of the manual adjustment, a warning sign appears on the Cost curve for this cost item. The cost curve is not being changed to manual, but the system records that this cost item is no longer linear, because it has been overridden


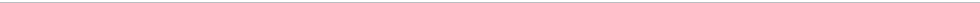

| CE po | Descript | Wl ph co | St | Finish | Cost curve |
|-------|--------------|----------|--------|------------|------------|
| 1 | Job Overhead | 1002 | 06/... | 11/25/2019 | Linear |
| 2 | Earthwork | 1069 | 11/... | 05/11/2020 | Linear |
| 3 | Concrete | 1071 | 05/... | 10/26/2020 | Linear |

- The override made to this cost item is no longer needed, and you now decide you want to **revert** to its original setting, and have the system Auto distribute the forecast

4. Make sure your cost item is checked, then select the **Auto distribute** icon.



- This action will revert the time phase values back to the same numbers as they were prior to any manual adjustments, plus:
 - a. It will erase any manual adjustments
 - b. It will distribute the remaining forecast values based on cost curve and start/end dates of that specific cost item, as determined by the fiscal calendar
- The result of selecting the Auto distribute icon starts its forecasting spread on the cost item's **Start** date of 05/12/20, and will **Finish** its schedule on 10/26/20

|  |  | | | | | | | | | |
|---|--|------------|------------|--|--------------------|------------------------------|--------------|---------------|---------------|---------------|
| Descript | WBS phase code | Start | Finist | Cost curve | Forecast remaining | Phased forecast remaining... | Aug '20 cost | Sep '20 cost | Oct '20 cost | |
| Concrete | 1071 | 05/12/2020 | 10/26/2020 | Linear  | Curr... | \$ 3,000,00... | \$ 0.00 | \$ 553,571.43 | \$ 553,571.43 | \$ 535,714.29 |

NOTE

It is important to remember the purpose of utilizing Time Phase Forecasting is to see how you are forecasting to spend money over a period of time. The expectation is to get the forecast adjusted to where it should be, and update costs as needed.

6.0.8 TIME PHASED FORECAST MICROSOFT EXCEL IMPORT

You can import a Microsoft Excel file to update the values in Time Phased Forecast by selecting **Import** on the Time Phased Forecast page to download the time phased template. To import time phased forecast values, you can download a template as shown in number 2 in the image below to use as a guide to import your new time phased forecast values. The same format provided in the download template is required for the import to be successful.

CBS > Time phased forecasting

Nov 2023 - May 2024

December 2023

Remaining m... Qty Remaining qty Cost

0.00 0.00 \$ 0.

0.00 0.00 \$ 296.

0.00 0.00 \$ 296.

0.00 0.00 \$ 0.

0.00 0.00 \$ 0.

Import time phased values

Import from Excel (.xlsx, .xls) or Comma separated value (.csv)

Drag and drop the file here or browse

Browse

Download time phased template

Template will include only the columns and rows currently in your view.

Do not change column header names. Only populated fields will be imported. Blanks will be ignored and proportional adjustments will not occur.

Cancel Import

v23.12 INEIGHT

The Excel file includes the cost items that are in your current Time Phased Forecast view. Columns in orange are required, columns in yellow are optional to change, and columns in grey are ignored and cannot be changed. When you are finished making your Excel changes, you can then import the Excel file into Control to update the Time Phased Forecast with your new values. Column header names are ignored if changed.

| A | B | C | D | E | L | M | N | O |
|----------------|---|----------------|----------|-----------|----------------------|----------------------|----------|----------|
| 1 Orange | Required | | | | | | | |
| 2 Yellow | Optional | | | | | | | |
| 3 Gray | Ignored | | | | | | | |
| 4 | | | | | | | | |
| 5 CBS position | Description | WBS phase code | Start | Finish | Phased forecast rema | Phased forecast rema | November | November |
| 6 1 | Financial Results Analysis | 1000 | | | 0 | -1 | 0 | 0 |
| 7 2 | Misc. Rev Internal | 1103 | 1/1/2024 | 3/31/2024 | 0 | -0.000956353 | 0 | 0 |
| 8 2.3 | Directs | 1001 | 1/1/2024 | 3/31/2024 | 56 | 9.1E-09 | 0 | 0 |
| 9 2.3.1.1.4 | Type D Excavation LD/PL/CP to Embankm | 1007 | | | 0 | 0 | 0 | 0 |
| 10 2.3.1.1.5 | Road Subgrade Prep/Place/Finish (1600 m | 1008 | | | 0 | 0 | 0 | 0 |
| 11 2.3.1.1.8 | Sump Excavation & Backfill (CONDITIONA | 1011 | | | 0 | 0 | 0 | 0 |

Updates are made when you select **Publish**. Excel imports are shown in the Import History Audit Log, where you can download the Excel file to see a list of errors if the process fails.

TIME PHASED FORECAST MICROSOFT EXCEL IMPORT

1. To start time phased forecasting, on the CBS tab, select your pre-determined **CBS items** as shown below.

| Tasks | | | Task details | | |
|-------------------------------------|--------------|-----------------------|--------------------|-----|-----------------------|
| <input type="checkbox"/> | CBS position | Description | Forecast (T/O) qty | UoM | Actual MHrs (to date) |
| <input checked="" type="checkbox"/> | 1 | Financial Results ... | 1.00 | PLS | 0.00 |
| <input checked="" type="checkbox"/> | 2 | Misc. Rev Internal | 1.00 | PLS | 7,030.50 |
| <input checked="" type="checkbox"/> | 2.1 | Misc. Rev Internal | 1.00 | PLS | 0.00 |
| <input checked="" type="checkbox"/> | 2.3 | Directs | 1.00 | PLS | 3,821.00 |
| <input checked="" type="checkbox"/> | 2.3.1 | Direct Labour | 1.00 | PLS | 3,067.00 |

2. Select **Time phased forecasting** from the Actions menu.

Actions

Global forecast method..

Set forecast method

Time phased forecasting

Claim multiple CBS quantities

Budget move and contract adjustment

Unlock budget

Sync

Fiscal calendar settings have been

| Description |
|--------------|
| Job Overhead |
| Earthwork |
| Concrete |

3. Select the **Import** icon.

CBS > Time phased forecasting

| CBS position | Description | WBS phase code |
|--------------|----------------------------|----------------|
| 1 | Financial Results Analysis | 1000 |
| 2 | Misc. Rev Internal | 1103 |
| 2.1 | Misc. Rev Internal | 1104 |
| 2.3 | DIRECTS | 1001 |
| 2.3.1 | Direct Labour | 1002 |

Dec 2023 - Jun 2024

February 2024

| Mhrs | Qty | Cost |
|----------|-------|------|
| \$ 0.00 | 0.00 | 0.00 |
| \$ 13.63 | 10.00 | 0.00 |
| \$ 0.00 | 0.00 | 0.00 |
| \$ 13.63 | 10.00 | 0.00 |
| \$ 13.63 | 10.00 | 0.00 |

4. Click **Download time phased template**.

Import time phased values

Import from Excel (.xlsx, .xls) or Comma separated value (.csv)

Drag and drop the file here
or browse

[Browse](#)

[Download time phased template](#)

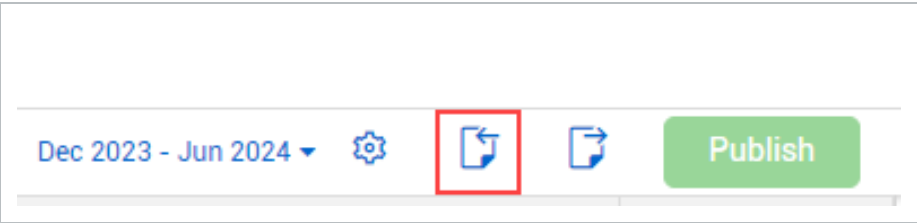
ⓘ Template will include only the columns and rows currently in your view.
 ⓘ Do not change column header names. Only populated fields will be imported. Blanks will be ignored and proportional adjustments will not occur.

[Cancel](#) [Import](#)

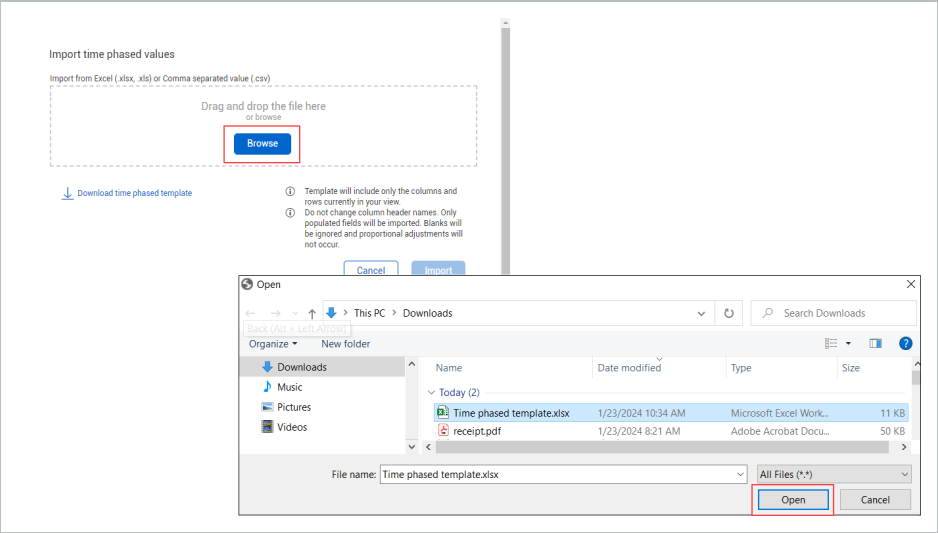
5. Adjustment any of the fields under the **yellow columns**. For example, for CBS position 2.3, change the February 2024 Cost from 13.62637329 to 9, then **save** your changes.

| | | | | | | | | | |
|----|--------------|----------------------------|------------|--------------------|--------------------|-------------------|-----------------|-----------------|----------------|
| T1 | | | | | | | | | |
| | A | B | S | T | U | V | W | X | Y |
| 1 | Orange | Required | | | | | | | |
| 2 | Yellow | Optional | | | | | | | |
| 3 | Gray | Ignored | | | | | | | |
| 4 | | | | | | | | | |
| 5 | CBS position | Description | January 20 | February 2024 Cost | February 2024 Mhrs | February 2024 Qty | March 2024 Cost | March 2024 Mhrs | March 2024 Qty |
| 6 | 1 | Financial Results Analysis | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 7 | 2 | Misc. Rev Internal | 0 | 13.62637329 | 10 | 0.000614656 | 12.74725243 | 10 | 0.000575001 |
| 8 | 2.1 | Misc. Rev Internal | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | 2.3 | Directs | 0.001413 | 13.62637329 | 10 | 0.001990392 | 12.74725243 | 10 | 0.00186198 |
| 10 | 2.3.1 | Direct Labour | 0 | 13.62637329 | 10 | 0 | 12.74725243 | 10 | 0 |
| | CBS position | Description | January 20 | February 2024 Cost | | | | | |
| | 1 | Financial Results Analysis | 0 | 0 | | | | | |
| | 2 | Misc. Rev Internal | 0 | 13.62637329 | | | | | |
| | 2.1 | Misc. Rev Internal | 0 | 0 | | | | | |
| | 2.3 | Directs | 0.001413 | | | | | | |
| | 2.3.1 | Direct Labour | 0 | 13.62637329 | | | | | |

6. Select the **Import** icon again.



7. Select **Browse**, and then navigate to the Excel file you just saved, then select **Open**.



8. Select **Import**.

Import time phased values - Time phased template.xlsx

Import from Excel (.xlsx, .xls) or Comma separated value (.csv)

Drag and drop the file here
or browse

Browse

[Download time phased template](#)

- ① Template will include only the columns and rows currently in your view.
- ① Do not change column header names. Only populated fields will be imported. Blanks will be ignored and proportional adjustments will not occur.

Cancel Import

6.0.9 COLUMN CHOOSER

When you open the Time phase forecast, a column chooser has been added to the grid.

Column options

Available columns

Search...

- Account code
- Actual finish
- Actual start
- Allow as-built
- As-built lock
- CBS contribute quantity
- CBS tag 1
- CBS tag 10
- CBS tag 11
- CBS tag 12

Selected columns

Search...

- CBS position
- Description
- WBS phase code
- Start
- Finish
- Forecast method
- Cost curve
- Forecast remaining cost
- Forecast remaining man hour
- Qty remaining

Cancel Save

After you choose which columns to show, the left side of the grid updates with your selection.

On the right of the grid, you can also adjust your view for each month's Cost, Man hours, and Quantity. This can be done using the drop down next to the month and deselecting the options you do not want to see on your grid.

**NOTE**

If you select cost from past dates, the data is read only.

6.0.10 AUDIT LOG

All changes made within TPF are captured in the Audit log within Control Workspaces. The Audit log captures changes based on any changes made to a forecasted CBS item.

In the example, it shows that a forecasting value was changed on 08/13/19 for Audit ID 232. The forecasting value had been changed from 89.36 to 100.00 for the Aug '10 remaining cost time period.

| CBS | Audit ID | Data type | Item type | Description | WBS | Attribute | Change by | Changed date | Value before | Value after |
|----------------|----------|----------------------|---------------|------------------|------|------------------------|-------------|-----------------|--------------|---------------|
| ACS | 232 | Time phased forecast | Cost item | Job Overhead | 1002 | Aug '19 remaining cost | Paul trippi | 08/13/2019 0... | 89.36 | 100.00 |
| Pay items | 225 | Current Estimate | Estimate r... | C01.04-Concr... | | Resource employed | Paul trippi | 08/13/2019 1... | | Resource e... |
| Integration | 224 | Current Estimate | Estimate r... | E.01.05-Earth... | | Resource employed | Paul trippi | 08/13/2019 1... | | Resource e... |
| Import history | 223 | Current Estimate | Estimate r... | C01.04-Concr... | | Resource employed | Paul trippi | 08/13/2019 1... | | Resource e... |

CHAPTER 6 – PUSH TO LIVE FORECASTS

As mentioned above, the Live Forecast is the official forecast used for financial reporting and shared with all members of the project.

You can push forecasts entered in the Forecast data block to the Live Forecast either individually or by selection. This allows you to send only the items that you choose from your forecast to the Live Forecast.

The Live Forecast can only be updated if the user is assigned the appropriate role with the associated permissions. Project Admin or Power User can edit the Live Forecast directly.

NOTE

Forecast changes made in the Forecast data block WILL NOT be pushed to the Live Forecast without an additional action detailed in the Step by Step below.

Changes made to your Forecast are only seen by you, unless you share them with someone else (see topic 9.4 Forecast Management) or update them to the Live Forecast.

PUSH LIVE FORECAST BY SELECTION IN THE CBS TAB

1. From the CBS tab with the Forecast data block in the view, select a group of cost items, by clicking the row header check boxes.
2. Click on the **drop-down arrow** in the center of the Forecast data block.
3. Select **Push to Live Forecast**.

NOTE

The Push to Live Forecast option is disabled until you select one or more cost items.

4. After review, select **Yes** and your forecast values will push to the Live Forecast.

6.0.1 TIME PHASED FORECAST PUSH TO LIVE

The time phased forecast feature lets you make edits in your time phased forecast. You are then able to push those edits to your live forecast.

You can edit your total forecast remaining cost and forecast remaining hour values in the Time phased forecast window. It would then override your forecast remaining cost and your forecast remaining man hour if there is a change.

The Time phasing Forecasting option must be enabled first in order to have the Push Time phased forecast to Live option available to be enabled. Enabling only the Forecasting option does not automatically enable both.

Time phasing

Enable time phasing for the following:

Forecasting ⓘ

☒
☐

Budget ⓘ

☒

Push Time phased forecast to Live forecast

☒
☐

Forecast

% Complete value at which delta from straight line calculation utilizes average performance

The Time phasing section can be located in the Project Settings of Control under the Project tracking tab.

When you have enabled both options under the Time phasing section click save. Then go back to the CBS tab.

Follow these step by steps to use a time phased forecast push to live.

TIME PHASED FORECAST PUSH TO LIVE FORECAST

1. Select cost items from the CBS tab with a **Forecast remaining cost** to use in the push to live feature.

NOTE

Make sure the cost items you selected have start and end dates. Otherwise you cannot edit them in the Time phased forecasting window.

2. From Control's CBS tab, select the Actions tab. Then select the **Time phased forecasting** option.
3. In the third data block where it has the Month and Year, scroll to the Remaining cost. Now move the scroll bar over to January of 2021.

| | | | | | | | | | | | |
|-------------------------------|--------------|---------------------|----------------------|--------------------------|---------------|---------------------------|----------------|------|----------------|------|---------------|
| CBS > Time phased forecasting | | | | | | | | | | | |
| <input type="checkbox"/> | CBS position | Description | Forecast remain-cost | Forecast remain-man hour | Qty remaining | Phased forecast remaining | December 2020 | | | | |
| <input type="checkbox"/> | 1.2 | Fiber optic cable-1 | \$ 5,000.00 | 0.00 | 10,000.00 | | Remaining c... | Mhrs | Remaining m... | Qty | Remaining qty |
| <input type="checkbox"/> | 1.4 | CCTV devices | \$ 1,500.00 | 0.00 | 6.00 | | \$ 5,000.00 | 0.00 | 0.00 | 0.00 | 10,000.00 |
| | | | | | | | \$ 318.77 | 0.00 | 0.00 | 0.00 | 1.28 |

| January 2021 | | | | | | | February |
|---------------|-----------|------|------|-----------|------|--|----------|
| Remaining qty | Cost | Mhrs | Qty | Cost | Mhrs | | |
| 10,000.00 | | | 0.00 | 0.00 | | | \$ 0.00 |
| 1.28 | \$ 366.00 | 0.00 | 1.46 | \$ 402.01 | | | |

4. If you believe the line item could take up more time and money, you can adjust the Cost and Man hours for the following month. These changes will then be added to the phased forecast remaining columns once you push to live.

| January 2021 | | | | | | | February |
|---------------|-----------|------|------|-----------|------|--|----------|
| Remaining qty | Cost | Mhrs | Qty | Cost | Mhrs | | |
| 10,000.00 | | | 0.00 | 0.00 | | | \$ 0.00 |
| 1.28 | \$ 366.00 | 0.00 | 1.46 | \$ 402.01 | | | |


NOTE

Quantity will show as changed with a delta next to the column. Currently, you cannot push quantity updates to live.

5. When you have made all the changes you need, select the cost items you want to push to live. You can either select one or all.

| | | | | | | | | | | | |
|-------------------------------------|--------------|---------------------|----------------------|--------------------------|---------------|---------------------------|----------------|------|----------------|------|---------------|
| CBS > Time phased forecasting | | | | | | | | | | | |
| <input type="checkbox"/> | CBS position | Description | Forecast remain-cost | Forecast remain-man hour | Qty remaining | Phased forecast remaining | January 2021 | | | | |
| <input type="checkbox"/> | 1.2 | Fiber optic cable-1 | \$ 5,000.00 | 0.00 | 10,000.00 | | Remaining c... | Mhrs | Remaining m... | Qty | Remaining qty |
| <input checked="" type="checkbox"/> | 1.4 | CCTV devices | \$ 1,500.00 | 0.00 | 6.00 | | \$ 5,000.00 | 0.00 | 0.00 | 0.00 | 10,000.00 |
| | | | | | | | \$ 318.77 | 0.00 | 0.00 | 0.00 | 1.28 |

6. Dialog appears asking if you want to push these values to the Live forecast. Select **Yes** to continue. The Cost and Man hours difference shows in the orange columns.

 Push these values to the Live forecast?
Please review the changes below, and then click 'Yes' if you wish to push these values to the live forecast.

| CBS | Description | Current live forecast values | | Time phased forecast values | | Cost difference | MHrs difference |
|-----|---------------------|------------------------------|----------------------------------|-----------------------------|-----------------------------|-----------------|-----------------|
| | | Live forecast remaining cost | Live forecast remaining manhours | Forecast remaining cost | Forecast remaining manhours | | |
| 1.2 | Fiber optic cable-1 | \$ 5,000.00 | 0.00 | \$ 6,000.00 | 100.00 | \$ 1,000.00 | 100.00 |
| 1.4 | CCTV devices | \$ 1,500.00 | 0.00 | \$ 1,200.00 | 0.00 | (\$ 300.00) | 0.00 |

7. When this is pushed to live, your Forecast remaining cost and Forecast remaining man hour should update in the Live forecast. Your Forecast Method will then change to **Manual ETC**. Manual ETC will have a green dot indicator that states it was pushed from Time phased forecast when you hover over the item.

| Live forecast | | | | | | Live forecast 12/09/2020 |
|---------------------------|-------------------------------|------------------------------------|-----------------------------------|--------------------------------|-------------------|---|
| ★ Forecast remaining cost | ★ Forecast remaining man hour | ★ Forecast remaining man hour/Unit | ★ Forecast remaining productivity | ★ Forecast remaining unit cost | ★ Forecast method | |
| \$ 36,975.68 | 500.00 | 500.00 | 0.80 | \$ 36,975.68 | Rollup | |
| \$ 25,000.00 | 300.00 | 0.03 | 1.00 | \$ 2.50 | Current estimate | |
| \$ 6,000.00 | 100.00 | 0.01 | 0.01 | \$ 0.25 | Current estimate | Updated by push from Time phased forecast |
| \$ 5,000.00 | 100.00 | 0.01 | 1.00 | \$ 0.50 | Manual (ETC) | |
| \$ 975.68 | 0.00 | 0.00 | 0.00 | \$ 162.61 | | |

The Forecast remaining cost and Forecast remaining man hour columns will have an orange wedge indicator that shows you which values have been updated manually changed when you hover over the indicator.

| Tasks | | | | Live forecast | | | | | | Live forecast 12/09/2020 |
|----------------|---------------------|----------------|----------------------|---------------------------|-------------------------------|------------------------------------|-----------------------------------|--------------------------------|-------------------|--------------------------|
| ☐ CBS position | Description | WBS phase code | Total committed cost | ★ Forecast remaining cost | ★ Forecast remaining man hour | ★ Forecast remaining man hour/Unit | ★ Forecast remaining productivity | ★ Forecast remaining unit cost | ★ Forecast method | |
| ☐ 1 | Electrical devices | 1000 | 500.00 | \$ 5,000.00 | | | | | | |
| ☐ 1.1 | Install conduit | 1002 | 250.00 | \$ 150.00 | | | | | | |
| ☐ 1.2 | Fiber optic cable-1 | 1001.1 | 250.00 | \$ 150.00 | \$ 6,000.00 | 100.00 | 0.01 | \$ 0.50 | Manual (ETC) | |
| ☐ 1.3 | | | | | | | | | | |
| ☐ 1.4 | | | | | | | | | | |
| ☐ 1.5 | | | | | | | | | | |
| ☐ 1.6 | | | | | | | | | | |
| ☐ 2 | | | | | | | | | | |

Most recent change to this item:

| CBS | Column | Previous value | New value | Previous Forecast final | Forecast final cost new | Previous Forecast final MH | New Forecast final MH | Changed by | Changed date |
|---------------------------|------------------------|------------------|------------------|-------------------------|-------------------------|----------------------------|-----------------------|-----------------|--------------|
| 1.2 - Fiber optic cable-1 | ForecastRemainingMa... | 100.000000000000 | 200.000000000000 | \$ 6,000.00 | \$ 7,000.00 | 100.00 | 200.00 | Danielle Shovel | 12/9/2020 |

CHAPTER 6 – FISCAL CALENDAR

InEight Control has built in settings that automatically set the actuals in the forecasting-related data blocks to match your company's month end calendar. This allows you to hold the actuals at a certain

cutoff date to allow for forecasting to be done based on month end actuals.

Steel Structure Job (105091) Settings

PROJECT HOME PROJECT INFORMATION FISCAL CALENDAR FUEL TYPES CUSTOM LIST FIELDS

Cancel Save

* Week ending day Tuesday

* Financial year start month April

Period end

* Month end day 15

Last weekday

* Financial period closing day Same as Month End Day

Month end plus days

* Financial period closing time 23:30

* Closing time zone (UTC-06:00) Central Time (US and Canada)

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These fiscal calendar settings include a suspended period for you to finalize your forecast numbers without incurring any new actuals.

Period end

* Month end day Last day of the month

Last weekday Select one

* Financial period closing day Same as Month End Plus Days

* Month end plus days 8

* Financial period closing time 23:30

* Closing time zone (UTC-06:00) Central Time (US and Canada)

During this suspended period, your numbers are “frozen”, allowing you to finish month end reporting without worrying about the numbers changing. Any new actuals accumulated during the suspended period will populate once the suspended period is over.

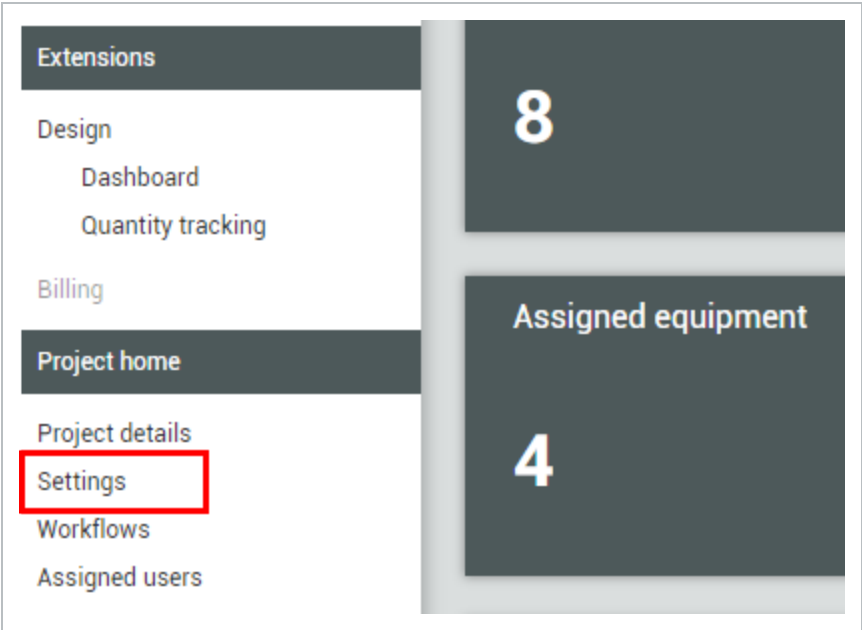
You will note that the Live forecast data block contains a label in its header called “This Month”.

| | | |
|---------------------------------|---------------------|-------------------|
| ★ Live forecast | This Month | |
| Forecast Final Labor Total Cost | Forecast Final Cost | Forecast Final MH |
| \$250,000.00 | \$250,000.00 | |
| \$400,000.00 | \$400,000.00 | 8.00 |

This label reminds you that the values in the live forecast data block are only for the current month, as defined in the Organization Settings under Fiscal Calendar (see *Lesson 3 – Project Setup*).

VIEW FISCAL CALENDAR SETTINGS

1. From the Project home page of the **your job**, select **Settings** from the left side menu.



- You can also access settings from the first-level menu or by clicking on the View project settings tile on the home page
2. On the resulting Project Settings page, click on the **Fiscal Calendar** tab.

| | | | | | |
|----------------|-----------|------------------------|------------|--------------|--------------|
| GLOBAL OPTIONS | HOME PAGE | FISCAL CALENDAR | FUEL TYPES | CUSTOM LISTS | MENU OPTIONS |
|----------------|-----------|------------------------|------------|--------------|--------------|




| | |
|---|---|
| <div>• Week ending day</div> <div>Saturday</div> <div>⌵</div> | <div>• Financial year start month</div> <div>January</div> <div>⌵</div> |
|---|---|

In this section, you can define the following fields (if you have the appropriate access):

| Field Name | Purpose |
|-------------------------------|--|
| Week ending day | Determines which day of the week is the last day. |
| Financial year start month | Allows the financial year-end to be different from the calendar year-end. |
| Month end day | Determines what the last day of the month is. |
| Last weekday | Sets the day for the above setting. |
| Financial period closing day | Allows you to set the financial period to end on the same day or allow a period to close out the finances. |
| Month end plus days | Sets how many closing days. |
| Financial period closing time | Establishes the time when the Forecast data block actuals will be reset to the next period. |
| Closing time zone | Sets the closing time zone. |

6.0.1 FORECAST EQUATION UPDATES TO CURRENT

The actual numbers claimed are periodically synced. The date of actuals which apply to your forecast can be seen in the Data Block Header.

| Forecast Created from Live forec...  | | | | | |  07/09/2018  |
|---|---------------------|-------------------------------|-------------------------------|--------------------------|-----------------|--|
| Forecast final cost | Forecast final MHrs | Forecast final man hours/Unit | Forecast final productivit... | Forecast final unit cost | Forecast method | |

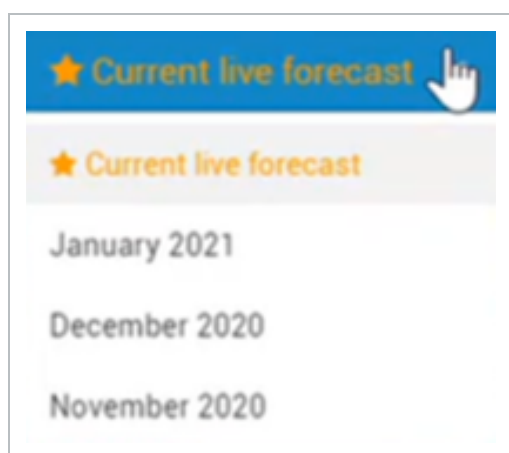
NOTE

The fiscal settings in Platform determine when actuals for the period will be synced.

CHAPTER 6 – LIVE FORECAST SNAPSHOTS


When you sync your live forecast, Control creates a snapshot. After that sync has been completed, everything in your live forecast is captured and saved in a snapshot for that month. As soon as the month ends, the most recently synced items in the live forecast, is your snapshot for the month.

In the live forecast column, select the drop-down menu to show the live forecast snapshots. The snapshots saved are labeled with the month and year they were created.

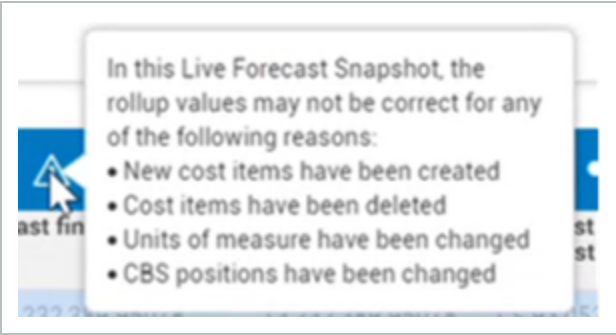


You can view the current live forecast for the month. For existing projects, cannot snapshot previous months.

For example, if you select a previous snapshot such as January, it loads into your live forecast. You can put in any columns you want to organize the view. If you do have a column in your view that is not a live forecast type (such as open/remaining committed cost and total committed cost), those columns show as blank and disabled. This occurs because the snapshots only capture the live forecast values.

| CC January 2021  | | |
|---|----------------------|------------------|
| Open committed cost | Total committed cost | Forecast method |
| | | Rollup |
| | | Rollup |
| | | Rollup |
| | | Manual (ETC) |
| | | Manual (ETC) |
| | | Manual (ETC) |
| | | Current estimate |
| | | Manual (ETC) |

All columns from past live forecast snapshots are read-only. You cannot change anything that has been calculated in the past snapshots. A warning icon with a tool tip also appears in the column header. Hover over it to show the warnings.



When you load an old snapshot, the CBS hierarchy does not rearrange to show how the live forecast previously looked when that snapshot was taken.

The Forecast cost G/L change column shows you what has changed between last month and this month for your gain loss values.

Formula description: Forecast cost gain or loss change = Current CB forecast final cost G/L - Previous month CB forecast final cost G/L

| | ★ Forecast cost G/L change | ★ Forecast cost |
|-------|----------------------------|-----------------|
| 87... | (\$ 10,000.0000000... | \$ 10, |
| 30... | (\$ 10,000.0000000... | \$ 9,9 |

The Forecast cost change column calculates the difference between the Forecast final cost and the previous month's Live Forecast final cost.

Formula description: Forecast cost change = Current Live Forecast final cost - Previous month Live Forecast final cost

| | ★ Forecast cost change | ★ Forecast method |
|--------|------------------------|-------------------|
| 100... | \$ 10,000.000000041... | Rollup |
| 100... | \$ 9,999.9999999690... | Rollup |

Green coloring for the numbers indicates an increase in forecast cost change between the two months.

EXERCISE 6.1 – FORECASTING

Now that you have covered all the functions of forecasting, it is time to perform your own forecasts. Utilizing the forecasting methods you have learned, practice creating forecasts as indicated below. You can use your own project (if available) or the training project used in this lesson.

1. From the Control main page, select the **CBS** tab.

2. Change to a view that contains the **Forecasts** data block.

3. Save a new forecast.

4. Update the forecasts of cost items of your choice to practice using each of the following Forecast Methods:
 - Current Budget
 - Average Performance
 - Manual EAC (based on costs or hours)_____
5. Send your forecast to a person.

6. Note the differences.

Congratulations, you have completed this exercise!

REVIEW

1. How is the Current Budget Forecast Method calculated?
 - a. Forecast Total Cost = Current Budget
 - b. Forecast Total Cost = As-built Total Cost + (Current Budget Unit Rate * Current Budget Remaining Qty)
 - c. Forecast Total Cost = As-built Total Cost + (Current Budget Unit Rate * Current Estimate Remaining Quantity)

2. How does the Live Forecast receive updates?
 - a. They happen automatically
 - b. Push to live forecast from the Forecast data block title bar drop-down
 - c. Push to Live Forecast from the Actions drop-down menu
 - d. Viewed in the CBS change log

3. Who can a forecast be sent to?
 - a. Project Manager
 - b. Project Engineer
 - c. It automatically goes to everyone
 - d. Anyone you add to the list

4. Which data block do you use to compare forecasts?
 - a. Forecast
 - b. Forecast Delta
 - c. Forecast Comparison
 - d. Live Forecast

5. The fiscal calendar settings for Live Forecast are located under:

- a. Organizational Breakdown Structure
 - b. Account code structure
 - c. Operational resources
 - d. Project settings
-

SUMMARY

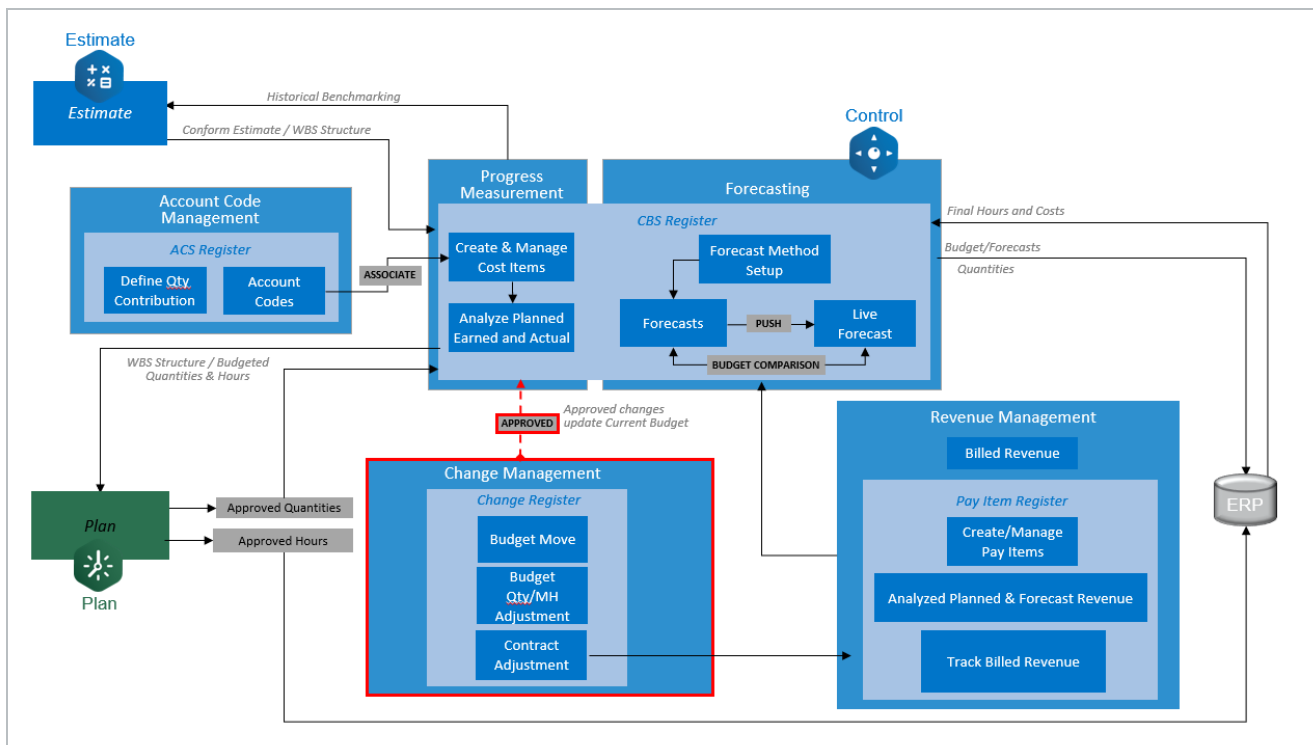
As a result of this lesson, you can:

- Differentiate and utilize InEight forecasting methods
- Manage forecasts
- Manage Time Phased Forecasting
- Push to Live Forecast
- View the Fiscal Calendar settings

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CHAPTER 7 – CHANGE MANAGEMENT

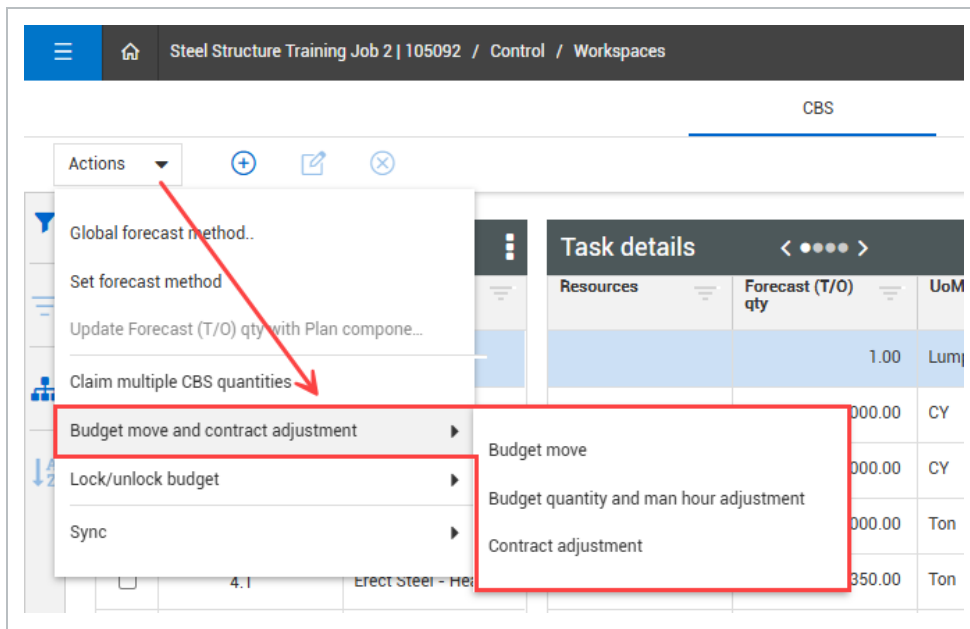
CHAPTER 7 – INEIGHT CONTROL WORKFLOW - CHANGE MANAGEMENT



CHAPTER 7 – CHANGE MANAGEMENT OVERVIEW

During any phase of a project there are multiple ways you can manage changes to items such as quantities, design, schedule, and cost. Within Control, you can manage changes to quantities, man-hours, and costs through a controlled approval process. You can make records of items such as budget moves, quantity and man-hour adjustments, and change orders by filling out forms.

You can access these change management forms from the Actions menu.



After you fill out and save the applicable changes, Control stores these changes in the Change Register tab, where the project budget is managed.

| ACS PAY ITEMS CHANGE REGISTER AUDIT LOG | | | | | | | | | | | | |
|---|-------------------------------|----------|----------------|------------|-------------------|-----------------|-------|--------------|----------------------|--------------------|-------------------------|----------|
| ID | Description | CCO | Cre... date | Issue # | Last cha... by | Last changed on | Notes | Status | Total budget cost | Total budget MH | Total contract price | Type |
| 22.0 | Contingency Draw - Buildi... | CD-001 | 01/12/2023 | | AJ Waters | 03/19/2023 | | Approved | \$ 0.00 | 0.00 | \$ 0.00 | Budget r |
| 21.0 | Fiber Office Connections | CO220831 | 08/31/2022 | 13 | AJ Waters | 08/31/2022 | | CCO-Approved | \$ 55,000.00 | 0.00 | \$ 57,200.00 | Contract |
| 20.0 | New Cabinet Hardware | CCO-0015 | 09/21/2020 | 9 | Jordan Ca... | 10/22/2020 | | CCO-Approved | \$ 3,500.00 | 0.00 | \$ 3,500.00 | Contract |
| 19.0 | Flooding and material was... | CCO-004 | 02/10/2020 | 6 | Austin Wil... | 03/10/2023 | | CCO-Approved | \$ 0.00 | 0.00 | \$ 10,000.00 | Contract |
| 18.0 | Extra Surveying | 0019A | 02/10/2020 | 19-1 | Chris Hohl... | 04/21/2021 | | Draft | \$ 15,000.00 | 0.00 | \$ 19,500.00 | Contract |
| 17.0 | Increase in Scope | 002 | 01/18/2020 | 002 | Mike Paul | 02/05/2020 | | Approved | \$ 22,000.00 | 0.00 | \$ 50,000.00 | Contract |
| 16.0 | Change in Scope | CD1 | 01/18/2020 | 001 | Paul Benni... | 04/24/2020 | | Approved | \$ 0.00 | 0.00 | \$ 0.00 | Budget Q |
| 15.0 | | | 11/13/2019 | | John Upton | 04/12/2022 | | Approved | \$ 0.00 | 0.00 | \$ 0.00 | Budget r |
| 14.0 | traslado de dinero dentro ... | | 10/21/2019 | 011 | Elia Burgu... | 03/19/2023 | | Pending | \$ 0.00 | 50.00 | \$ 0.00 | Budget r |
| 13.0 | Traslado de dinero dentro ... | | 09/16/2019 | 013 | Elia Burgu... | 03/19/2023 | | Pending | \$ 0.00 | 0.00 | \$ 0.00 | Budget r |
| 12.0 | | CCO0002 | 09/15/2019 | 003 | Mike Paul | 03/19/2023 | | Pending | \$ 0.00 | 0.00 | \$ 0.00 | Budget r |
| 11.1 | Flood control on haul road | CCO-0002 | 03/22/2021 | 4 | Chris Hohl... | 03/22/2021 | | CCO-Draft | \$ 9,000.00 | 0.00 | \$ 0.00 | Contract |
| Subtotals | | | | | | | | | \$ 12,115,309... | 64,222.00 | \$ 290,200.00 | |

In the Change Register you can review each change individually and approve changes as needed. When a change is approved, it updates the current budget values in the CBS and is given a status of *Approved* in the Change Register. Otherwise, the change is only documented in the Change Register with a status of *Draft* or *Pending* and has no effect on the current budget.

NOTE To manage changes, you must have applicable permissions.

The table below provides a brief description of the three types of changes you can record in Control.

| Change type | Description |
|--|--|
| Budget move | Reallocate costs from one area of the budget to another. When making a budget move, the result must be net zero, neither adding nor removing costs from the budget. The move can include reallocation of man-hours and quantities as well. |
| Budget quantity and man hour adjustment | Make modifications to budgeted man-hours and/or quantities without making changes to overall budgeted costs. |
| Contract adjustment | Make a change to the scope of your budget and contract, via the addition or revision of cost items and pay items, which results in a change to the project's budgeted costs and pricing. Also commonly referred to as a change order. |

NOTE When you perform a budget move, contract adjustment, or budget quantity and man-hour adjustment, you can select a maximum total of 250 cost items or 100 pay items. When you exceed the maximum, the Budget move and contract adjustment option in the Actions menu drop-down becomes unavailable. This improves the speed, reliability, and performance of the change order.

7.0.1 MANAGING CHANGES USING THE INEIGHT SUITE

For a more holistic approach to managing changes within your organization, your company might choose to follow a change management process that integrates with other InEight applications that can include:

- InEight Change
- InEight Document
- InEight Schedule
- InEight Progress

For more information on how to use the InEight suite of applications to manage change orders, see [Change Order Management](#).

7.0.2 INEIGHT CHANGE INTEGRATION WITH CONTROL

The InEight Change application is designed to manage project changes through a detailed, organized process, tracking changes from issue to executed change order. When executed in InEight Change,

change orders can automatically become contract adjustments within InEight Control via an integration between the two applications. If your company is using both Change and Control for managing change orders, consult the Contract Adjustment (with InEight Change) topic for more information on this process.

Budget moves can also be initiated in InEight Change and integrate with InEight Control to show up in the Control Change Register. For more information about managing budget moves using Change and Control, see [Budget Moves](#) in InEight Change.

RELEVANT LINKS

Integrated Solutions - Approve contract adjustment

Integrated Solutions - Execute the change order

Integrated Solutions - Change order management

Video - Contract adjustment

Video - Assigning pay items to cost items

Link 5

CHAPTER 7 – ASSOCIATED BUDGET MOVE

During a project, you might need to move costs from one area of the budget to another to account for project changes, without changing the total budget amount. In Control, you can manage budget moves via a controlled approval process.

To launch a budget move in Control, from the CBS tab of the Workspaces module, select Actions > Budget move & contract adjustment > **Budget move**. This opens a Budget move record with the option to fill out the record following one of two workflows.

Change register > Budget Move

1 Details

2 Select from & to items

3 Define relationships

4 Assign amounts

5 Adjust cost categories

6 Summary

Choose your Budget move workflow

☒ Associated
Define budget moves with a From and To process to provide ultimate traceability of budget moves.

☐ Non-Associated
Define budget moves freely to provide the most flexibility.

The following table provides information about each budget move workflow.

| Budget move workflow | Description | Pros | Cons |
|-----------------------|---|--|---|
| Associated | Links each source cost item to a target cost item as a single transfer transaction. | <ul style="list-style-type: none"> • Clear audit trail – Shows both the source and destination of the funds in a single transaction, improving transparency. • Traceability – Easily see where the budget came from and where it went. • Reporting clarity – Helps financial and project controls teams track budget changes as purposeful reallocations rather than isolated changes. | <ul style="list-style-type: none"> • More steps required – Typically involves selecting both a “from” and “to” item, with extra steps for assigning amounts and adjusting cost categories, which can be more time-consuming than a non-associated move. • Requires clear planning – You must know both ends of the move when performing it, which might not always be the case. |
| Non-associated | Treats each adjustment (debit or credit) as a standalone action, without explicitly linking the source and destination. | <p>Flexibility – Can make quick, one-sided adjustments without needing to define where the funds are coming from or going to.</p> <p>Faster entry – Useful when you're adjusting budgets over time and the counterbalance to the move is handled later or separately.</p> <p>Auto-calculate – Only non-associated budget</p> | <p>Lack of traceability – Harder to tell where money came from or where it went, which complicates reviews and audits.</p> <p>Potential for confusion – Can lead to misunderstanding or misreporting of why certain budget changes occurred.</p> <p>Reduced accountability – Without links, it's easier to lose the rationale for the budget changes, especially</p> |

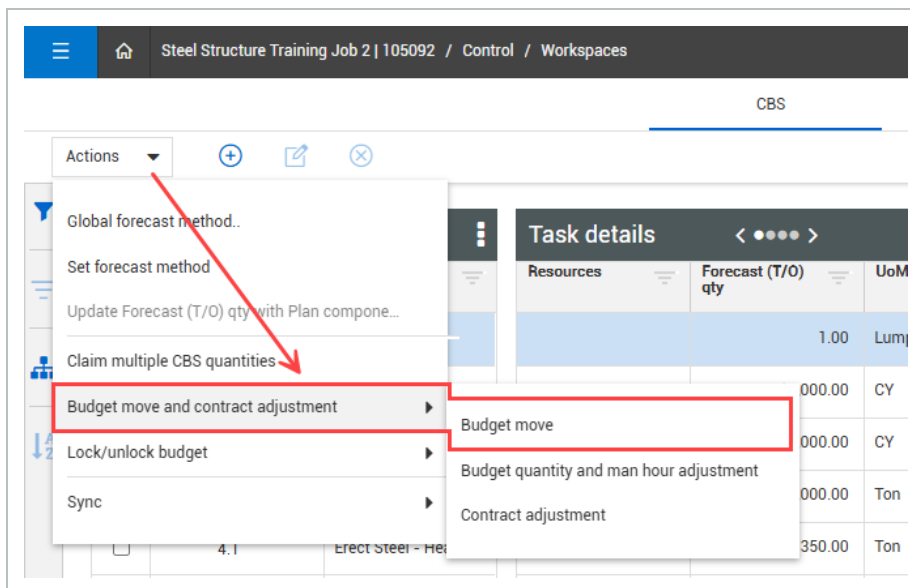
| Budget move workflow | Description | Pros | Cons |
|----------------------|-------------|--|-------------------------------|
| | | moves contain the feature to automatically generate CB budget adjustments from CE values and CE values from CB budget adjustments. | over a long project timeline. |

The following are considerations when performing a budget move using the Associated workflow option:

- Current Budget cost and man-hours are only maintained at the terminal level. You cannot move cost to or from a parent cost item.
- You can move costs between multiple cost items at the same time.
- You can automatically update Current Estimate (CE) values from Current Budget (CB) values only in a non-associated budget move or a contract adjustment.

PERFORM AN ASSOCIATED BUDGET MOVE

1. Select Actions > Budget move & contract adjustment > **Budget move**.



The Budget Move wizard opens to the step 1, **Details**.

2. Select the **Associated** option and add budget move details as needed, and then click **Next**.

1 Details 2 Select from & to items 3 Define relationships 4 Assign amounts 5 Adjust cost categories 6 Summary

Choose your Budget move workflow

☒ **Associated**
Define budget moves with a From and To process to provide ultimate traceability of budget moves.

☐ **Non-Associated**
Define budget moves freely to provide the most flexibility.

Budget move details

Description 453
Move budget from light steel erection to heavy.

CCO 60
CCO

Issue # 57
056

Discipline 484
Structural Steel

The Budget move wizard opens step 2, **Select from & to items**.

3. From the **From** section on the left, select the cost items you need to move budget from and from the To (for net zero moves) section on the right, select the cost items you need to move budget to.

Change register > Budget Move

1 Details

2 Select from & to items

3 Define relationships

4 Assign amounts

5 Adjust cost categories

6 Summary

From :

| <input type="checkbox"/> | CBS position | Description | WBS phase code |
|-------------------------------------|--------------|---------------------------|----------------|
| <input type="checkbox"/> | 3.1.8 | Building N&O - Scrape... | 1099 |
| <input type="checkbox"/> | ▼ 4 | Structural Steel | 1073 |
| <input type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 |
| <input checked="" type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 |
| <input type="checkbox"/> | 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> | 4.4 | Labor | 1088 |
| <input type="checkbox"/> | 4.5 | Equipment | 1089 |
| <input type="checkbox"/> | 4.6 | 3rd Party | 1090 |
| <input type="checkbox"/> | ▼ 5 | Materials | 1084 |
| <input type="checkbox"/> | 5.1 | Earthwork - Materials | 1085 |
| <input type="checkbox"/> | 5.2 | Concrete - Materials | 1086 |
| <input type="checkbox"/> | 5.3 | Structure Steel - Mate... | 1087 |

1 items selected

To (for net zero moves):

| <input type="checkbox"/> | CBS position | Description | WBS phase code |
|-------------------------------------|--------------|---------------------------|----------------|
| <input type="checkbox"/> | 3.1.8 | Building N&O - Scrape... | 1099 |
| <input type="checkbox"/> | ▼ 4 | Structural Steel | 1073 |
| <input checked="" type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 |
| <input checked="" type="checkbox"/> | 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> | 4.4 | Labor | 1088 |
| <input type="checkbox"/> | 4.5 | Equipment | 1089 |
| <input type="checkbox"/> | 4.6 | 3rd Party | 1090 |
| <input type="checkbox"/> | ▼ 5 | Materials | 1084 |
| <input type="checkbox"/> | 5.1 | Earthwork - Materials | 1085 |
| <input type="checkbox"/> | 5.2 | Concrete - Materials | 1086 |
| <input type="checkbox"/> | 5.3 | Structure Steel - Mate... | 1087 |

2 items selected

Cancel

Draft

Back

Next

4. Click **Next**. The Budget move wizard opens to step 3, **Define relationships**.
5. For each cost item listed under the From section, select Define to do one of the following:
 - Select **Cost category, Qty or MHR adjustment only** to modify only the cost category, quantity or man-hours of the cost item (not the cost item's cost).
 - Select the cost item or items to move budget to that includes costs. You can click **Select All**

to select all the listed cost items.

1 Details 2 Select from & to items 3 Define relationships 4 Assign amounts 5 Adjust cost categories 6

From: → To:

4.2 [1005] Erect Steel - Light Define

| 1 | CB total cost | Pending budget cost | CB total MHrs | CB total quantity |
|---|---------------|---------------------|---------------|-------------------|
| | \$ 200,000.00 | \$ 0.00 | 4,0 | |

☐ Cost category, Qty or MHR adjustment only

Budget move with Cost category, Qty or MHR adjustment to:

☒ 4.1 [1074] Erect Steel - Heavy

☒ 4.3 [1006] Bolted Connections

Select All OK

4.1 [1074] Erect Steel - Heavy
4.2 [1005] ✕

4.3 [1006] Bolted Connections
4.2 [1005] ✕

Cancel Draft Back Next

6. Click **OK** to close the Define window. Now, for each cost item under the To section, it shows the cost items you associate to it from the From section.
7. Click **Next**. The Budget move wizard opens to step 4, **Assign amounts**.
8. In Assign amounts, you can move costs, quantities, and man-hours.
 - You can move costs and man-hours by entering values in the CB total cost and CB total MHrs fields under the To section. This automatically deducts the amounts from the assigned cost items under the From section.

1 Details2 Select from & to items3 Define relationships4 Assign amounts5 Adjust cost categories6 Summary

From:

To:

4.2 [1005] Erect Steel - Light

| | CB total cost | Pending budget cost | CB total MHRs | CB total quantity |
|---|---------------|---------------------|---------------|-------------------|
| 1 | \$ 200,000.00 | \$ 0.00 | 4,000.00 | 200.00 |
| | \$ 11,000.00 | | -200.00 | 0.00 |
| = | \$ 189,000.00 | | 3,800.00 | 200.00 |

4.1 [1074] Erect Steel - Heavy

| | CB total cost | CB total MHRs | CB total quantity |
|---|---------------|---------------|-------------------|
| | \$ 800,000.00 | 16,000.00 | 800.00 |
| 1 | 10000.00 | 200.00 | 0 |
| = | \$ 810,000.00 | 16,200.00 | 800.00 |

4.3 [1006] Bolted Connections

| | CB total cost | CB total MHRs | CB total quantity |
|---|---------------|---------------|-------------------|
| | \$ 50,000.00 | 1,000.00 | 2,000.00 |
| 1 | 1000.00 | 0 | 0 |

Advanced options

CancelDraftBackNext

- You can enter CB Total Quantity values on the To section. They do not automatically deduct from the From section because you could be moving between cost items with differing units of measure.
- You may need to add more or fewer man-hours than you deduct. To allow this, select **Advanced options** and switch the **Adjust MHRs (not net zero)** to *On*. The CB total MHRs of your From cost items will no longer automatically deduct when you make adjustments to your To cost items.

9. Click **Next**. The Budget move wizard opens to step 5, **Adjust cost categories**.

10. In Adjust cost categories, you can assign your pending budget changes to existing and new cost categories of your cost item. For each cost item under the To section, click the **Add cost category** button to reassign costs to different cost categories.

1 Details2 Select from & to items3 Define relationships4 Assign amounts5 Adjust cost categories6 Summary

From:

To:

4.2 [1005] Erect Steel - Light

| | CB total cost | Pending | Available: | New total |
|---|----------------------|--------------|------------|---------------|
| 1 | Labor: \$ 200,000.00 | \$ 11,000.00 | \$ 0.00 | \$ 189,000.00 |
| = | Totals \$ 200,000.00 | \$ 11,000.00 | | \$ 189,000.00 |

4.1 [1074] Erect Steel - Heavy

| | CB total cost | Pending | Available: | New total |
|---|----------------------|--------------|------------|---------------|
| | Labor: \$ 800,000.00 | \$ 8,000.00 | \$ 0.00 | \$ 808,000.00 |
| | Materials: \$ 0.00 | \$ 2,000.00 | | \$ 2,000.00 |
| = | Totals \$ 800,000.00 | \$ 10,000.00 | | \$ 810,000.00 |

Add cost category

4.3 [1006] Bolted Connections

| | CB total cost | Pending | Available: | New total |
|---|---------------------|-------------|------------|--------------|
| | Labor: \$ 50,000.00 | \$ 1,000.00 | \$ 0.00 | \$ 51,000.00 |
| = | Totals \$ 50,000.00 | \$ 1,000.00 | | \$ 51,000.00 |

Add cost category

11. On the **Add cost categories** window, select a cost category, then click **OK**.

Add cost categories

Total :2 Selected

- ☒ Labor
- ☐ Construction Equipment
- ☐ FOM Rented Equipment
- ☐ Supplies
- ☒ Materials
- ☐ Subcontract
- ☐ Fees
- ☐ Allowance
- ☐ G & A
- ☐ Undefined

12. In the **Pending** fields, adjust the cost category amounts as needed.

To:

| 4.1 [1074] Erect Steel - Heavy | | Available: | \$ 0.00 |
|--------------------------------|---------------|----------------------|----------------------|
| | CB total cost | Pending | New total |
| Labor: | \$ 800,000.00 | 8,000.00 | \$ 808,000.00 |
| Materials: | \$ 0.00 | 2,000.00 | \$ 2,000.00 |
| = | Totals | \$ 800,000.00 | \$ 810,000.00 |

[+ Add cost category](#)

NOTE After making your adjustments, the Available amount should equal \$0.00.

13. Click **Next**. The Budget move wizard opens to step 4, **Summary**.
14. In Summary, review your proposed changes, and then click **Submit** to send the budget move for approval.

Change Register > Budget Move

1 Details

2 Select From & To Items

3 Define Relationships

4 Assign Amounts

5 Adjust Cost Categories

6 Summary

From:

To:

4.2 Erect Steel - Light

| | CB total cost | CB total MHrs | CB total quantity |
|----------|----------------|---------------|-------------------|
| Before: | \$ 200,000.00 | 4,000.00 | 200.00 |
| Pending: | (\$ 10,000.00) | -100.00 | -20.00 |
| | \$ 190,000.00 | 3,900.00 | 180.00 |

4.4 Modluel 01 - Erect Steel Heavy

| | CB total cost | CB total MHrs | CB total quantity |
|----------|---------------|---------------|-------------------|
| Before: | \$ 0.00 | 0.00 | 0.00 |
| Pending: | \$ 10,000.00 | 100.00 | 20.00 |
| | \$ 10,000.00 | 100.00 | 20.00 |

Cancel

Draft

Back

Submit

NOTE

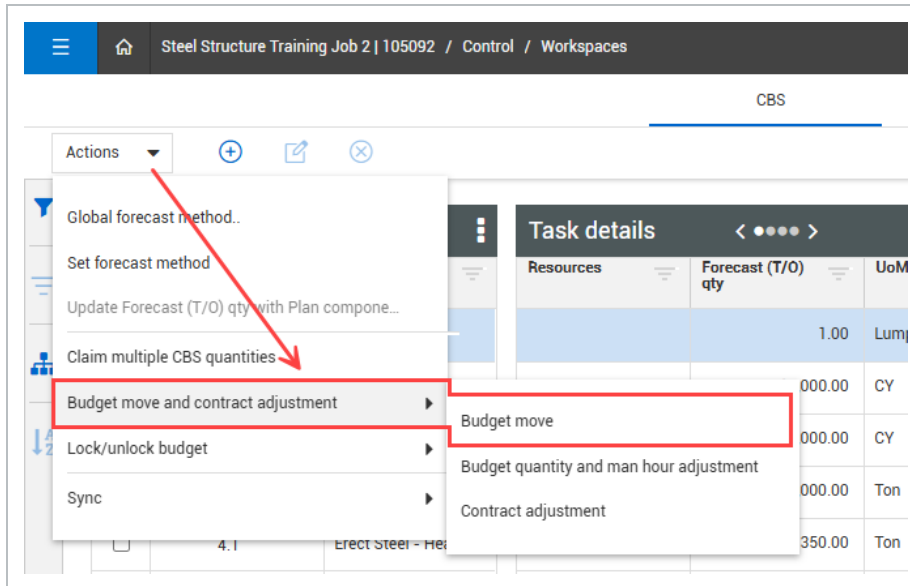
Select **Draft** if the budget move is not ready to be submitted and needs to be saved for later.

7.0.1 ASSOCIATED BUDGET MOVE - SINGLE COST ITEM

At times, you might encounter changes that require you to make budget changes within the cost categories of a single cost item. For example, you may find that some items that you estimated to be self-performed work may be faster and cheaper if they were subcontracted out. Therefore, you can perform a budget move for a single cost item to redistribute the budgeted cost between different cost categories.

PERFORM AN ASSOCIATED BUDGET MOVE WITHIN A SINGLE COST ITEM

1. Select Actions > Budget move & contract adjustment > **Budget move**.



The Budget Move wizard opens to the step 1, **Details**.

2. In Details, select the **Associated** option and add budget move details as needed, and then click **Next**.

1 Details2 Select from & to items3 Define relationships4 Assign amounts5 Adjust cost categories6 Summary

Choose your Budget move workflow

☒ Associated
Define budget moves with a From and To process to provide ultimate traceability of budget moves.

☐ Non-Associated
Define budget moves freely to provide the most flexibility.

Budget move details

Description453

Move budget from light steel erection to heavy.

CCO60

CCO

Issue #57

056

Discipline484

Structural Steel

The Budget move wizard opens step 2, **Select from & to items**.

3. In Select from & to items, select the same cost item under both the From and To sections, and then click **Next**.

Change Register > Budget Move

1 Details2 Select From & To Items3 Define Relationships4 Assign Amounts5 Adjust Cost Categories6 Summary

From :

| CBS position | Description | WBS phase code |
|---|--------------------------------|----------------|
| <input type="checkbox"/> 1 | Job Overhead | 1002 |
| <input type="checkbox"/> 2 | Earthwork | 1069 |
| <input type="checkbox"/> 3 | Concrete | 1071 |
| <input checked="" type="checkbox"/> 4 | Structural Steel | 1073 |
| <input type="checkbox"/> 4.1 | Erect Steel - Heavy | 1074 |
| <input type="checkbox"/> 4.2 | Erect Steel - Light | 1005 |
| <input checked="" type="checkbox"/> 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> 4.4 | Modfuel 01 - Erect Steel Heavy | 1087 |
| <input type="checkbox"/> 5 | Materials | 1084 |
| <input type="checkbox"/> 5.1 | Earthwork - Materials | 1085 |

1 items selected

To (for net zero moves):

| CBS position | Description | WBS phase code |
|---|--------------------------------|----------------|
| <input type="checkbox"/> 1 | Job Overhead | 1002 |
| <input type="checkbox"/> 2 | Earthwork | 1069 |
| <input type="checkbox"/> 3 | Concrete | 1071 |
| <input checked="" type="checkbox"/> 4 | Structural Steel | 1073 |
| <input type="checkbox"/> 4.1 | Erect Steel - Heavy | 1074 |
| <input type="checkbox"/> 4.2 | Erect Steel - Light | 1005 |
| <input checked="" type="checkbox"/> 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> 4.4 | Modfuel 01 - Erect Steel Heavy | 1087 |
| <input type="checkbox"/> 5 | Materials | 1084 |
| <input type="checkbox"/> 5.1 | Earthwork - Materials | 1085 |

1 items selected

Cancel

Draft

Back

Next

The Budget Move wizard opens to the step 3, **Define relationships**.

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4. In Define relationships, click the **Define** button, and then select **Cost category, Qty, or MHR adjustment only**.

Change Register > Budget Move

1 Details 2 Select From & To Items 3 Define relationships 4 Assign Amounts 5 Adjust Cost Categories 6 Summary

From: 4.3 Bolted Connections Define

To: 4.3 Bolted Connections 4.3 Adjust only x

Cost category, Qty or MHR adjustment only

OK

NOTE

Selecting the Cost category, Qty, or MHR adjustment only option lets you move budgeted cost category values within a single cost item.

5. Click **OK** to close the Define window, and then **Next**. The Budget move wizard opens to step 4, **Assign amounts**.
6. In Assign amounts, click **Next** to skip the Assign amounts step because we are not changing the man-hours or quantities. The Budget move wizard opens to step 5, **Adjust cost categories**.
7. Click the **Add cost category** button to assign your pending budget changes to existing and new cost categories of your cost item.

Change Register > Budget Move

1 Details 2 Select From & To Items 3 Define Relationships 4 Assign Amounts 5 Adjust Cost Categories 6 Summary

From: 4.3 Bolted Connections To:

| 4.3 Bolted Connections | | Available: | \$ 0.00 |
|------------------------|---------------|------------|--------------|
| | CB total cost | Pending | New total |
| Labor | \$ 50,000.00 | 0.00 | \$ 50,000.00 |
| = Totals | \$ 50,000.00 | \$ 0.00 | \$ 50,000.00 |

+ Add cost category

Cancel Draft Back Next

8. On the Add cost categories window, select the cost categories to include in the adjustment, and then click **OK**.

9. Make adjustments in the cost category Pending fields as needed.

- The values shown in the Available and New total fields will automatically adjust based on the values entered in the To Pending fields
- The amount in the Available field must be \$0.00 to proceed to the next step.

| | CB total cost | Pending | New total |
|------------------------------|---------------------|----------------|---------------------|
| Labor: | \$ 50,000.00 | -50,000.00 | \$ 0.00 |
| Subcontract: | \$ 0.00 | 50,000.00 | \$ 50,000.00 |
| = Totals | \$ 50,000.00 | \$ 0.00 | \$ 50,000.00 |

10. Click **Next**. The Budget move wizard opens to step 4, **Summary**.
11. In Summary, review your proposed changes, then click **Submit** to send the budget move for approval.

The budget move will now be listed in the project's Change Register with a status of *Pending*.

RELEVANT LINKS

Non-associated budget move

Integrated Solutions - Change order management

Video - Associated budget move

Video - Non-associated budget move

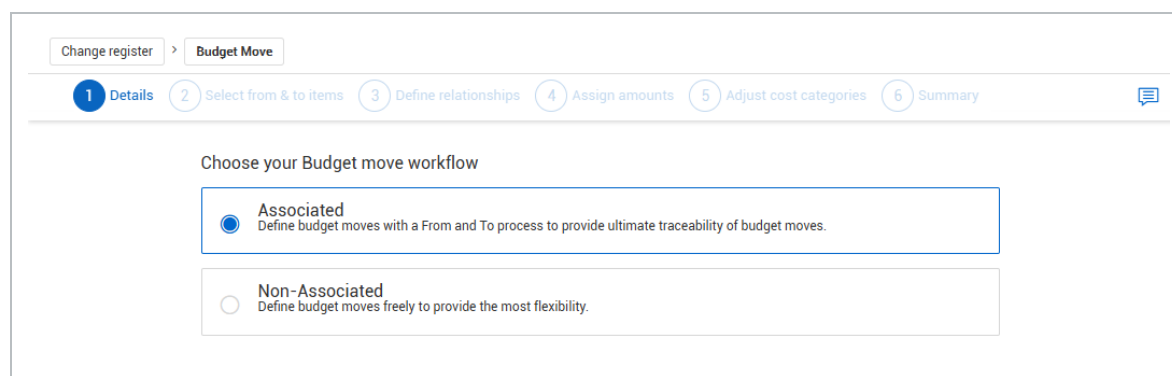
Video - Contract adjustment

Link 5

CHAPTER 7 – NON-ASSOCIATED BUDGET MOVE

During a project, you might need to move costs from one area of the budget to another to account for project changes, without changing the total budget amount. In Control, you can manage budget moves via a controlled approval process.

To launch a budget move in Control, from the CBS tab of the Workspaces module, select Actions > Budget move & contract adjustment > **Budget move**. This opens a Budget move record with the option to fill out the record following one of two workflows.



Change register > Budget Move

1 Details 2 Select from & to items 3 Define relationships 4 Assign amounts 5 Adjust cost categories 6 Summary

Choose your Budget move workflow

☒ **Associated**
Define budget moves with a From and To process to provide ultimate traceability of budget moves.

☐ **Non-Associated**
Define budget moves freely to provide the most flexibility.

The following table provides information about each budget move workflow.

| Budget move workflow | Description | Pros | Cons |
|----------------------|---|--|--|
| Associated | Links each source cost item to a target cost item as a single transfer transaction. | <ul style="list-style-type: none"> • Clear audit trail – Shows both the source and destination of the funds in a single transaction, improving transparency. • Traceability – Easily see where the budget came from and where it went. | <ul style="list-style-type: none"> • More steps required – Typically involves selecting both a “from” and “to” item, with extra steps for assigning amounts and adjusting cost categories, which can be more time-consuming than a non-associated move. • Requires clear planning – You must |

| Budget move workflow | Description | Pros | Cons |
|-----------------------|---|--|---|
| | | <ul style="list-style-type: none"> • Reporting clarity – Helps financial and project controls teams track budget changes as purposeful reallocations rather than isolated changes. | know both ends of the move when performing it, which might not always be the case. |
| Non-associated | Treats each adjustment (debit or credit) as a standalone action, without explicitly linking the source and destination. | <p>Flexibility – Can make quick, one-sided adjustments without needing to define where the funds are coming from or going to.</p> <p>Faster entry – Useful when you're adjusting budgets over time and the counterbalance to the move is handled later or separately.</p> <p>Auto-calculate – Only non-associated budget moves contain the feature to automatically generate CB budget adjustments from CE values and CE values from CB budget adjustments.</p> | <p>Lack of traceability – Harder to tell where money came from or where it went, which complicates reviews and audits.</p> <p>Potential for confusion – Can lead to misunderstanding or misreporting of why certain budget changes occurred.</p> <p>Reduced accountability – Without links, it's easier to lose the rationale for the budget changes, especially over a long project timeline.</p> |

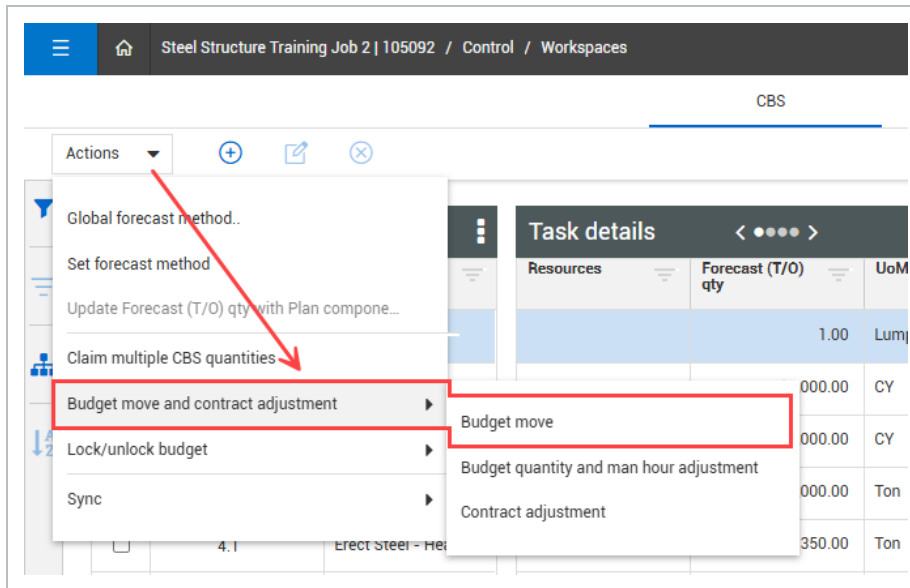
Performing a non-associated move makes cost adjustments at the total cost and cost category levels. In addition to cost adjustments, adjustments to man-hours and quantities can also be made.

With the applicable permissions, you can approve budget moves. When you approve a budget move, a message shows confirming the budget move is approved.

Change order # 1.0 approved. successfully.

PERFORM A NON-ASSOCIATED BUDGET MOVE

1. Select Actions > Budget move & contract adjustment > **Budget move**.



The Budget Move wizard opens to step 1, **Details**.

2. In Details, select the Non-Associated option and add budget move details as needed, and then click **Next**.

1 Details2 Select from & to items3 Define relationships4 Assign amounts5 Adjust cost categories6 Summary

Choose your Budget move workflow

☐ Associated
Define budget moves with a From and To process to provide ultimate traceability of budget moves.

☒ Non-Associated
Define budget moves freely to provide the most flexibility.

Budget move details

Description453

Move budget from light steel erection to heavy.

CCO60

CCO

Issue #57

056

Discipline484

Structural Steel

The Budget move wizard opens step 2, Select **Assign amounts**.

3. In Assign amounts, click the **Add cost item** icon to select the applicable cost items.

Change register > Budget Move

1 Details2 Assign amounts

No cost items selected
Click the add icon above to add cost items

No results found

Subtotals 0

\$ 0.00

\$ 0.00

0.00

0.00

Approve

Cancel

Draft

Back

Submit

4. Select the cost items, and then click **Add**.

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Change register > Budget Move > Select cost items

Search

| <input type="checkbox"/> | CBS position | Description | WBS phase code |
|-------------------------------------|--------------|-----------------------|----------------|
| <input type="checkbox"/> | 1 | Job Overhead | 1002 |
| <input type="checkbox"/> | 2 | Earthwork | 1069 |
| <input type="checkbox"/> | 3 | Concrete | 1071 |
| <input type="checkbox"/> | ^ 4 | Structural Steel | 1073 |
| <input checked="" type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 |
| <input checked="" type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 |
| <input checked="" type="checkbox"/> | 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> | ^ 5 | Materials | 1084 |
| <input type="checkbox"/> | 5.1 | Earthwork - Materials | 1085 |
| Subtotals 32 (3 items selected) | | | |

Cancel Add

5. Enter adjustment amounts for each cost item. You can enter positive or negative adjustments into any of the fields labeled *Adjusted*, including *Adjusted CB cost*, *Adjusted CB Mhrs*, and *Adjusted CB qty*. See the following adjustment examples:

- Moving from one cost item to another:

Change register > Budget Move

1 Details 2 Assign amounts

| <input type="checkbox"/> | CBS position | Description | WBS phase code | CB total cost | Adjusted CB cost | CB total Mhrs | Adjusted CB Mhrs | CB total quantity | Adjusted CB qty |
|--------------------------|--------------|---------------------|----------------|-----------------|------------------|---------------|------------------|-------------------|-----------------|
| <input type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 | \$ 800,000.00 | (\$ 5,000.00) | 16,000.00 | -200.00 | 800.00 | 0.00 |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 | \$ 200,000.00 | \$ 5,000.00 | 4,000.00 | 200.00 | 200.00 | 0.00 |
| <input type="checkbox"/> | 4.3 | Bolted Connections | 1006 | \$ 50,000.00 | \$ 0.00 | 1,000.00 | 0.00 | 2,000.00 | 0.00 |
| Subtotals 3 | | | | \$ 1,050,000.00 | \$ 0.00 | 21,000.00 | 0.00 | | |

Approve Cancel Draft Back Submit

- Moving one cost item to multiple cost items:

Change register > Budget Move

1 Details 2 Assign amounts

| CB position | Description | WBS phase code | CB total cost | Adjusted CB cost | CB total Mhrs | Adjusted CB Mhrs | CB total quantity | Adjusted CB qty |
|-------------|---------------------|----------------|-----------------|------------------|---------------|------------------|-------------------|-----------------|
| 4.1 | Erect Steel - Heavy | 1074 | \$ 800,000.00 | (\$ 5,000.00) | 16,000.00 | -200.00 | 800.00 | 0.00 |
| 4.2 | Erect Steel - Light | 1005 | \$ 200,000.00 | \$ 4,000.00 | 4,000.00 | 200.00 | 200.00 | 0.00 |
| 4.3 | Bolted Connections | 1006 | \$ 50,000.00 | \$ 1,000.00 | 1,000.00 | 0.00 | 2,000.00 | 0.00 |
| Subtotals 3 | | | \$ 1,050,000.00 | \$ 0.00 | 21,000.00 | 0.00 | | |

Approve Cancel Draft Back Submit

- Make cost adjustments at the CB cost category level using any of the Adjusted CB cost category columns:

1 Details 2 Assign amounts

| Description | WBS phase code | CB labor total cost | Adjusted CB labor cost | CB construction equipment to... | Adjusted CB construction equipment c... | CB FOM rented equipment total cost | Adjusted CB FOM rented equipment c... |
|---------------------|----------------|---------------------|------------------------|---------------------------------|---|------------------------------------|---------------------------------------|
| Erect Steel - Heavy | 1074 | \$ 800,000.00 | (\$ 4,000.00) | \$ 0.00 | (\$ 1,000.00) | \$ 0.00 | (\$ 500.00) |
| Erect Steel - Light | 1005 | \$ 200,000.00 | \$ 3,000.00 | \$ 0.00 | \$ 1,000.00 | \$ 0.00 | \$ 500.00 |
| Bolted Connections | 1006 | \$ 50,000.00 | \$ 1,000.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

- The Adjusted CB total cost must equal zero to submit.
 - The Adjusted CB cost will automatically calculate as the total of all cost category values.
 - Costs entered directly in the Adjusted CB cost field are automatically allocated to the appropriate CB cost categories (for example, Adjusted CB labor cost, Adjusted CB material cost) based on where costs were originally allocated on the cost item.
- Assign amounts at the cost category level by right-clicking on the cost item, and then selecting **Cost category**.

Change register > Budget Move

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| <input type="checkbox"/> | CBS position | Description | WBS phase code |
|-------------------------------------|--------------|---------------------|----------------|
| <input type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 |
| <input checked="" type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 |
| <input type="checkbox"/> | 4.3 | Bolted Connection | |

Cost category

This gives you a view that makes it easy to see the pending adjustments of all your categories in a slide-out register and how they contribute to the total.

After making adjustments, click the **Close** icon at the top right corner to close the Cost category slide-out.

1 Details

2 Assign amounts

\$

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✕

1005

4.2 Erect Steel - Light

CB total cost

\$ 200,000.00

Pending budget cost

(\$ 10,000.00)

CB total MHrs

4,000.00

CB total quantity

200.00

| Cost category | CB total cost | Pending |
|--------------------------|---------------|---------------|
| ^ Total | \$ 200,000.00 | (\$ 1,000.00) |
| v Labor | \$ 200,000.00 | \$ 0.00 |
| v Construction Equipment | \$ 0.00 | \$ 0.00 |
| v FOM Rented Equipment | \$ 0.00 | \$ 0.00 |
| v Supplies | \$ 0.00 | \$ 0.00 |
| v Materials | \$ 0.00 | (\$ 1,000.00) |
| v Subcontract | \$ 0.00 | \$ 0.00 |
| v Fees | \$ 0.00 | \$ 0.00 |
| v Allowance | \$ 0.00 | \$ 0.00 |
| G & A | \$ 0.00 | \$ 0.00 |
| Undefined | \$ 0.00 | \$ 0.00 |

The Adjusted CB cost subtotal must equal zero to submit. In other words, the cost adjustments must be net-zero to proceed.

6. Review your proposed changes, and then click **Submit** to send the budget move for approval. Click **Draft** if the budget move is not ready to be submitted and needs to be saved for later.

NOTE The hours and quantities subtotals do not need to equal zero to submit.

7.0.1 AUTO-CALCULATE BUDGET MOVE VALUES

Non-Associated budget moves include a time-saving feature that auto-calculates values when performing the following tasks:

- **Update CB from CE** – Automatically generates CB adjustments in the non-associated budget move record to match existing current estimate values of the cost items selected.
- **Update CE from CB** - When approved, automatically updates current estimate values in the CBS based on adjustment values defined on the non-associated budget move.

7.0.1.1 UPDATE CURRENT BUDGET (CB) ADJUSTMENTS FROM CURRENT ESTIMATE (CE)

Prior to generating a budget move record for approval, a common best practice to help you work through project changes and have traceability should questions arise, is to make your budget move adjustments directly in the CE fields of your cost items on the CBS tab.

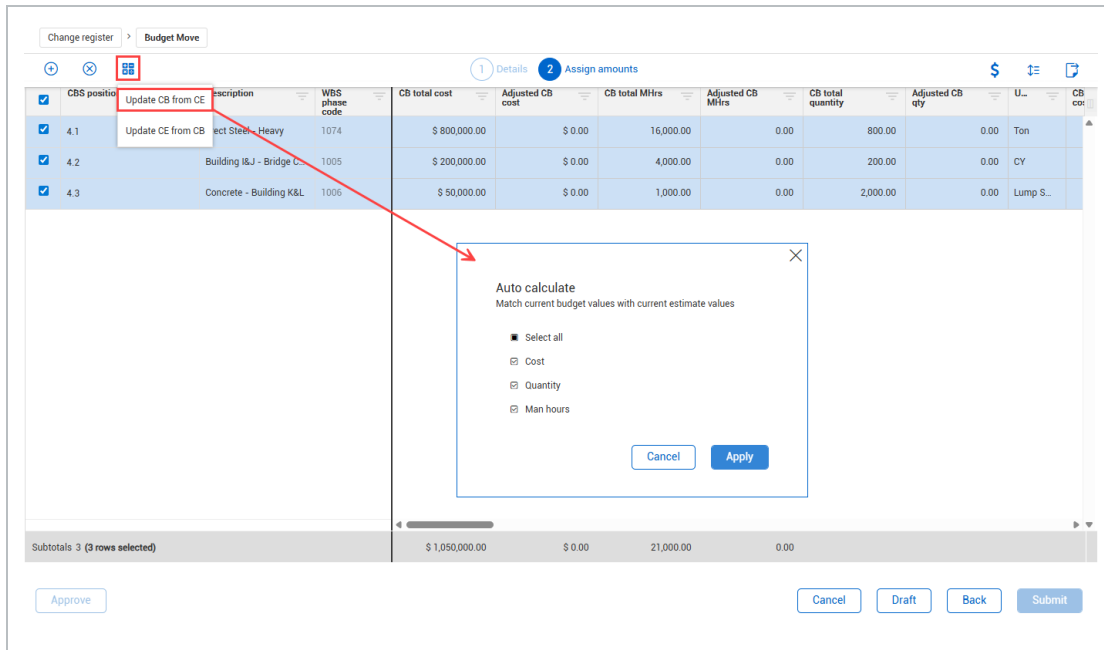
When the time comes to get approval, you can create a non-associated budget move and use the Auto-calculate feature to generate the CB adjustments on your budget move record automatically.

PERFORM A BUDGET MOVE USING AUTO-CALCULATE > UPDATE CB FROM CE

NOTE These steps assume budget move adjustments have already been made in the Current Estimate.

1. Select Actions > Budget move & contract adjustment > **Budget move**. The Budget Move wizard opens to step 1, **Details**.
2. In Details, select the **Non-Associated** option and add budget move details as needed, and then click **Next**. The Budget Move wizard opens to step 2, **Assign amounts**.

3. In Assign amounts, click the **Add** button to select the cost items that are part of the budget move.
4. Click the **Auto-calculate** icon, and then select **Update CB from CE**.
5. . Select the values to auto-calculate, and then click **Apply**.



6. Click **Yes** when prompted to confirm.
7. Click **Submit** to submit the budget move for approval. Click **Draft** if the budget move is not ready to be submitted and needs to be saved for later.

7.0.1.2 UPDATE CURRENT ESTIMATE FROM ADJUSTED CURRENT BUDGET

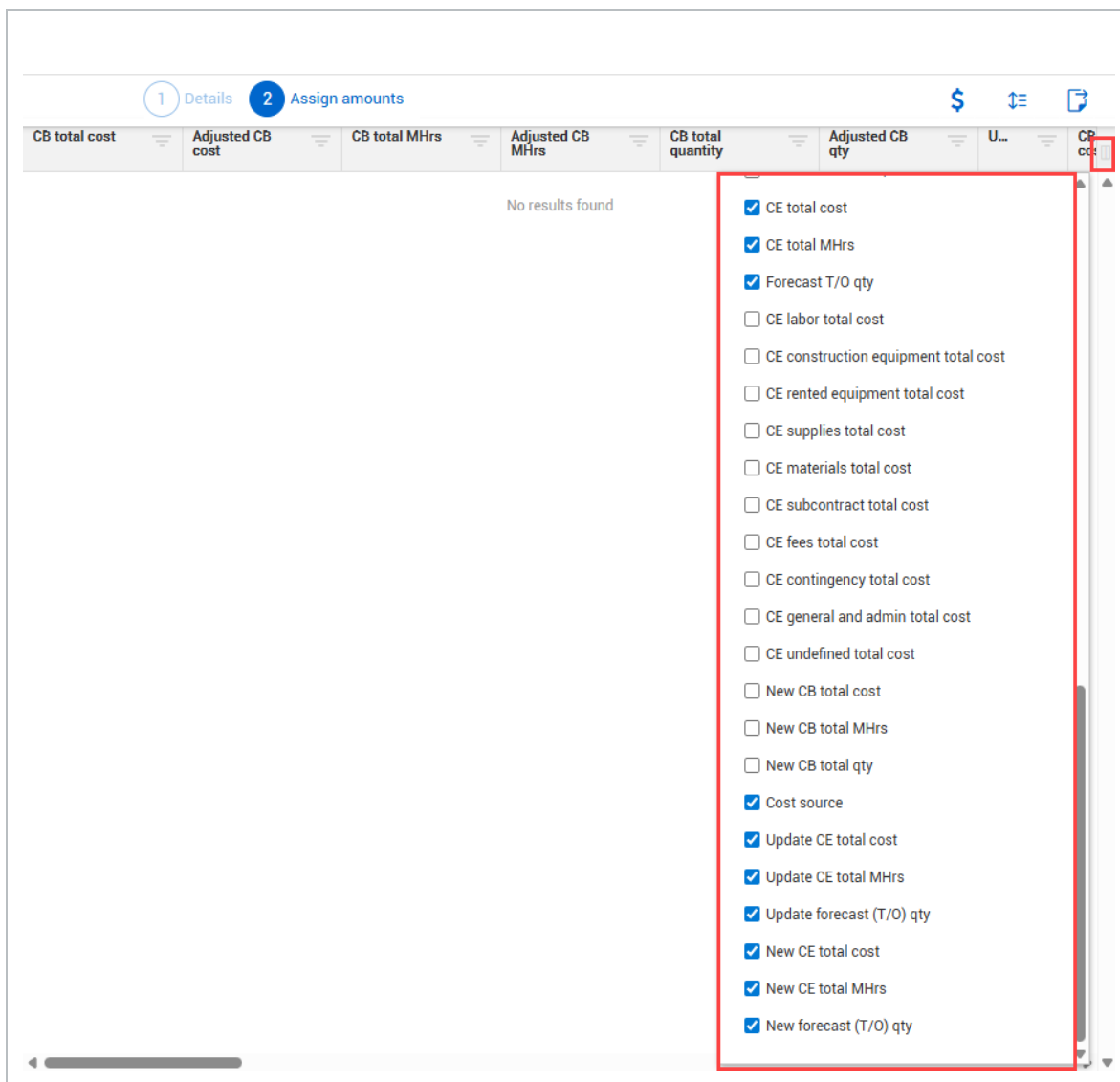
You can update your current estimate values based on the adjusted current budget values for contract non-associated budget moves.

To view adjusted current budget values in relation to current estimate values, add the following columns to your view:

- Cost source
- Update CE total cost
- Update CE total MHrs

- Update forecast (T/O) qty
- CE total cost
- CE total MHrs
- Forecast T/O qty
- New CE total cost
- New CE total MHrs
- New forecast (T/O) qty

To add these columns, initiate a non-associated budget move, go to the **Assign Amounts** step, click the **Column chooser** icon, and then select your columns.



7.0.1.3 SELECT COST ITEMS TO UPDATE

The check boxes under the Update CE total cost, Update CE total MHrs, and Update forecast (T/O) qty allows you to update the current estimate based on what is adjusted in the current budget after the budget move is approved.

| CBS position | | Cost source | Update CE total cost | Update CE total MHrs | Update forecast (T/O) qty |
|--------------------------|----------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Unassigned cost items | | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | 1.1.1.7 | Detail | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | 1.1.1.8 | Plug | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | 1.1.1.9 | Plug | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | 1.1.1.10 | Plug | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Subtotals 4 | | | | | |

The Update CE total cost and Update CE total MHrs check boxes are active for plug cost source only. The Update CE total cost and Update CE total MHrs check boxes cannot be edited for Detail cost items because cost is driven by your associated resources.

For example, if the Update CE total cost box is checked, the Adjust CB cost is added to the CE total cost after the contract adjustment is approved. You can preview the results in the New CE total cost, New CE total MHrs, and New forecast (T/O) qty columns.

| Cost Item | Current CE total cost | Adjusted CB cost | New CE total cost | Current CE total MHrs | Adjusted CB cost | New CE total MHrs | Current forecast (T/O) qty | Adjusted CB cost | New forecast (T/O) qty |
|-----------|-----------------------|------------------|-------------------|-----------------------|------------------|-------------------|----------------------------|------------------|------------------------|
| 1.1.1.7 | 1,000.00 | 0.00 | 1,000.00 | 100 | 0.00 | 100 | 100 | 0.00 | 100 |
| 1.1.1.8 | 1,000.00 | 0.00 | 1,000.00 | 100 | 0.00 | 100 | 100 | 0.00 | 100 |
| 1.1.1.9 | 1,000.00 | 0.00 | 1,000.00 | 100 | 0.00 | 100 | 100 | 0.00 | 100 |
| 1.1.1.10 | 1,000.00 | 0.00 | 1,000.00 | 100 | 0.00 | 100 | 100 | 0.00 | 100 |

7.0.1.4 SELECT AUTOMATIC UPDATES FOR MULTIPLE COST ITEMS

You can select automatic updates for multiple cost items to save you time from selecting check boxes manually for each cost item.

The Auto-calculate tool automatically checks the adjustment boxes for all the cost items that you select.

To use the Auto-calculate feature select the cost items you wish to update. Click the **Auto-calculate** icon, and then select **Update CE from CB**. In the Auto calculate dialog box, select whether to update Cost, Qty, Man hours, or Select all for the selected cost items, and then click **Apply**.

Change register > Budget Move

1 Details2 Assign amounts

| | CBS position | Description | WBS phase code | CB total cost | Adjusted CB cost | CB total Mhrs | Adjusted CB Mhrs | CB total quantity |
|-------------------------------------|--------------|-------------------------|----------------|---------------|------------------|---------------|------------------|-------------------|
| <input checked="" type="checkbox"/> | 4.1 | Update CB from CE | 1074 | \$ 800,000.00 | \$ 0.00 | 16,000.00 | 0.00 | |
| <input checked="" type="checkbox"/> | 4.2 | Update CE from CB | 1005 | \$ 200,000.00 | \$ 0.00 | 4,000.00 | 0.00 | |
| <input checked="" type="checkbox"/> | 4.3 | Building I&J - Bridge C | 1006 | \$ 50,000.00 | \$ 0.00 | 1,000.00 | 0.00 | |
| <input checked="" type="checkbox"/> | | Concrete - Building K&L | | | | | | |

Auto calculate

Match current budget values with current estimate values

☒ Select all

☒ Cost

☒ Quantity

☒ Man hours

Cancel

Apply

The applicable check boxes are now automatically selected to adjust your current estimate values for the selected cost items.

7.0.1.5 SET SETTING FOR DEFAULT CURRENT ESTIMATE UPDATE

You can have the current estimate cost, man-hours, and quantity check boxes selected by default to be updated with adjusted current budget cost, man-hours, and quantity values when doing change orders.

In Settings > Control > **Project Tracking**, you can switch the **Default CE values to be updated from CB values** toggle to **ON**. When enabled, all applicable check boxes are selected by default. This is a quick way to keep CE and CB values in sync without having to double enter values.

The screenshot shows the 'Tasks' configuration page. At the top, the 'PROJECT TRACKING' tab is active. The settings include:

- Maintain CBS Structure at a specific level?** Set to **No**.
- Level to Maintain CBS Structure at** (Empty text field).
- Generate WBS phase code automatically?** Set to **Yes**.
- WBS Phase code generation method** Set to **Continue numbering from the last generated number**.
- WBS Phase codes start value** Set to **1000**.
- Enable manual snapshots** (Information icon).
- Allow syncs to replace manual snapshots** (Information icon).
- Default CE values to be updated from CB values** (Checked, highlighted with a red box).

For more information, see the **Default CE values to be updated from CB values** section in Project Tracking, [Tasks](#) settings.

RELEVANT LINKS

Associated budget move

Integrated Solutions - Change order management

Video - Associated budget move

Video - Non-associated budget move

Video - Contract adjustment

Link 5

CHAPTER 7 – BUDGET QUANTITY / MAN-HOUR ADJUSTMENT

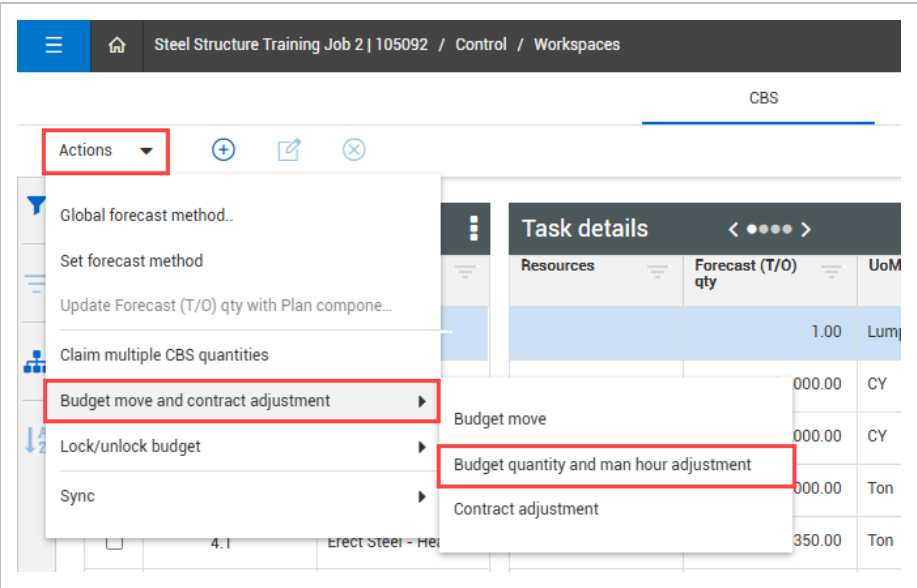
During the course of a project, it is typical to have scope modifications that warrant changes to quantities or labor hours.

It is important to remember that changing man-hours or quantities will affect budgeted values of MH/QTY, QTY/MH, and Unit-Costs, but will not change the overall dollar value of your budget.

Within InEight Control, you can perform budget quantity and man-hour adjustments using a controlled approval process.

PERFORM A BUDGET QUANTITY / MAN-HOUR ADJUSTMENT

- 1. Select Actions > Budget move & contract adjustment > **Budget quantity and man hour adjustment.**



- The budget adjustment wizard opens to step 1, **Details**.
- 2. In Details, add details as needed, and then click **Next**.

Change Register > Budget quantity and ...

1 Details 2 Select Items 3 Assign Amounts 4 Summary

Issue # 002XX CCO 002XX

Description Tonnage increase due to material change 211

Discipline 500

Change Management tag 1 Change Management tag 2 Change Management tag 3

Cancel Draft **Next**

The budget adjustment wizard opens to step 2, **Select Items**.

- In Select Items, select a cost item from the list.

Change Register > Budget quantity and ...

1 Details 2 Select Items 3 Assign Amounts 4 Summary

| CBS position | Description | WBS phase code |
|---|-------------------------------|----------------|
| 3 | Concrete | 1071 |
| 4 | Structural Steel | 1073 |
| 4.1 | Erect Steel - Heavy | 1074 |
| 4.2 | Erect Steel - Light | 1005 |
| 4.3 | Bolted Connections | 1006 |
| <input checked="" type="checkbox"/> 4.4 | Module 01 - Erect Steel Heavy | 1087 |

NOTE

You can select more than one cost item to adjust; however, these changes will be grouped as a single line item in the Change Register.

- Click **Next**. The budget adjustment wizard opens to step 3, **Assign amounts**.
- In Assign Amounts, enter the change to the man-hours or quantities into the applicable field, and then click **Next**.

Change Register > Budget quantity and ...

1 Details

2 Select Items

3 Assign Amounts

4 Summary

4.4 Module 01 - Erect Steel Heavy

| | MHrs | Quantity |
|------------|------|----------|
| Original: | 0.00 | 0.00 |
| Pending: | | 5,000.00 |
| New total: | 0.00 | 5,000.00 |

The budget adjustment wizard opens to step 4, **Summary**.

6. In Summary, review your proposed changes, and then click **Submit** to send the budget move for approval.

Change Register > Budget quantity and ...

1 Details

2 Select Items

3 Assign Amounts

4 Summary

4.4 Module 01 - Erect Steel Heavy

| | MHrs | Quantity |
|----------|-----------|----------|
| Before: | 0.00 | 0.00 |
| Pending: | 0.00 | 5,000.00 |
| After: | No change | 5,000.00 |

Cancel

Draft

Back

Submit

You can select **Draft** if the budget move is not ready to be submitted and needs to be saved for later. With applicable permissions, you can select **Approve** to approve the budget move.

RELEVANT LINKS

- Integrated Solutions - Approve contract adjustment
- Integrated Solutions - Execute the change order
- Integrated Solutions - Change order management
- Video - Contract adjustment
- Video - Associated budget move
- Video - Non-associated budget move
- Link 5

CHAPTER 7 – CONTRACT ADJUSTMENT FROM INEIGHT CHANGE OVERVIEW

A contract adjustment, often referred to as a change order, represents a change to the scope of the contract that results in a change to the project's budgeted costs, man-hours, and contract price. These adjustments typically involve adding or revising cost and pay items to accurately estimate the financial and labor impacts of the change.

When you integrate InEight Change with InEight Control, you can track project changes using a more robust, transparent, and auditable process than using just the Control application.

RELEVANT LINKS

[Integrated Solutions - Approve contract adjustment](#)

[Integrated Solutions - Execute the change order](#)

[Integrated Solutions - Change order management](#)

[Video - Contract adjustment](#)

[Video - Assigning pay items to cost items](#)

[Link 5](#)

CHAPTER 7 – CHANGE APPROVAL PROCESS

After budget moves are submitted, they must be reviewed and approved before their values are added to the current budget. The Change Register allows users with applicable permissions to review the details of contract adjustments, budget moves, and quantity or man-hour adjustments. They can revise, reject, or approve the changes.

To access the Change Register in Control Workspaces, select the Change Register tab.

Steel Structure Training Job 2 | 1... / Control / Workspaces

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

Actions

The Change Register includes the following columns:

| Column name | Description |
|------------------------|--|
| ID | Auto-assigned by the system to uniquely identify each change entry. When a submitted change is revised, a duplicate record is created with the ID indicating a new version of the original. For example, if the original change has an ID of 2.0, the new revision entry will have an ID of 2.1. |
| Description | The description entered on the Detail step of the change's record. |
| CCO | Text field for entering a change order number. Contract adjustments generated from InEight Change will automatically have this filled with the number defined in the executed CCO. This is only editable within the CCO in Change. |
| Creation date | The date the change record was created in the Change Register. |
| Issue # | Text field for entering the issue number. Change records generated in InEight Change will automatically contain the number as defined on the issue/PPO/CCO in Change. This is only editable within the CCO in Change. |
| Last changed by | Indicates the user who last made a change to the record. |
| Last changed on | Indicates the date when the last change was made. |
| Notes | Clicking on the icon in this field opens a slide out panel where notes can be entered and reviewed in a "text feed" format. |
| Status | Indicates the state of the change record (for example draft, pending, approved). More information about statuses is covered in a separate table |

| Column name | Description |
|--|---|
| | below. |
| Total budget cost adjustment | Indicates the total amount of adjusted cost estimated on the change record. |
| Total budget MH adjustment | Indicates the total adjusted man-hours estimated on the change record. |
| Total contract price adjustment | Indicates the total contracted price adjustment estimated on the change record. |
| Type | Indicates whether the change record is a Budget move, Budget Qty & MH adjustment, or Contract adjustment. |

Entries in the Change Register will have different statuses depending on what step of the process they are in and where the change was created (for example, Change or Control). The following table lists the possible statuses and what they indicate.

| Status | Description |
|-----------------|--|
| Draft | A change record that is not yet submitted. This allows a change record to be started and saved for later, until it is ready to submit. A change record that came from Change is indicated as Issue-Draft for budget moves or CCO-Draft for executed change orders. |
| Pending | A change record that has been submitted but not yet approved. A change record that came from Change is indicated as Issue-Pending for budget moves or CCO-Pending for executed change orders. |
| Approved | A change record that has been approved by someone with the appropriate permissions. An approved change makes the proposed budget cost and contract price adjustments final, updating the Current Budget accordingly. An approved change record that came from Change is indicated as Issue-Approved for budget moves or CCO-Approved for executed change orders. |
| Rejected | A change record that has been rejected by someone with the appropriate |

| Status | Description |
|---------|---|
| | permissions. Rejecting a change ends the change process and prevents the proposed changes from updating cost items and pay items in the Current Budget. A rejected change record that came from Change is indicated as Issue-Rejected for budget moves or CCO-Rejected for executed change orders. |
| Revised | An approved change record that has been revised. Revising an approved record results in a new version of the change record with a new version number. For example, if an original change record has an ID of 2.0 and has its status changed to Revised, it results in a new change record being created automatically with an ID of 2.1 and a status of Draft. A revised change record that originally came from Change is indicated as Issue-Revised for budget moves or CCO-Revised for executed change orders. |

7.0.1 MANAGING CHANGES IN THE CHANGE REGISTER

With the applicable permissions, you can review project changes as they are recorded as entries in the Change Register and either approve, reject, or revise them as needed. The Change Register includes both change records that are in progress (status of Draft) and changes that have been submitted (status of Pending).

To review a change record, click within the row representing the change. A slide-out panel opens that summarizes the details of the change. The options available on the slide-out panel depend on the change record's status.

7.0.1.1 DRAFT CHANGES REVIEW

On the slide-out panel for Draft changes, you can select Review, Delete, or Revise.

ACS
PAY ITEMS
CHANGE REGISTER
AUDIT LOG

\$
Filter
Sort
List
Print
Refresh
Search

3.1
Additional Steel Work

Type
Status
Originated on
Originated by
Contract adjustment (Cost ite...
Draft
07/01/2025
Paul bennion

Last changed on
Last changed by
Approved on
Approved by
Approval probability
07/02/2025
Paul bennion
N/A
N/A
N/A

Pay item details

| Pay item number | Description | Current billing method | Adjusted current price | Adjusted current unit price | Adjusted current pay qty | Locked date |
|-----------------|--------------------------|------------------------|------------------------|-----------------------------|--------------------------|-------------|
| 003 | Steel - Labor & Material | Unit price | \$ 164,500.00 | \$ 0.00 | 0.09 | |
| 4 | Additional steel work | Unit price | \$ 86,400.00 | \$ 800.00 | 108.00 | |
| | | | \$ 250,900.00 | \$ 800.00 | | |

Cost item details

| CBS position | Description | WBS pha... | Adjusted CB cost | Adjusted CB MHrs | Adjusted CB atv | Locked date |
|--------------|-------------|------------|------------------|------------------|-----------------|-------------|
|--------------|-------------|------------|------------------|------------------|-----------------|-------------|

Review
Delete
Revise

- **Review** - Opens the change record in a read-only state. All the steps of the change can be reviewed, but no changes can be made. This may be a helpful option to give users permission to review changes without having the access to approve or reject them.
- **Delete** - Permanently deletes the draft. When clicking Delete, a prompt comes up to make sure you want to delete the record.
- **Revise** - Opens the change record with full functionality to edit the record. After editing, if the record is ready for approval, on the Summary step you can click **Submit**. If the record is still not ready, you can select Draft to save it for future editing.

7.0.1.2 PENDING CHANGES REVIEW

On the slide-out panel for changes with a Pending status, you can select Review, Reject, Revise, or Approve.

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

\$

Filter

Sort

Grid

Print

Refresh

Search

1.0

Erect steel budget move

Type

Budget move (Associated)

Status

Pending

Originated on

06/18/2025

Originated by

Paul bennion

Last changed on

07/03/2025

Last changed by

Paul bennion

Approved on

n/a

Approved by

n/a

| From/To | CBS position | Description | W... ph... co... | Adjusted CB cost | Adjusted CB MHrs | Adjusted CB qty | Locked |
|---------|--------------|---------------------|------------------------|---------------------|---------------------|--------------------|--------|
| From | 4.2 | Erect Steel - Light | 1005 | (\$ 10,000.00) | -200.00 | 0.00 | |
| To | 4.1 | Erect Steel - Heavy | 1074 | \$ 10,000.00 | +200.00 | 0.00 | |
| From | 4.2 | Erect Steel - Light | 1005 | (\$ 1,000.00) | 0.00 | 0.00 | |
| To | 4.3 | Bolted Connections | 1006 | \$ 1,000.00 | 0.00 | 0.00 | |

\$ 0.00

Review

Reject

Revise

Approve

- **Reject** - Changes the status of the change record to Rejected, ending the change process and preventing the proposed change from updating cost items or pay items. From that point on, the change record is read-only. Once rejected, the change cannot be revised.
- **Approve** - Changes the status of the change to Approved, making the proposed changes final and updating the Current Budget and contract price with the changes. Once approved, you can review or revise the change.
- **Revise** - Opens the change record with full functionality to edit the record. If you revise a Pending record, you can resubmit maintaining the Pending status, or select Draft to save with a status of Draft.

If you revise an approved record, the status of the record will change to Revised and become read only, and a new draft of the record will be created with a new version number.

| | | | | | | | | |
|-----|---------------------|--|------------|--|---------------|------------|--|---------|
| 2.1 | Cracked foundations | | 07/03/2025 | | Paul benni... | 07/03/2025 | | Draft |
| 2.0 | Cracked foundations | | 07/01/2025 | | Paul benni... | 07/03/2025 | | Revised |

NOTE

Revising an approved record will back out all approved budget, quantity, man-hour, and pay item amounts from the Current Budget. A revising warning message shows to confirm that you want to proceed.



Revising will back out previously approved amounts from current budget.

All approved budgets, quantities, man hours and pay items will be reverted back to it's original, pre-approved state. Are you sure you want to continue?

OK

Cancel

7.0.2 GROUP BY OPTION

You can activate the Group by icon to show certain change columns in groups of like information. Like the CBS, you can activate the Group By icon to categorize certain columns in the Change Register.

Steel Structure Training Job 2 | 1... / Control / Workspaces

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

Actions

\$

| ID | Description | CCO | Crea... date | Issue # | Last cha... by | Last changed on | Notes | Status | Total budget cost adjustment | Total budget MH adjustment | Total contract price adjustment | Type |
|-----|------------------------------|---------|--------------|---------|----------------|-----------------|-------|-------------|------------------------------|----------------------------|---------------------------------|---------------------|
| 8.0 | Concrete issue | CCO-003 | 07/01/2025 | 2 | Paul benni... | 07/01/2025 | | CCO-Pending | \$ 259,000.00 | 3,000.00 | \$ 284,900.00 | Contract adjustment |
| 7.0 | Cracked weld | | 06/26/2025 | 3 | Paul benni... | 07/01/2025 | | Issue-Draft | \$ 0.00 | 0.00 | \$ 0.00 | Budget move |
| 6.0 | Steel alignment issue | CCO-002 | 06/26/2025 | 1 | Paul benni... | 06/30/2025 | | CCO-Draft | \$ 11,000.00 | 20.00 | \$ 1,000.00 | Contract adjustment |
| 3.1 | Additional Steel Work | CCO-001 | 07/01/2025 | 079 | Paul benni... | 07/03/2025 | | Draft | \$ 225,000.00 | 2,900.00 | \$ 250,900.00 | Contract adjustment |
| 3.0 | Additional Steel Work | | 06/25/2025 | 079 | Paul benni... | 07/01/2025 | | Revised | \$ 225,000.00 | 2,900.00 | \$ 250,900.00 | Contract adjustment |
| 2.0 | Structural steel budget move | | 06/19/2025 | | Paul benni... | 07/01/2025 | | Approved | \$ 0.00 | 0.00 | \$ 0.00 | Budget move |
| 1.0 | Erect steel budget move | | 06/18/2025 | | Paul benni... | 07/03/2025 | | Rejected | \$ 0.00 | 0.00 | \$ 0.00 | Budget move |

Select a column header, drag it into the gray section above the column headers, and then drop it. Multiple column headers can be placed in the Group By field.

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

\$

▼

↕

☰

Drag a column header and drop it here to group by column

+ Status

| CCO | Creation date | Issue # | Last changed by | Last changed on | Notes | Status | Total budget cost adjustment | Total budget MH adjustment | Total contract price adjustment |
|---------|---------------|---------|-----------------|-----------------|-------|-------------|------------------------------|----------------------------|---------------------------------|
| CCO-003 | 07/01/2025 | 2 | Paul benni... | 07/01/2025 | | CCO-Pending | \$ 259,000.00 | 3,000.00 | \$ 284,900.00 |
| | 06/26/2025 | 3 | Paul benni... | 07/01/2025 | | Issue-Draft | \$ 0.00 | 0.00 | \$ 0.00 |
| CCO-002 | 06/26/2025 | 1 | Paul benni... | 06/30/2025 | | CCO-Draft | \$ 11,000.00 | 20.00 | \$ 1,000.00 |
| CCO-001 | 07/01/2025 | 079 | Paul benni... | 07/03/2025 | | Draft | \$ 225,000.00 | 2,900.00 | \$ 250,900.00 |
| | 06/25/2025 | 079 | Paul benni... | 07/01/2025 | | Revised | \$ 225,000.00 | 2,900.00 | \$ 250,900.00 |
| | 06/19/2025 | | Paul benni... | 07/01/2025 | | Approved | \$ 0.00 | 0.00 | \$ 0.00 |
| | 06/18/2025 | | Paul benni... | 07/03/2025 | | Rejected | \$ 0.00 | 0.00 | \$ 0.00 |

After the Group by icon is activated, and one or more columns are grouped, such as the Status column, you can see all the change records in their respective groupings. You can also see a subtotal for each of the groupings (if applicable).

| < PAY ITEMS CHANGE REGISTER AUDIT LOG > | | | | | | | | | | | | |
|---|-------------|-----|---------------|---------|-----------------|-----------------|----------------|----------|-------|-------------------------|-------------------------|--|
| Actions | | | | | | | | | | | | |
| 1 Status | | | | | | | | | | | | |
| ID | Description | CCO | Creation date | Issue # | Last changed by | Last changed on | Net Qty change | Status | Notes | Change management tag 1 | Change management tag 2 | |
| Status:Pending(Count:6) | | | | | | | | | | | | |
| 8.0 | | | 09/23/2021 | | Paul trippi | 09/23/2021 | 0.00 | Pend... | | | | |
| 7.0 | | | 09/23/2021 | | Paul trippi | 09/23/2021 | 10,000.00 | Pend... | | | | |
| 6.0 | | | 09/23/2021 | | Paul trippi | 09/23/2021 | 0.00 | Pend... | | | | |
| 5.0 | | | 09/23/2021 | | Paul trippi | 09/23/2021 | 0.00 | Pend... | | | | |
| 4.0 | | | 09/23/2021 | | Paul trippi | 09/23/2021 | 0.00 | Pend... | | | | |
| 2.1 | 3 | 3 | 09/23/2021 | 3 | Paul trippi | 09/23/2021 | 0.00 | Pend... | | | | |
| Count:6 | | | | | | | | | | | | |
| Status:Draft(Count:1) | | | | | | | | | | | | |
| 3.0 | | | 07/26/2021 | 5 | Paul trippi | 07/26/2021 | 100.00 | Draft | | | | |
| Count:1 | | | | | | | | | | | | |
| Status:Revised(Count:1) | | | | | | | | | | | | |
| 2.0 | 3 | 3 | 01/19/2021 | 3 | Paul trippi | 09/23/2021 | 0.00 | Revis... | | | | |
| Count:1 | | | | | | | | | | | | |

RELEVANT LINKS

[Integrated Solutions - Approve contract adjustment](#)

[Integrated Solutions - Change order management](#)

[Video - Change approval process](#)

[Link 5](#)

EXERCISE 7.1 – CHANGE MANAGEMENT

Now that you have covered the key tasks related to change management, you can practice making changes on your own. You can use your own project (if available) or the training project used in this lesson.

1. Review the project and determine a scenario that would require a contract change.

2. Perform a Contract Adjustment per your scenario, including the creation of a pay item.

3. Once completed, approve the Contract Adjustment.

Congratulations, you have completed this exercise!

REVIEW

1. Where can you review the details of your contract adjustment or budget move and choose to either revise, reject, or approve the change?
 - a. Change Register
 - b. Approval Screen
 - c. CBS Log
 - d. Contract Change Log

2. When creating a budget move, what is recommended?
 - a. Issue number
 - b. Description
 - c. Dollar amount
 - d. All of the above

SUMMARY

As a result of this lesson, you can:

- Explain the change management process
- Complete a cost budget move
- Complete a quantity budget move
- Complete a man-hour adjustment
- Create an adjustment to the contract
- Describe the change order approval process

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CHAPTER 8 – REVENUE MANAGEMENT

LESSON DURATION: 45 MINUTES

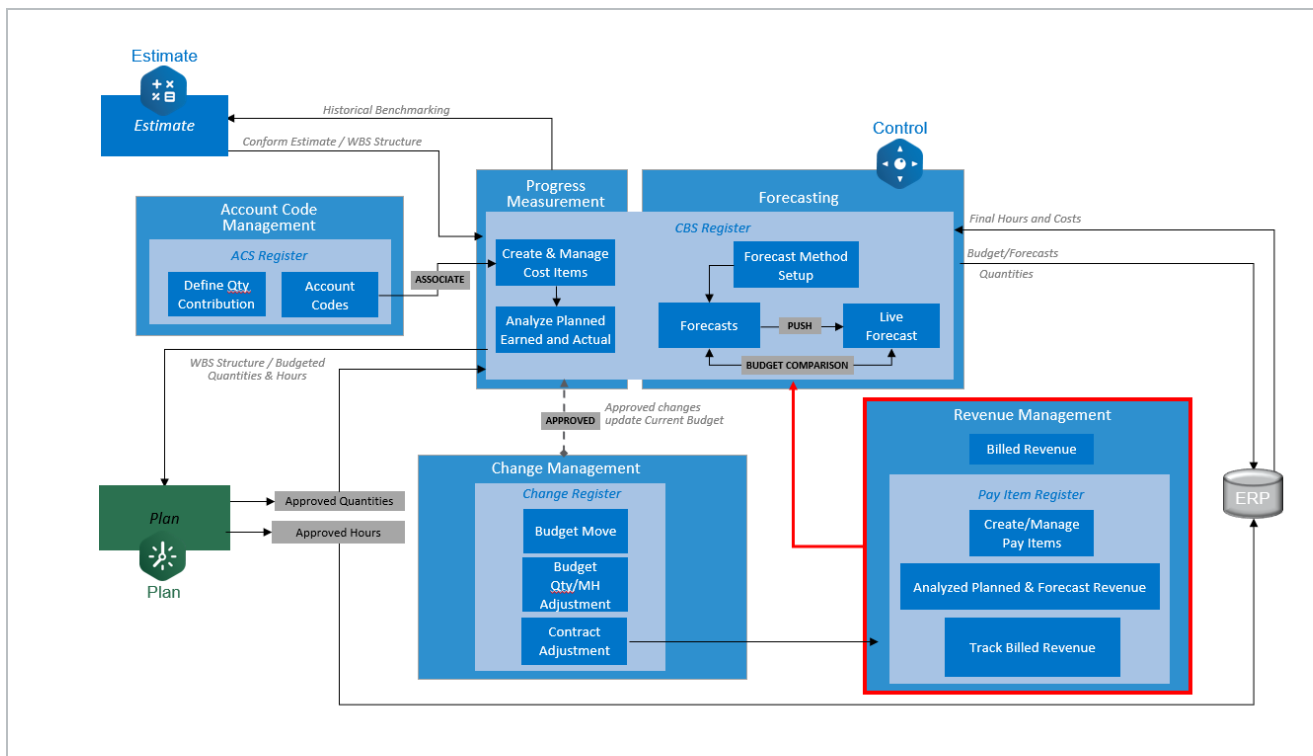
LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Forecast revenue and determine profit
- Manage pay item details
- Adjust pay item earning rules
- Bill customers per pay item or in mass
- Track billed revenue

LESSON TOPICS

CHAPTER 8 – INEIGHT CONTROL WORKFLOW - REVENUE MANAGEMENT



CHAPTER 8 – PAY ITEMS

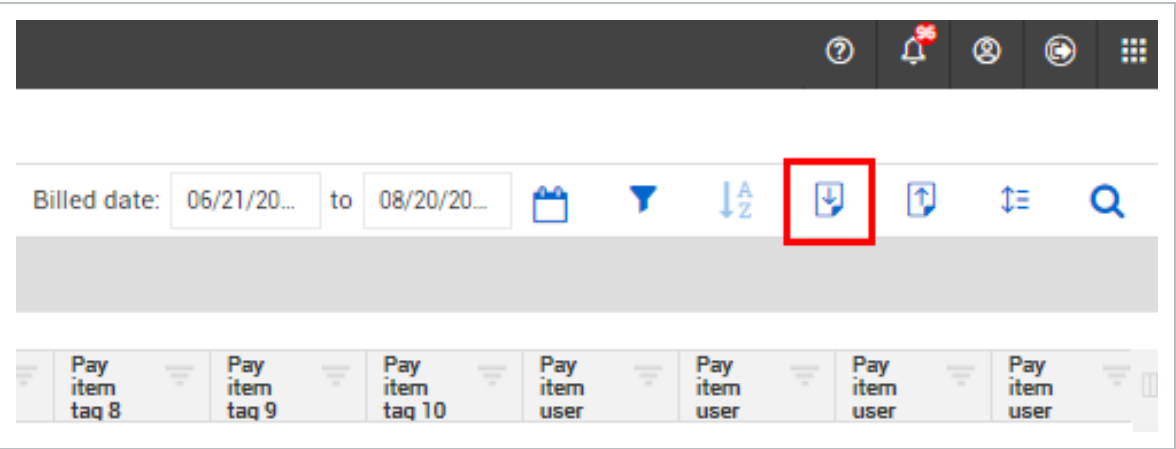
VIDEO | [Pay Item Details](#)

Pay items distribute the cost calculated in the Cost Breakdown Structure along with all markups, fees and contingencies calculated in the pay items. You can manage pay items on the Pay Items tab. For more information, see **Pay Items** section in [Workspaces](#).

CHAPTER 8 – BULK IMPORT PAY ITEMS

You can import pay items in mass directly into the Pay Item and Proposal register, similar to how cost items can be imported directly into the CBS.

You can access the Excel import feature by clicking on the Import icon on the far right toolbar of Control > Workspaces > Pay Items.



When you click on the Import icon within the Pay Items tab of the Workspaces page, the Import Pay Items window is shown.

Overview - Import Pay Items window

| Title | | Description |
|-------|---------------------|--|
| 1 | Import from Excel | You can either drag and drop or browse to the file to import. Microsoft Excel files (.xlsx,, .xls) and Comma Separated Value (.csv) files can be imported. |
| 2 | Import Type | You can add new pay items into the Pay Item and Proposal register. |
| 3 | Information message | Explains that once an import file is specified, the next step will allow you to match the columns in your spreadsheet to the appropriate columns in Control. |

Import Pay items

1

Import from Excel (.xlsx, .xls) or Comma separated value (.csv)

Drag and drop the file here
or browse

Browse

Options

2

* Import type

Pay Items

☒ New import

3

i The import file is read and field mapping can be specified. Mapping uses row 1 headers from the source document

Cancel

Next

Clicking Next brings you to the Map columns window, where you can map your Excel columns to the applicable column in Control.

Overview - Map Columns Window

| Title | | Description |
|-------|---------------|---|
| 1 | Template | After you map the import file columns to the Pay Item columns in Control, you can save your settings as a template for future use. This is helpful when you need to make scope changes or updates on a regular basis. |
| 2 | Control field | The names of the column headers in Control that you can map your data to. |
| 3 | Mapped | A green checkmark indicates the column in your import file is mapped correctly to the Pay Item's column. The Green key indicates the matching code you specified is locked. |

Overview - Map Columns Window (continued)

| Title | | Description |
|-------|--------------|--|
| 4 | File columns | The names of the column headers in your import file that you can map to the pay item columns in Control. |




Import Pay items - payItems.csv

Map columns

1

Template

Unsaved template



| 2 | 3 | 4 |
|--------------------------|--------|----------------------------|
| Control field | Mapped | File columns |
| Pay items | | |
| Current billing method | | Blank-do not import |
| Current forecast t/o qty | ✓ | Current forecast (T/O) qty |
| Current pay qty | | Blank-do not import |
| Current price | ✓ | Current price |
| Current unit price | | Blank-do not import |
| Description | ✓ | Description |
| Line number | | Blank-do not import |
| * Pay item number | 🔍 | Pay item number |
| Pay item tag 1 | | Blank-do not import |

* Required fields

Reset

Cancel

Back

Next

8.0.1 SPREADSHEET RULES

For the import to work correctly, the items in your Excel spreadsheet need to be formatted in a certain way so that Control can recognize them. The following table indicates important spreadsheet rules to follow to make sure your data imports successfully:

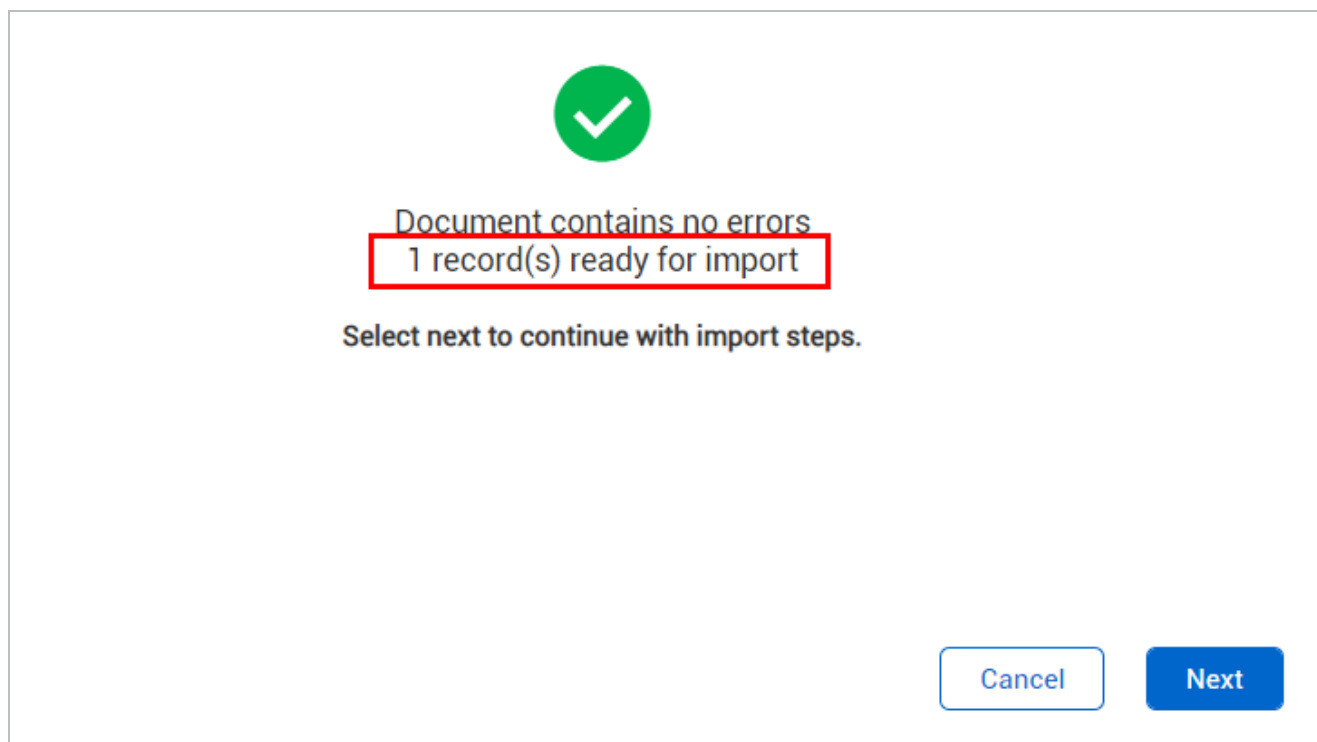
| Attribute | Rules |
|-----------------|---|
| Import function | Reads the first worksheet within the referenced workbook. Stops the import process when a blank row is encountered, so consolidating |

| Attribute | Rules |
|---------------------------|--|
| | the data to be imported is required. |
| First row of data | This is the header row of the data. This becomes the titles that are referenced during the mapping process. During import, headers are not read if a blank header cell is encountered. |
| Numbers | Need to be the actual number, not the summation of cells. Cannot contain the \$ or other currency symbol. |
| Second row of data | This is the first row of data import. |


NOTE

If you make changes in the spreadsheet, you must save the spreadsheet before importing. Only saved data are imported.

After clicking the Next button, the system reads your Excel file and attempts to import pay items. A successful import shows a message stating the number of files to be imported.



If the import is not successful, a message is shown stating that errors exist. An error file is provided for you to download, review, make corrections to your Excel file, then eventually continue with the pay item import again.



1 of 1 records contain errors

No Pay Items were imported. Multiple errors found in pay item import.

Download the error file to review and resolve errors.
Once all errors have been resolved, reattempt import.

[Close](#) [Download Error File](#)

The import error download file shows exactly where the error(s) exist within the Excel file.

```
|PayItem from External System
File Import attempted on: 8/20/2021 7:43:46 PM

The following errors were detected while attempting to import pay item
values into control.
Review the errors below, once all the errors have been resolved,
reattempt the import to Control.

Error 1: Current unit price must be a numeric value for pay item number
5. (this error has 1/1 total rows affected)

    Pay Item Number: 5
    Row: 1
```

CHAPTER 8 – EARNING RULES

On the Cost Items tab the **Update earning rules** icon updates the earning rules for all associated cost items. For each cost item associated to a pay item, you can adjust the earning rules by Earning % and

Earnings Timing. The Earnings timing indicates when you can earn revenue for a specific cost item associated to a pay item. You can select from the following earnings timing options:

- **Percent complete** – You will earn revenue based on the % complete of the cost item
- **Start** – You will earn all the revenue when the work of the cost item is started (e.g., Mobilization)
- **Finish** – You will not earn any revenue for the cost item until all the work is completed (e.g., QC item)

Pay item ID: 002
Description: Concrete - Labor & Material
Total Price: \$2,919,020.71

| CBS Position | Description | Earning % | Earning Amount (Forecast) | Earnings Timing | WBS Phase Code |
|--------------|----------------------|-----------|---------------------------|------------------|----------------|
| 5.2 | Concrete - Materials | 25.00 % | \$ 729,755.18 | Percent complete | 1086 |
| 3 | Concrete | 75.00 % | \$ 2,189,265.53 | | 1071 |
| | | 100.00 % | \$2,919,020.71 | | |

☒ Default Earning Rules

Cancel Save

In this case for your Structural Steel Project, cost item 3 has an earning rule that equals 75% of the Earning Amount (Forecast) of the pay item's final revenue. Respectively, cost item 5.2 has an earning rule of 25% of the Earning Amount (Forecast).

Since the Total Price of this pay item is \$2,919,020.71, it is expected that cost item 3 will earn 75% of this amount, and cost item 5.2 will earn 25%.

Pay item ID: 002
Description: Concrete - Labor & Material
Total Price: \$2,919,020.71

| CBS Position | Description | Earning % | Earning Amount (Forecast) | Earnings Timing | WBS Phase Code |
|--------------|----------------------|-----------|---------------------------|------------------|----------------|
| 5.2 | Concrete - Materials | 25.00 % | \$ 729,755.18 | Percent complete | 1086 |
| 3 | Concrete | 75.00 % | \$ 2,189,265.53 | Percent complete | 1071 |
| | | 100.00 % | \$2,919,020.71 | | |

☒ Default Earning Rules

Cancel Save

UPDATE EARNING RULES

| Earning % | Earning Amount (Forecast) |
|-----------|---------------------------|
| 25.00 % | \$ 729,755.18 |
| 75.00 % | \$ 2,189,265.53 |
| 100.00 % | \$2,919,020.71 |

Update earning rules

NOTE**Billing method of Cost plus**

When the billing method of the pay item is set to Cost Plus, then the Update earnings rules option will be disabled. Therefore, the associated cost items of the pay item will earn revenue based on the assigned estimate resources' billing rates and the % complete of the cost item.

ADJUSTING PAY ITEM EARNING RULES

1. On the Pay Items tab, select a pay item.
2. Hover over to the right of the Description and click on the **three black dots**.
3. Select **Pay item details**.
4. Select the **Cost Items** tab.
5. Click the **Update earning rules** icon.
6. Change the Earning % percentages for each associated cost item so the total will equal 100%..
7. Click **Save**.

CHAPTER 8 – BILLED REVENUE

You can track revenue for your cost items in the Billed revenue details panel. The timing and basis for billing revenue varies depending on your contractual agreement. Options include billing by a time period or milestone, or based on a schedule.

The Billed revenue details slide-out panel records and tracks billed revenue.

002

Concrete - Labor & Material

BILLED

RETENTION

BILLED HISTORY

| | | |
|----------------------|--------------------------|-------------|
| Pending billable qty | Pending billable revenue | Retainage % |
| 0.18 | \$ 530,386.06 | 0.00 % |

Billed revenue

\$ 0.00

Cost category

Undefined

Retention withheld: \$ 0.00

Net bill: \$ 0.00

Billed quantity

0.00

* Billed date

07/08/2025

Cost item

Type a CBS position, Description, or Phase code

Change order

Type a Change order ID or Description

Notes

Notes

250

+ Add billed

Cancel

Apply

In the Billed revenue details slide-out panel you can navigate to the following tabs:

- Billed
- Retention
- Billed History

To open the Billed revenue details slide-out panel, from the Pay Items register, click the ellipses next to the pay item description, and then select **Billed revenue details**. The Billed revenue details slide-out panel opens, where you can record and track what you bill to the client.

Steel Structure Training Job 2 | 1050... / Control / Workspaces

CBSACS

PKY ITEMSCHANGE REGISTERAUDIT LOG

ViewUnsaved (Revenue)

Actions

Revenue snapshot: Current revenue forecastBilled date: 10/01/2015 to 07/08/2025

Drag a column header and drop it here to group by that column

| | Pay item position | Pay item number | Description | Forecast total revenue | Forecast revenue unit cost | Revenue forecast method | Current billing method | Is billed | Billed revenue | Billed qty | Revenue earned | Quantity earned | Pending billable revenue | Pending billable qty | Net billed reven... |
|------------------------------------|-------------------|-----------------|------------------------------|------------------------|----------------------------|-------------------------|------------------------|-----------|----------------|------------|-----------------|-----------------|--------------------------|----------------------|---------------------|
| | | | Unapproved revenue | \$ 93,159.69 | | | | | | | | | | | |
| | 1 | 001 | Earthwork - Labor & Material | \$ 759,887.01 | \$ 759,887.01 | Default | Unit price | | \$ 0.00 | 0.00 | \$ 217,444.37 | 0.29 | \$ 217,444.37 | 0.29 | \$ 0.00 |
| | 2 | 002 | Concrete - Labor & Material | \$ 2,919,020.71 | \$ 2,919,020.71 | Default | Unit price | | \$ 0.00 | 0.00 | \$ 530,386.06 | 0.18 | \$ 530,386.06 | 0.18 | \$ 0.00 |
| | 3 | 003 | Steel - Labor & Material | | 1,092.28 | Default | Unit price | | \$ 0.00 | 0.00 | \$ 321,183.01 | 0.18 | \$ 321,183.01 | 0.18 | \$ 0.00 |
| Subtotals 3 (1 pay items selected) | | | | \$ 5,593,159.69 | | | | | \$ 0.00 | | \$ 1,069,013.45 | | \$ 1,069,013.45 | | \$ 0.00 |

Insert pay item

Delete pay item(s)

Pay item details

Billed revenue details

The Billed Revenue Details slide-out panel opens by default to the Billed tab.

RELEVANT LINKS

- Control Revenue settings
- Control Sync integration settings
- Integrated Solutions - Tracking Revenue
- Video - Billed revenue
- Video - Billings integration to Control

CHAPTER 8 – REVENUE FORECAST PROBABILITY

Revenue can come from Control or Change. Only Contract Adjustments have revenue. You can also adjust your pay item values in a Contract Adjustment. For example a drop down field called Approval Probability is a drop down of all your revenue categories and their associated probability. This drop down field displays the Approval probability by percentage and associated name.

Follow the steps below to select an approval probability.

APPROVAL PROBABILITY

1. Select the **Actions** drop down menu.
2. Hover over **Budget move and contract adjustment**, then click **Contract Adjustment**.
3. In the Approval probability drop down, select the percentage and associated name.
4. In step 3, select the add icon to add either new or existing pay items.
5. Enter a value into the **Adjusted total price** text box.
6. Either save as **Draft** or select the **Submit** button. Now it shows the selected approval probability in the Change Register. It also displays in the line item slideout. This updates automatically based on status changes.
7. If your line item is approved, it has a 100.00% in the Approval Probability column.
8. If a Contract Adjustment has been **revised** or **rejected**, then the line item has a 0.00% in the Approval Probability column.

NOTE

That Contract Adjustment's revenue is never going to be earned or added to the pay items because a new Contract Adjustment has been created.

9. If your line item is in a **Draft** or **Pending** state, the Approval Probability column displays the approval probability you selected for that line item.

NOTE

If you don't select an approval probability, the Approval Probability column is blank.

Your Approval Probability drives the price you include in your Forecast Final Revenue. For this next example, we are going to include the Unapproved Revenue into the Forecast Final Revenue. In the Pay Items Register, the Unapproved Revenue column calculates all the Contract Adjustments. The column adds up all Contract Adjustments that include the pay item and the adjusted price that has not yet been approved. The Unapproved Revenue column calculates anything that is in a **Draft** or **Pending** state.

OBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

Actions

+

×

Billed date: 06/19/2019 to 10/01/2020

Drag a column header and drop it here to group by that column

| | Pay item number | Description | Pay Item User | Forecast final revenue | Fore... unit reve... | % Mar... | Billed reve... | Billed qua... | Rev... fore... met... | Rev... earn... | Quantity earned | Unapproved revenue | Pending billable quantity | |
|-------------------------------------|-----------------|---------------|---------------|------------------------|----------------------|-------------|----------------|---------------|-----------------------|----------------|-----------------|--------------------|---------------------------|-------|
| <input type="checkbox"/> | 1 | | | \$ 212.00 | \$ 26.50 | 100.00 % | \$ 0.00 | -1.00 | Default | \$ 0.00 | 0.00 | | 1.00 | \$ 0. |
| <input type="checkbox"/> | 001 | Pay Item 1 | | \$ 112,594,397.58 | \$ 0.91 | 100.00 % | \$ 10,020.12 | 888,919.12 | Default | \$ 112,594,... | 123,458.77 | | -765,451.35 | \$ 1. |
| <input type="checkbox"/> | 005 | Danielle test | | \$ 105,062.40 | \$ 105.06 | -4,278.83 % | \$ 105,062... | 822.00 | Billed | \$ 875,767... | | | | \$ 7. |
| <input type="checkbox"/> | 123 | 123 | | \$ 4,014,854.93 | \$ 1,003,71... | 100.00 % | \$ 220,485... | 219.67 | Default | \$ 3,954,88... | 3.94 | | -215.73 | (\$ |
| <input checked="" type="checkbox"/> | 12345 | 12345 | | \$ 3,010.00 | \$ 3,010.00 | 100.00 % | \$ 124.00 | 1.00 | Default | \$ 0.00 | 0.00 | \$ 1,000.00 | -1.00 | (\$ |

In Pay Item Details, the Change Orders, you can view the following details:

- Total price change
- Total unit price change
- Total pay quantity change
- Approval probability
- Adjusted forecast final revenue
- Status

12345

12345

Total Price

\$ 3,000.00

Pay Quantity

1.00

Unit Price

\$ 3,000.00

DETAILS

ATTRIBUTES

CHANGE ORDERS

COST ITEMS

| Issue # | Total price change | Total unit price change | Total pay qty change | Approval probability | Adjusted forecast final revenue | Status |
|---------|--------------------|-------------------------|----------------------|----------------------|---------------------------------|----------|
| | \$ 1,000.00 | \$ 0.00 | 0.33 | 1.00 % | \$ 10.00 | Draft |
| | \$ 0.00 | (\$ 3,000.00) | 0.00 | 0.00 % | \$ 0.00 | Pending |
| | \$ 0.00 | (\$ 3,000.00) | 0.00 | 0.00 % | \$ 0.00 | Revised |
| | \$ 3,000.00 | \$ 3,000.00 | 1.00 | 100.00 % | \$ 3,000.00 | Approved |

The Forecast Final Revenue is the sum of all the Adjusted Forecast final revenue. Calculating the Unapproved Revenue with the Forecast Final Revenue provides you with a more accurate look at the revenue you will see when the Contract Adjustment is approved. Nothing is added into the Total Pay Item Price until it is approved.

Approval Probability drop down is only available in the Contract Adjustment. Everywhere else it is read only. To manually adjust the Contract Adjustment, go to the **Change Register**. Then right click the line item you want to change and select **Revise**. The Contract Adjustment can also automatically change based on status changes.

The Revenue Category Name and probability percentage drives the Approval Probability. The Revenue Category Name draws from the Revenue Categories in the Master Data libraries.

Master data libraries

Revenue categories

QA 20.9 TEST ENVIRONMENT

English

The Revenue Categories show the Revenue category name and probability percentage for only **active** revenue.

CHAPTER 8 – TIME PHASED BUDGET

Time phased budget lets you plan out where to spend money in the months of the active fiscal calendar for the project.

The point of being able to time phase your budget is so that you can plan out your budget cost per cost item. You are spreading out your budget over the course of the project for each cost item.

8.0.1 BUDGET ORGANIZATION SETTING

The time phased budget feature includes an organization setting located in the Project tracking tab of the Control settings. The organization setting sets the default for all the projects within that organization.

You can also change the budget setting at the project level. If you are starting new projects in your organization, you need to have Time phasing budget switched on.

By default all the projects that are created under that organization also have the time phased budget enabled. This is the same for when budget is disabled.

Time phasing

Enable time phasing for the following:

Budget ⓘ

☒

Edit past Time phased budget values


☐

8.0.2 EDIT PAST TIME PHASED BUDGET VALUES

The Edit past Time phased budget values toggle lets you edit past fiscal period time phased budget values.

Time phasing

Enable time phasing for the following:

Budget 



Edit past Time phased budget values



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

Change register

Contract adjustment

Net budget change

\$ 0.00

Net quantity change

No

Net man hour change

0.00

Markup

\$ 0.00

Fee

\$ 0.00

Net contract change

\$ 0.00

Approval probability

1 Details

2 Cost items

3 Time phased budget


4 Pay items

5 Summary

| <input type="checkbox"/> CBS position | Description | WBS phase code | Start | Finish | Cc | January 2022 | | February 2022 | |
|---------------------------------------|-------------|--------------------------------|-------|------------|-----|--------------|---------------|---------------|---------------|
| | | | | | | Cost | Adjusted cost | Cost | Adjusted cost |
| <input type="checkbox"/> | 2.3.1.1.1 | Resurface Existing Access road | 1004 | 10/16/2022 | Lir | \$ 212.33 | (\$ 212.33) | \$ 191.78 | \$ 212.33 |
| <input type="checkbox"/> | 2.3.1.1.2 | Maintain Access Road | 1005 | 10/16/2022 | Lir | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

Selecting the new Rebaseline icon resets the cost item's time phased budget distribution based on the Start and Finish dates against that cost item. Rebaselining lets you amend your time phased budget distribution costs for a cost item.

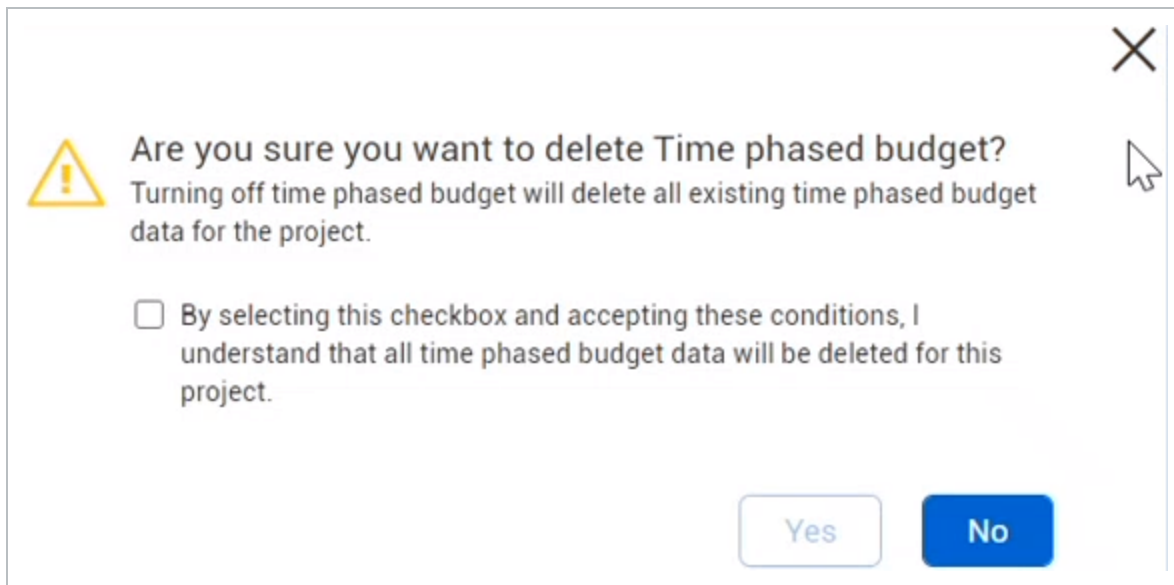
You can also edit any of the Adjusted cost values manually for past months.

| | | | | | | | |
|---|--------------------------|---------------------------|-------------|------------|-----------|-------------------------|--------------------------------------|
|  | <input type="checkbox"/> | CBS position | Description | Start | Finish | April 2022 | May 2022 |
| <input type="checkbox"/> | 2.3.1.1.1 | Resurface Existing Access | 10/16/2022 | 11/15/2022 | \$ 205.48 | Adjusted cost \$ 0.00 | Cost \$ 212.33 Adjusted cost \$ 0.00 |
| <input checked="" type="checkbox"/> | 2.3.1.1.2 | Maintain Access Road | 05/01/2022 | 12/31/2022 | \$ 0.00 | Adjusted cost \$ 471.92 | Cost \$ 0.00 Adjusted cost \$ 975.31 |

At the project level, the time phased budget inherits the organization settings, but still lets you switch the budget setting *On* or *Off* at the project level. For example, you can have time phased budget turned on at the organization level and you can turn it off at the project level.

8.0.3 SWITCHING OFF TIME PHASING BUDGET

If the Time phasing budget is switched on, that means there is time phasing budget data in the database. If you turn it off time phasing budget at the project level, it gives you the following warning message:

**NOTE**

All of your time phased budget data is going to be deleted if you switch time phased budget off. You must select the check box in the warning dialog acknowledging that you understand and accept these conditions.

If you still want to turn off the time phasing budget, you can select **Yes** and then click **Save**. This will delete the time phasing budget data from the database.

8.0.4 SWITCHING ON THE TIME PHASING BUDGET

If you want to turn on time phased budget, the following dialog box appears if there are any missing start or end dates:

Cost items are missing start and end dates.

How would you like to populate the missing cost item start and end dates?

☒ Default all budget to current fiscal period

☐ Default to project start and end dates

☐ Go back and populate the missing dates

Cancel

Confirm

Every cost item in your project needs the start and finish date entered to use that data in the time phase budget.

When time phased budget data is calculated, the calculation is based off of the data in the current budget and total cost for the cost item. Then, the cost is distributed to the cost items start date, finish date, and cost curve.

| Time phased budget < • > | | | | |
|--------------------------|------------|------------|----------------|---------------------|
| CB total cost | Start | Finish | Cost curve | Pending budget cost |
| \$ 48,790.00 | 01/01/2020 | 03/31/2022 | Linear | \$ 150.00 |
| \$ 25,020.00 | 01/01/2020 | 07/30/2021 | Back Loaded | (\$ 5,060.00) |
| \$ 5,050.00 | 12/30/2020 | 12/31/2020 | Front Loaded | \$ 4,640.00 |
| \$ 5,120.00 | 01/01/2021 | 05/31/2021 | Linear | \$ 540.00 |
| \$ 1,600.00 | 12/01/2020 | 03/31/2021 | Custom curve 1 | \$ 10.00 |
| \$ 1,000.00 | 12/01/2020 | 05/15/2021 | Bell Shaped | \$ 10.00 |
| \$ 11,000.00 | 12/01/2020 | 03/31/2022 | Custom curve 2 | \$ 10.00 |

8.0.4.1 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.

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

8.0.4.2 DEFAULT TO PROJECT START AND END DATES

The next option is to default to the 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 of those missing start and end dates to just the project start and end dates.

8.0.4.3 POPULATE MISSING DATES MANUALLY

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.

NOTE Time phased budget data currently can only be seen in the CBS contract adjustment.

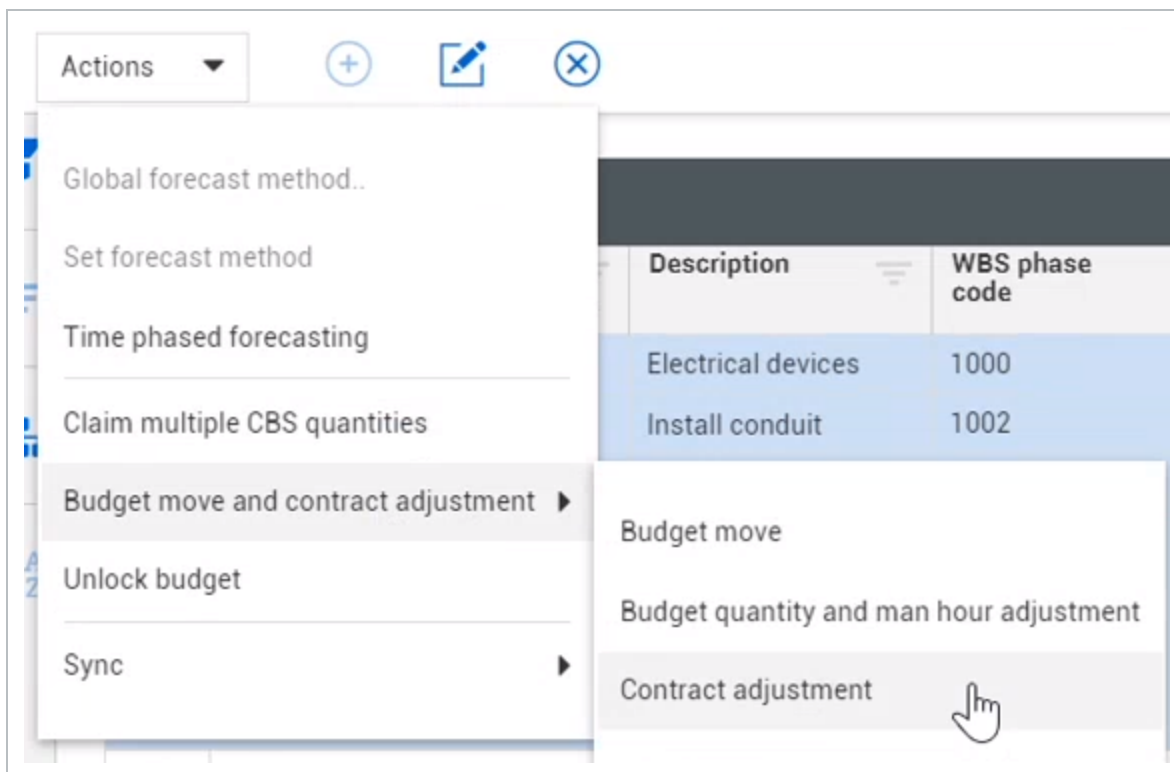
For more information about settings for time phasing budget, see [Time-phasing](#).

8.0.5 TIME PHASED BUDGET IN CONTRACT ADJUSTMENT

From the CBS, select cost items to adjust in the contract adjustment.

| Tasks | | | | Time phased budget | | | | |
|-------------------------------------|--------------|---------------------|----------------|--------------------|------------|------------|----------------|---------------------|
| | CBS position | Description | WBS phase code | CB total cost | Start | Finish | Cost curve | Pending budget cost |
| <input type="checkbox"/> | 1 | Electrical devices | 1000 | \$ 48,790.00 | 01/01/2020 | 03/31/2022 | Linear | \$ 150.00 |
| <input checked="" type="checkbox"/> | 1.1 | Install conduit | 1002 | \$ 25,020.00 | 01/01/2020 | 07/30/2021 | Back Loaded | (\$ 5,060.00) |
| <input checked="" type="checkbox"/> | 1.2 | Fiber optic cable-1 | 1001.1 | \$ 5,050.00 | 12/30/2020 | 12/31/2020 | Front Loaded | \$ 4,640.00 |
| <input checked="" type="checkbox"/> | 1.3 | Pull cable | 1003 | \$ 5,120.00 | 01/01/2021 | 05/31/2021 | Linear | \$ 540.00 |
| <input type="checkbox"/> | 1.4 | CCTV devices | 1004 | \$ 1,600.00 | 12/01/2020 | 03/31/2021 | Custom curve 1 | \$ 10.00 |

Then select the **Actions** drop-down, hover over the **budget move and contract adjustment** and then select **Contract adjustment**.



In the contract adjustment, there is an area called Change order attributes. This area lets you set your change orders/contract adjustment to the following:

- Start date
- Finish date
- Cost curve

1 Details

2 Cost items

3 Time phased budget

4 Pay items

5 Summary

Choose your Contract adjustment workflow

☒ **Start with Cost items**
Enter markup and fees on cost items to generate pay item price

☐ **Start with Pay items**
Adjust pay item price before adjusting cost item budgets

Change order attributes

Start date

2020 ▼

December ▼

Finish date

2020 ▼

December ▼

Cost curve

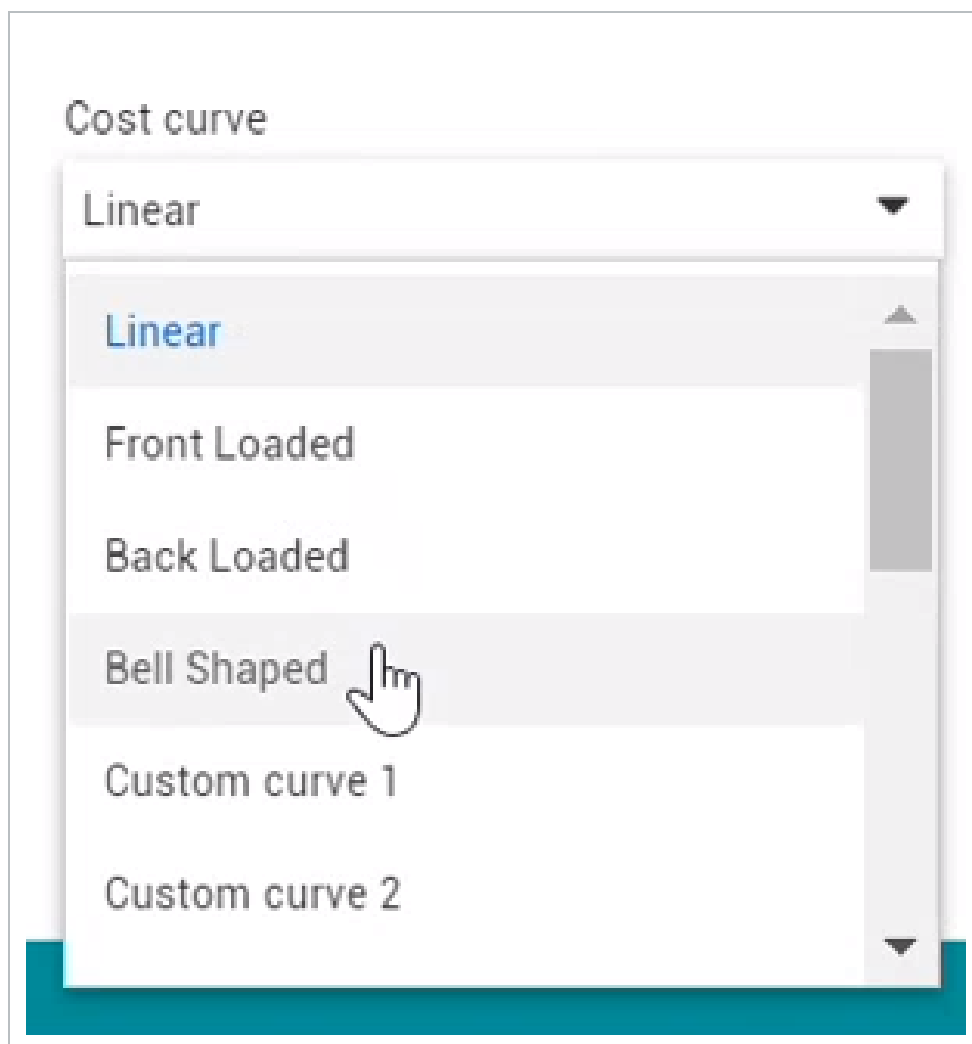
Linear ▼

Contract adjustment details

Issue #

CCO

Cost Curve can be adjusted in many ways. If you select **Bell Shaped** the cost adjustments increase during the summer months and then decreases in the winter months.



In step 3 of the contract adjustment, the Time phased budget step can be used for both Start with Cost items work flow and the Start with Pay items work flow. You can adjust your time phased budget in either contract adjustment work flow.

NOTE The only time your time phased budget should change is when you get change orders and you have to change your overall budget amount.

For the Start dates, you cannot put budget in the past. If you try to select a month that has already passed, you will get an error stating Start date must be in an open fiscal period.

Change order attributes

| | | |
|------------|-------------|------------|
| Start date | Finish date | Cost curve |
| 2020 ▼ | 2021 ▼ | Linear ▼ |
| January ▼ | December ▼ | |

Start date must be in an open fiscal period

Finish date has to be greater than your start date otherwise you get the following error.

Finish date

2020
December

Cost curve

Linear

Finish date cannot be earlier than start date

Move onto step 2 Cost Items. You can add Adjusted CB total cost. In this example we are adding \$100 to each cost item.

| 1 Details 2 Cost items 3 Time phased budget | | | | | | |
|---|--------------|---------------------|----------------|---------------|------------------------|----------|
| Assign cost to | | | | | | |
| <input type="checkbox"/> | CBS position | Description | WBS phase code | CB total cost | Adjusted CB total cost | Markup % |
| Unassigned cost items | | | | | | |
| <input type="checkbox"/> | 1.2 | Fiber optic cable-1 | 1001.1 | \$ 5,050.00 | \$ 100.00 | |
| <input type="checkbox"/> | 1.1 | Install conduit | 1002 | \$ 25,020.00 | \$ 100.00 | |
| <input type="checkbox"/> | 1.3 | Pull cable | 1003 | \$ 5,120.00 | \$ 100.00 | |
| <input type="checkbox"/> | 1.4 | CCTV devices | 1004 | \$ 1,600.00 | \$ 100.00 | |
| <input type="checkbox"/> | 1.5 | Terminations | 1005 | \$ 1,000.00 | \$ 100.00 | |
| <input checked="" type="checkbox"/> | 1.6 | Light poles | 1006 | \$ 11,000.00 | \$ 100.00 | |

In the Time phased budget step, the 100 dollars now has to be distributed. Scroll over to the Distribution type column.

NOTE

In step 3, only TERMINAL cost items will be brought into that grid. Non-terminal cost items do not show on the Cost items grid of the contract adjustment.

1

Details

2

Cost items

3

Time phased budget

4

Pay items

5

Summary

| <input type="checkbox"/> | CBS position | Description | Start | Finish | Cost curve | Distribution type | CB total cost | <div> <div>November 2020</div> <div>Cost</div> </div> | <div> <div>December 2020</div> <div>Cost</div> </div> | Adjusted cost |
|--------------------------|--------------|---------------------|------------|------------|------------|-------------------|---------------|---|---|---------------|
| <input type="checkbox"/> | 1.1 | Install conduit | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 25,020.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| <input type="checkbox"/> | 1.2 | Fiber optic cable-1 | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 5,050.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| <input type="checkbox"/> | 1.3 | Pull cable | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 5,120.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| <input type="checkbox"/> | 1.4 | CCTV devices | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 1,600.00 | \$ 0.00 | \$ 327.43 | \$ 0.00 |
| <input type="checkbox"/> | 1.5 | Terminations | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 1,000.00 | \$ 0.00 | \$ 14.43 | \$ 0.00 |
| <input type="checkbox"/> | 1.6 | Light poles | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 11,000.00 | \$ 0.00 | \$ 588.48 | \$ 0.00 |

There are three different Distribution types:

- Change order (default setting)
- Cost Item
- Manual

When Distribution type is set to **Change order**, it means it is pulling in the start date, finish date, and cost curve from the details step of your change order.

The changes to the Adjusted total cost column are then distributed throughout the start and finish date and shows in the Adjusted Cost column.

If your cost curve was set to **linear**, roughly the same amount of cost goes into the same fiscal period. Since some months are longer than others, they will have additional cost.

1

Details

2

Cost items

3

Time phased budget

4

Pay items

5

Summary

\$ 0.00

Dec 2020 - Dec 2021

View Cost column

| <div><input type="checkbox"/></div> | <div>CBS position</div> | <div>Description</div> | <div>WBS phase code</div> | <div>Start</div> | <div>Finish</div> | <div>Cost curve</div> | <div>Distribution type</div> | October 2021 | | November 2021 | | December 2021 | |
|-------------------------------------|-------------------------|------------------------|---------------------------|------------------|-------------------|-----------------------|------------------------------|--------------|---------------|---------------|---------------|---------------|---------------|
| | | | | | | | | Cost | Adjusted cost | Cost | Adjusted cost | Cost | Adjusted cost |
| <input type="checkbox"/> | 1.1 | Install conduit | 1002 | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 0.00 | \$ 9.62 | \$ 0.00 | \$ 7.69 | \$ 0.00 | \$ 7.69 |
| <input type="checkbox"/> | 1.2 | Fiber optic cable-1 | 1001.1 | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 0.00 | \$ 9.62 | \$ 0.00 | \$ 7.69 | \$ 0.00 | \$ 7.69 |
| <input type="checkbox"/> | 1.3 | Pull cable | 1003 | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 0.00 | \$ 9.62 | \$ 0.00 | \$ 7.69 | \$ 0.00 | \$ 7.69 |
| <input type="checkbox"/> | 1.4 | CCTV devices | 1004 | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 0.00 | \$ 9.62 | \$ 0.00 | \$ 7.69 | \$ 0.00 | \$ 7.69 |
| <input type="checkbox"/> | 1.5 | Terminations | 1005 | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 0.00 | \$ 9.62 | \$ 0.00 | \$ 7.69 | \$ 0.00 | \$ 7.69 |
| <input type="checkbox"/> | 1.6 | Light poles | 1006 | 12/27/2020 | 12/25/2021 | Linear | Change order | \$ 792.18 | \$ 9.62 | \$ 633.74 | \$ 7.69 | \$ 633.74 | \$ 7.69 |

1 Details

2 Assign amounts

3 Time phased budget

4 Summary

Choose your Budget move workflow

☐ **Associated**
 Define budget moves with a From and To process to provide ultimate traceability of budget moves.

☒ **Non-Associated**
 Define budget moves freely to provide the most flexibility.

Change order attributes

Start date

2021

▼

April

▼

Finish date

2021

▼

December

▼

Cost curve

Linear

▼

Budget move details

Issue #

Issue #

CCO

CCO

Description

500

The Time phased budget step is similar to the Time phased budget step for Contract adjustment. The distribution type on this step is where you can select to distribute by the change order attributes or the cost item attributes. You can also manually adjust your cost.

[Change register](#) > [Budget Move](#)

1 Details
2 Assign amounts
3 Time phased budget
4 Summary

🗨

🗪

⚙ \$ 0.00
Feb 2021 - Aug 2021
View Cost column ☒

| CBS position | Description | WBS phase code | Start | Finish | Cost curve | Distri type | February 2021 | | March 2021 | | April 2021 | |
|--|-------------|----------------|------------|------------|--------------|-------------|---------------|---------------|---|---------------|------------|---------------|
| | | | | | | | Cost | Adjusted cost | Cost | Adjusted cost | Cost | Adjusted cost |
| <input checked="" type="checkbox"/> 41 | Cost item 1 | 01 | 05/01/2021 | 12/31/2021 | Linear | Cost B | \$ 0.00 | \$ 1,500.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| <input checked="" type="checkbox"/> 42 | Cost item 2 | 02 | 05/01/2021 | 05/01/2022 | Front Loaded | Cost B | \$ 0.00 | \$ 200.00 | <input style="width: 100px;" type="text" value="0.00"/> | \$ 0.00 | \$ 0.00 | \$ 0.00 |

⏪
⏩

Cancel
Draft
Back
Next

When you adjust the budgeted cost either through a contract adjustment or a budget move, you can adjust the cost over the different fiscal periods and decide where to place the adjusted cost.

8.0.7 TIME PHASED BUDGET GRIDS

In the left side grid, you have many of the cost item details in columns. This includes the following columns:

- CBS position
- Description
- WBS phase code
- Start
- Finish
- Cost curve
- Distribution type
- CB total cost
- Adjusted CB total cost
- Pending budget cost: any outstanding budget cost that has not yet been approved. For example, if you have another pending contract adjustment, it adds those values in this column.
- Phased budget cost delta

| <input type="checkbox"/> | CBS position | Description | CB total cost | Adjusted CB total cost | Pending budget cost | Phased budget cost delta |
|--------------------------|--------------|---------------------|---------------|------------------------|---------------------|--------------------------|
| <input type="checkbox"/> | 1.1 | Install conduit | \$ 25,020.00 | \$ 100.00 | (\$ 5,060.00) | \$ 0.00 |
| <input type="checkbox"/> | 1.2 | Fiber optic cable-1 | \$ 5,050.00 | \$ 100.00 | \$ 4,640.00 | \$ 0.00 |
| <input type="checkbox"/> | 1.3 | Pull cable | \$ 5,120.00 | \$ 100.00 | \$ 540.00 | \$ 0.00 |
| <input type="checkbox"/> | 1.4 | CCTV devices | \$ 1,600.00 | \$ 100.00 | \$ 10.00 | \$ 0.00 |
| <input type="checkbox"/> | 1.5 | Terminations | \$ 1,000.00 | \$ 100.00 | \$ 10.00 | \$ 0.00 |
| <input type="checkbox"/> | 1.6 | Light poles | \$ 11,000.00 | \$ 100.00 | \$ 10.00 | \$ 0.00 |

You can adjust the amount of columns you see using the slider to move between the left side grid and the right side grid.

The right side grid shows your cost and adjusted cost columns. Your cost columns show current cost that has been approved.

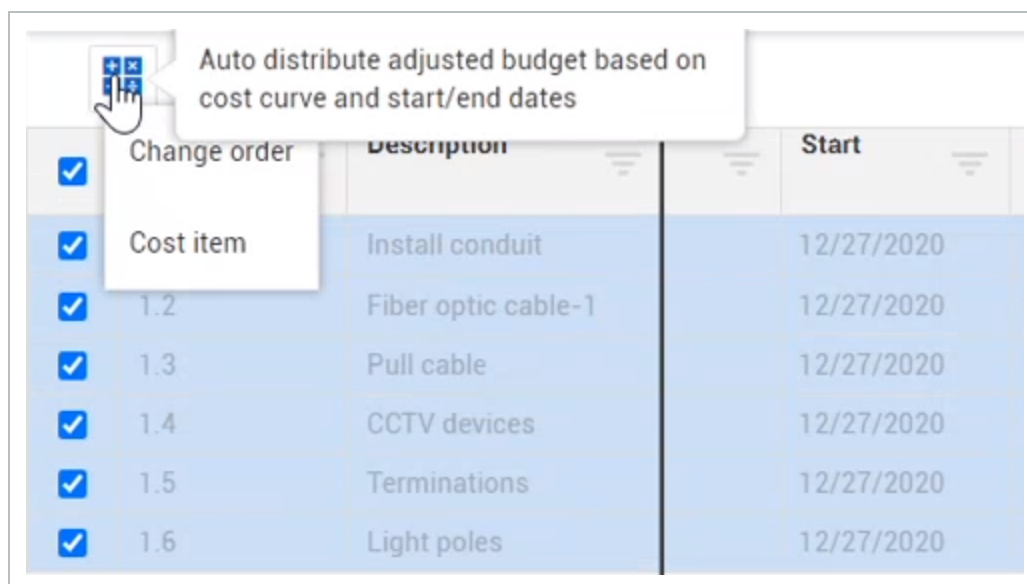
For example, in the **CB total cost** column, if you have \$1,000 approved, the cost columns for each month distributes that cost throughout each month.

| <div> <div>1 Details</div> <div>2 Cost items</div> <div>3 Time phased budget</div> <div>4 Pay items</div> <div>5 Summary</div> </div> | | | | | | | | | | | |
|---|--------------|---------------------|---------------|------------------------|-----------|---------------|-------------|---------------|-----------|---------------|-----------|
| | | | | Dec 2020 | | January 2021 | | February 2021 | | March 2021 | |
| <input type="checkbox"/> | CBS position | Description | CB total cost | Adjusted CB total cost | Cost | Adjusted cost | Cost | Adjusted cost | Cost | Adjusted cost | Cost |
| <input type="checkbox"/> | 1.1 | Install conduit | \$ 25,020.00 | \$ 100.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 9.62 | \$ 0.00 | \$ 7.69 | \$ 0.00 |
| <input type="checkbox"/> | 1.2 | Fiber optic cable-1 | \$ 5,050.00 | \$ 100.00 | \$ 0.00 | \$ 0.00 | \$ 5,050.00 | \$ 9.62 | \$ 0.00 | \$ 7.69 | \$ 0.00 |
| <input type="checkbox"/> | 1.3 | Pull cable | \$ 5,120.00 | \$ 100.00 | \$ 0.00 | \$ 0.00 | \$ 1,017.22 | \$ 9.62 | \$ 949.40 | \$ 7.69 | \$ 949.40 |
| <input type="checkbox"/> | 1.4 | CCTV devices | \$ 1,600.00 | \$ 100.00 | \$ 327.43 | \$ 0.00 | \$ 440.77 | \$ 9.62 | \$ 352.62 | \$ 7.69 | \$ 428.81 |
| <input checked="" type="checkbox"/> | 1.5 | Terminations | \$ 1,000.00 | \$ 100.00 | \$ 14.43 | \$ 0.00 | \$ 187.96 | \$ 9.62 | \$ 387.76 | \$ 7.69 | \$ 312.69 |
| <input type="checkbox"/> | 1.6 | Light poles | \$ 11,000.00 | \$ 100.00 | \$ 588.48 | \$ 0.00 | \$ 792.18 | \$ 9.62 | \$ 633.74 | \$ 7.69 | \$ 633.74 |

8.0.8 CHANGING DISTRIBUTION TYPE TO COST ITEM

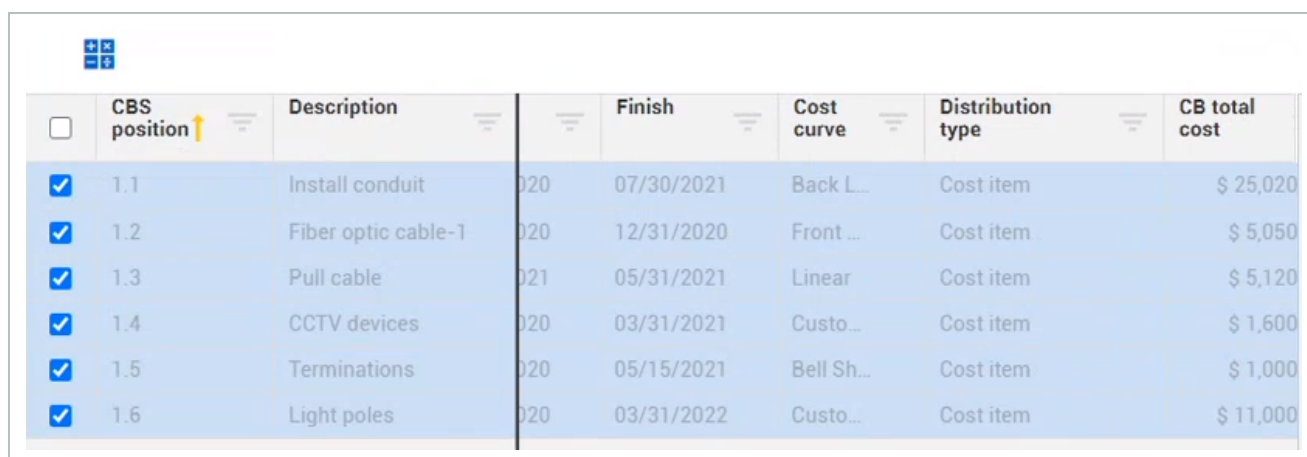
You can change the auto distribute type to Cost item if you want your adjusted budget to use attributes from the CBS.

To do this, you can select one, many, or all of your cost items in the left side grid, and then click on the **auto distribute** icon. Then select **Cost item**.



| | CBS position | Description | Start |
|-------------------------------------|--------------|---------------------|------------|
| <input checked="" type="checkbox"/> | | Install conduit | 12/27/2020 |
| <input checked="" type="checkbox"/> | 1.2 | Fiber optic cable-1 | 12/27/2020 |
| <input checked="" type="checkbox"/> | 1.3 | Pull cable | 12/27/2020 |
| <input checked="" type="checkbox"/> | 1.4 | CCTV devices | 12/27/2020 |
| <input checked="" type="checkbox"/> | 1.5 | Terminations | 12/27/2020 |
| <input checked="" type="checkbox"/> | 1.6 | Light poles | 12/27/2020 |

Your Distribution type has changed to cost item. You are now distributing your adjusted budget based on the cost item attributes that are pulling in from the CBS.



| | CBS position | Description | Finish | Cost curve | Distribution type | CB total cost |
|-------------------------------------|--------------|---------------------|------------|------------|-------------------|---------------|
| <input checked="" type="checkbox"/> | 1.1 | Install conduit | 07/30/2021 | Back L... | Cost item | \$ 25,020 |
| <input checked="" type="checkbox"/> | 1.2 | Fiber optic cable-1 | 12/31/2020 | Front ... | Cost item | \$ 5,050 |
| <input checked="" type="checkbox"/> | 1.3 | Pull cable | 05/31/2021 | Linear | Cost item | \$ 5,120 |
| <input checked="" type="checkbox"/> | 1.4 | CCTV devices | 03/31/2021 | Custo... | Cost item | \$ 1,600 |
| <input checked="" type="checkbox"/> | 1.5 | Terminations | 05/15/2021 | Bell Sh... | Cost item | \$ 1,000 |
| <input checked="" type="checkbox"/> | 1.6 | Light poles | 03/31/2022 | Custo... | Cost item | \$ 11,000 |

This also changes how the Cost curve distributes the adjusted cost. As you can see from the screenshot above, some cost curves have been adjusted.

8.0.9 MANUAL DISTRIBUTION OF COST ADJUSTMENT

You can change a specific cost item's cost adjustment to zero and then manually redistribute that zeroed cost to other months. If you do not distribute the cost to other months, the following missing amount for the adjustment cost is highlighted in orange.

| | | △ \$ 40.00 | | Dec 2020 - Dec 2021 ▾ | | View Cost column <input checked="" type="checkbox"/> | |
|---------------|---------------|--------------|---------------|-----------------------|---------------|--|--|
| December 2020 | | January 2021 | | February 2021 | | | |
| Cost | Adjusted cost | Cost | Adjusted cost | Cost | Adjusted cost | | |
| \$ 0.00 | \$ 10.00 ● | \$ 0.00 | \$ 50.00 ● | \$ 0.00 | | | |
| \$ 0.00 | \$ 0.00 | \$ 5,050.00 | \$ 100.00 | \$ 0.00 | \$ 0.00 | | |
| \$ 0.00 | \$ 0.00 | \$ 1,017.22 | \$ 19.87 | \$ 949.40 | \$ 18.54 | | |
| \$ 327.43 | \$ 20.46 | \$ 440.77 | \$ 27.55 | \$ 352.62 | \$ 22.04 | | |
| \$ 14.43 | \$ 1.44 | \$ 187.96 | \$ 18.80 | \$ 387.76 | \$ 38.78 | | |
| \$ 588.48 | \$ 5.35 | \$ 792.18 | \$ 7.20 | \$ 633.74 | \$ 5.76 | | |

After redistribution, there are some manual indicators showing what the value was before the change.

| Start | Finish | Cost curve | Distribution type | December 2020 | | January 2021 | | February 2021 | | |
|------------|------------|------------|-------------------|---------------|---------------|--------------|---------------|---------------|---------------|-----------------------|
| | | | | Cost | Adjusted cost | Cost | Adjusted cost | Cost | Adjusted cost | Cost |
| 01/01/2020 | 07/30/2021 | Back L. ⚠ | Manual | \$ 0.00 | \$ 10.00 ● | \$ 0.00 | \$ 50.00 ● | \$ 0.00 | | Value before: \$ 0.00 |
| 12/30/2020 | 12/31/2020 | Front ... | Cost item | \$ 0.00 | \$ 0.00 | \$ 5,050.00 | \$ 100.00 | \$ 0.00 | \$ 0.00 | |
| 01/01/2021 | 05/31/2021 | Linear | Cost item | \$ 0.00 | \$ 0.00 | \$ 1,017.22 | \$ 19.87 | \$ 949.40 | \$ 18.54 | |
| 12/01/2020 | 03/31/2021 | Custo... | Cost item | \$ 327.43 | \$ 20.46 | \$ 440.77 | \$ 27.55 | \$ 352.62 | \$ 22.04 | |
| 12/01/2020 | 05/15/2021 | Bell Sh... | Cost item | \$ 14.43 | \$ 1.44 | \$ 187.96 | \$ 18.80 | \$ 387.76 | \$ 38.78 | |
| 12/01/2020 | 03/31/2022 | Custo... | Cost item | \$ 588.48 | \$ 5.35 | \$ 792.18 | \$ 7.20 | \$ 633.74 | \$ 5.76 | |

The warning indicator on the cost curve column lets you know that your cost item contains manual time phased months and is not technically back loaded anymore.

| Finish | Cost curve | Distribution type |
|--|------------|-------------------|
| 07/30/2021 | Back L. ⚠ | Manual |
| Cost item contains manual time phased months | | |

8.0.10 DELTAS IN A ADJUSTED COST COLUMNS

Deltas appear on a contract adjustment when the adjusted cost for a cost item does not match the current budget total cost.

NOTE You are not allowed to submit or approve a cost item adjustment that has a delta.

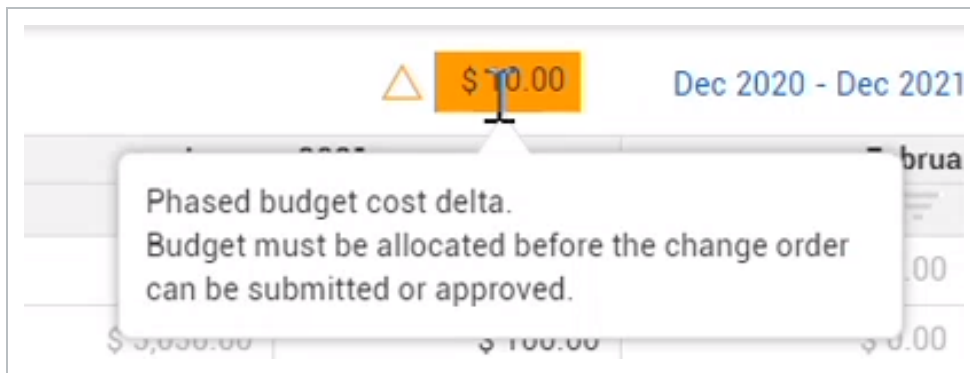
That is where the **phased budget cost delta** column displays any missing or over budgeted costs for any one cost item.

This column sums up all of your adjusted cost in the right side grid and compares it to the Adjust CB total cost.

For example, if you have \$10 not distributed, you need to add it to the adjusted cost in that same cost item before moving onto the next step. If the current budget total cost has \$100, you must spread that total cost amount throughout your months.

| | | | Dec 2020 - Dec 2021 View Cost column | | | | | |
|------------------------|---------------------|--------------------------|---|---------------|--------------|---------------|---------------|---------------|
| Adjusted CB total cost | Pending budget cost | Phased budget cost delta | December 2020 | | January 2021 | | February 2021 | |
| | | | Cost | Adjusted cost | Cost | Adjusted cost | Cost | Adjusted cost |
| \$ 100.00 | (\$ 5,060.00) | \$ 10.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 50.00 | \$ 0.00 | \$ 40.00 |
| \$ 100.00 | \$ 4,640.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 5,050.00 | \$ 100.00 | \$ 0.00 | \$ 0.00 |

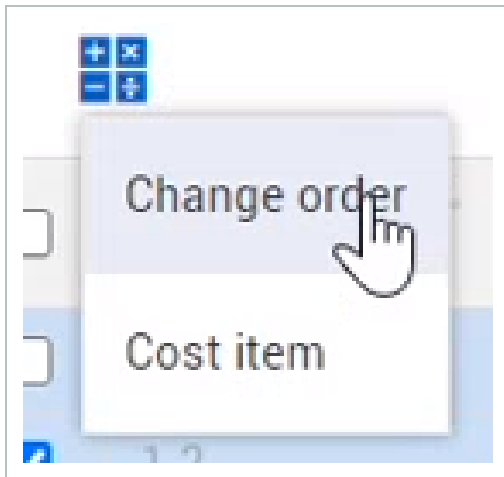
Hovering over the delta warning in the right side grid shows where the error in cost is occurring. If you have multiple deltas in different cost items, the delta cost would then sum up all delta costs.



If you attempt to submit or approve the contract adjustment with deltas and you return to the Time phased budget step, the **Phased budget cost delta** column shows which cost items have a delta. You need to resolve the deltas and redistribute the costs in the **Adjusted cost** columns in the right side grid before moving forward.

| | | | Dec 2020 - Dec 2021 View Cost column | | | | | |
|------------------------------|---------------------|------------------------|---|--------------------------|---------------|---------------|--------------|---------------|
| CBS position | Description | Adjusted CB total cost | Pending budget cost | Phased budget cost delta | December 2020 | | January 2021 | |
| | | | | | Cost | Adjusted cost | Cost | Adjusted cost |
| <input type="checkbox"/> 1.1 | Install conduit | \$ 0.00 | \$ 100.00 | (\$ 5,060.00) | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 50.00 |
| <input type="checkbox"/> 1.2 | Fiber optic cable-1 | \$ 0.00 | \$ 100.00 | \$ 4,640.00 | \$ 0.00 | \$ 10.00 | \$ 5,050.00 | \$ 100.00 |
| <input type="checkbox"/> 1.3 | Pull cable | \$ 0.00 | \$ 100.00 | \$ 540.00 | \$ 0.00 | \$ 0.00 | \$ 1,017.22 | \$ 19.87 |
| <input type="checkbox"/> 1.4 | CCTV devices | \$ 0.00 | \$ 100.00 | \$ 10.00 | \$ 327.43 | \$ 20.46 | \$ 440.77 | \$ 27.55 |

You can also adjust your delta costs using the same Auto distribution button from earlier and selecting **Change order**. Change order always distributes without a delta.



Now you can submit and approve your contract adjustment. All those values are going to be committed into your time phased budget.

For example, if you sync into your ERP, you can receive all changes made in the contract adjustment right after those changes have been approved.

8.0.11 VIEW COST COLUMNS

If you want to view just your adjusted cost columns, select the **View Cost column** slider to turn off your cost columns. Only the adjusted cost columns shows. These columns show what you are adjusting in the active project months for the contract adjustment.

| <div><div>△</div><div>\$ 0.00</div></div> <div>Dec 2020 - Dec 2021 ▾</div> <div>View Cost column <input checked="" type="checkbox"/></div> | | | | | | | |
|--|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| December 2020 | January 2021 | February 2021 | March 2021 | April 2021 | May 2021 | June 2021 | July 2021 |
| Adjusted cost ▾ | Adjusted cost ▾ | Adjusted cost ▾ | Adjusted cost ▾ | Adjusted cost ▾ | Adjusted cost ▾ | Adjusted cost ▾ | Adjusted cost ▾ |
| \$ 0.00 | \$ 9.62 | \$ 7.69 | \$ 7.69 | \$ 7.69 | \$ 9.62 | \$ 7.69 | \$ 7.69 |
| \$ 0.00 | \$ 9.62 | \$ 7.69 | \$ 7.69 | \$ 7.69 | \$ 9.62 | \$ 7.69 | \$ 7.69 |
| \$ 0.00 | \$ 9.62 | \$ 7.69 | \$ 7.69 | \$ 7.69 | \$ 9.62 | \$ 7.69 | \$ 7.69 |
| \$ 0.00 | \$ 9.62 | \$ 7.69 | \$ 7.69 | \$ 7.69 | \$ 9.62 | \$ 7.69 | \$ 7.69 |
| \$ 0.00 | \$ 9.62 | \$ 7.69 | \$ 7.69 | \$ 7.69 | \$ 9.62 | \$ 7.69 | \$ 7.69 |
| \$ 0.00 | \$ 9.62 | \$ 7.69 | \$ 7.69 | \$ 7.69 | \$ 9.62 | \$ 7.69 | \$ 7.69 |
| \$ 0.00 | \$ 9.62 | \$ 7.69 | \$ 7.69 | \$ 7.69 | \$ 9.62 | \$ 7.69 | \$ 7.69 |

8.0.12 DATE RANGE FILTER

The date range filter lets you filter the right side grid to show only the months you want to see. You can view the project months based on the following options:

- This month (current fiscal month you are in)
- Next 3 months

- Next 6 months
- Next 12 months
- Through project finish date

You can also manually select the months you want to view using the **Show months** drop-down lists.

8.0.13 APPROVING BUDGET WARNINGS

You can't approve budget set in the past. If you have any adjusted cost set for the current month (December) and the contract adjustment is approved in the next month (January), the approver receives a warning stating *you have budget in past or closed periods*.

The contract adjustment can still be approved, but the adjusted cost from the closed month moves to the following month.

The other option the approver has is to revise the adjusted cost. When revising, the adjusted cost from December has already moved into the adjust cost column for January. If you do not want all of the previous month added into a single month, you can manually move the additional adjusted cost from January into the other open fiscal period months.

REVIEW

1. Revenue columns can only be populated for a cost item that has an assigned ____?
 - a. UOM
 - b. Unit price
 - c. Pay item
 - d. Cost curve

2. What are the four tabs within the Pay Item slide out?
 - a. Details, Attributes, Revenue, Cost Items
 - b. Revenue, Cost Curves, Change Orders, Cost Items
 - c. Details, Cost Curves, Change Orders, Cost Items
 - d. Details, Attributes, Change Orders, Cost Items

3. In the Pay item details slide out panel, which tab contains the Update earning rules option?
 - a. Details
 - b. Cost Items
 - c. Attributes
 - d. Change Orders

4. The _____ slide out panel is where you can record what you bill to the client
 - a. Billed revenue details
 - b. Pay item details
 - c. Forecast revenue details
 - d. Cost curve details

SUMMARY

As a result of this lesson, you can:

- Forecast revenue and determine profit
- Manage pay item details
- Adjust pay item earning rules
- Bill customers per pay item or in mass
- Track billed revenue

CHAPTER 9 – SCHEDULING

LESSON DURATION: 20 MINUTES

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Navigate to the Schedule data block
- Edit schedule data inside the CBS
- Edit schedule data using Excel import
- Integrate planning activities
- Schedule using Primavera

LESSON TOPICS

CHAPTER 9 – SCHEDULING OVERVIEW

Inside of the Control application exists the functionality to track schedule dates at a CBS level. The ability to easily add and modify this information allows you to accurately track your operations planned and completed dates.

The schedule data can either be mass imported through an Excel upload, created and modified directly within the CBS, or by way of Primavera schedule integration through and XER file import. This lesson will cover all options.

CHAPTER 9 – SCHEDULE DATA BLOCK

The schedule data block is where all information regarding schedule dates is contained. Some of the key fields inside this data block are:

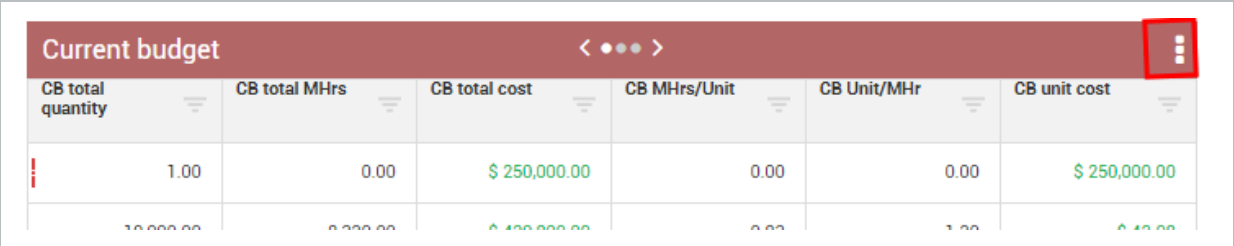
- Schedule ID
- Planned Start Date
- Planned Finish Date
- Early Start Date
- Early Finish Date
- Late Start Date
- Late Finish Date
- Actual Start Date
- Actual Finish Date

You can add and edit this information directly inside the Schedule data block. However, this will only allow you to modify one CBS line item at a time.

The following Step by Step shows you how to add the Schedule data block, save a Scheduling view, and add various dates for a specific CBS item.

SCHEDULE DATA BLOCK

- 1. From the Workspaces page of the Steel Structure Job, remove each data block from the page, except for the Tasks and Task Details data blocks, by right clicking on the **context menu**.



| Current budget | | | | | |
|-------------------|---------------|---------------|--------------|-------------|---------------|
| CB total quantity | CB total MHrs | CB total cost | CB MHrs/Unit | CB Unit/MHr | CB unit cost |
| 1.00 | 0.00 | \$ 250,000.00 | 0.00 | 0.00 | \$ 250,000.00 |
| 10.000.00 | 0.000.00 | \$ 400.000.00 | 0.00 | 1.00 | \$ 40.00 |

- 2. For each data block you plan to remove, select **Remove Data Block**

Choose columns

Filter

Save data block as...

Remove data block

- 3. Once the data blocks are removed, click the **Add Data Block** button.



4. Drag and drop the **Schedule Data Block** to the right of Task Details.

Steel Structure Job (105091) Control Workspaces

CBS ACS PAY ITEMS CHANGE REGISTER

Actions + -

Add data block

Standard data blocks

- Task details
- Actuals
- Current budget
- Current estimate
- Forecast
- Forecast delta
- Live forecast
- Schedule

Cost category data blocks

- Cost category s : Actu...
- Cost category s : CB
- Cost category s : CE
- Cost category s : Fore...

Tasks

| CBS position | Description |
|--------------|---------------------|
| 1 | Job Overhead |
| 2 | Earthwork |
| 2.1 | Earthwork Review |
| 2.2 | Earthwork |
| 3 | Concrete |
| 4 | Structural Steel |
| 4.1 | Erect Steel - Heavy |
| 4.2 | Erect Steel - Light |

Task details

| Resource | Forecast (T/O) quantity | UoM |
|----------|-------------------------|----------|
| | 1.00 | Lump Sum |
| | 10,000.00 | CY |
| 1 | 1.00 | Each |
| 5 | 10,000.00 | CY |
| 5 | 10,000.00 | CY |
| | 1,000.00 | Ton |
| 5 | 350.00 | Ton |
| 5 | 200.00 | Ton |

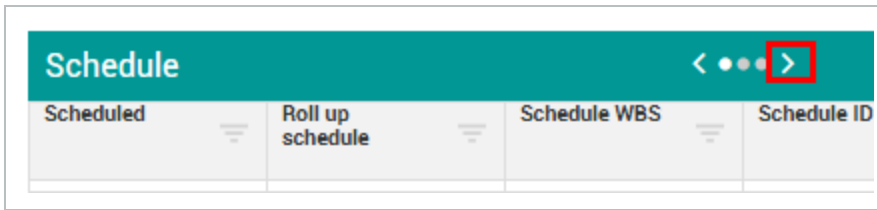
5. Select **Module [your initials] – [description.]**

| Tasks | | Task details | | | Schedule | | | | | | |
|-------------------------------------|--------------|-------------------------------|----------|-------------------------|----------|--------------------------|--------------------------|--------------------------|-------------|--------------------------|-----------|
| <input type="checkbox"/> | CBS position | Description | Resource | Forecast (T/O) quantity | UoM | Scheduled | Roll up schedule | Schedule WBS | Schedule ID | Schedule plug days | Plug days |
| <input type="checkbox"/> | | | | | | | | | | | |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light | 5 | 200.00 | Ton | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | HD.0000105 | <input type="checkbox"/> | 50.00 |
| <input type="checkbox"/> | 4.3 | Bolted Connections | 5 | 2,000.00 | Ea | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | HD.0000106 | <input type="checkbox"/> | 12.50 |
| <input checked="" type="checkbox"/> | 4.4 | Module 01 - Erect Steel Heavy | 3 | 800.00 | Ton | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | 0.00 |

6. In the schedule data block, type **your Initials.01234** in the Schedule ID field.

| Schedule | | | |
|-----------|------------------|--------------|-------------|
| Scheduled | Roll up schedule | Schedule WBS | Schedule ID |
| | | | SH.01234 |
| | | | |

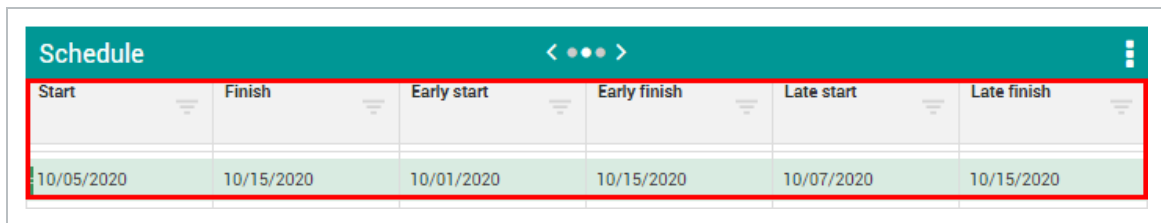
7. Click the **right arrow** to move to next set of columns in the schedule data block.



| Schedule | | | |
|-----------|------------------|--------------|-------------|
| Scheduled | Roll up schedule | Schedule WBS | Schedule ID |

8. Double click into each field and enter the following:

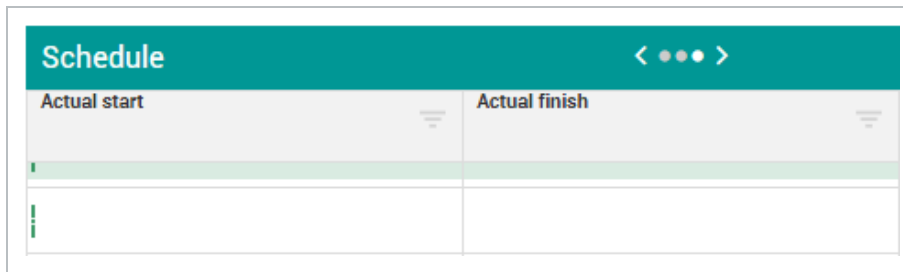
- Start = **10/05/2020**
- Finish = **10/15/2020**
- Early Start = **10/01/2020**
- Early Finish = **10/15/2020**
- Late Start = **10/07/2020**
- Late Finish = **10/15/2020**



| Schedule | | | | | |
|------------|------------|-------------|--------------|------------|-------------|
| Start | Finish | Early start | Early finish | Late start | Late finish |
| 10/05/2020 | 10/15/2020 | 10/01/2020 | 10/15/2020 | 10/07/2020 | 10/15/2020 |

- Entering dates on any terminal CBS item will auto-populate the parent's dates. If there are multiple terminal items under one parent, any start dates will take the earliest and any finish dates will take the latest
 - Once all the initial schedule dates are entered, the schedule data block also allows for the project to track actual dates
9. Click the **Right Arrow** to move to next set of columns in the schedule data block.

- You will leave these columns blank for this Step by Step



| Schedule | |
|--------------|---------------|
| Actual start | Actual finish |
| | |
| | |

CHAPTER 9 – SCHEDULE EXCEL IMPORT

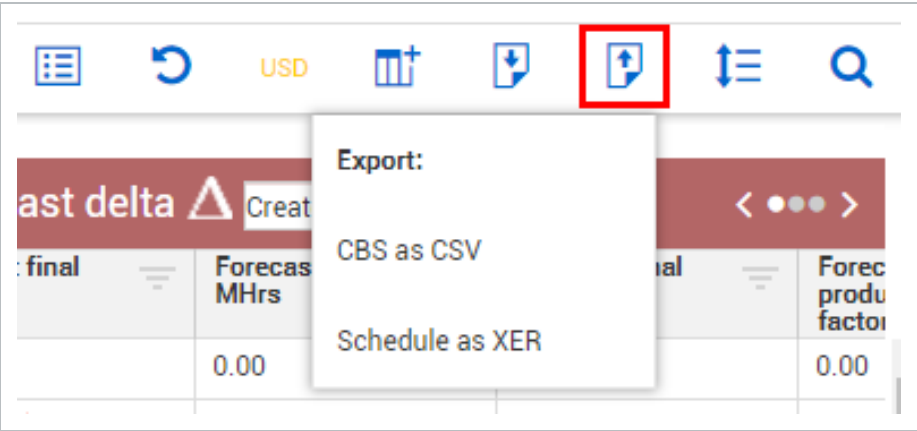
The Control application allows for an Excel import to import data into the Schedule data block. This is especially useful when bringing in large sets of data for multiple CBS items.

Excel imports can sometimes 'hang' while attempting to import CBS data. If this happens, it's possible to cancel an Excel import while the system continues the attempt to import the data.

The following Step by Step covers downloading this Excel sheet, entering the necessary data, and importing it back it into Control.

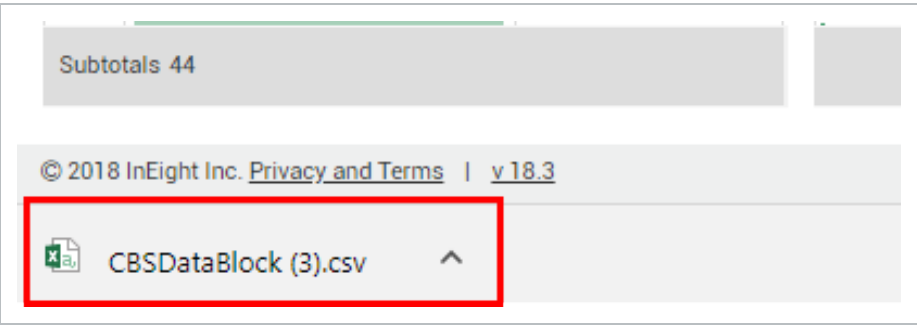
EXCEL IMPORT

1. From the Workspaces page, using the **Schedule** view on the CBS tab, click the **Export** button, then **CBS as CSV**.

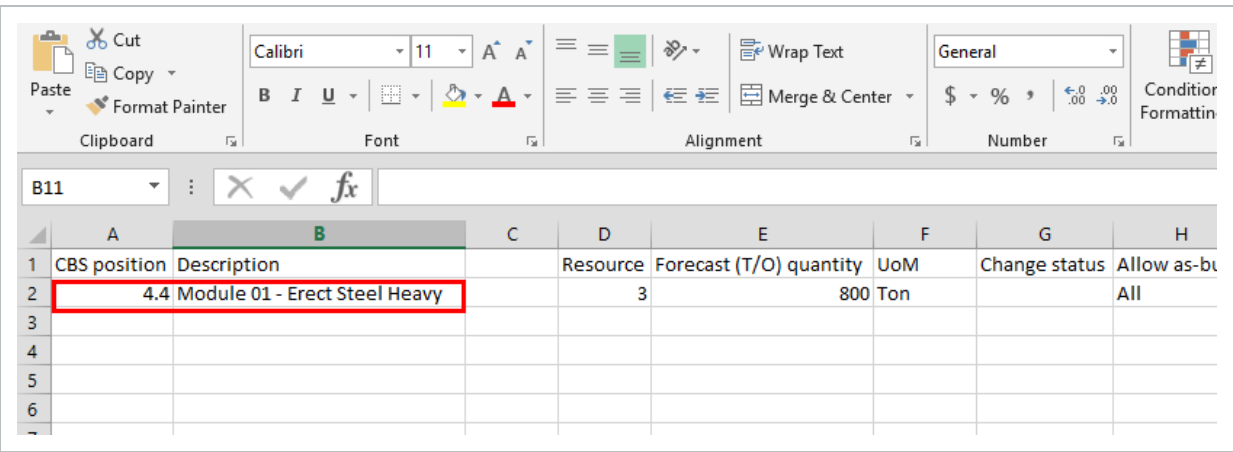


- This creates a CBSDataBlock folder in your Downloads folder

2. Open the **CBSDataBlock.csv** file.



3. Inside the Excel spreadsheet, delete all rows except for **Module [your initials] – [description]**.

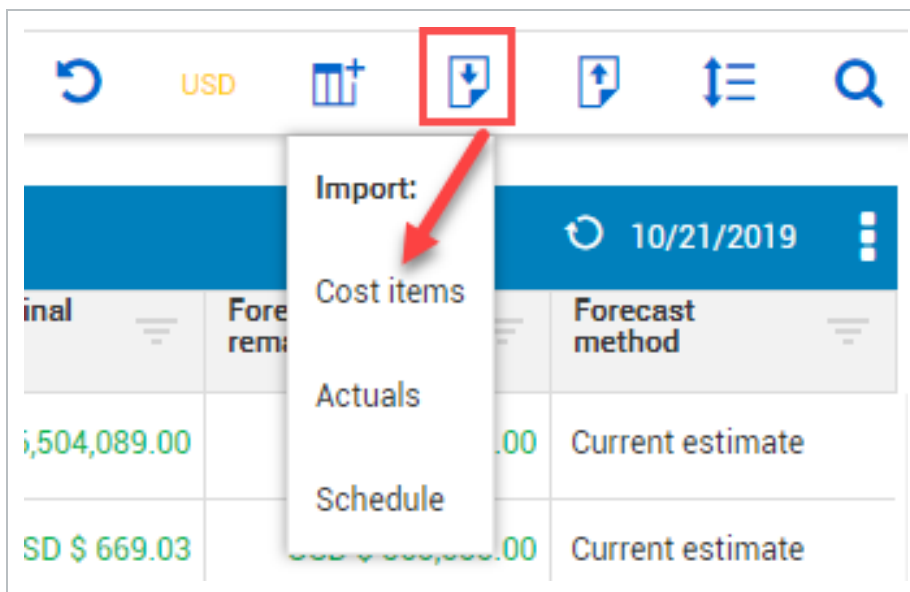


4. Enter the following:

- Actual Start = **10/03/2020**
- Actual Finish = **10/12/2020**

| AB | AC | AD | AE |
|-------------|--------------|---------------|------------|
| Late finish | Actual start | Actual finish | Cost curve |
| 10/14/2020 | 10/03/2020 | 10/12/2020 | Linear |

5. **Save** the file to your computer (as .xlsx, .xls, or .csv).
6. From the Control > Workspaces page, click the **Import** button for Cost Items.



7. Click **Browse** to select your Excel file.

Import CBS data

Import from Excel (.xlsx, .xls) or Comma separated value (.csv)

Drag and drop the file here or browse

[Browse...](#)

8. Select **Cost Items and cost item attributes**, **Update Existing Items** and **CBS position**.

Options

* Import type

Cost items and cost item attributes ▼

☒ Update existing and new items

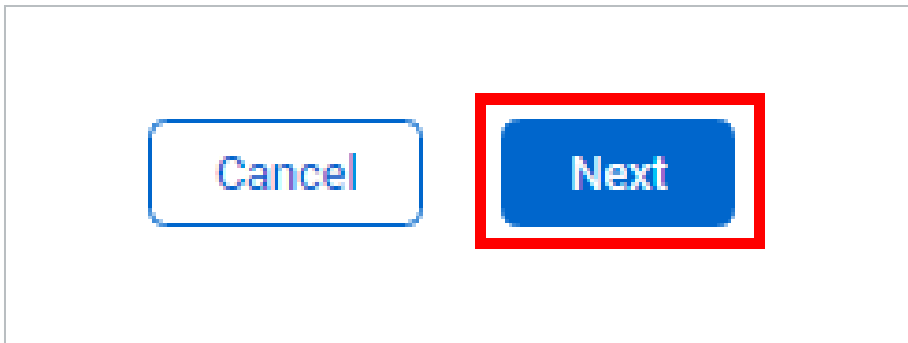
Cost item matching criteria

CBS position ▼

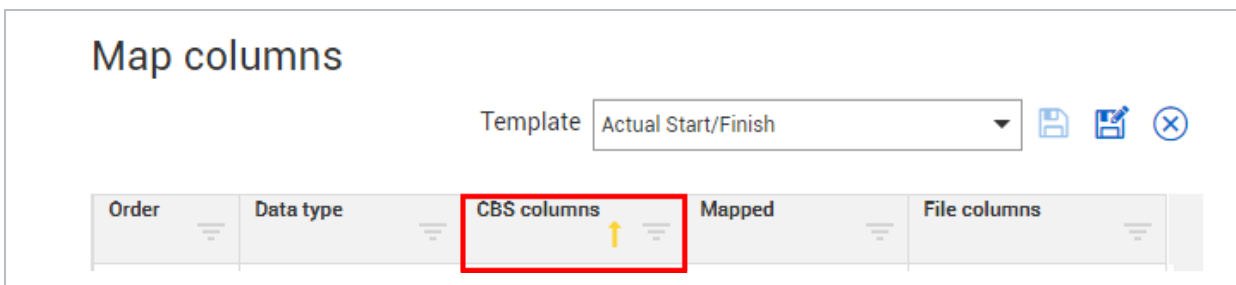
☐ Update existing items

☐ New items

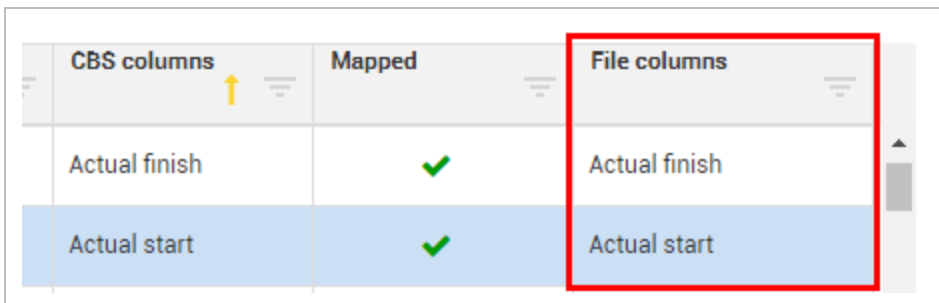
9. Click **Next**.




10. Next, you will map which columns from the Excel sheet get imported to which columns in Control. Click on **CBS Columns** to sort A-Z.



11. Under **File Columns**, match Actual Finish and Actual Start to the CBS columns description.



12. Do the same for WBS Phase Code.

| CBS columns | Mapped | File columns |
|-------------------|---|---------------------|
| User defined 6 | | Blank-do not import |
| User defined 7 | | Blank-do not import |
| User defined 8 | | Blank-do not import |
| WBS client code 1 | | Blank-do not import |
| WBS client code 2 | | Blank-do not import |
| WBS phase code |  | WBS phase code |

13. Click **Next**.

Cancel

Next

- The actual dates you specified import into the Schedule data block

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

Actions

Tasks

CBS position

1

Job Overhead

2

Earthwork

3

Concrete

4

Structural Steel

4.1

Erect Steel - Heavy

4.2

Erect Steel - Light

4.3

Bolted Connections

4.4

Module 01 - Erect Steel Heavy

Task details

Resource

Forecast (T/O) quantity

UoM

5

10,000.00

CY

5

10,000.00

CY

6

1,000.00

Ton

5

800.00

Ton

5

200.00

Ton

5

2,000.00

Ea

5

350.00

Ton

Schedule

Actual start

Actual finish

Cost cur

10/03/2020

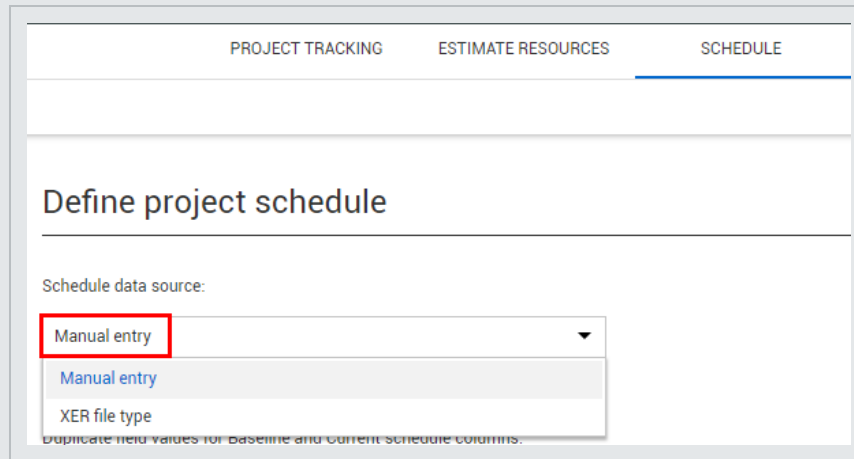
10/12/2020

10/03/2020

10/12/2020

TIP

The Excel import can only be accomplished if the Control > Settings > Schedule setting is set to Manual Entry.



The screenshot shows a web interface with three tabs: 'PROJECT TRACKING', 'ESTIMATE RESOURCES', and 'SCHEDULE'. The 'SCHEDULE' tab is active. Below the tabs is a section titled 'Define project schedule'. Under this title, there is a label 'Schedule data source:' followed by a dropdown menu. The dropdown menu is open, showing two options: 'Manual entry' (which is highlighted with a red box) and 'XER file type'. Below the dropdown menu, there is a small text note: 'Duplicate field values for baseline and current schedule columns.'

CHAPTER 9 – PRIMAVERA SCHEDULE INTEGRATION

The XER (file extension used by Primavera containing project file related data) import functionality allows the milestones and schedule dates (baseline and current) to be integrated into planning activities. Schedule IDs in Control are used to map Primavera Activity IDs to import and export the project information. The status of construction activities and progress are then integrated back into the InEight scheduling tools.

The Primavera schedule integration not only allows for XER file import of schedule dates but is also capable of a cost item bi-directional push and pull between Control and Primavera. XER imports integrate critical milestones and schedule dates into planning activities in the InEight cloud platform.

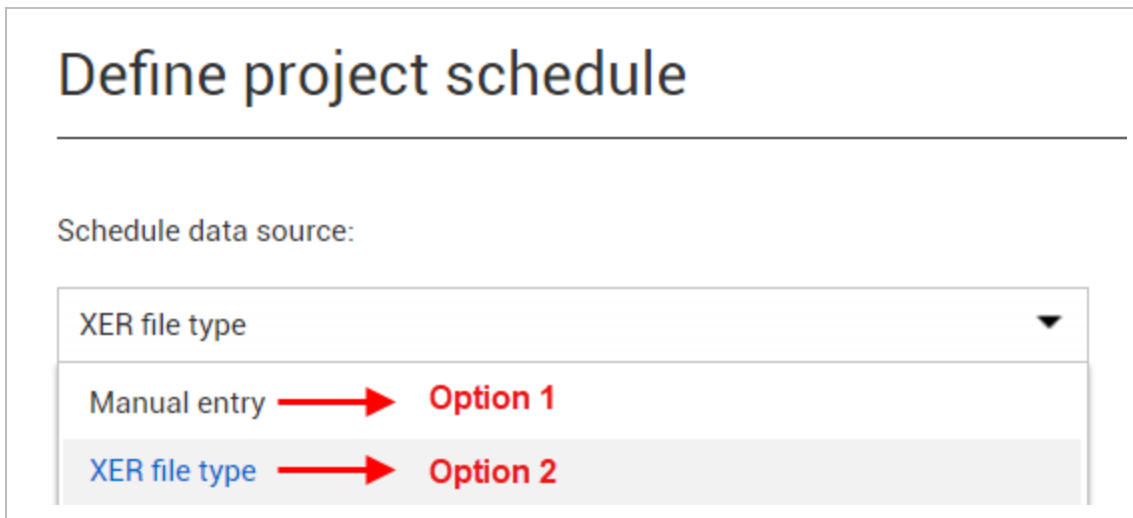
It's also possible for you to map the existing Control 25 CBS tag fields, and also the existing 15 user defined fields to P6. Conversely, you can create new fields in P6 based on tagging scheme. This allows you to filter Primavera and Control in similar ways, with the same sets of dates within both applications.

You also can push (Physical) % complete to P6. As you are progressing in Plan or Progress, and as quantities drive the percent complete in Control, it's possible to push the percent complete back to the associate activity in P6.

9.0.1 PRIMAVERA SCHEDULE INTEGRATION SETTINGS

The setting to change the schedule data source to Manual entry or an **XER file type** is in Settings > Control > Schedule > Define project schedule.

Under the Schedule data source, it's possible to manually enter schedule dates, or you can utilize the XER file type.



Define project schedule

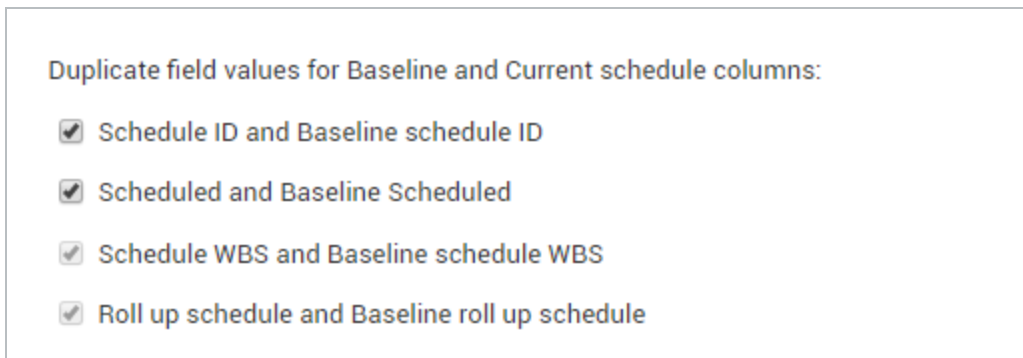
Schedule data source:

XER file type

Manual entry → Option 1

XER file type → Option 2

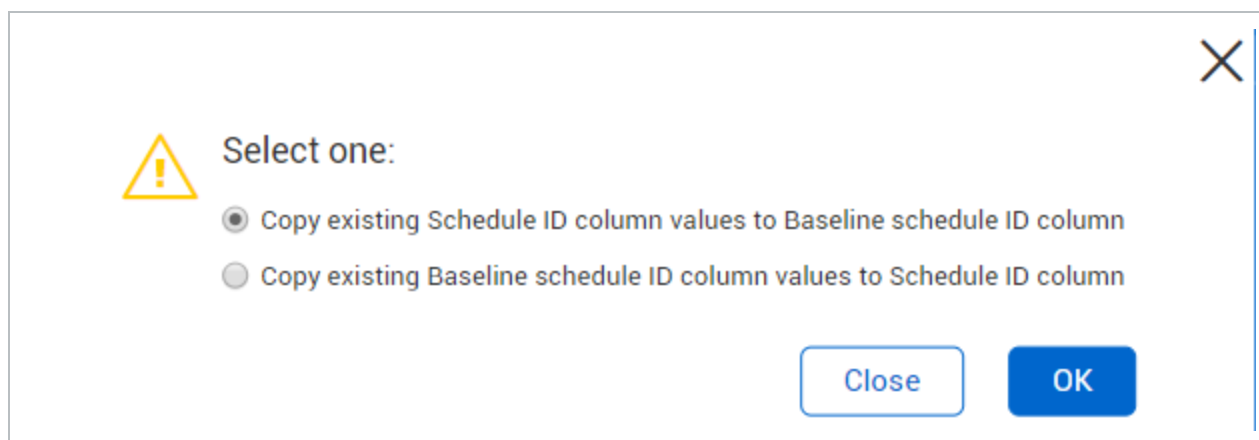
After selecting your Schedule data source, you will have the option of making sure that your schedule IDs are similar across your baseline and current schedule.



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

If you uncheck one of these options, and then check it back, you will be given the option to copy existing Schedule ID column values to Baseline schedule ID column, and vice versa. This is a way to ensure that data consistencies remain in check for both baseline and current monthly schedule.



A warning dialog box with a yellow triangle icon containing an exclamation mark. The text "Select one:" is followed by two radio button options. The first option is selected. At the bottom right are "Close" and "OK" buttons.

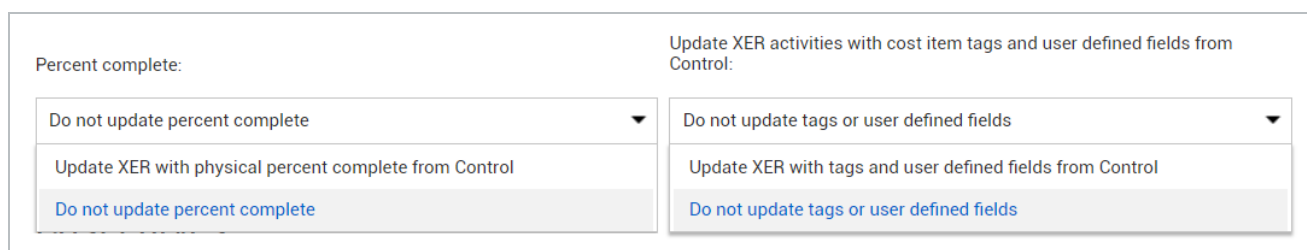
Select one:

- ☒ Copy existing Schedule ID column values to Baseline schedule ID column
- ☐ Copy existing Baseline schedule ID column values to Schedule ID column

Close OK

Under Percent complete, you can either update the XER file with physical percent complete from Control, or not.

Under the second dropdown for Update XER activities, you have the option to update XER with tags and user defined fields from Control, or not to.



A dialog box with two dropdown menus. The first dropdown is labeled "Percent complete:" and the second is labeled "Update XER activities with cost item tags and user defined fields from Control:". Both dropdowns have three options: "Do not update percent complete", "Update XER with physical percent complete from Control", and "Do not update percent complete" (highlighted in blue). The second dropdown has three options: "Do not update tags or user defined fields", "Update XER with tags and user defined fields from Control", and "Do not update tags or user defined fields" (highlighted in blue).

Percent complete:

Update XER activities with cost item tags and user defined fields from Control:

Do not update percent complete

Update XER with physical percent complete from Control

Do not update percent complete

Do not update tags or user defined fields

Update XER with tags and user defined fields from Control

Do not update tags or user defined fields

If you choose to update XER with tags and user defined fields, the Define tags and user defined export rules table appears. The 3 options to choose from are to match using Control field name, match using external system field name, or do not export.

If you choose to map to an external system field (as shown below using Tag 15 for the second record), you will need to manually type in the name of the field first. Because this is not an API, the system is not aware the existing fields within P6. Therefore, you need to self-determine which Control values you want to populate in P6.

Percent complete: Do not update percent complete

Update XER activities with cost item tags and user defined fields from Control: Update XER with tags and user defined fields from Control

Define XER tags and user defined export rules:

Column names in external scheduling system must be an exact match. If the specified name does not have a match with the external system, then a new column will be added at the project level.

| Match using External system field name | | Export Rule | *External system field |
|--|---|--|---------------------------|
| Match using Control field name | | | |
| Match using External system field name | | | |
| Do not export | | Do not export | |
| <input type="checkbox"/> | EN_CBS tag 8(CBS tag 8) | Match using External system field name | Tag 15 |
| <input type="checkbox"/> | EN_CBS tag 17(CBS tag 17) | Match using Control field name | EN_CBS tag 17(CBS tag 17) |
| <input type="checkbox"/> | EN_CBS tag 19(CBS tag 19) | Do not export | |
| <input type="checkbox"/> | EN_CBS tag 25(CBS tag 25) | Do not export | |
| <input type="checkbox"/> | EN_CBS user defined 6(CBS user defined 6) | Do not export | |
| <input type="checkbox"/> | EN_CBS user defined 12(CBS user defined 12) | Do not export | |
| <input type="checkbox"/> | EN_CBS tag 4(CBS tag 4) | Do not export | |
| <input type="checkbox"/> | EN_CBS tag 10(CBS tag 10) | Do not export | |
| <input type="checkbox"/> | EN_CBS tag 15(CBS tag 15) | Do not export | |

* Required fields

9.0.1.1 PRIMAVERA XER SCHEDULE INTEGRATION PREREQUISITES

1. XER file type or manual entry must be selected in Settings > Control > Schedule, in the Schedule data source section.

PROJECT TRACKING ESTIMATE RESOURCES **SCHEDULE** OTHERS

Define project schedule

Schedule data source:

XER file type
Manual entry
XER file type

- On the Schedule data block, the **Scheduled column** must be checked prior to importing a schedule.

| Schedule < ● ● ● > | | | | | |
|-------------------------------------|-------------|-------------------------------------|-----------|------------|------------|
| Scheduled | Schedule ID | Sched plug days | Plug days | Start | Finish |
| <input checked="" type="checkbox"/> | PS.1 | <input checked="" type="checkbox"/> | 21,682.50 | 07/18/2019 | 07/18/2019 |
| <input checked="" type="checkbox"/> | PS.2 | <input checked="" type="checkbox"/> | 0.00 | 07/18/2019 | 07/18/2019 |
| <input checked="" type="checkbox"/> | XYZ | <input type="checkbox"/> | 0.00 | 07/18/2019 | 07/18/2019 |

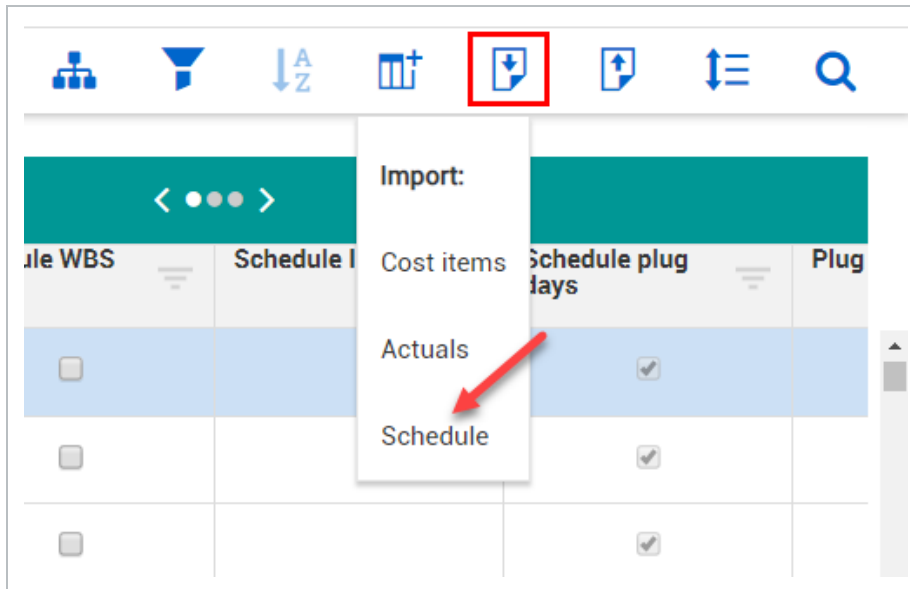
- The **Schedule ID** in Control must match the **Activity ID** in the XER file.

| Schedule < ● ● ● > | | | | | |
|-------------------------------------|-------------|-------------------------------------|-----------|------------|------------|
| Scheduled | Schedule ID | Sched plug days | Plug days | Start | Finish |
| <input checked="" type="checkbox"/> | PS.1 | <input checked="" type="checkbox"/> | 21,682.50 | 07/18/2019 | 07/18/2019 |
| <input checked="" type="checkbox"/> | PS.2 | <input checked="" type="checkbox"/> | 0.00 | 07/18/2019 | 07/18/2019 |
| <input checked="" type="checkbox"/> | XYZ | <input type="checkbox"/> | 0.00 | 07/18/2019 | 07/18/2019 |

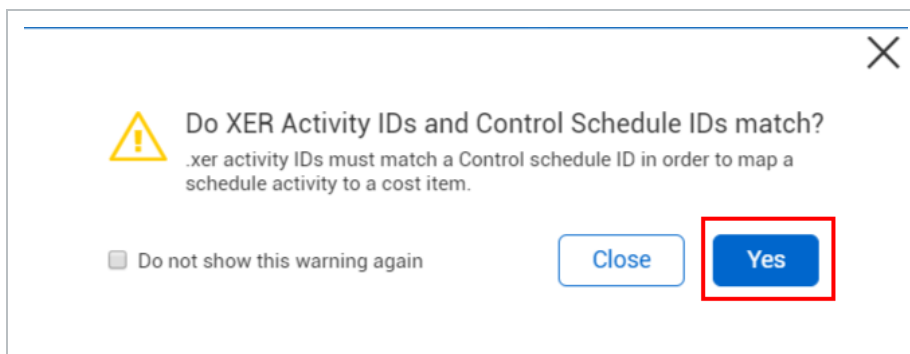
The following steps walk you through how to import a Primavera .XER file into Control.

SCHEDULE INTEGRATION IMPORT

1. From the CBS tab of the Control Workspaces page, select the **Import icon** on the top right menu bar, then click **Schedule**.



2. A warning message appears asking if the XER Activity IDs and Control IDs match. Click **Yes** if both IDs match before continuing.



3. In the Import schedule data window, click on the **Browse** icon in the Drag and drop file portion of the screen.

Import schedule data

Import from schedule (.xer)

Drag and drop the file here
or Browse

Browse

Maximum upload file size: 50 MB

Options

☐ **Baseline schedule**
A fixed project schedule that is the standard by which project performance is measured, and a reflection of all formally authorized scope and schedule changes. After importing a baseline, you can import a current schedule and derive some key performance indicators (KPI's).

☒ **Current schedule**
A schedule update, which reflects progress to date, plus forecast progress going forward and is used for monitoring. Schedule data can be mapped to domain data such as Control cost items to derive cost based schedules, and time phasing, for example.

4. In the Import schedule data window, click on the **Browse** icon in the Drag and drop file portion of the screen.
5. Select the desired **.XER** file that was generated in Primavera.
 - Once the .XER file is uploaded, the Browse box turns green

Import schedule data - Activity ID file.xer

Import from schedule (.xer)

Drag and drop the file here
or Browse

Browse

Maximum upload file size: 50 MB

6. In **Options**, select either the Baseline schedule or Current schedule for the schedule type that you want to import.

Options

☐ **Baseline schedule**
A fixed project schedule that is the standard by which project performance is measured, and a reflection of all formally authorized scope and schedule changes. After importing a baseline, you can import a current schedule and derive some key performance indicators (KPI's).

☒ **Current schedule**
A schedule update, which reflects progress to date, plus forecast progress going forward and is used for monitoring. Schedule data can be mapped to domain data such as Control cost items to derive cost based schedules, and time phasing, for example.

7. Select **Next**.
8. Select **Import** after reviewing the Schedule summary.

Import schedule data - Activity ID file.xer

Schedule summary

Schedule name

WSFN Shoreline Protection

Schedule type

Current schedule

| Total schedule records | |
|------------------------|-----|
| Schedule WBS | 107 |
| Schedule activities | 306 |

Import may take some time. You may continue to make changes to your project while the import is processing.

Cancel

Import

- The **Importing data** process screen displays the current status for each step of the .XER data import.

Processing schedule data import - Activity ID file.xer ("3058" OPG WSFN Shoreline Protection-A00131-1)

Importing data

| Step | Status |
|---|--|
| Step 1: Preparing data to be sent | <div><div></div>Complete</div> |
| Step 2: Placing data in queue | <div><div></div>Processing - 1mins</div> |
| Step 3: Writing data to master library | |
| Step 4: Sending data to project | |
| Step 5: Mapping master data to project data | |
| Step 6: Inserting data to project tables | |

This may take some time. You may continue to make changes to your project while the import is processing.

Status update is also available in the Import history

- If there are errors in any of the steps, you can click on the **Pending unmapped items found** link to make the corrections

| Importing data | |
|---|---------------------------------|
| Step | Status |
| Step 1: Preparing data to be sent | ✓ Complete |
| Step 2: Placing data in queue | ✓ Complete |
| Step 3: Writing data to master library | ✓ Complete |
| Step 4: Sending data to project | ✓ Complete |
| Step 5: Mapping master data to project data | ⚠ Pending, unmapped items found |
| Step 6: Inserting data to project tables | |

- You can also navigate to Audit Log > Import history to view the import status, which includes the **Total line items** imported

| File name | Status | Processing Details | Total line items | Errors | Total imported | Added estimate resources | Added pay items | Created by | Created date |
|-------------------|------------|--------------------|------------------|--------|----------------|--------------------------|-----------------|------------|--------------------|
| NEWPROJ.xer (D... | ✓ Complete | All steps | 18 | 0 | 19 | 0 | 0 | Asmita Ray | 08/02/2019 10:0... |

- If there are corrections to be made, once completed, you can select **Import** to re-import the data.

Audit log > Import history > Activity ID file.xer ("..."

CancelImport

| Status details | | | Schedule details | | Cost item details | | |
|---|-----------------|---------------------|------------------|--------------|-------------------|----------------|------------------------|
| Map status | XER activity ID | Control schedule ID | Description | CBS position | Description | WBS phase code | Scheduled |
| <div><div></div><div>⚠ No match found</div></div> | | HD.0000003 | | 1 | Job Overhead | 1002 | <div><div></div></div> |
| <div><div></div><div>⚠ No match found</div></div> | | HD.0000019 | | 2 | Earthwork | 1069 | <div><div></div></div> |
| <div><div></div><div>⚠ No match found</div></div> | | HD.0000044 | | 3 | Concrete | 1071 | <div><div></div></div> |

- When the import is successful, select the **Close** button.

Processing schedule data import - NEWPROJ.xer (Duplicate-NEWPROJ)

Importing data

| Step | Status |
|---|------------|
| Step 1: Preparing data to be sent | ✔ Complete |
| Step 2: Placing data in queue | ✔ Complete |
| Step 3: Writing data to master library | ✔ Complete |
| Step 4: Sending data to project | ✔ Complete |
| Step 5: Mapping master data to project data | ✔ Complete |
| Step 6: Inserting data to project tables | ✔ Complete |

This may take some time. You may continue to make changes to your project while the import is processing.

Status update is also available in the Import history

✔ Job ended successfully

Close

- Check the Control: **Schedule block** for newly imported **scheduled dates**
- This is a quick audit to make sure that the desired Primavera dates imported successfully into Control

| Tasks | | | Schedule | | | | | |
|-------|--------------|------------------------|-----------|-------------|--------------------|-----------|------------|------------|
| | CBS position | Description | Scheduled | Schedule ID | Schedule plug days | Plug days | Start | Finish |
| | ^ 1 | Financial Results A... | ✔ | PS.1 | ✔ | 21,682.50 | 07/18/2019 | 07/18/2019 |
| | ^ 1.1 | 10 - Commercial C... | ✔ | PS.2 | ✔ | 0.00 | 07/18/2019 | 07/18/2019 |
| | 1.1.1 | Dependent G&A | ✔ | XYZ | | 0.00 | 07/18/2019 | 07/18/2019 |

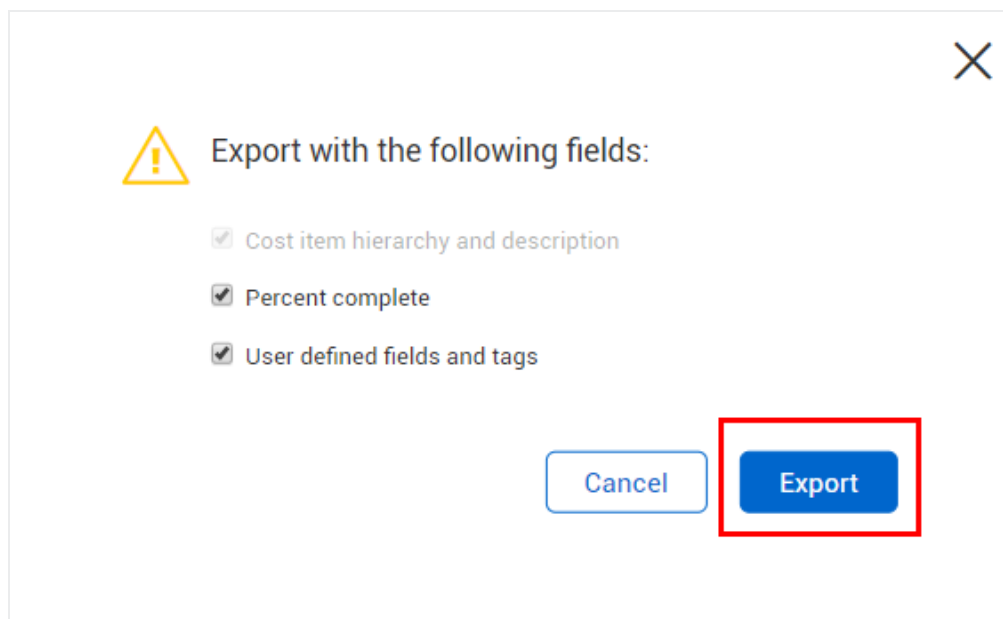
The following steps walk you through how to export a Primavera .XER file from Control.

PRIMAVERA SCHEDULE INTEGRATION EXPORT

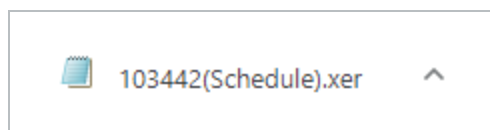
1. From the CBS tab of the Control Workspaces page, select the **Export icon** on the top right menu bar, then click **Schedule as XER**.

2. Assuming you have Percent Complete and User defined Fields and tags turned on in your settings, click **Export**.

- Depending on what you'd like to export, you can always uncheck undesired options



- After selecting Export, an XER file will generate and be placed within your C:/Downloads folder. The file will be named <job name>(Schedule).xer



- At this point you are ready to import the XER file into Primavera

9.0.2 PERCENT COMPLETE COLUMN UPDATES IN CBS

If you are progressing your schedule in P6, it's possible to import this progress data directly into Control using the Schedule Integration Import process. The % Complete column records within the CBS can receive updates from the P6 XER file. The XER file can originate from Primavera or InEight Schedule. As long as the % Complete data is captured within the XER file, it will update the CBS with this new schedule information.

| Tasks | | | | Actuals 9/2/2019 to 1/12/2020 | | | | |
|-------|--------------|-------------------------|----------------|-------------------------------|------------|------------------------|------------|------------|
| | CBS position | Description | WBS phase code | Schedule ID | % Complete | Qty complete (to date) | Start | Finish |
| | ^ 1 | Financial Results An... | 1000 | PS.001 | 0.45 % | 0.00 | 10/01/2019 | 08/25/2020 |
| | ^ 1.1 | INDIRECTS & UNASS... | 1001 | PS.002 | 0.76 % | 0.01 | 10/01/2019 | 08/25/2020 |
| | ^ 1.1.1 | Commercial Cost | 1002 | PS.003 | 2.30 % | 0.00 | 10/01/2019 | 10/15/2019 |
| | 1.1.1.1 | Direct Pickup | 1016 | PS.013 | 100.00 % | 30.50 | 10/01/2019 | 11/29/2019 |

By not using this feature, the % Complete column updates from P6 will not populate the % Complete column within Control. You would need to update the CBS with the % Complete or claimed quantity via other methods for completing progress measurement which are addressed in the [Progress Measurement & Forecasting User Guide](#).

This feature allows for the Schedule Import process to align the P6's schedule % complete with the cost item's % Complete.

After running the Schedule Integration Import process, you can check the CBS and verify the progress results in the % Complete column.

REVIEW

1. Where can you enter schedule dates for your cost items?
 - a. Cost item details
 - b. Task details data block
 - c. Schedule data block
 - d. On the Schedule tab
 - e. On the Schedule slide out panel

2. Using the Control Import feature, you can import which of the following types of data?
 - a. Tasks
 - b. Current Estimate
 - c. Schedule
 - d. Cost Categories
 - e. All of the above

3. When importing a Primavera schedule, the **Schedule ID** in Control must match the _____ in the XER file.
 - a. Import ID
 - b. Current Estimate ID
 - c. Task Details ID
 - d. Activity ID
 - e. Start Date ID

4. When using the **Define project schedule: Schedule data source** feature, which option allows you to export a Primavera formatted file to eventually be used to import directly into Primavera?
 - a. Manual entry file
 - b. XER file type

- c. Activity ID file type
 - d. Task Details file type
 - e. Schedule file type
-

SUMMARY

As a result of this lesson, you can:

- Navigate to the Schedule data block
- Edit schedule data inside the CBS
- Edit schedule data using Excel import
- Integrate planning activities
- Schedule using Primavera

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CHAPTER 10 – ACCOUNT CODE STRUCTURE (ACS)

LESSON DURATION: 30 MINUTES

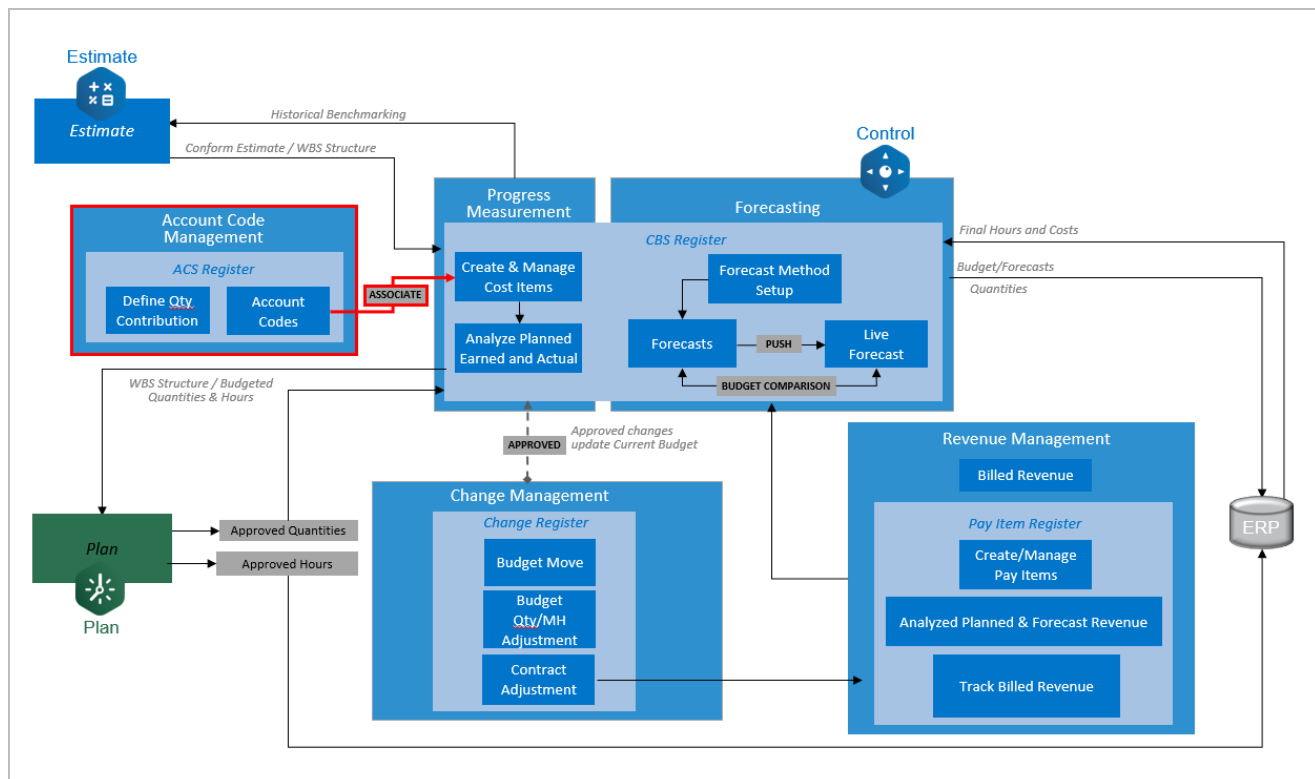
LESSON OBJECTIVES

After completing this lesson, you will be able to:

- 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

LESSON TOPICS

CHAPTER 10 – INEIGHT CONTROL WORKFLOW - ACCOUNT CODE STRUCTURE



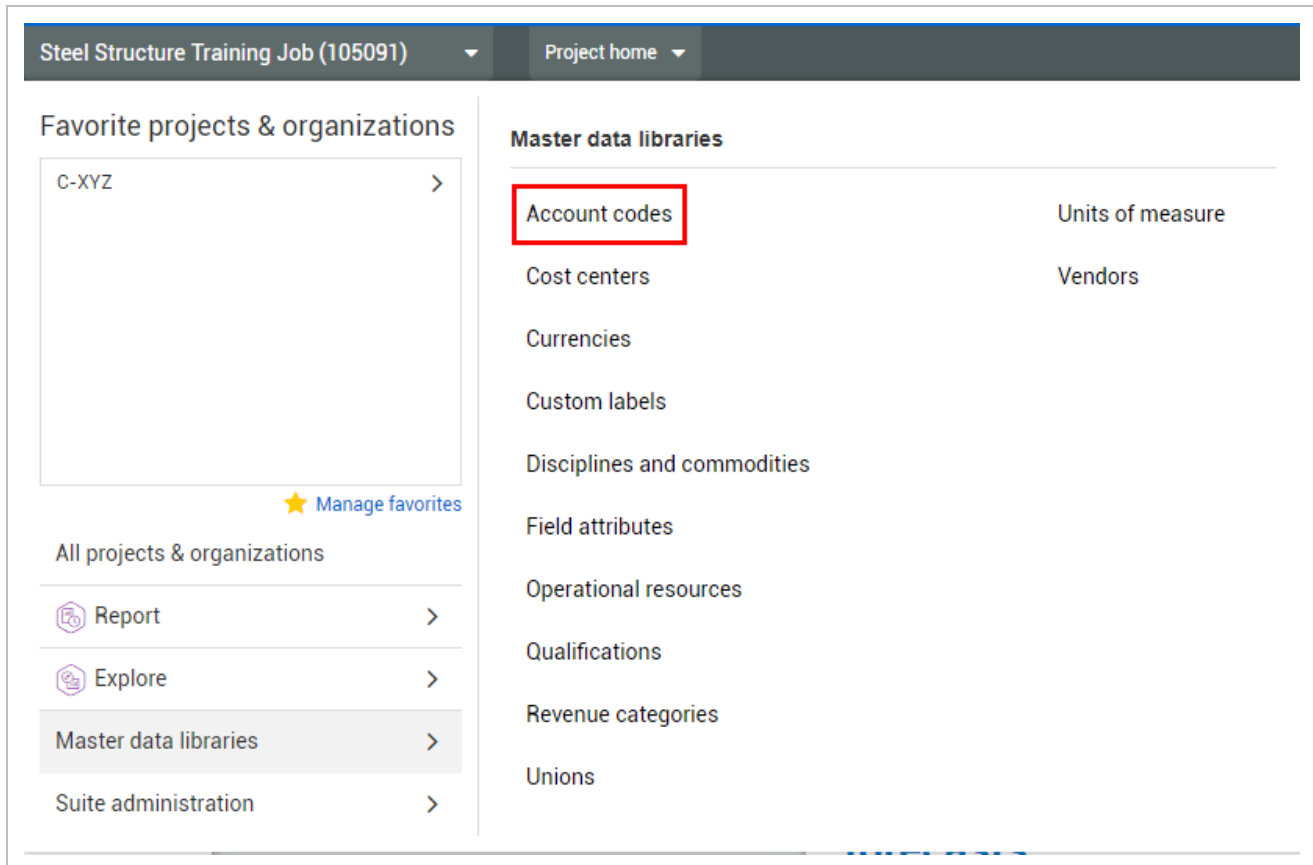
CHAPTER 10 – WHAT IS AN ACCOUNT CODE?

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.

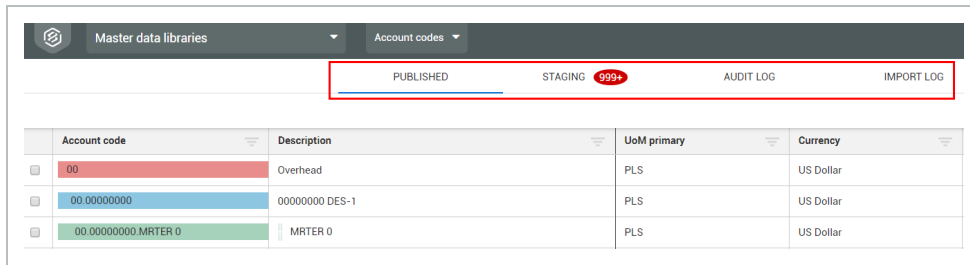
CHAPTER 10 – ACCOUNT CODE SETUP

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



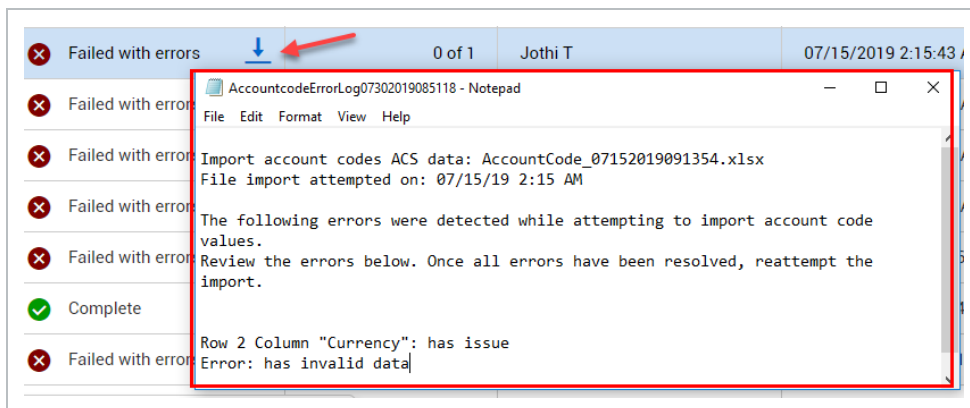
10.0.1 STAGING VS. PUBLISHED ACCOUNT CODES

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



| Account code | Description | UoM primary | Currency |
|---------------------|----------------|-------------|-----------|
| 00 | Overhead | PLS | US Dollar |
| 00.00000000 | 00000000 DES-1 | PLS | US Dollar |
| 00.00000000 MRTER 0 | MRTER 0 | PLS | US Dollar |

- 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**.

Steel Structure Training Job (105091) Project home

Favorite projects & organizations

C-XYZ >

★ Manage favorites

All projects & organizations

Report >

Explore >

Master data libraries >

Suite administration >

Master data libraries

Account codes Units of measure

Cost centers Vendors

Currencies

Custom labels

Disciplines and commodities

Field attributes

Operational resources

Qualifications

Revenue categories

Unions

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



4. Select the **Staging** tab.

| Master data libraries | | Account codes | | | | | |
|-----------------------|-------------------------------------|---------------|-----------|---------------|----------|---------|--|
| | | | | PUBLISHED | | STAGING | |
| Account code | Description | UoM primary | Currency | UoM secondary | Auto qty | | |
| 00 | Overhead - Edit - publish666_edited | PLS | US Dollar | | On | | |
| 00.002 | 002-Edit_Test-publish | PLS | US Dollar | | Off | | |

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

| Master data libraries | | Account codes | | | | | |
|-----------------------|--|---------------|-----------|---------------|------------------|---------|-----|
| | | | | PUBLISHED | | STAGING | |
| Account code | Description | UoM primary | Currency | UoM secondary | Auto qty primary | | |
| 62.03.04.004 | Module Assembly - Erect Steel | Ton | US Dollar | | On | | |
| 62.03.04.004.02 | Module Assembly - Erect Steel - Erect Steel - Light (0-19 lb/LF) | Ton | US Dollar | | On | | |
| 62.03.04.004.04 | Module Assembly - Erect Steel - Erect Steel - Medium (20-39 lb/LF) | Ton | US Dollar | | On | On | Off |
| 62.03.04.004.06 | Module Assembly - Erect Steel - Erect Steel - Heavy (40-79 lb/LF) | Ton | US Dollar | | On | On | Off |
| 62.03.04.004.08 | Module Assembly - Erect Steel - Erect Steel - Extra Heavy (80-119 lb/LF) | Ton | US Dollar | | On | On | Off |

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

| <div>   </div> | | | |
|--|-----------------|--|-----|
| | Account code | Description | UoM |
| <input type="checkbox"/> | 62.03.04.004 | Module Assembly - Erect Steel | Ton |
| <input type="checkbox"/> | 62.03.04.004.02 | Module Assembly - Erect Steel - Erect Steel - Light (0-19 lb/LF) | Ton |
| <input type="checkbox"/> | 62.03.04.004.04 | Module Assembly - Erect Steel - Erect Steel - Medium (20-39 lb/LF) | Ton |
| <input checked="" type="checkbox"/> | 62.03.04.004.06 | Module Assembly - Erect Steel - Erect Steel - Heavy (40-79 lb/LF) | Ton |

- 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. |

NOTE

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

Account code details

Parent account code
62.03.04.004.06 - Module Assembly - Erect Steel - ...

Account code
62... -User #

Description
Your Initials - Account Code

Currency
USD - US Dollar

UoM primary
Ton

UoM secondary

Associated entity roll up behavior

Auto quantity primary Auto quantity secondary

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

Cancel Stage

- 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.

| PUBLISHED | | | | | |
|-----------------------------------|--|-------------|-----------|------------|--|
| STAGING | | | | | |
| <div><div></div><div></div></div> | | | | | |
| Account code | Description | UoM primary | Currency | UoM second | |
| 62.03.04.004 | Module Assembly - Erect Steel | Ton | US Dollar | | |
| 62.03.04.004.02 | Module Assembly - Erect Steel - Erect Steel - Light (0-19 lb/LF) | Ton | US Dollar | | |
| 62.03.04.004.04 | Module Assembly - Erect Steel - Erect Steel - Medium (20-39 lb/LF) | Ton | US Dollar | | |
| 62.03.04.004.06 | Module Assembly - Erect Steel - Erect Steel - Heavy (40-79 lb/LF) | Ton | US Dollar | | |
| 62.03.04.004.06.-User # | Your Initials - Account Code | Ton | US Dollar | | |
| 62.03.04.004.08 | Module Assembly - Erect Steel - Erect Steel - Extra Heavy (80-119 lb/LF) | Ton | US Dollar | | |

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

TIP

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.

Account code details

| | |
|--|--|
| <p>• Parent account code</p> <div style="border: 1px solid #ccc; padding: 2px;">62.03.04.004.06-Module Assembly - Erect Steel - ...</div> <p><small>Start typing the code or description. i.e. footing</small></p> | <p>• Account code</p> <div style="border: 1px solid #ccc; padding: 2px;">62... -User #</div> |
| <p>• Description</p> <div style="border: 1px solid #ccc; padding: 2px;">Your Initials - Account Code</div> | <p>• Currency</p> <div style="border: 1px solid #ccc; padding: 2px;">USD-US Dollar ▼</div> <p><small>Start typing the entity, name or code. i.e. USD</small></p> |
| <p>• UoM primary</p> <div style="border: 1px solid #ccc; padding: 2px;">Ton ▼</div> <p><small>Start typing the name. i.e. cubic yard</small></p> | <p>UoM secondary</p> <div style="border: 1px solid #ccc; padding: 2px;">▼</div> <p><small>Start typing the name. i.e. cubic yard</small></p> |

Associated entity roll up behavior

| | |
|---|---|
| <p>Auto quantity primary</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <input type="checkbox"/> Off ⓘ </div> | <p>Auto quantity secondary</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <input type="checkbox"/> Off ⓘ </div> |
|---|---|

Parent roll up behavior

| | |
|---|---|
| <p>Contribute primary to primary</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <input type="checkbox"/> Off </div> | <p>Contribute primary to secondary</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <input type="checkbox"/> Off </div> |
| <p>Contribute secondary to secondary</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> <input type="checkbox"/> Off </div> | |

10.0.2 ACCOUNT CODE PERMISSIONS

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

NOTE 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.




10.0.2.1 DELETING ACCOUNT CODES

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

NOTE 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.

| Master data libraries | | Account codes | | | |
|---|-------------------------------|---|-------------------|---------------|------------|
| | | PUBLISHED | STAGING | AUDIT LOG | IMPORT LOG |
|   | |  Staged account code changes and requests may differ from current published codes, refer to Published tab for current information. | | | |
| Account code | Description | UoM primary | Currency | UoM secondary | |
| <input checked="" type="checkbox"/> 001 | 001 | Acre | US Dollar | | |
| <input type="checkbox"/> 00 | DES WD A2k | Hour | CFA Franc BCEAO | Hour | |
| <input type="checkbox"/> 00.00000000000001 | desrption updated_1324 | Test1920- Copy | US Dollar | TestSep13 | |
| <input type="checkbox"/> 00.00000000000001.MRTER 0 | DES_P | PLS | US Dollar | | |
| <input type="checkbox"/> 00.00000000000001.MRTER 0 Core H | DES_PDU | TestSep13 | US Dollar | TestSep13 | |
| <input type="checkbox"/> 00.00000000000001.nandy kendo | nandy | TestSep13 | Unidad de Fomento | TestSep13 | |
| <input type="checkbox"/> 00.00000000000001.Nandy test ACS | Nandy Test Acs | TestSep13 | US Dollar | TestSep13 | |
| <input type="checkbox"/> 00.00000000000001.New nandy May2 | New nandy May20th | TestSep13 | US Dollar | TestSep13 | |
| <input type="checkbox"/> 00.00000000000001.NR_05082019 | 00.00000000.NR_05082019_DESC | Acre | US Dollar | | |
| <input type="checkbox"/> 00.00000000000001.NR1_05082019 | 00.00000000.NR1_05082019_DESC | Acre | US Dollar | 098765 | |
| <input type="checkbox"/> 00.00000000000001.NR1_05082019 | NR1_09082019_DESC | Acre | US Dollar | | |
| <input type="checkbox"/> 00.00000000000001.PK -Oct-2019 | PK -Oct-2019-description | Test01 30-05-2019 | US Dollar | TestSep13 | |

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

Delete account code

Replacement account code (optional)

Select one

Cancel Next

NOTE

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.

Delete account code

Cancel

Stage

Delete account code

Confirm deletion

Are you sure you want to delete this account code? This action cannot be undone.

None____001

Back

Cancel

Delete

6. Click the **Stage** button.

- This takes you back to the Staging page.

Approve all [Download] [Upload] [Info] [Search] **Publish**

Approve account codes

Are you sure you want to approve all pending account codes? This action cannot be undone.

Staging notes
Staging notes entered here will be applied to all account codes being approved.

500


Type message here

Cancel **Approve**

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.

| Task details | | |
|---|-------------------------------------|-------------------------------------|
| Account code | Hide in plan and progress | Is terminal |
| | <input type="checkbox"/> | <input type="checkbox"/> |
| #REF!  | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

10.0.2.2 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.

✕

Assign account code

Search... 🔍

| Sel... | Utilized | Account code ↑ | Description | UoM |
|----------------------------------|-------------------------------------|--|--------------------------|---------------------------|
| <input checked="" type="radio"/> | <input type="checkbox"/> | 00 | Overhead | PLS |
| <input type="radio"/> | <input checked="" type="checkbox"/> | 00 | DES WD A2k | Hour |
| <input type="radio"/> | <input type="checkbox"/> | 00.00000000.Core Functi... | DES - DUTCH | Test123456Test123456Te... |
| <input type="radio"/> | <input type="checkbox"/> | 00.0000000000000001 | desrption updated_1324 | Test1920- Copy |
| <input type="radio"/> | <input type="checkbox"/> | 00.0000000000000001.MRT... | DES_P | PLS |
| <input type="radio"/> | <input type="checkbox"/> | 00.0000000000000001.MRT... | DES_PDU | TestSep13 |
| <input type="radio"/> | <input type="checkbox"/> | 00.0000000000000001.nan... | nandy | TestSep13 |
| <input type="radio"/> | <input type="checkbox"/> | 00.0000000000000001.Nan... | Nandy Test Acs | TestSep13 |
| <input type="radio"/> | <input type="checkbox"/> | 00.0000000000000001.New... | New nandy May20th | TestSep13 |
| <input type="radio"/> | <input type="checkbox"/> | 00.0000000000000001.NR_... | 00.00000000.NR_050820... | Acre |

Clear
Cancel
Assign

10.0.2.3 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.

Approve all [Download] [Upload] [Info] [Search] **Publish**

Approve account codes

Are you sure you want to approve all pending account codes? This action cannot be undone.

Staging notes
Staging notes entered here will be applied to all account codes being approved.

500

Type message here

Cancel **Approve**

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.

NOTE

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

CHAPTER 10 – ACCOUNT CODE ASSIGNMENT

NOTE

Account codes can only be assigned to terminal items. Parents cannot have an account code.

ASSIGN ACCOUNT CODES TO COST ITEMS

1. From within the Control Workspaces page of a project, select the **CBS** tab to view your Cost Breakdown Structure.
2. From the View menu, select the **Project Controls** view by first selecting View more, if not already displayed.
3. Within the Task Details data block, click on the right arrow to progress to the Account Code column.
4. For a cost item you wish to have an Account Code assigned, double click in the Account Code cell for that cost item.
5. Use the search box to find the account code to assign, then click **Select**, and then click **Assign**.

10.1 AUDIT LOG

The **Audit Log** tab within the CBS register is used to capture changes that were made within InEight Control and is broken down into five sub-tabs located on a left sidebar menu. Each log is designed to capture the changes that happened within each of the different registers and during synchronization.

All five audit logs can be access by selecting Audit log tab menu bar, then selecting each individual audit log on the far left.

| CBS ACS PAY ITEMS CHANGE REGISTER AUDIT LOG | | | | | | | | | | | | |
|---|----------|-----------|-----------|---------------|------|--------------|--------------|-------------|-------------|-------------|-------------|-------------------|
| Actions ▾ | | | | | | | | | | | | |
| CBS | Audit ID | Data type | Item type | Desc | WBS | Attrit | Chan by | Chan date | Value befor | Value after | Actual comp | Forec total 50... |
| ACS | 4871359 | CBS | Cost Item | Concrete | 1071 | Schedule ... | Michael M... | 07/23/20... | False | True | | Forec total 52... |
| Pay Items | 4871358 | CBS | Cost Item | Earthwork | 1069 | Schedule ... | Michael M... | 07/23/20... | False | True | | |
| Integration | 4871357 | CBS | Cost Item | Job Overh... | 1002 | Schedule ... | Michael M... | 07/23/20... | False | True | | |
| Import history | 4871356 | CBS | Cost Item | Structural... | 1073 | Scheduled | Michael M... | 07/23/20... | False | True | | |

10.1.1 CBS

You can access the CBS audit log by selecting CBS from the left side menu.

The **CBS audit Log** captures changes in the CBS register and utilizes an attribute field to identify what type of change was made. Other columns include:

- Changed By (who made the change)
- Change Date (the date and time the change was made)
- The attribute value before and after
- Forecast cost before and after
- Forecast man-hours before and after
- Posting date before and after

| | | | | | | | | | | |
|----------------|----------|-----------|-----------|---------------|------|--------------|--------------|-------------|-------------|-------------|
| CBS | Audit ID | Data type | Item type | Desc | WBS | Attrit | Chan by | Chan date | Value befor | Value after |
| ACS | 4871359 | CBS | Cost Item | Concrete | 1071 | Schedule ... | Michael M... | 07/23/20... | False | True |
| Pay items | 4871358 | CBS | Cost Item | Earthwork | 1069 | Schedule ... | Michael M... | 07/23/20... | False | True |
| Integration | 4871357 | CBS | Cost Item | Job Overh... | 1002 | Schedule ... | Michael M... | 07/23/20... | False | True |
| Import history | 4871356 | CBS | Cost Item | Structural... | 1073 | Scheduled | Michael M... | 07/23/20... | False | True |

10.1.2 ACS

You can access the ACS Audit Log by selecting **ACS** from the left side menu.

The **ACS Audit Log** functions similarly to the CBS Audit Log, but contains the changes that were made within the ACS (Account Code Structure) tab. The fields utilized to capture what changes were made are:

- Change attribute
- Changed By (who made the change)

- Changed Date (the date and time the change was made)
- Attribute value before and after

| CBS | Audit ID | Data type | Item type | Description | AC No. | Attribute | Changed by | Changed date | Value before | Value after |
|----------------|----------|-----------|--------------|--------------------------------|-----------------|------------------------------|-------------|---------------------|--------------|-------------|
| ACS | 177 | ACS | Account Code | Structural Steel Industrial... | 62.03.02.004.02 | Primary Auto Quantity | Paul Semson | 11/16/2018 12:28 PM | False | True |
| Pay items | 176 | ACS | Account Code | Structural Steel Industrial... | 62.03.02.004.02 | Primary Auto Quantity | Paul Semson | 11/16/2018 12:24 PM | True | False |
| Integration | 175 | ACS | Account Code | Structural Steel Industrial... | 62.03.02.004.06 | Primary Quantity | Paul Semson | 11/16/2018 12:21 PM | 800.00 | 400.00 |
| Import history | 174 | ACS | Account Code | Structural Steel Industrial... | 62.03.02.004.06 | Primary Auto Quantity | Paul Semson | 11/16/2018 12:21 PM | True | False |
| | 170 | ACS | Account Code | Structural Steel Industrial... | 62.03.02.004 | Contribute Primary To Pri... | Paul Semson | 11/16/2018 11:36 AM | False | True |

10.1.2.1 PAY ITEMS

You can access the Pay Item Audit Log by selecting **Pay Items** from the left side menu.

| CBS | Audit ID | Data type | Item type | Description | Pay item No. | Attribute | Changed by | Changed date | Value before | Value after |
|----------------|----------|-----------|-----------|-------------|--------------|----------------|------------|-------------------|--------------|-------------------|
| ACS | 4873330 | Pay Item | Pay Item | Pay Item 1 | 001 | Billing Method | Renee Japp | 07/26/2019 01:... | Cost Plus | Fixed Final Price |
| Pay items | 4872029 | Pay Item | Pay Item | | 1 | Pay item tag 8 | Renee Japp | 07/24/2019 02:... | | PY 8 |
| Integration | 4872028 | Pay Item | Pay Item | | 1 | Pay item tag 6 | Renee Japp | 07/24/2019 02:... | | PY 6 |
| Import history | 4872027 | Pay Item | Pay Item | | 1 | Pay item tag 4 | Renee Japp | 07/24/2019 02:... | | PY 4 |

The **Pay Item Log** again functions similarly but contains changes that were made to the pay items. The fields utilized to capture what changes were made are:

- Attribute
- Changed By (who made the change)
- Changed Date (the date and time the change was made)
- Value before and Value after
- Total price before and after

| Audit ID | Description | Attribute | Changed by | Changed date | Value before | Value after | Total price before |
|----------|---------------|-------------|-------------|-------------------|--------------|---------------|--------------------|
| 1333638 | Testing 07/31 | Description | paul trippi | 07/31/2019 08:... | Test | Testing 07/31 | \$1040.00000000... |
| 1333637 | Testing 07/31 | Sales Order | paul trippi | 07/31/2019 08:... | | \$1 | \$40.0000000000... |

10.1.3 INTEGRATION

You can access the Integration/Sync Audit Log by selecting **Integration** from the left side menu.

| | Audit ID | Interface | Status | Processing details | Start | Finish | User name | Log Handle |
|----------------|----------|--------------|-----------|------------------------|---------------------|---------------------|--------------------|---|
| CBS | | | | | | | | |
| ACS | 65639 | ActualQty | Succeeded | 4 of 4 | 07/29/2019 03:23 PM | 07/29/2019 03:24 PM | pavithra baskaran1 | 4a2a98f6-caa6-431b-81f... |
| Pay items | 65638 | LiveForecast | Succeeded | 4 of 4 | 07/29/2019 03:23 PM | 07/29/2019 03:24 PM | pavithra baskaran1 | ce90c8df-f916-4a50-847... |
| Integration | 65637 | Budget | Succeeded | 4 of 4 | 07/29/2019 03:23 PM | 07/29/2019 03:24 PM | pavithra baskaran1 | 43b8dc1c-6825-413a-9c... |
| Import history | 65636 | CBS | Succeeded | 4 of 4 | 07/29/2019 03:23 PM | 07/29/2019 03:24 PM | pavithra baskaran1 | 0985605a-745c-4f27-88... |

The **Sync Audit Log** is different from the other three. This log is used to capture:

- Whether the synchronization process between InEight Control and the ERP system was completed successfully
- How long the sync process took to complete and who requested the sync

It keeps track of the following functions, as seen under the Actions > Sync menu:

- Push CBS Structure
- Push CBS Structure and Budget
- Push CBS Structure and Live Forecast
- Push CBS Structure and Actual Qty
- Get Plan Quantities
- Get Actual Cost and MH


The syncing relationships and process will be discussed further in *Lesson 12 - Interfaces*.

NOTE

The status field will automatically update and change from Queued to Succeeded. Queued status items can be cancelled if there is an error or if the sync is no longer necessary by clicking the Cancel a Queued Sync button in the top right-hand corner of the sync log.



To help troubleshoot sync issues, you can click on the Processing details link to get more information on which steps succeeded, are suspended, or failed.

Last updated: 08/29/2018 01:03 PM
Use shortcut key FS to refresh status

Completed details - - Plan quantities pull: 31570

| Step | Status |
|-------------------------|----------|
| Step 1: Recieving data | Complete |
| Step 2: Populating data | Complete |

Close

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INEIGHT

If a sync error should occur, you can click on the Log Handle link to obtain troubleshooting information.

Log Handle

[4a2a98f6-eea6-431b-81f...](#)

[ce90c8df-f916-4a50-847...](#)

This brings you into the InEight **Suite App Logs** screen, where you can see information relating to the error including Level, Time, Domain, Area, Exception Message, Exception Type and Correlation Id, which can help you determine the cause of the sync error.

10.1.4 IMPORT HISTORY

You can access the Import history audit log by selecting **Importhistory** from the left side menu.

The Import history log contains status information for all imports coming into InEight Product Portfolio. *For example:* cost item and actuals import processes can both be viewed in the Import history log for status, then you can eventually make corrections and reprocess.

| CBS | File name | Status | Processi Details | Total line items | Errors | Total imported | Added estimate resource | Added pay items | Created by | Created date | Last edited by | Last edited date |
|----------------|--|-----------|---------------------|------------------------|--------|-------------------|-------------------------------|-----------------------|---------------|-----------------|----------------------|------------------------|
| ACS | Market_St_9_8_17_GMP_Baseline.xer (Mark... | Failed | Step_3 | 1842 | 0 | 0 | 0 | 0 | Renee Japp | 07/24/2019 1... | Renee Japp | 07/24/2019 1... |
| Pay items | Market_St_9_8_17_GMP_Baseline.xer (Mark... | Failed | Step_3 | 1842 | 0 | 0 | 0 | 0 | Renee Japp | 07/23/2019 1... | Renee Japp | 07/23/2019 1... |
| Integration | Book1.xlsx | Pe... | | 2 | 2 | 0 | 0 | 0 | Renee Japp | 07/12/2019 0... | paul trippi | 07/30/2019 0... |
| Import history | Market_St_9_8_17_GMP_Baseline.xer (Mark... | Cancelled | Step_5 | 0 | 0 | 0 | 0 | 0 | Renee Japp | 07/10/2019 0... | Renee Japp | 07/23/2019 1... |

The Import history audit log allows you to take action on import and sync failures, based on error messages. Error messages are contained within the Error File Here for those imports that have failed import.

You can view progress in sync longs, view error messages, and then resolve issues in effort to continue with your import.

Control - Audit Log

| Section | | Description |
|---------|--------------------------|--|
| 1 | File name | The name of the actual import file being used to import data. |
| 2 | Status | The current status of the import file. There are six import status that can define the current state of an import process. |
| 3 | Processing Details | This column describes the processing state in which the file is being processed. This column is not applicable for all statuses. |
| 4 | Total line items | This is the total line items that are included within the Excel import file. |
| 5 | Errors | This is a count of the number of errors during import. |
| 6 | Total import | This is the total amount of records that were successfully imported from the Excel import file. |
| 7 | Added estimate resources | This is the total amount of added estimate resources that were added in the CBS. |
| 8 | Added pay items | This is the total amount of pay items successfully imported from the Excel import file. |
| 9 | Created by | This is user responsible for importing the Excel upload file. |
| 10 | Created date | This is the actual date the Excel upload file was imported. |
| 11 | Last edited by | This is the last user to edit the Excel upload file. |




Control - Audit Log (continued)

| Section | Description |
|---------|-------------|
|---------|-------------|

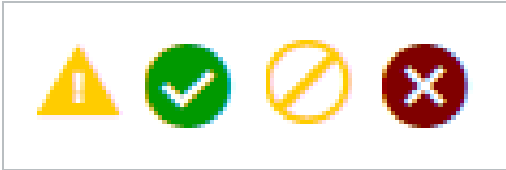
12

Last edited date

This is the last date the Excel upload file was edited.



| File name | Status | Processing Details | Total line items | Errors | Total imported | Added estimate resources | Added pay items | Created by | Created date | Last edited by | Last edited date |
|-------------------|---|--------------------|------------------|--------|----------------|--------------------------|-----------------|-------------|--------------------|----------------|--------------------|
| NEWPROJ.xer (D... |  Pending  | Step 5 | 18 | 0 | 0 | 0 | 0 | paul trippi | 08/02/2019 12:1... | paul trippi | 08/02/2019 12:1... |
| NEWPROJ.xer (D... |  | Step 5 | 0 | 0 | 0 | 0 | 0 | paul trippi | 08/02/2019 12:1... | paul trippi | 08/02/2019 12:1... |
| NEWPROJ.xer (D... |  | Step 5 | 0 | 0 | 0 | 0 | 0 | paul trippi | 08/02/2019 12:0... | paul trippi | 08/02/2019 12:1... |
| NEWPROJ.xer (D... |  | Step 5 | 0 | 0 | 0 | 0 | 0 | paul trippi | 08/02/2019 12:0... | paul trippi | 08/02/2019 12:0... |

If you hover over one of these Status symbols below, it provides you with a brief explanation of the selected status.



Here are some examples:


Database update failed

 Failed 

Import Cancelled


0 of 0 items contains errors


User cancelled the import

 Cancelled


Import complete


842 items imported successfully



 Complete



 Pending


0 of 111 line items contain errors

 Continue Import







 Cancel

 Pending 

 Pending 

 Complete

There are six possible import statuses listed below.

| Status | Status Icon | Definition |
|--------------------|---|---|
| Failed |  | Import failed due to a duplicate row within the Excel file. |
| Failed with errors |  | Import failed with an attachment to download with further information. |
| Pending |  | The Excel import file is pending, further action is needed. The double blue arrows will open a new window where you can correct and re-process the Excel import file. The blue circle with the line through it will cancel the import completely. |
| Cancelled |  | The Excel import file has been cancelled. |
| Processing |  | The Excel import is still processing. Once this is complete, the status will move into one of the other five statuses. |
| Complete |  | Processing of the Excel import files is complete. |

10.1.5 PENDING STATUS

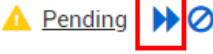
When an import is in a **Pending** status, this means that further action is needed to complete the Excel file import.

 Pending

There are two options:

Option 1

1. By selecting the double blue errors, you will be taken to another window to continue processing the faulty records.

| File name | Status |
|----------------|---|
| CBS Import.csv |  |

As an example, in the below screenshot, there are 3 existing errors. If you hover over one of the errors, it will tell you what needs to be corrected.

In this case, there is an issue with the account code assignment, as the pop-up hover suggests.

Audit log > Import history > CBS Import.csv

Find previous error

3 errors remain

Find next error

Cancel

Import

Status Details (WBS phase code)

| Import status | CBS match status |
|---------------|--------------------------------------|
| Pending | ✓ to 1002 [1] [Job Overhead] |
| Pending | ✓ to 1069 [2] [Earthwork] |
| Pending | ✓ to 1071 [3] [Concrete] |
| Pending | ✓ to 1073 [4] [Structural Steel] |
| Pending | ✓ to 1074 [4.1] [Erect Steel - H...] |
| Pending | ✓ to 1005 [4.2] [Erect Steel - L...] |
| Pending | ✓ to 1006 [4.3] [Bolted Connec...] |
| Pending | ✓ to 1084 [5] [Materials] |
| Error | ✓ to 1085 [5.1] [Earthwork - M...] |
| Error | ✓ to 1086 [5.2] [Concrete - Mat...] |
| Error | ✓ to 1087 [4.4] [Module 01 - Er...] |

Import Columns

| Import method | CBS position | Description | WBS phase code | Account code |
|----------------------------|--------------|-----------------------------|----------------|-----------------|
| Update existing items o... | 1 | Job Overhead | 1002 | 20 |
| Update existing items o... | 2 | Earthwork | 1069 | 51 |
| Update existing items o... | 3 | Concrete | 1071 | 61 |
| Update existing items o... | 4 | Structural Steel | 1073 | |
| Update existing items o... | 4.1 | Erect Steel - Heavy | 1074 | 62.03.02.004.06 |
| Update existing items o... | 4.2 | Erect Steel - Light | 1005 | 62.03.02.004.02 |
| Update existing items o... | 4.3 | Bolted Connections | 1006 | 62.03.02.006 |
| Update existing items o... | 5 | Materials | 1084 | 1112233 |
| Update existing items o... | 5.1 | Earthwork - Materials | 1085 | 1112234 |
| Update existing items o... | 5.2 | Concrete - Materials | 1086 | 1112235 |
| Update existing items o... | 4.4 | Module 01 - Erect Steel ... | 1087 | 1112236 |

2. When you double click into one of the 3 errors, it will take you directly into an account code assignment screen where you can make the correction.

From here you can select an account code and click on Assign.

Assign account code

Search...

| Select | Account code | Description | UoM |
|----------------------------------|--------------|--------------------------------------|-----|
| <input type="radio"/> | 00 | Overhead 6233 EDIT | PLS |
| <input type="radio"/> | 00.03 | OH - Get Work | MWk |
| <input type="radio"/> | 00.03.02 | OH - Estimating | MWk |
| <input checked="" type="radio"/> | 00.03.02.002 | OH - Estimating - Engineering (Pr... | MWk |
| <input type="radio"/> | 00.03.02.006 | OH - Estimating - Research & Qu... | MWk |
| <input type="radio"/> | 00.03.02.008 | OH - Estimating - Prepare Estima... | MWk |
| <input type="radio"/> | 00.03.02.010 | OH - Estimating - Review (Pre-Bid) | MWk |
| <input type="radio"/> | 00.03.02.014 | OH - Estimating - Post Bid | MWk |
| <input type="radio"/> | 00.03.02.016 | OH - Estimating - Management | MWk |
| <input type="radio"/> | 00.03.02.018 | OH - Estimating - 2nd Estimates | MWk |

Cancel

Assign

3. After all corrections have been made to the existing errors, you can select the Import button on the top right on the screen.


Find next error

Cancel

Import

| Description | WBS phase code | Account code |
|------------------|----------------|--------------|
| Job Overhead | 1002 | 20 |
| Earthwork | 1069 | 51 |
| Concrete | 1071 | 61 |
| Structural Steel | 1073 | |

4. A warning message appears stating that changes will be made, and this project will be disabled until completion.



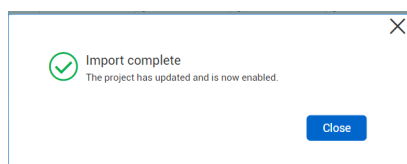
Importing cost items will update the CBS for all connected users. Notify all users that changes need to be saved prior to continuing with import. Upon commitment of import, this project will be disabled until completion. Please note this may take several mins.

Active Users :
Super Nintendo Chalmers
bridgette quintero

Import now

Save draft

5. Once processing has finished, you will receive an Import complete message.





6. The Import history page now shows that the imported file is now successfully imported and updates the Last edited date.

| File name | Status | Total line items | Errors | Total imported | Added estimate resources | Added pay items | Created by | Created date | Last edited by | Last edited date |
|----------------|----------|------------------|--------|----------------|--------------------------|-----------------|----------------|----------------------|----------------|----------------------|
| CBS Import.csv | Complete | 11 | 0 | 0 | 0 | 0 | Keith Anderson | 06/19/2019 06:30 ... | paul trippi | 07/31/2019 10:32 ... |

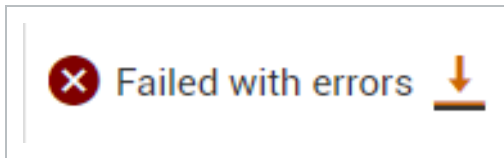
Option 2

1. Selecting cancel, the blue circle with the line through it, will cancel the import completely.

| File name | Status |
|----------------|---|
| CBS Import.csv |  Pending  |

10.1.6 FAILED WITH ERRORS STATUS

When an import is in a **Failed with errors** status, the system will generate a Word error report. The document displays detected errors while attempting to import the Excel file values. Errors will need to be reviewed within the Word document



An example of the Failed with errors Word **error file** provides direction on how to proceed with correcting the Excel import errors, and a course of action to run the import again

```
Import actuals CBS data: CBS import.xls
File Import attempted on: 7/31/2019 3:45:03 PM

The following errors were detected while attempting to import actual
values into control.
Review the errors below, once all the errors have been resolved,
reattempt the import to Control.

Error 1: Posting date in external system must be valid (this error
affects 10 WBS/CBS items out of 10 total attempted imported WBS/CBS items
and 10 rows out of 10 total attempted imported rows)

WBS: 2904
CBS: 10
Row: 7

WBS: 2905
CBS: 11
Row: 8

WBS: 2906
CBS: 12
Row: 9

WBS: 2907
CBS: 13
Row: 10
```

The only option with a Failed with errors status is to review the errors, resolve them within the initial Excel file import, and then re-import the file.

CHAPTER 10 – QUANTITY CONTRIBUTION

At the project level, you can manage account codes under the ACS tab from the Control Workspaces page. On the ACS tab, you can see the account codes assigned to your cost items, along with the related parent account codes, with account code details and quantity contributors.

Other budget information is automatically pulled into the ACS Details data block including, Total Cost, Unit Cost, Unit Rates, Primary and Secondary Quantity Ratios, Quantities Complete, and Account Code Tags. To access this information, click the right arrow to view the second, third and fourth panels of the data block.

| <div>CBS</div> <div>ACS</div> <div>PAY ITEMS</div> <div>CHANGE REGISTER</div> <div>AUDIT LOG</div> <div>View : Unsaved (Quantity Managem...</div> | | | | | | | | | |
|--|------------------|----------------|-------------|--------------------------|-------|----------------------------|-----------------------|-------------------------------|---------------------------------|
| ACS | | ACS details | | | | | ACS qty contributors | | |
| Account code | Descri... | Primary Qty | Primary UoM | Auto-quantity (Primary) | Notes | Forecast total cost | Forecast total Mhrs | Contribute Primary to Primary | Contribute Primary to Secondary |
| 99 | Change Order... | 1.000000000000 | PLS | <input type="checkbox"/> | | \$187,829,311.97999998927 | 3,535,755.04678499978 | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09 | Back charges | 0.000000000000 | PLS | <input type="checkbox"/> | | \$187,829,311.97999998927 | 3,535,755.04678499978 | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.02 | Back charges ... | 1.000000000000 | PLS | <input type="checkbox"/> | | \$209,963,377.59999999404 | 3,535,755.04678499978 | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.02.002 | Back charges ... | 1.000000000000 | PLS | <input type="checkbox"/> | | \$209,963,377.59999999404 | 3,535,755.04678499978 | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.04 | Back charges ... | 0.000000000000 | PLS | <input type="checkbox"/> | | (\$22,134,065.62000000104) | 0.000000000000 | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.04.002 | Back charges ... | 1.000000000000 | PLS | <input type="checkbox"/> | | \$200.000000000000 | 0.000000000000 | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.06 | Back charges ... | 0.000000000000 | PLS | <input type="checkbox"/> | | \$0.000000000000 | 0.000000000000 | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.06.002 | Back charges ... | 1.000000000000 | PLS | <input type="checkbox"/> | | \$0.000000000000 | 0.000000000000 | <input type="checkbox"/> | <input type="checkbox"/> |

10.0.1 ACS NAVIGATION

The ACS tree lets you easily navigate up and down your ACS structure and also provides a way to filter down to a subset in the structure. Open the ACS tree slide-out panel by clicking on the ACS tree icon on the side toolbar.

<

ACS

PAY ITEMS

CHANGE REGISTER

>

View : Unsaved (Project Controls)

Actions

ACS tree

Expand all

Collapse all

20 Job Related Overhead

51 Grading

61 Concrete

62 Metals

62.03 Structural Steel and Connections

62.03.02 Structural Steel Industrial St(...)

62.03.02.004 Structural Steel Industria(...)

62.03.02.004.02 Structural Steel Indust(...)

62.03.02.004.06 Structural Steel Indust(...)

62.03.02.006 Structural Steel Industria(...)

ACS

Account code

Description

20

Job Related Overhead

51

Grading

61

Concrete

62

Metals

62.03

Structural Steel and Connections

62.03.02

Structural Steel Industrial Structures

62.03.02.004

Structural Steel Industrial - Erect Steel

62.03.02.004.02

Structural Steel Industrial - Erect Steel - Li...

62.03.02.004.06

Structural Steel Industrial - Erect Steel - H...

62.03.02.006

Structural Steel Industrial - Bolted Connec...

ACS details

Primary Qty

1.00

1.00

10,000.00

0.00

0.00

600.00

600.00

200.00

400.00

2,000.00

Similar to the CBS color coded hierarchy, the ACS gives you the option to differentiate your account codes by color. Click on the ACS data block ellipsis to select this option to help you identify which level of the hierarchy a specific account code is located.

| Account code | Description | Quantity | Unit | Auto-quantity (Primary) |
|-----------------|---|----------|------|-------------------------------------|
| 20 | Job Related Overhead | | | <input checked="" type="checkbox"/> |
| 51 | Grading | | | <input type="checkbox"/> |
| 61 | Concrete | | | <input checked="" type="checkbox"/> |
| 62 | Metals | 0.00 | Ton | <input type="checkbox"/> |
| 62.03 | Structural Steel and Connections | 0.00 | Ton | <input checked="" type="checkbox"/> |
| 62.03.02 | Structural Steel Industrial Structures | 600.00 | Ton | <input type="checkbox"/> |
| 62.03.02.004 | Structural Steel Industrial - Erect Steel | 600.00 | Ton | <input type="checkbox"/> |
| 62.03.02.004.02 | Structural Steel Industrial - Erect Steel - Li... | 200.00 | Ton | <input checked="" type="checkbox"/> |
| 62.03.02.004.06 | Structural Steel Industrial - Erect Steel - H... | 400.00 | Ton | <input type="checkbox"/> |
| 62.03.02.006 | Structural Steel Industrial - Bolted Connec... | 2,000.00 | Ea | <input checked="" type="checkbox"/> |

10.0.2 ACCOUNT CODE QUANTITY

There are two methods for defining primary and secondary quantities for your account codes:

- Manual entry in the Primary Qty and Secondary Qty fields
- Using the auto-quantity feature to have them automatically inherit the quantities of any cost items that have the same unit of measure as the assigned account code

DEFINE ACCOUNT CODE QUANTITY

1. From the Workspaces page of the Steel Structure Job, select the **CE + CB** viewset from the View drop-down list.
2. In the Current Estimate data block, double click in the **Secondary UoM** field for a cost item you assigned an account code to.
3. Select a Secondary UoM from the drop-down list different than the cost item's primary UoM.
4. Click the **side arrow** to navigate to the Secondary Qty column.
5. Double click in the **Secondary Qty** field for your cost item and enter a value.
6. Select the **ACS** tab.
7. In the Primary Qty field for the account code assigned to the cost item you just changed and type in a quantity value.
8. For your account code, check the **Auto-quantity (Primary)** check box.

9. To view what cost items are assigned to the account code, right click on your account code and select **ACS item details**.

If you have the account code slideout open and want to open a different account code's item details, you can select a different account code. The details slideout updates to the current account code's details. You no longer have to exit out of one ACS item only to right click and select ACS details slide out to open another.

10.0.3 QUANTITY CONTRIBUTORS

Within your project, you can specify how primary and secondary quantities contribute to your account codes. Specifically, you can indicate how:

- Cost item primary and secondary quantities contribute to assigned account code primary and secondary quantities
- Child account code primary and secondary quantities contribute to parent account code primary and secondary quantities

For both cost item and account code contributions you can have quantities roll up:

- Primary quantity to primary quantity
- Primary quantity to secondary quantity
- Secondary quantity to secondary quantity

NOTE

Account codes will only automatically inherit quantities from cost items/account codes using the same unit of measure.

10.0.3.1 CONTRIBUTION OPTIONS - COST ITEM TO ACCOUNT CODE

From the ACS item details slide out panel, you can specify how cost item quantities roll up to the account code that is assigned to it, by selecting the appropriate checkbox. The total of the contributing cost item(s)'s quantities will roll up to become the account code quantity.

| ACS item details | | | | | | | - Structural Steel Industrial - Erect Steel - Light (0-19 lb/LF) | | |
|-------------------|---------------------|----------------|-----|------------------|---------------|---------------|--|--------------------------|--------------------------|
| CBS position code | Description | WBS phase code | UoM | Forecast (T/O... | CE final MHrs | CE total cost | Primary to Prim... | Primary to Seco... | Secondary to Seco... |
| 4.2 | Erect Steel - Light | 1005 | Ton | 200.00 | 4000 | 200,000.00 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

10.0.3.2 CONTRIBUTION OPTIONS - CHILD ACCOUNT CODE TO PARENT ACCOUNT CODE

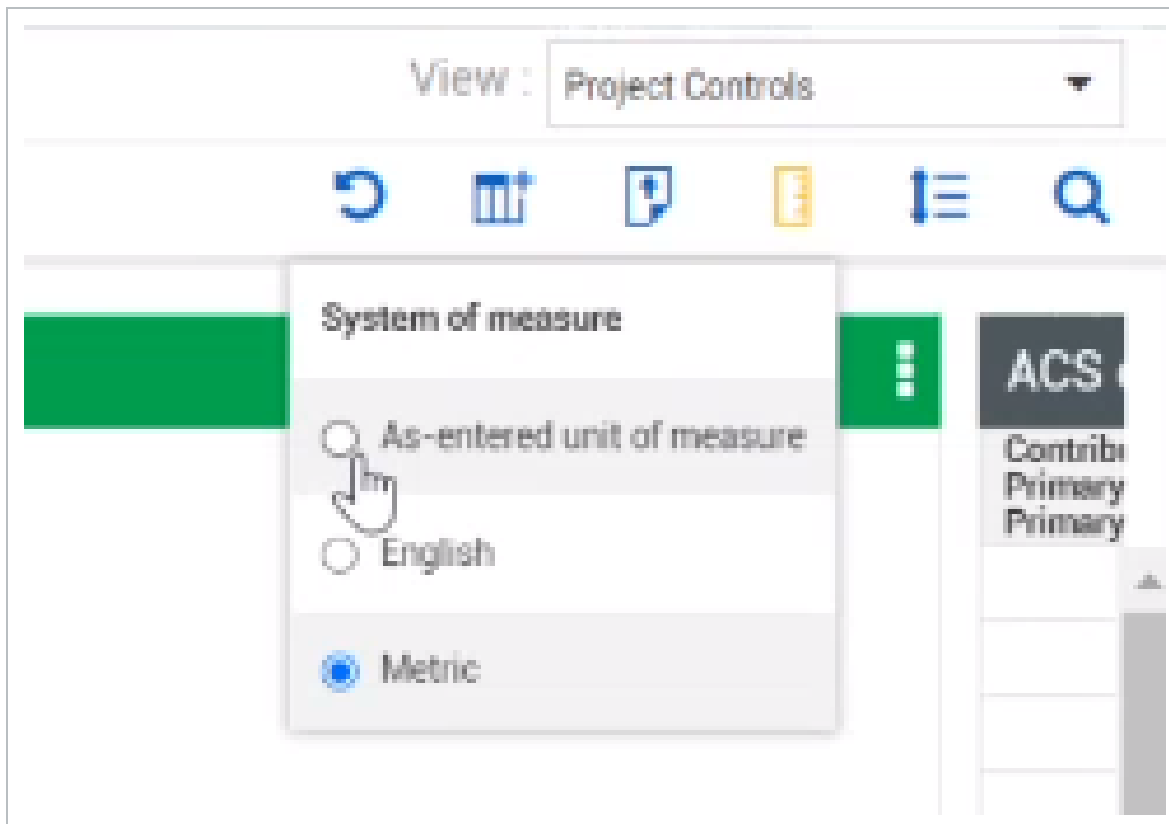
On the ACS page, in the ACS qty contributors data block, you can specify how child account code quantities will roll up to their parent account codes by selecting the appropriate checkbox.

| ACS | | ACS details | | | ACS qty contributors | | |
|----------------|--------------------------------------|-----------------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------------------|
| Account code | Description | Primary Qty | Primary UoM | Auto-quantity (Primary) | Contribute Primary to Primary Qty | Contribute Primary to Secondary ... | Contribute Secondary to secondary Qty |
| 20 | Job Related Overhead | 0.000000000... | MWk | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 51 | Grading | 1.000000000... | PLS | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 61 | Concrete | 10000.00000... | CY | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ^ 62 | Metals | 0.000000000... | Ton | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ^ 62.03 | Structural Steel and Connectio... | 0.000000000... | Ton | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ^ 62.03.02 | Structural Steel Industrial Stru... | 0.000000000... | Ton | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ^ 62.03.02.004 | Structural Steel Industrial - Ere... | 1000.0000000... | Ton | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 62.03.02... | Structural Steel Industrial - Ere... | 200.00000000... | Ton | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| 62.03.02... | Structural Steel Industrial - Ere... | 800.00000000... | Ton | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

10.0.4 ACS UNIT OF MEASURE TOGGLE

In the ACS register, you can toggle different Unit of Measures. The Unit of Measure toggle has three different options:

- As entered Unit of Measure
- English (Imperial Unit of Measure)
- Metric



If you want to display and edit in liters instead of gallons for example, you would select the ruler icon in the top right corner of the ACS register, and then select Metric. The quantity amount converts in the browser and displays in the alternate unit of measure.

10.0.5 ACCOUNT CODE QUANTITY CONVERSIONS

Cost items that are tracked in one unit of measure can be tracked in another UoM. For example, cost items that are tracked in a metric UoM can contribute to account codes tracked in imperial UoM. This saves time in maintaining account code quantities, as project team members do not have to perform quantity conversions manually. Data accuracy is also ensured since any manual errors are eliminated from the conversion process.

In this example, CBS item Asphalt Paving and Break Removal contains a Forecast quantity of 3,000 with a UoM of Square Meter.

| Tasks | | | Task details | | |
|-------|--------------|----------------------|--------------|-------------------------|--------------|
| | CBS position | Description | Resource | Forecast (T/O) quantity | UoM |
| | 1.1.1.2 | Removals and De... | | 1.00 | PLS |
| | 1.1.1.2.1 | Excavate Native t... | 3 | 42,000.00 | m3 |
| | 1.1.1.2.2 | Asphalt Paving Br... | 3 | 3,000.00 | Square Meter |
| | 1.1.1.2.3 | Concrete Removal | | 1.00 | PLS |

In the ACS, you can display the Primary UoM Alternate System column to see what UoM is needed to track cost items in, so they contribute to your account codes. The Auto-quantity column is set up so that quantities are summing up the CBS. The Primary Qty of 3,587.97 is automatically populated. There is no further action to allow this value to roll up to the account code.

| ACS | | ACS details | | | |
|-----------------|----------------------|-------------|--------------|-------------------------------------|------------------------------------|
| Account code | Description | Primary Qty | Primary UoM | Auto-quantity (Primary) | Primary UoM alternate system of... |
| 50.03.02.002 | Paving Removal - ... | 3,587.97 | Square Yard | <input checked="" type="checkbox"/> | Square Meter |
| 50.03.02.002.02 | Break - Asphalt P... | 3,224.10 | Square Meter | <input checked="" type="checkbox"/> | Square Meter |
| 50.03.02.004 | Paving Removal - ... | 0.00 | Square Meter | <input checked="" type="checkbox"/> | Square Meter |
| 50.03.12 | Concrete Removal | 0.00 | Cubic Meter | <input checked="" type="checkbox"/> | Cubic Meter |
| 50.03.12.002 | Concrete Removal... | 0.00 | Cubic Meter | <input checked="" type="checkbox"/> | Cubic Meter |
| 50.03.12.002.05 | Concrete Removal... | 290.82 | Cubic Meter | <input checked="" type="checkbox"/> | Cubic Meter |

The system will automatically take the Forecast Qty in the CBS, and convert that number to the value shown in the Primary Qty field displayed in the ACS. In the above example, the CBS Forecast Qty of 3,000 in square meters is being converted to the 3,587.97 square yards, as shown in the ACS.

3000

Square meter

=

3587.97

Square yard

10.0.6 NOTES COLUMN

A Notes column is available for you to add to a new or existing data block. The Notes column lets you add commentary to any of the ACS records.

The screenshot shows the 'ACS details' table with columns: Primary Qty, Primary UoM, Auto-quantity (Primary), Notes, and ACS qty contributors. The 'Notes' column contains comment icons. A red box highlights these icons, and a red arrow points from one icon to the 'Project account code notes' panel on the right, which displays a note: 'On hold until spec docs are received.' with a count of 463.

| Account code | Description | Primary Qty | Primary UoM | Auto-quantity (Primary) | Notes | Contribute Primary to Primary | Contribute Primary to Secondary |
|--------------|-------------------------------------|---------------|-------------|--------------------------|--------|-------------------------------|---------------------------------|
| 99 | Change Orders, Contract Allowan... | 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09 | Back charges | 0.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.02 | Back charges - Incoming | 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.02.002 | Back charges - Incoming - Labor | 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.04 | Back charges - Outgoing Internal | 0.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.04.002 | Back charges - Outgoing Internal... | 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.06 | Back charges - Outgoing External | 0.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 99.09.06.002 | Back charges - Outgoing Externa... | 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |

After notes are added to a record, the Notes column populates with the number of comments that are currently added to each record.

The screenshot shows the 'ACS details' table with columns: Primary Qty, Primary UoM, Auto-quantity (Primary), Notes, and ACS qty contributors. The 'Notes' column now displays comment counts instead of icons. A red box highlights the count '3' for the first row, and a red arrow points from it to the 'Project account code notes' panel on the right, which displays three notes: 'On hold until spec docs are received.', 'Primary UOM needs to be verified.', and 'Change tax rate to 7%'. The count '500' is also visible at the bottom of the panel.

| Primary Qty | Primary UoM | Auto-quantity (Primary) | Notes | Contribute Primary to Primary | Contribute Primary to Secondary |
|---------------|-------------|--------------------------|--------|-------------------------------|---------------------------------|
| 1.00000000000 | PLS | <input type="checkbox"/> | 3 | <input type="checkbox"/> | <input type="checkbox"/> |
| 0.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 0.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 0.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |
| 1.00000000000 | PLS | <input type="checkbox"/> | [Icon] | <input type="checkbox"/> | <input type="checkbox"/> |

CHAPTER 10 – 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.

| Master data libraries | | Units of measure | |
|--------------------------|--------------------------------|--------------------------------|------------------|
| Units of measure | | | |
| Measurement types | | | |
| | Name | Description | Measurement type |
| <input type="checkbox"/> | #NAME?- Copy AE ae | BACKLOGS | Area |
| <input type="checkbox"/> | #NAME?- Copy B | DESC | Area |
| <input type="checkbox"/> | #NAME?d | DESC | Area |
| <input type="checkbox"/> | -0098765- Copy- Copy1- Copy | | Area |
| <input type="checkbox"/> | -0098765- Copy- Copy1- Copy... | -0098765- Copy- Copy1- Copy... | Area |

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.

| Primary Qty | Primary UoM |
|---------------|-------------|
| 2,460.1999... | SF |

DETAILS

COST CATEGORIES

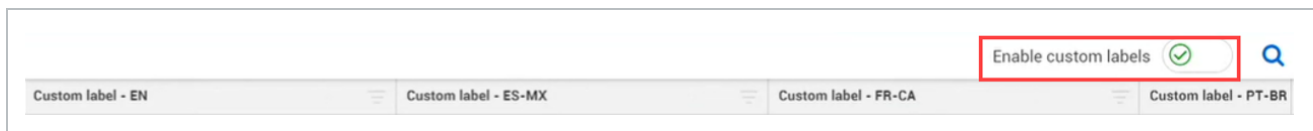
Primary to Primary

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

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.

CHAPTER 10 – 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.

NOTE 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.

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

| Field name | Is terminal | Custom label - EN |
|------------|-------------------------------------|-------------------|
| Total | <input type="checkbox"/> | Total |
| Labor ⓘ | <input type="checkbox"/> | TEST-12345-94 |
| Labor Base | <input checked="" type="checkbox"/> | L-Base |

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.

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

1004_

Permits

DETAILS

ATTRIBUTES

COST CATEGORIES

% Complete

★ Live forecast method

Latest actuals in forecast values

75.55556 %

Manual (EAC)

12/11/2020

Total

Per unit

| Cost category | Current budget | Total cost (to date) | Current estimate | ★ Live forecast |
|---------------|---------------------|----------------------|-------------------|----------------------|
| ^ Total | \$ 109.999995000... | \$ 30,559.6000000... | \$ 99.99999500000 | \$ 49,999.9999990... |
| ^ Labor | \$ 0.000000000000 | \$ 44,111.0000000... | \$ 0.000000000000 | \$ 72,352.8918529... |
| L-Base | L-Base | 00000... | \$ 0.000000000000 | \$ 183.093332000... |

NOTE

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

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CHAPTER 11 – INEIGHT CONTROL INTERFACES

LESSON DURATION: 30 MINUTES

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- 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

LESSON TOPICS

CHAPTER 11 – INTERFACES

OVERVIEW

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

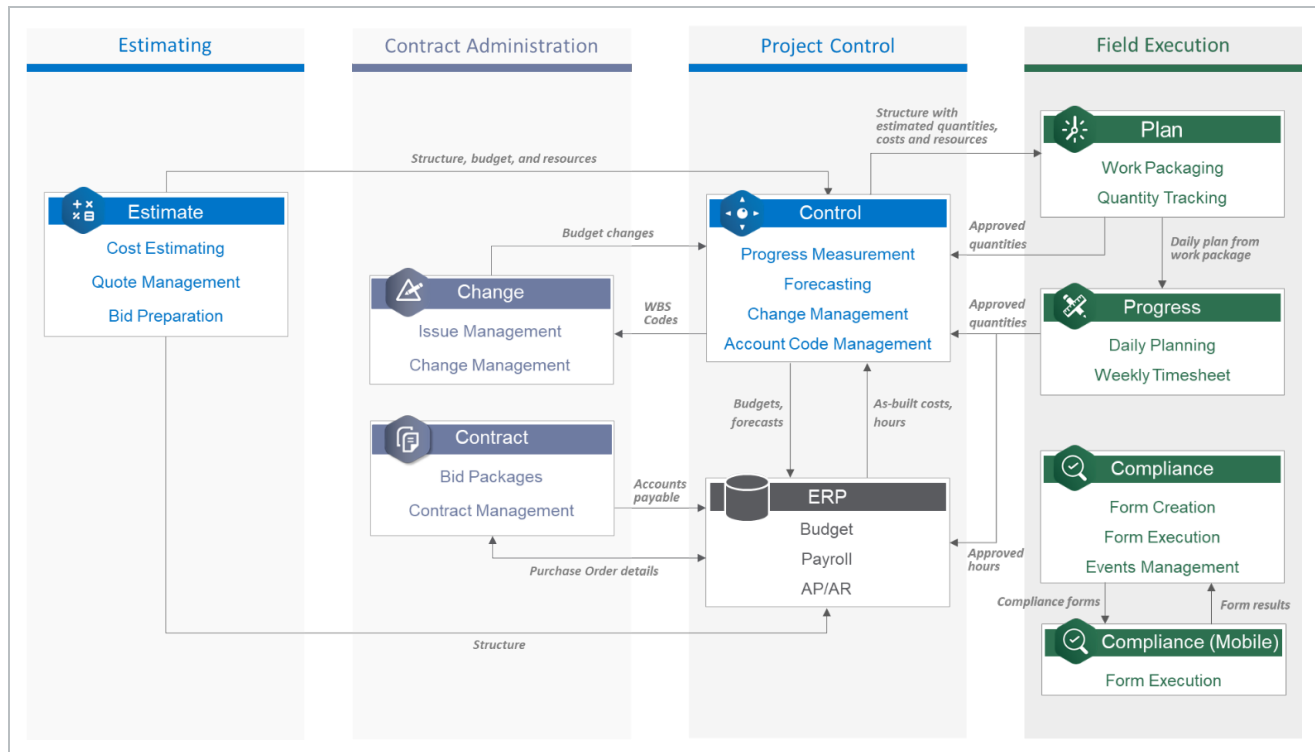
The table below shows you the high-level functions of multiple platforms to help you better understand how these tools interrelate.

Overview - Interfaces

| 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 |
| ERP | Budget, Payroll, Forecasts, AP/AR, Final Costs |

For this lesson, you will focus on the programs that integrate directly with Control (after the initial import from Estimate) and will go over how to perform the basic “Push” and “Get” actions to move data between systems.

The workflow diagram below shows the connections between the programs, and details on what data passes between the various InEight products:



CHAPTER 11 – 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 sync action, referred to as “Push” or “Get”.

- A Push sync occurs when you are in a program and you would like to send information to a different program
- A Get sync occurs when you are in a program and you would like to retrieve information from a different program

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:

Overview - Sync Options

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

Actions

Global forecast method..

Set forecast method

Claim multiple CBS quantities

Budget move and contract adjustment

Lock/unlock budget

Sync

1

2

3

4

5

6

7

8

9

10

11

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 A...

Push Pay Item

Push Billed revenue

Push Forecast revenue

Get quantities

Get Actual cost and MHrs

Get Billed revenue

Through previous pay period

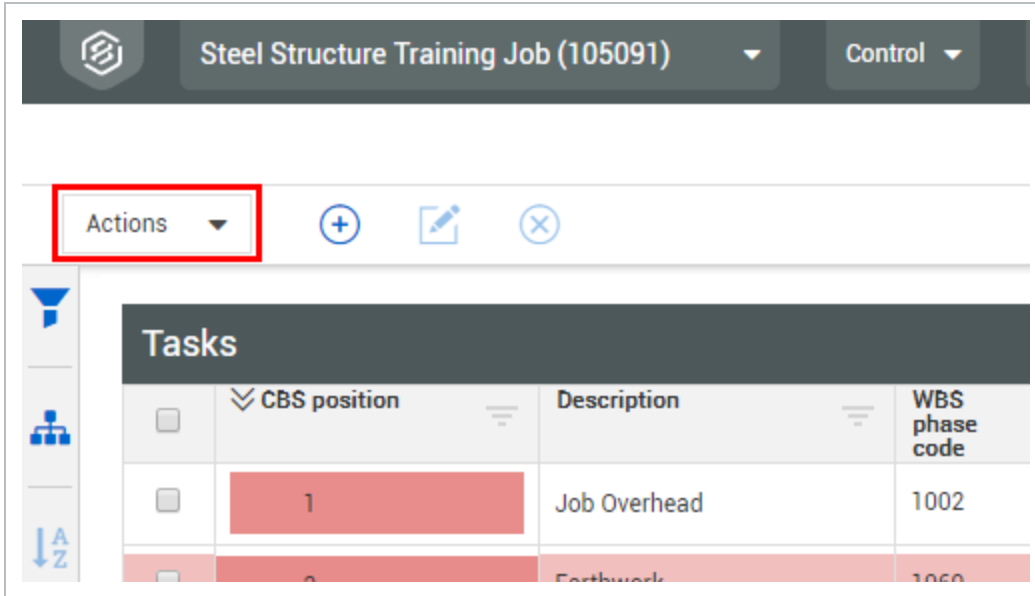
Job to date

Job to date

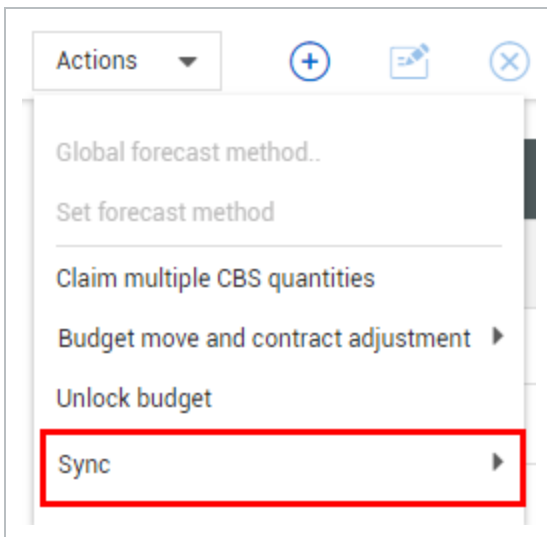
| Task details | | |
|--------------|----------------------------|----|
| SPI | CB planned value (to date) | Re |
| 0.00 | \$ 0.00 | 3 |
| 0.00 | \$ 0.00 | 9 |
| 0.00 | \$ 0.00 | |
| 0.00 | \$ 0.00 | 11 |
| 0.00 | \$ 0.00 | 8 |
| 0.00 | \$ 0.00 | |
| 0.00 | \$ 0.00 | 3 |
| 0.00 | \$ 0.00 | 6 |
| 0.00 | \$ 0.00 | |
| 0.00 | \$ 0.00 | 6 |
| 0.00 | \$ 0.00 | 2 |
| 0.00 | \$ 0.00 | |
| 0.00 | \$ 0.00 | 3 |
| 0.00 | \$ 0.00 | 6 |
| | | |
| | | 2 |
| | | 3 |
| 0.00 | \$ 0.00 | 7 |
| 0.00 | \$ 0.00 | 4 |

SYNC OPTIONS

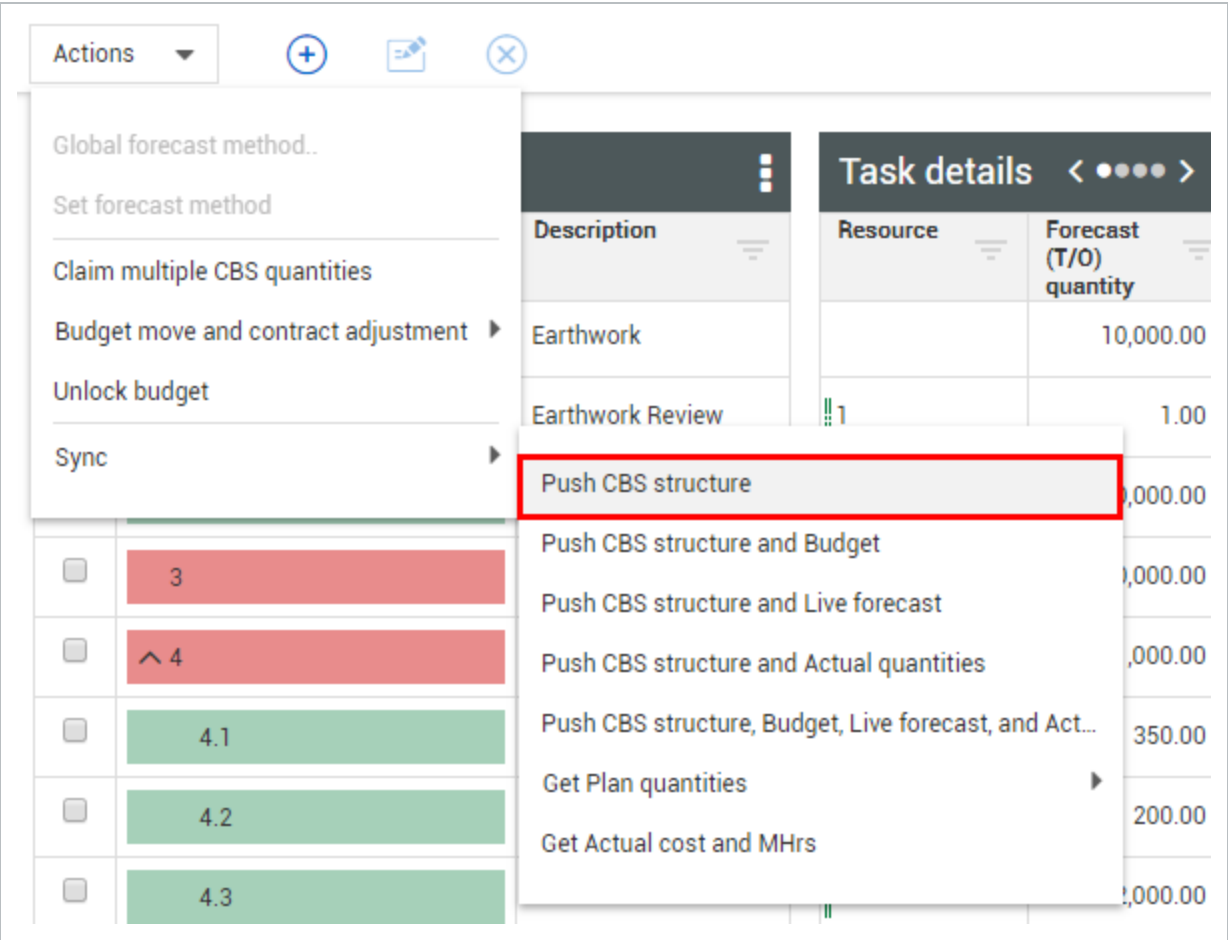
1. From the Control main page, click the **Actions** menu.



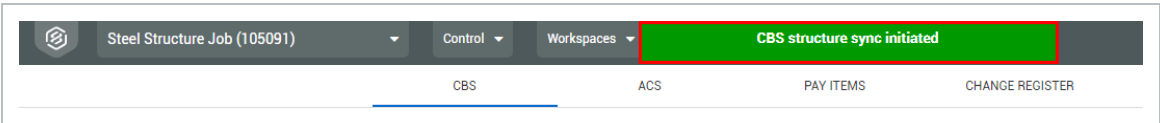
2. Select **Sync** from the Actions drop-down.



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



- A toast message appears at the top of the screen showing the process initiated



- You follow the same steps for selecting the other synchronization options
- For the Get Plan Quantities option, you will need to select the **Through Previous Pay**

Period option

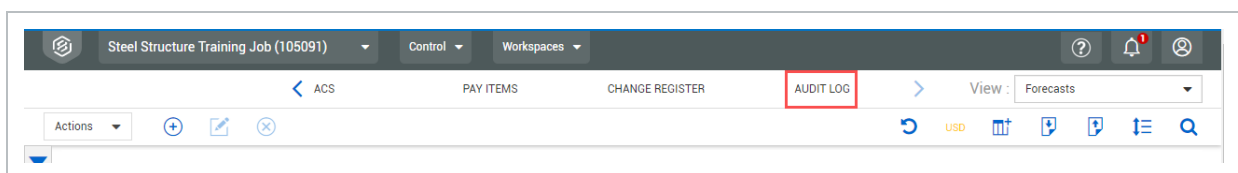
| | | | | | | |
|--------------------------|-----|-------------------|--------------------------|-----------------------------|---------|---|
| <input type="checkbox"/> | 5.2 | Insta | Push Forecast revenue | 0.00 | \$ 0.00 | 6 |
| <input type="checkbox"/> | 6 | 36 In | Get quantities | Through previous pay period | | |
| <input type="checkbox"/> | 6.1 | Furni | Get Actual cost and MHrs | Job to date | | |
| <input type="checkbox"/> | 6.2 | Exca | Get Billed revenue | 0.00 | \$ 0.00 | 7 |
| <input type="checkbox"/> | 6.3 | Insta | Get Billed revenue | 0.00 | \$ 0.00 | 7 |
| <input type="checkbox"/> | | Backfill P&G Disc | 10027 | 0.00 | \$ 0.00 | 4 |

CHAPTER 11 – AUDIT LOG INTEGRATION

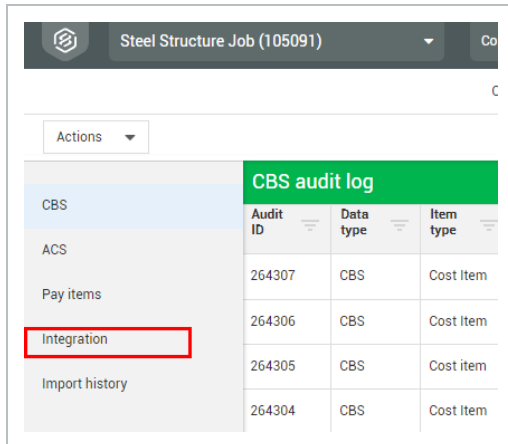
As you utilize the sync option, you have the option to go back and audit the status of the actions taken. The Audit Log Integration displays any synchronization process that has been initiated and its status. It is used to capture whether the synchronization process between InEight Control and the ERP system was completed successfully. The log can also tell you how long the sync process took to complete and who requested the sync.

SYNC AUDIT LOG

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



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



| Audit ID | Data type | Item type |
|----------|-----------|-----------|
| 264307 | CBS | Cost Item |
| 264306 | CBS | Cost Item |
| 264305 | CBS | Cost item |
| 264304 | CBS | Cost Item |

- The log displays the current sync status

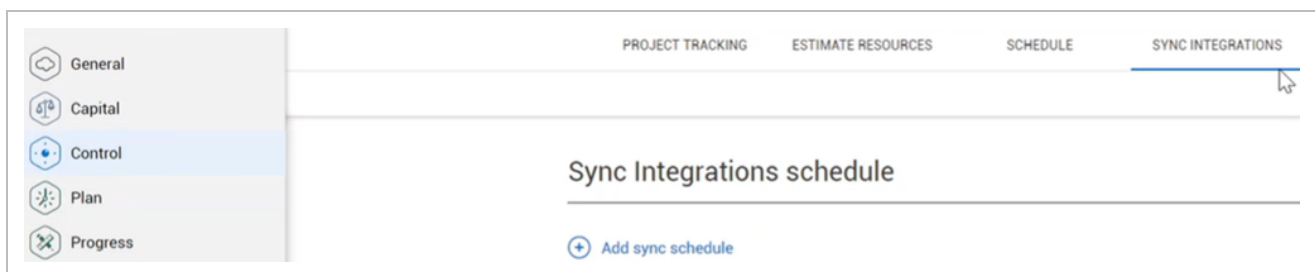
CHAPTER 11 – SCHEDULED SYNCs

Scheduled syncs let you set a time and date for the type of information you want updated from either push or get data.

You can set up recurring syncs or a one-time sync to get up-to-date costs on man-hours. Scheduled syncs occur at the point and time you scheduled them for.

To start scheduling syncs, the tab Sync integrations has been added to the Control Project settings.

If no syncs are scheduled, you can add a sync by selecting the **Add sync schedule** button.



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 screenshot displays a configuration window for setting up a sync. It includes the following elements:

- * Sync type:** A dropdown menu with "Select one" at the top. The menu is open, showing a list of options: "Select one", "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 Plan quantities" (highlighted with a right-pointing arrow), "Get Actual cost and MHrs", and "Get Billed revenue".
- * Time zone:** A text field containing "(UTC-06:00) Central Time (US & Canada)".
- * Time to run sync:** A text field containing "12:00 AM".
- Sub-menu for "Get Plan quantities":** A small window that appears when "Get Plan quantities" is selected, containing two options: "Through previous pay period" (highlighted with a hand cursor) and "Job to date".
- Cancel button:** A blue button labeled "Cancel" located to the right of the sub-menu.

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.

Add sync schedule

* Sync type

Select one

* Time zone

(UTC-06:00) Central Time (US & Canada)

* Start Date

02/02/2021

* Time to run sync

12:00 AM

* Repeat

Never

Daily

Weekly

Monthly

Cancel

Add

NOTE 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.

* Repeat

Never

Daily

Weekly

Monthly

* End

☒ After

1

Occurrence(s)

☐ On

02/03/2021

Cancel

Add

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

* Repeat

Never Daily Weekly Monthly

* End

☒ After 1 Occurrence(s)

☐ On 02/03/2021

* Repeat on All None

☐ S ☐ M ☐ T ☐ W ☐ T ☐ F ☐ S

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

* Repeat

Never Daily Weekly Monthly

* End

☒ After 1 Occurrence(s)

☐ On 02/03/2021

* Repeat on

☐ Day 1

☒ First

First

Second

Third

Fourth


Last

Sunday

Cancel Add



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

Sync Integrations schedule



 Add sync schedule

Scheduled syncs

Push Billed revenue

| | | |
|--------------------------------|------------------------|---|
| Sync type: Push Billed revenue | Start date: 02/01/2021 |   |
| Time to run sync: 12:00 PM CST | Repeat on: Fri | |
| Repeat: Weekly | End: 12/31/2021 | |

Get Plan quantities

| | | |
|--|----------------------------|---|
| Sync type: Get Plan quantities - Job to date | Start date: 02/08/2021 |   |
| Time to run sync: 1:00 PM CST | Repeat on: Last - Saturday | |
| Repeat: Monthly | End: 12/31/2021 | |

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

NOTE

You can schedule all your syncs for the project at one time. If you already have syncs configured for currently existing projects, you don't need to reconfigure your setup for this feature.

For any new projects that do not yet have scheduled syncs set up, you need to go to the **Application integrations** section of Control. Follow the Step by Step to navigate to the Application integrations page.

NAVIGATING TO APPLICATION INTEGRATION

1. From the header bar, select the projects drop-down.
2. Hover over **Suite administration**. That is where you would set up all of your sync configurations.
3. Select **Application integrations**.

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

CHAPTER 12 – 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.

12.0.1 CONSIDERATIONS

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

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

This lesson covers how to set up these project options.

NOTE

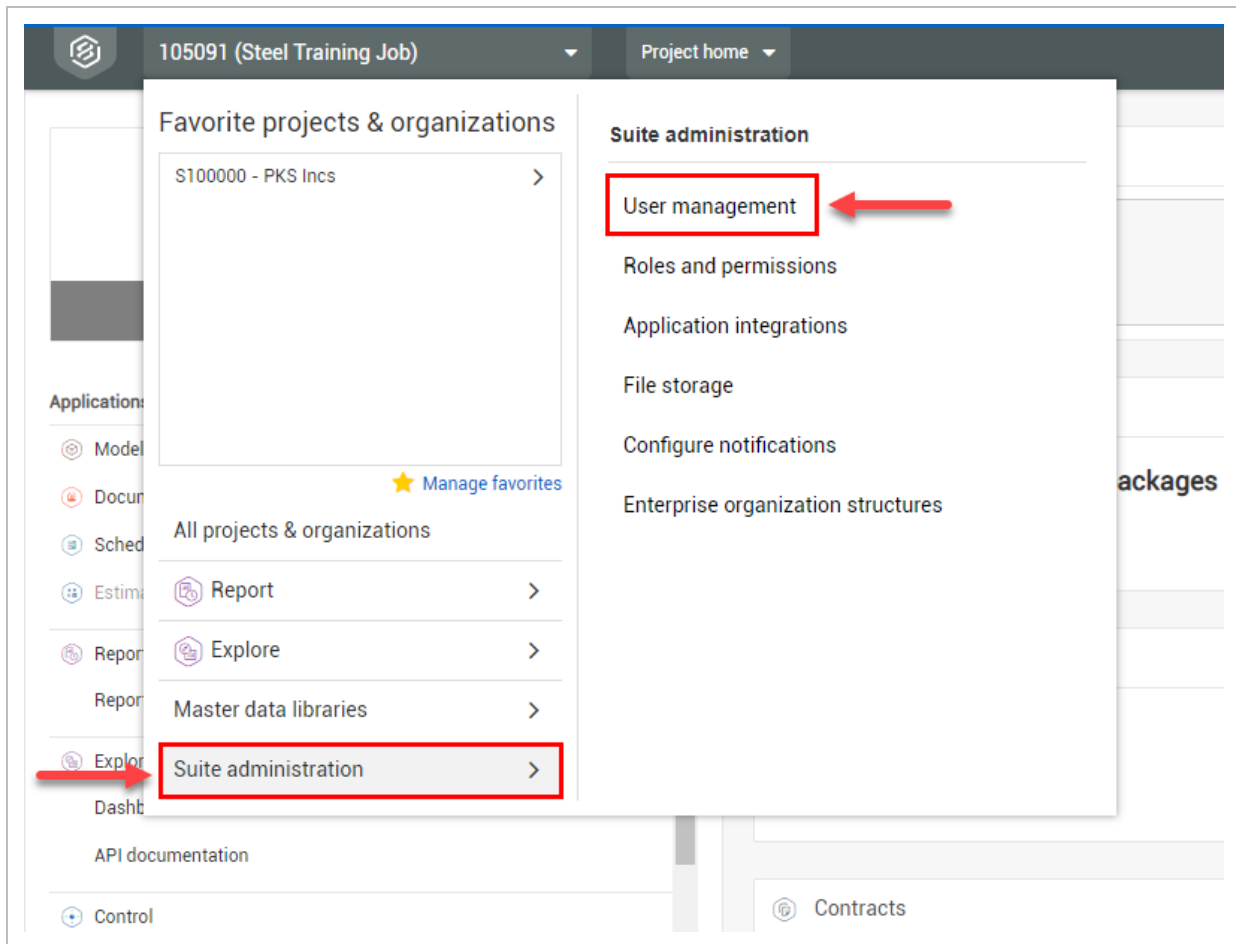
Establishing roles and permissions is an administrative function. As such, access to these settings may not be available to you, as the setup of these settings may not be within the scope of your daily tasks.

12.0.2 USER MANAGEMENT

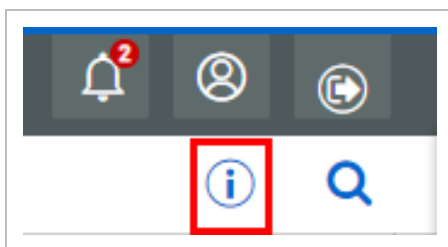
The User Management page provides a list of users inside your organization. You can view any user's project access, roles, and permissions within your organization. Users with required administrative permissions can edit and grant permissions to other users, up to the equivalent level of access they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

VIEW THE ROLE AND PERMISSIONS OF A USER

1. From any InEight application, click on the **First Level Menu** in the upper left corner of your screen, and from the drop-down menu, select **Suite Administration**, then **User Management**.

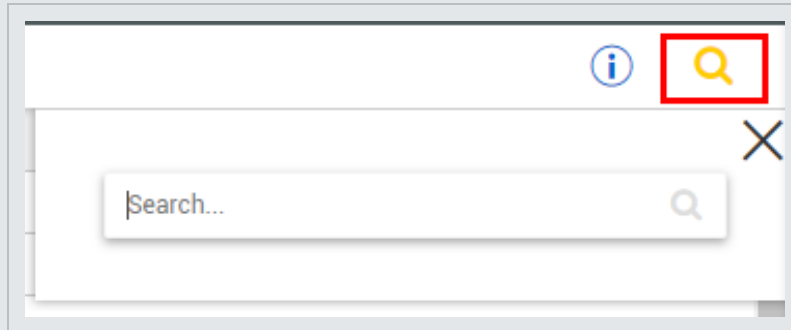


2. Scroll down the list or use the Search field to find and select **a user**.
3. To view the record, **right click** on the name, and select **Show Info**.
 - You can also click on the Show Info button located on the upper-right register menu bar

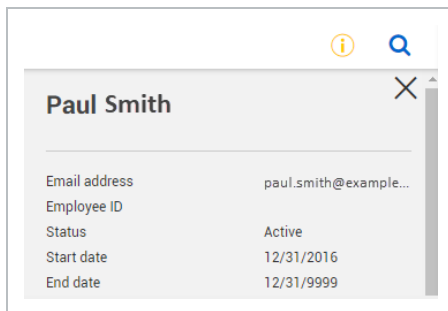


TIP

You can use the Search located in the upper right corner of the page to search for a keyword in any column in the User Management database.



- Once you click on the **Show Info** option, a slide out panel appears on the right. From this panel, you can view the contact information, as well as the role and project access of that specific user.

**NOTE**

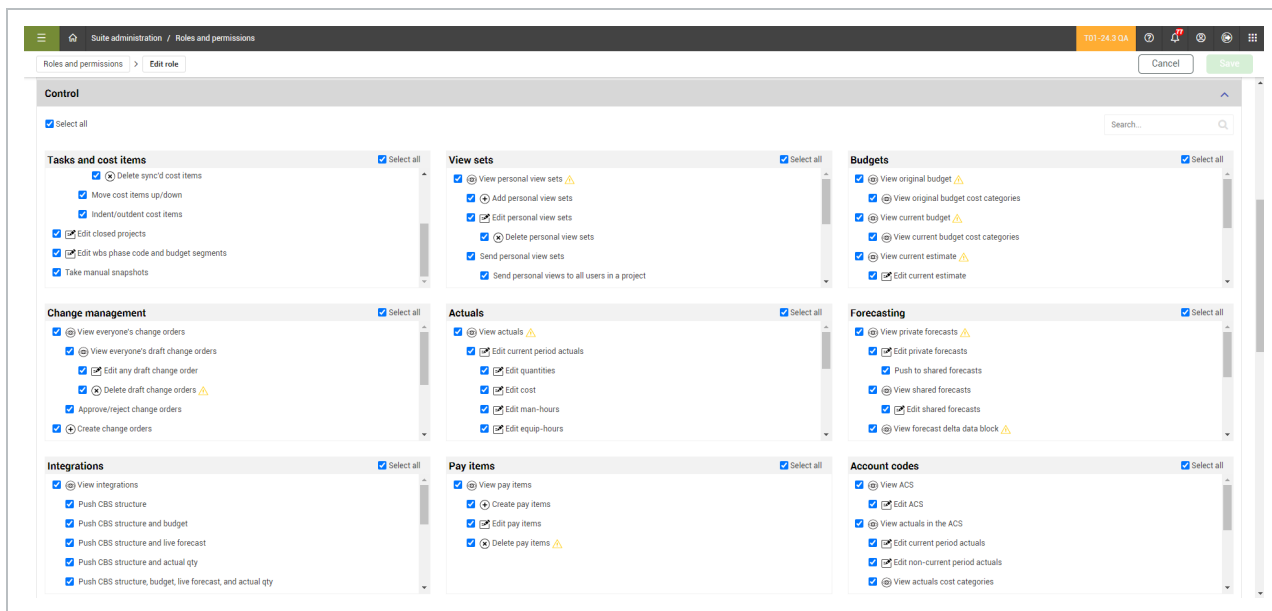
Note that once your organization implements the InEight cloud platform, you will be able to link your contacts' address book to your user information.

12.0.3 ORGANIZATIONAL BREAKDOWN STRUCTURE

The Organizational Breakdown Structure represents 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 a district level access would have access to all the projects under that district's umbrella.

12.0.4 ROLES AND PERMISSIONS

A role is defined as the function that a user occupies inside an organization or project. A role in Platform 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 different role has. Refer to Platform topic for information about adding, deleting, modifying, and assigning roles.



NOTE

The administrator levels range from 0-3 and give you a predetermined set of permissions, with the lowest level giving read only access, and higher levels having more abilities to adjust settings and edit fields within the InEight portfolio of products.

InEight Control has many permissions that control important functions within the program.

12.1 PROJECT SETTINGS

To manage a project successfully in Control, the correct project details must be added before project initiation. To view project details, go back to the **All projects & organizations** page of the InEight cloud platform.

12.1.1 ORGANIZATIONS PAGE

The Organizational Breakdown Structure (OBS) represents the hierarchical company structure. It can have regions, such as Eastern and Western, and within those regions, the company can have also divisions, such as Electrical, Paving, and Masonry. The organization can continue to be more refined to the level such as states, cities, districts. Projects are the lowest level of the structure but they do not show in the OBS.

The OBS controls your access. Where you are assigned in the organization determines what access you inherit and the visibility you have to other areas of the OBS. The higher the level a user is placed on the OBS, the more actions they can perform, and the more organizations and projects they can view. A user assigned at only the project level has no visibility to any other projects or administrative pages.

To access the OBS, go to All projects & organizations > **Organization**.

The screenshot displays the 'All projects & organizations' interface. The 'ORGANIZATIONS' tab is active, showing a table of organizations. An 'Edit organization' modal is open, allowing for the configuration of a specific organization.

| Organization | Description | Created by | Created on | Last modified on |
|--|--------------------|------------------------------|------------------------|------------------------|
| S100000 - PKS Inc | PKS Inc | InEight Service Account | 01/26/2017 9:48:11 AM | 01/26/2017 9:48:11 AM |
| S100000 - PKS Inc - AA | AAUO | Vijaya LakshmiDa-PTR@ineight | 12/07/2022 2:15:54 AM | 12/07/2022 2:15:54 AM |
| S100000 - PKS Inc - Concentrix | Concentrix Desc | Kullai Reddy | 09/15/2022 11:51:58 PM | 09/15/2022 11:51:58 PM |
| S100000 - PKS Inc - Core_Test_Org_102 | Core_Test_Org_102 | Core qa1 | 07/08/2022 12:35:26 PM | 07/08/2022 12:35:26 PM |
| S100000 - PKS Inc - Core_Test_Org_1118 | Core_Test_Org_1118 | Core qa1 | 07/27/2022 5:14:32 AM | 07/27/2022 5:14:32 AM |
| S100000 - PKS Inc - Core_Test_Org_1169 | Core_Test_Org_1169 | Core qa1 | 08/02/2022 4:13:08 AM | 08/02/2022 4:13:08 AM |
| S100000 - PKS Inc - Core_Test_Org_2014 | Core_Test_Org_2014 | Core qa1 | 08/04/2022 12:38:29 PM | 08/04/2022 12:38:29 PM |
| S100000 - PKS Inc - Core_Test_Org_2150 | Core_Test_Org_2150 | Core qa1 | 07/25/2022 10:10:38 PM | 07/25/2022 10:10:38 PM |
| S100000 - PKS Inc - Core_Test_Org_2244 | Core_Test_Org_2244 | | | |
| S100000 - PKS Inc - Core_Test_Org_2335 | Core_Test_Org_2335 | | | |
| S100000 - PKS Inc - Core_Test_Org_2362 | Core_Test_Org_2362 | | | |
| S100000 - PKS Inc - Core_Test_Org_242 | Core_Test_Org_242 | | | |
| S100000 - PKS Inc - Core_Test_Org_2436 | Core_Test_Org_2436 | | | |
| S100000 - PKS Inc - Core_Test_Org_2458 | Core_Test_Org_2458 | | | |
| S100000 - PKS Inc - Core_Test_Org_2482 | Core_Test_Org_2482 | | | |

Edit organization modal details:

- Parent organization:** Root organization
- Name:** S100000 - PKS Inc
- Description:** PKS Inc
- External organization ID:** RootOrg1
- Configurations:**
 - Default base currency:** USD - US Dollar
 - Account code delimiter:** Period (.)
- Budget code:**
 - Using unique budget code? ☒
 - Unique budget code:** Segment 1: Project

12.1.1.1 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.

All projects & organizations

All projects & organizations > Edit organization

Budget code

The segments are combined to create a single unique budget code separated by periods. They cannot be changed once a project has been added.

Using unique budget code? ☒

* Unique budget code

Segment 1

Project

Cost center

Phase code

Project

Other (String)

Segment 2

Cost center

Segment 3

Other (String)

Segment 4

Phase code

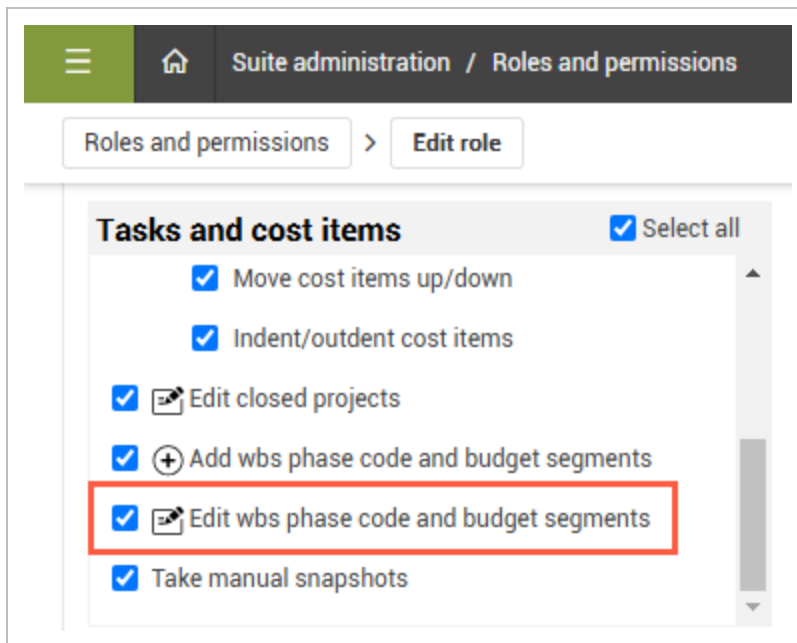
Please specify name

Cost Code

Tasks

| | CBS position | Description | Budget Segment 1 | Budget Segment 2 | Budget Segment 3 | Budget Segment 4 | Forecast method |
|-------------------------------------|--------------|-----------------------|------------------|------------------|------------------|------------------|----------------------|
| <input type="checkbox"/> | 1 | Financial Results ... | 103961 | | 1000 | | Average performan... |
| <input checked="" type="checkbox"/> | 2 | Misc. Rev Internal | 103961 | | 1103 | | Rollup |
| <input type="checkbox"/> | 2.1 | Misc. Rev Internal | 103961 | | 1104 | | Manual (EAC) |
| <input type="checkbox"/> | 2.2 | Escalation/Contin... | 103961 | | 1101 | | Rollup |
| <input type="checkbox"/> | 2.2.1 | General Project Ri... | 103961 | | 1102 | | Current estimate |
| <input type="checkbox"/> | 2.3 | Directs | 103961 | | 1001 | | Rollup |
| Subtotals 163 | | | | | | | |

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.

Import CBS data

Import from Excel (.xlsx, .xls) or Comma separated value (.csv)

Drag and drop the file here
or browse

Browse

Options

* Import type

Cost items and cost item attributes ▼

☐ Update existing and new items

☐ Update existing items

☒ New items

↓ Cost categories list

❗ The import file is read and field mapping can be specified. Mapping uses row 1 headers from the source document

For new cost items, if the CBS position field is mapped then the position specified is where the cost item will be placed in the hierarchy. If the CBS position field is not mapped then the new cost item will be inserted at the bottom of the CBS hierarchy.

Cancel

Next

OPEN PROJECT DETAILS

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

12.1.2 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
- Currency and Markets

All projects & organizations > Edit project

DETAILSINFORMATIONATTRIBUTES

Project settingsCancelSave

Project details

Add project image
Minimum of 540px x 360px

* Project ID

0020029472

* External project ID

0020029472

* Name

James River WWTP and AWT Facility

* Status

Active

* Organization

S100000 - PKS Inc.; SA1000 - Kiewit Corporation; SB3000 - Infrastructure; SC3002 - Infrastructure Central; SD3003 - Infrastructure Central (SVP Level); SE6...

Notes

Location

Country / Region

Address 1

Address 2

City

State

Postal / Zip code

Latitude

Longitude

* Time zone
(UTC-06:00) Central Time (US & Canada)

Project dates

Project start date
02/01/2020

Project end date
02/14/2020

Forecast start date

Duration
Hint: Notice to proceed date or date forecast time b...

Forecast completion date
Hint: forecast time duration in calendar days

Forecast extensions/reductions

Forecast revised duration

Forecast revised completion date

Prime contract

Company legal name
Hint: Business name

Original contract amount

Contract number
Hint: Client or Designer project number

Contract date
Hint: Date original contract signed

Contract start date
Hint: Notice to proceed date or date contract time b...

Duration
Hint: Contract time duration in calendar days

Contract completion date

Certificate of substantial completion(expected)

Certificate of substantial completion(awarded)

Contract extensions/reductions

Contract revised duration

Contract revised completion date

Certificate of final completion(expected)

Certificate of final completion(awarded)

Currency

* Base currency
USD - US Dollar
Hint: type the entity, name or code. i.e. USD

Add another currency

Project contacts

Owner

Designer

Contact 1

Contact 2

Contact 3

Contact 4

Markets

Market

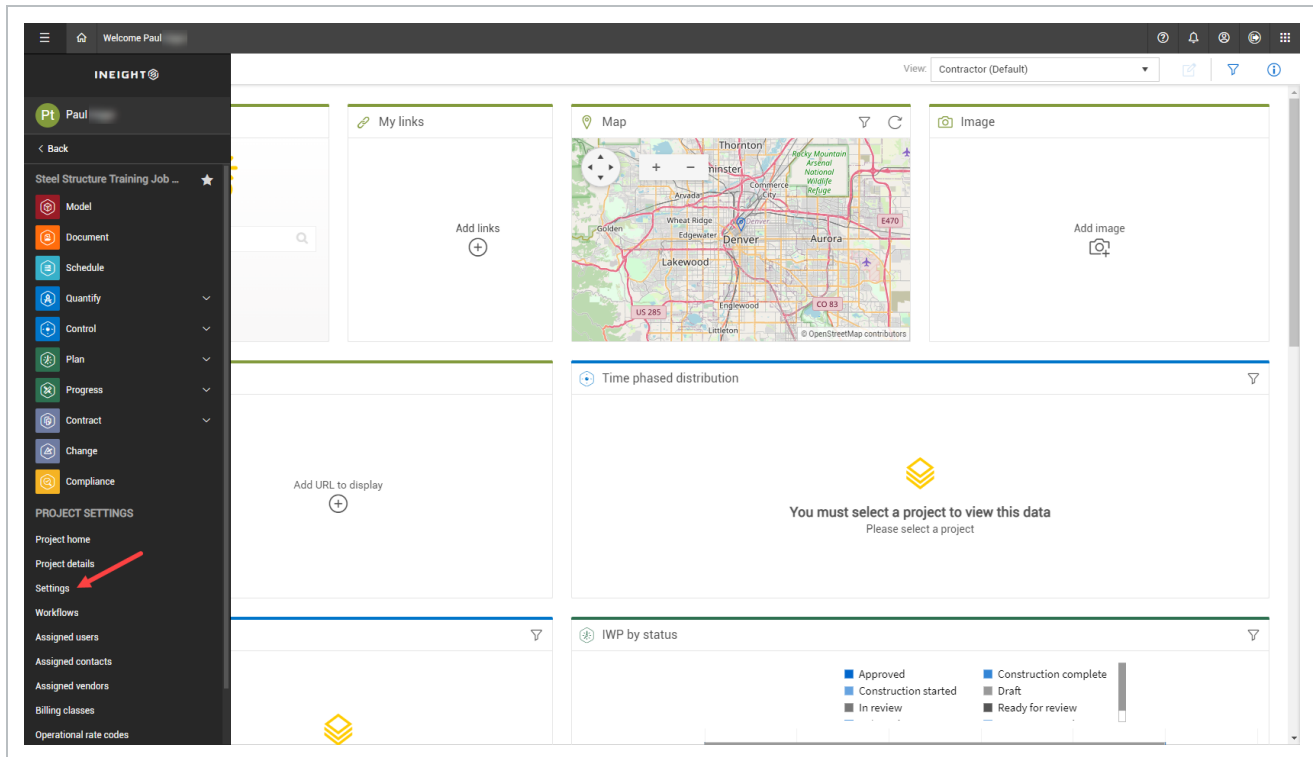
Hint: type the market name or description

Add another market

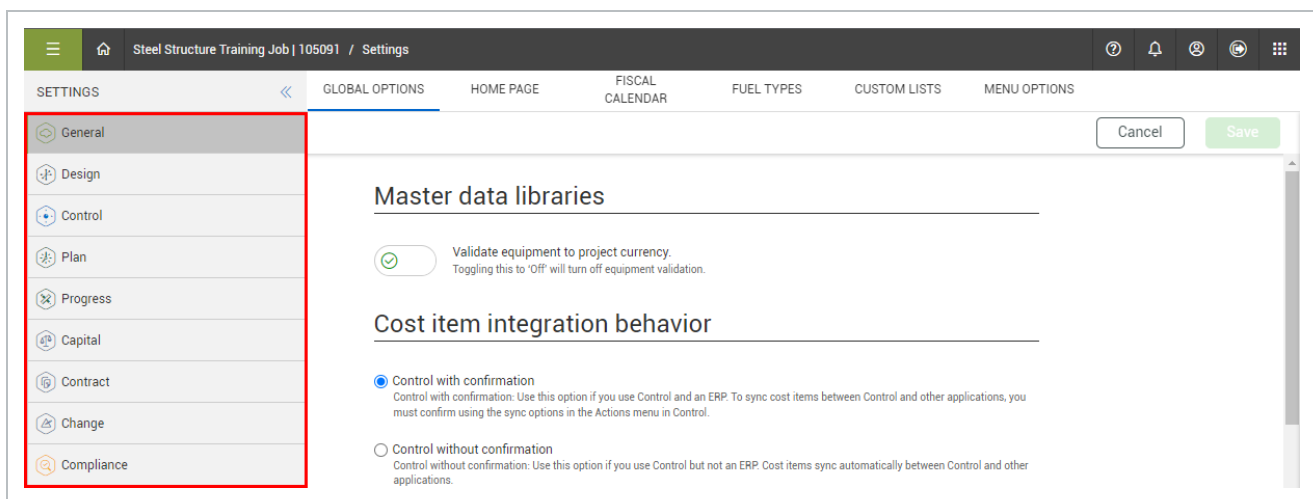
12.1.3 PROJECT SETTINGS

You access Project settings from the Project home landing page. From the Project home page, you can either:

- Select **Settings** from the side menu
- Select **Manage settings** on the Settings tile



The Project settings page contains setup information for all the InEight products, including Control. A list of tabs on the left allow you to navigate to the appropriate settings for each application.



The settings that pertain to Control are located under two of the tabs, as listed below:

- General
 - Home Page
 - Global Options
 - Fiscal Calendar
 - Document Types
 - Custom Lists
 - Attribute Definitions
 - Menu Options
- Control
 - Project Tracking (*Organization, Project*)
 - Forecast (*Organization, Project*)
 - Estimate Resources (*Organization, Project*)
 - Schedule (*Organization, Project*)
 - Revenue (*Project*)
 - Sync Integrations (*Project*)
 - Others (*Organization, Project*)

12.1.4 HOME PAGE

The Home Page tab lets you create URL links to be placed directly on the Project home page at both the Organization and Project levels.

Custom links

| | • Link name | • URL | |
|--------------------------|--------------------|------------------------|---|
| + | Enter link name | Enter URL | |
| <input type="checkbox"/> | InEight University | university.ineight.com | ✕ |
| <input type="checkbox"/> | Learn.Ineight | www.learn.ineight.com | ✕ |

103961 / Project home

Links

Organization

- KVK
- dds
- LaunchPad
- Print PO

Project

- InEight University
- Learn.Ineight

12.1.5 GLOBAL OPTIONS

The Global Options tab controls the master data libraries, cost item integration behavior, advanced work and scheduling features, and the template library. The three cost item integration behaviors provide 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.

Master data libraries



Validate equipment to project currency.
Toggling this to 'Off' will turn off equipment validation.

Cost item integration behavior



Control with confirmation

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.



Control without confirmation

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

Without control without confirmation: Use this option if you do not use Control. Cost items pass directly from other sources to applications.

Advanced work and scheduling features



Enables data sharing between Model, Schedule, and Plan applications for use with advanced work and scheduling features

Template library



Enables project to be listed as an available template library project

12.1.6 FISCAL CALENDAR

The settings in the Fiscal Calendar can be set at the organization and project levels. These settings specify the start and end dates for fiscal years and financial periods, such as month-end dates. 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.

Cancel Save

* Week ending day

Saturday ▼

* Financial year start month

April ▼

Period end

* Month end day

Last day of the month ▼

Last weekday

▼

* Financial period closing day

Same as Month End Plus Days ▼

* Month end plus days

17

* Financial period closing time

09:30 ⌚

* Closing time zone

(UTC-05:00) Eastern Time (US and Canada) ▼

12.1.7 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.

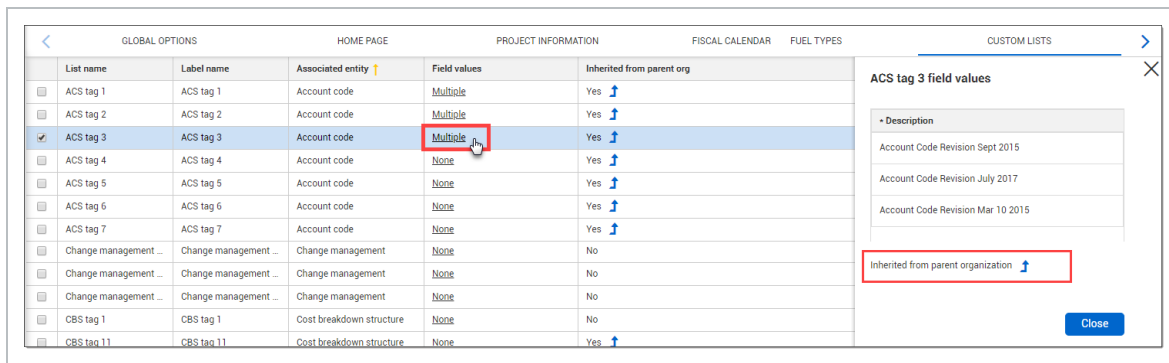
| English | | | | | Español | | ES-MX |
|-------------------------------------|-------------------------|-------------------------|--|----------------|---------------------------|---------------------------|-------|
| | Name | Description | Product(s) | System managed | Name | Description | |
| <input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

12.1.8 CUSTOM LISTS

Like 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.

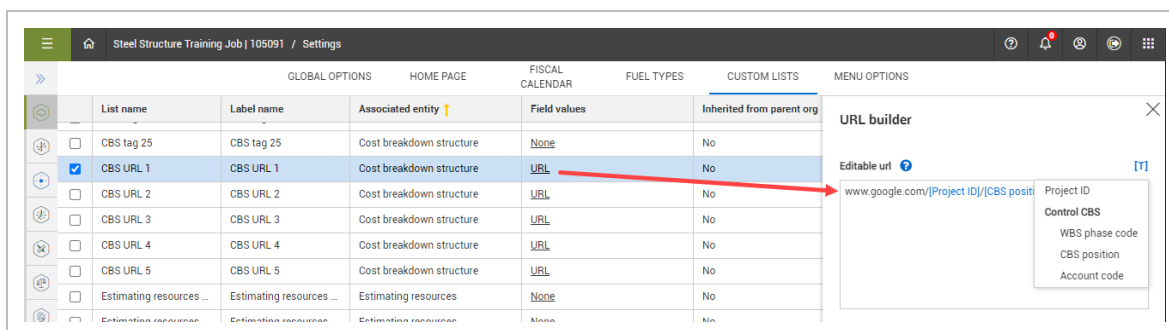
The field names associated with Cost breakdown structure and Account codes, are tags defined and editable at the organizational level; you cannot edit them at the project level, as indicated by the statement “Inherited from parent organization”.



12.1.8.2 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.

1028
Miscellaneous Revenue Internal

Tasks

| CBS position | Description |
|---------------------------------------|-----------------------|
| 1 | Financial Results ... |
| <input checked="" type="checkbox"/> 2 | Miscellaneous Re... |
| 2.1 | Craft Cost |
| 2.2 | B/C To Parent 103... |
| 2.3 | Intercompany Aut... |
| 3 | Miscellaneous Re... |
| 3.1 | Miscellaneous Re... |
| 4 | Financial Result E... |
| 4.1 | Not in Use |
| 4.2 | Not in Use |

DETAILS **ATTRIBUTES** **COST CATEGORIES** **RESOURCE**

CUD3 CUD4 CUD5

CUD6 CUD7 CUD8

CUD9 CUD10 CUD11

CUD12 CUD13 CUD14

CUD15 CBSURL1_EN CBSURL2_EN

CBSURL3_EN CBSURL4_EN CBSURL5_EN

[https://ineight.visualstudio.com/InterStellar/_workitems/edit/\[WBS phase code\]](https://ineight.visualstudio.com/InterStellar/_workitems/edit/[WBS phase code])

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.

| Tasks | CBS URL 1 | CBS URL 2 | CBS URL 3 | CBS URL 4 | CBS URL 5 | Forecast total cost |
|--|---|-----------|-----------|-----------|-----------|---------------------|
| 1 Job Overhead 1002 | | | | | | \$ 250,000.00 |
| <input checked="" type="checkbox"/> 2 Earthwork 1069 | https://ineight.visualstudio.com/InterStellar/_workitems/edit/[WBS phase code] | | | | | \$ 400,000.00 |
| 3 Concrete 1071 | | | | | | \$ 1,500,000.00 |
| 4 Structural Steel 1073 | | | | | | \$ 1,516,282.48 |
| 4.1 Erect Steel - Heavy 1074 | | | | | | \$ 25,666.00 |
| 4.2 Erect Steel - Light 1005 | | | | | | \$ 200,000.00 |
| 4.3 Bolted Connections 1006 | | | | | | \$ 49,955.00 |
| 5 Materials 1084 | | | | | | \$ 1,750,000.00 |
| 5.1 Earthwork - Mater... 1085 | | | | | | \$ 250,000.00 |
| 5.2 Concrete - Materi... 1086 | | | | | | \$ 1,000,000.00 |
| 5.3 Structure Steel - ... 1087 | | | | | | \$ 500,000.00 |
| 6 1088 | | | | | | \$ 0.00 |
| Subtotals 12 (1 rows selected) | | | | | | \$ 4,175,621.00 |

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.

| GLOBAL OPTIONS | | | | | | HOME PAGE | FISCAL CALENDAR |
|-------------------------------------|------------|------------|--------------------------|--------------|---------------------------|-----------|-----------------|
| | List name | Label name | Associated entity ↑ | Field values | Inherited from parent org | | |
| <input type="checkbox"/> | CBS tag 23 | CBS tag 23 | Cost breakdown structure | <u>CBS</u> | No | | |
| <input type="checkbox"/> | CBS tag 24 | CBS tag 24 | Cost breakdown structure | <u>None</u> | No | | |
| <input type="checkbox"/> | CBS tag 25 | CBS tag 25 | Cost breakdown structure | <u>None</u> | No | | |
| <input type="checkbox"/> | CBS URL 1 | CBS URL 1 | Cost breakdown structure | <u>URL</u> | No | | |
| <input type="checkbox"/> | CBS URL 2 | CBS URL 2 | Cost breakdown structure | <u>URL</u> | No | | |
| <input type="checkbox"/> | CBS URL 3 | CBS URL 3 | Cost breakdown structure | <u>URL</u> | No | | |
| <input type="checkbox"/> | CBS URL 4 | CBS URL 4 | Cost breakdown structure | <u>URL</u> | No | | |
| <input type="checkbox"/> | CBS URL 5 | CBS URL 5 | Cost breakdown structure | <u>URL</u> | No | | |
| <input checked="" type="checkbox"/> | CBS URL 6 | CBS URL 6 | Cost breakdown structure | <u>URL</u> | Yes ↑ | | |
| <input checked="" type="checkbox"/> | CBS URL 7 | CBS URL 7 | Cost breakdown structure | <u>URL</u> | Yes ↑ | | |
| <input checked="" type="checkbox"/> | CBS URL 8 | CBS URL 8 | Cost breakdown structure | <u>URL</u> | 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.

12.1.9 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 to all projects in the organization.

| *Fuel type | *Cost per UoM | *Currency | *UoM | Account code |
|---|----------------------|-----------------|------------|---|
| <input type="text" value="Enter fuel type name"/> | <input type="text"/> | USD - US Dollar | Select one | Start typing account code |
| Gasoline | \$1.00000 | USD - US Dollar | Gallon | 71.06.32.016.02 - Turbine Enclosure - Install En... |

Cancel Save

12.1.10 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.

Menu links

Configure the URL addresses for your InEight Products

| Product | * URL | * Target |
|----------|---|----------|
| Model | https://ineight.com/solutions/virtual-design-constr... | New tab |
| Document | https://ineight.com/solutions/collaborative-docum... | New tab |
| Basis | http://my.basisplanning.com | New tab |

12.1.11 PROJECT TRACKING (ORGANIZATION & PROJECT LEVEL)

Under the Control tab, Project Tracking settings configure how your project tracks progress and percent complete in Control.

These settings include the following options:

- What level to lock down your CBS structure to
- What value to base percent complete off
- If percent complete are capped at or allowed to exceed 100%

12.1.11.3 TASKS

The first option in the Tasks Section lets you maintain your CBS structure at a specific level. Selecting yes, lets you determine your own CBS structure level.

Tasks

Maintain CBS Structure at a specific level?

☐ No

Level to Maintain CBS Structure at

Generate WBS phase code automatically?


Yes ☐

WBS Phase code generation method


Continue numbering from the last generated number ▼

WBS Phase codes start value

1000

Enable manual snapshots 

☒

Allow syncs to replace manual snapshots 

☒

The second option is WBS Phase Code. Select Yes or No under the Generate WBS phase code automatically?

- Yes indicates phase codes for newly created cost items to be automatically generated
- The WBS Phase code generation method regenerates all values beginning from the specified start value
- The value entered in the WBS Phase code start 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.
- No indicates phase codes for newly created cost items must be manually entered

ENABLE MANUAL SNAPSHOTS

You can create a manual snapshot of Control project data in the CBS and Pay Items registers.

If you have the *Enable manual snapshots* setting enabled, you can create a snapshot at any point in time, separately from any of the above-mentioned syncs.



Tasks



WBS Phase code generation

Continue numbering from the

Phase codes start value

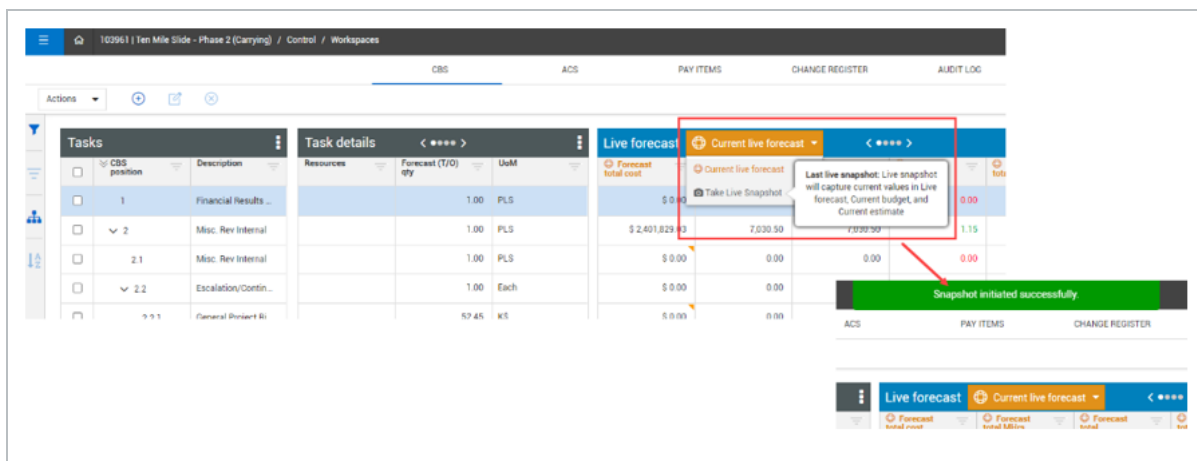
00

Enable manual snapshots  

Allow syncs to replace manual snapshots  

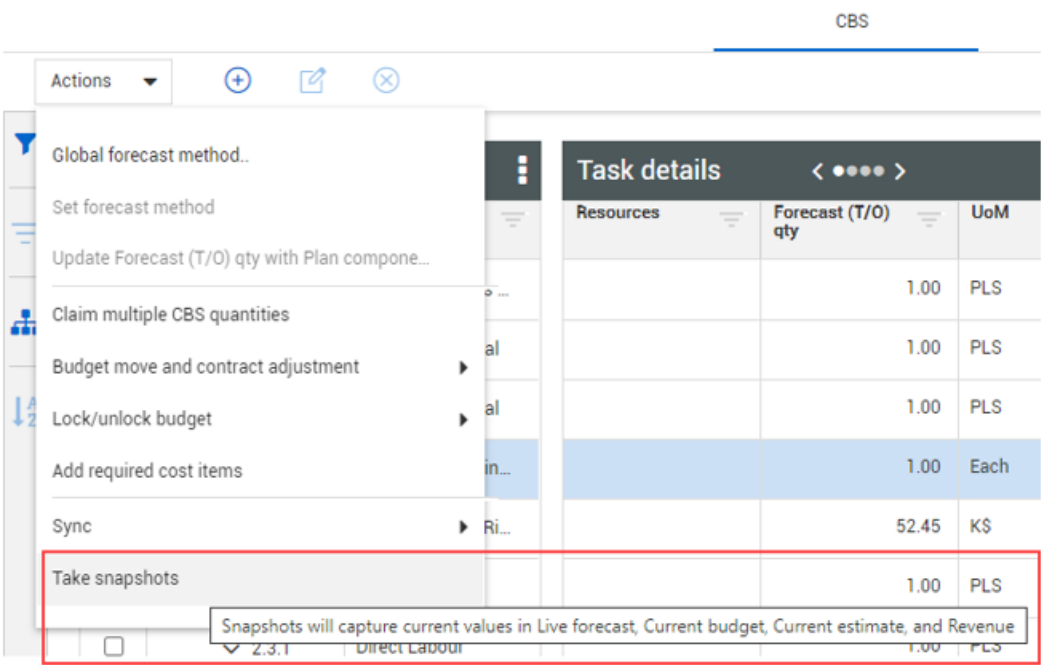
Snapshots will be captured when a user with permission selects to take the monthly snapshot. If this setting is disabled, snapshots will be captured only when Push Live forecast and Push Forecast revenue syncs are run.

When the Enable Snapshots settings is enabled, you can 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.

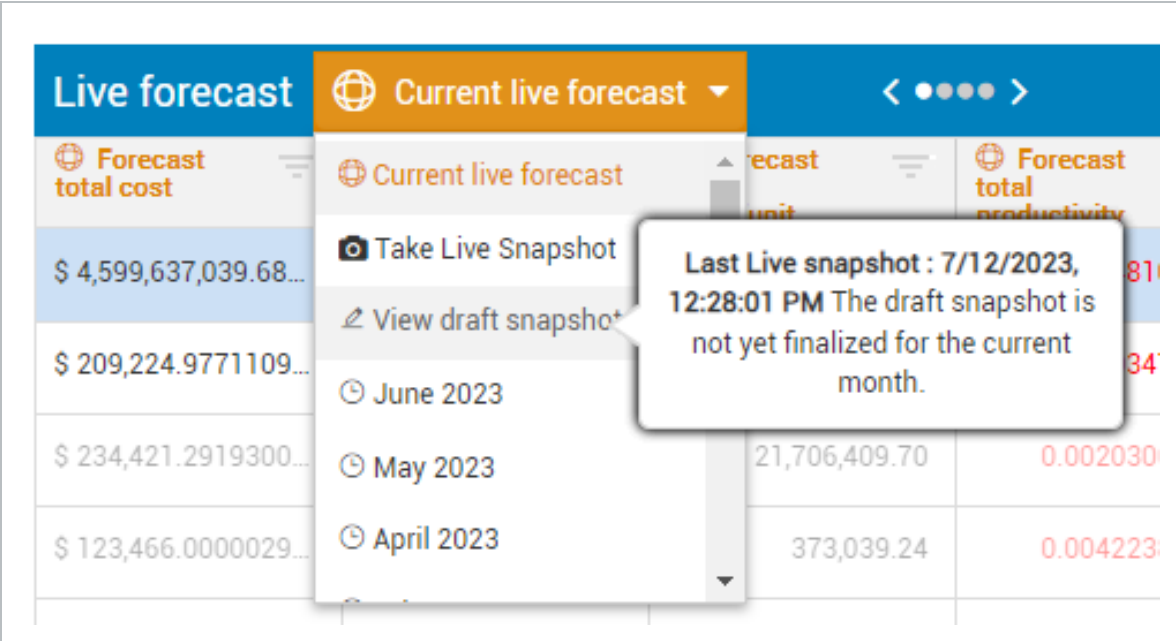


The screenshot displays the 'Live forecast' section of the software. A red box highlights the 'Current live forecast' dropdown menu, which includes the 'Take Live Snapshot' option. A tooltip explains that the last live snapshot captures current values in Live forecast, Current budget, and Current estimate. A green banner at the bottom indicates 'Snapshot initiated successfully'.

Snapshots can also be taken from the Actions menu.



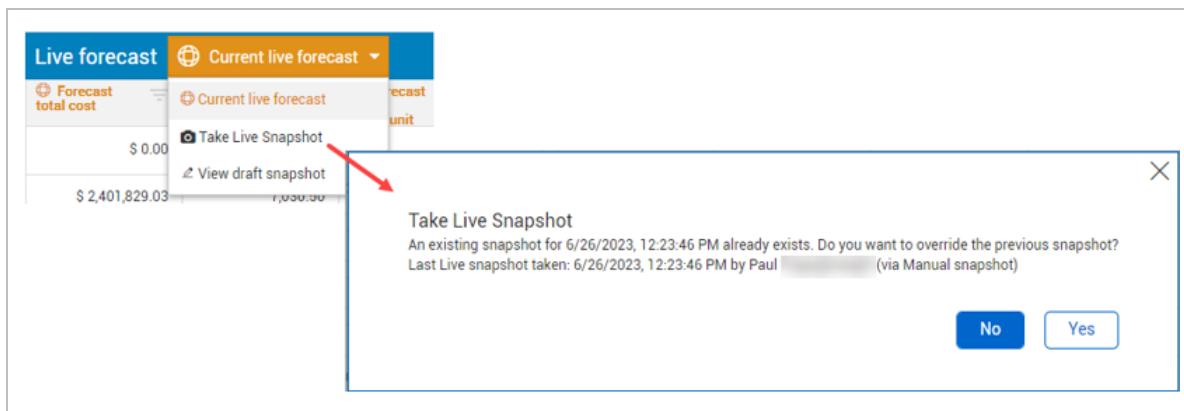
You can view the draft snapshot by selecting the View draft snapshot from the Current live forecast drop-down menu. This lets you know that the draft snapshot is not yet finalized for the current month.



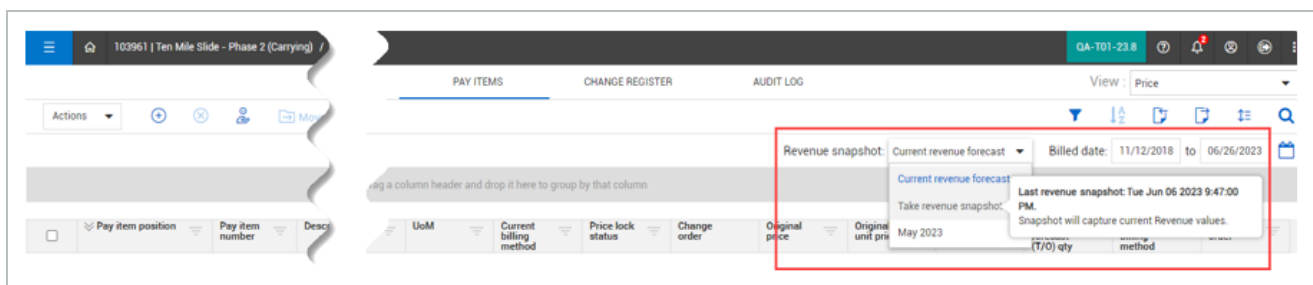
When you select **View draft snapshot**, the snapshot values load into the CBS in a read-only status.

| Live forec... | | | | | |
|---------------------|---------------------|--------------------------|-----------------------------|--------------------------|----------------------|
| View draft snapshot | | | | | |
| Forecast total cost | Forecast total Mhrs | Forecast total Mhrs/unit | Forecast total productivity | Forecast total unit cost | Forecast method |
| \$ 0.00 | 0.00 | 0.00 | 0.00 | \$ 0.00 | Current estimate |
| \$ 2,401,829.03 | 7,030.50 | 7,030.50 | 1.15 | \$ 2,401,829.03 | Rollup |
| \$ 0.00 | 0.00 | 0.00 | 0.00 | \$ 0.00 | Manual (EAC) |
| \$ 0.00 | 0.00 | 0.00 | 0.00 | \$ 0.00 | Rollup |
| \$ 0.00 | 0.00 | 0.00 | 0.00 | \$ 0.00 | Manual (EAC) |
| \$ 705,957.35 | 3,821.00 | 3,821.00 | 1.38 | \$ 705,957.35 | Rollup |
| \$ 203,410.93 | 3,067.00 | 3,067.00 | 1.37 | \$ 203,410.93 | Rollup |
| \$ 15,337.63 | 268.00 | 268.00 | 1.45 | \$ 15,337.63 | Rollup |
| \$ 2,478.22 | 46.00 | 0.02 | 1.30 | \$ 0.99 | Average performan... |
| \$ 2,946.01 | 49.00 | 4.45 | 3.18 | \$ 267.82 | Manual (EAC) |

When you select the **Take Live Snapshot** menu-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.



ALLOW SYNCES TO REPLACE SNAPSHOTS

When the *Enable manual snapshots* and the *Allow syncs to replace manual snapshots* toggle is turned to *On*, the manual snapshot is replaced when the Push Live Forecast and/or Push Forecast revenue is synced. If this setting is disabled, syncs are replaced with manual snapshots.

Tasks

WBS Phase code generation method

Continue numbering from the last generated number

WBS Phase codes start value

1000

Enable manual snapshots

Allow syncs to replace manual snapshots

If this setting is enabled, a manual snapshot will be replaced when Push Live forecast and/or Push Forecast revenue is synced. If this setting is disabled, syncs will not replace manual snapshots.

12.1.11.4 ACTUALS

The image and table below give a brief explanation of Project Tracking: Actuals settings.

Overview - Project Tracking: Actuals

| Title | | Function |
|-------|----------------------------|--|
| 1 | Calculate % complete | Calculate percent complete for individual cost items as a percentage of: <ul style="list-style-type: none">Forecast (T/O) QuantityCurrent Budget Quantity |
| 2 | % complete cap | Cap any cost item percent complete at 100% |
| 3 | Calculating roll-up method | Calculate percent complete for roll-ups, such as superior cost items and account codes by Cost or Manhours |

Overview - Project Tracking: Actuals (continued)

| Title | Function |
|--|---|
| 4 Roll-up % complete | Roll-up percent complete weighted by <ul style="list-style-type: none"> • Current Budget • Current Estimate |
| 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). Option 1: The summation of man hours earned from direct child items Option 2: The total man hours multiplied by percent complete |
| 6 Get actual cost from Contract | When turned 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 the same time for a record, the higher cost is recognized and not duplicated. |
| 7 Drive committed cost values from Contract | When turned on, the committed costs is driven from Contracts. When turned off, committed costs are derived from the ERP. |
| 8a Update % complete from Contract | Quantities that are claimed in Contract for SOV items updates the percent complete in Control when the Update % complete from Contract switch is enabled. 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. |

Overview - Project Tracking: Actuals (continued)

| Title | | Function | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--------------------------|----------------|---|--------------------------|----------------------------|-------------|--------------------------|---|-----------|--------------------------|---|-----------|--------------------------|-----|-----------|--------------------------|-----|------------|--------------------------|-------|-----------|--------------------------|-----|---------|--------------|--------------|-------------------|---------------|------------|-------|------------|----------------|-------------|-----------------|----------------------------|--|------------|--|--|--|--|--|------------|--|--|--|--|--|------------|--|--|--|--|--|------------|--|--|--|--|--|------------|--|--|--|--|--|---|
| | | <div><div><div><div>Tasks</div><table><tr><th><input type="checkbox"/></th><th>CBS position</th><th>Description</th></tr><tr><td><input type="checkbox"/></td><td>1</td><td>Financial</td></tr><tr><td><input type="checkbox"/></td><td>2</td><td>Misc. Rev</td></tr><tr><td><input type="checkbox"/></td><td>2.1</td><td>Misc. Rev</td></tr><tr><td><input type="checkbox"/></td><td>2.2</td><td>Escalation</td></tr><tr><td><input type="checkbox"/></td><td>2.2.1</td><td>General P</td></tr><tr><td><input type="checkbox"/></td><td>2.3</td><td>Directs</td></tr></table></div><div><div>1006</div><div>2.3.1.1.3 Clear & Grub Bench B & West Laydown</div><div>CLAIM ACTUALS</div><div>ACTUALS HISTORY</div><table><tr><th>Posting date</th><th>Actuals type</th><th>Actuals completed</th><th>Cost category</th><th>Changed by</th><th>Notes</th></tr><tr><td>12/22/2018</td><td>Confirmed cost</td><td>(\$ 217.14)</td><td>Undefined Labor</td><td>Change - [Service Account]</td><td></td></tr><tr><td>12/17/2018</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>12/15/2018</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>12/08/2018</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>12/01/2018</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>11/24/2018</td><td></td><td></td><td></td><td></td><td></td></tr></table></div></div></div> | <input type="checkbox"/> | CBS position | Description | <input type="checkbox"/> | 1 | Financial | <input type="checkbox"/> | 2 | Misc. Rev | <input type="checkbox"/> | 2.1 | Misc. Rev | <input type="checkbox"/> | 2.2 | Escalation | <input type="checkbox"/> | 2.2.1 | General P | <input type="checkbox"/> | 2.3 | Directs | Posting date | Actuals type | Actuals completed | Cost category | Changed by | Notes | 12/22/2018 | Confirmed cost | (\$ 217.14) | Undefined Labor | Change - [Service Account] | | 12/17/2018 | | | | | | 12/15/2018 | | | | | | 12/08/2018 | | | | | | 12/01/2018 | | | | | | 11/24/2018 | | | | | | <div>8b</div> <div>Calculate percent complete for individual cost items as a percentage of</div> <div>Calculate the percent complete for individual cost items as a percentage of<ul style="list-style-type: none">Current estimate total costCommitted total costForecast total costCurrent estimate total cost</div> |
| <input type="checkbox"/> | CBS position | Description | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 1 | Financial | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 2 | Misc. Rev | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 2.1 | Misc. Rev | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 2.2 | Escalation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 2.2.1 | General P | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> | 2.3 | Directs | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Posting date | Actuals type | Actuals completed | Cost category | Changed by | Notes | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12/22/2018 | Confirmed cost | (\$ 217.14) | Undefined Labor | Change - [Service Account] | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12/17/2018 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12/15/2018 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12/08/2018 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 12/01/2018 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 11/24/2018 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Actuals

Calculate percent complete for individual cost items as a percentage of **1**

Forecast (T/O) qty

Cap percent complete at 100% **2**

Yes ☐

Calculate percent complete for roll-up items such as superior cost items and account code by:

Cost **3**

Roll-up percent complete weighted by **4**

Current Budget

Calculate man hours earned at the parent level by **5**

☒ The summation of man hours earned from direct child items

☐ The total man hours multiplied by percent complete

Get actual cost from Contract **6**

Drive committed cost values from Contract **7**

Update % complete from Contract **8 A**

Calculate percent complete for individual cost items as a percentage of **8 B**

Current estimate total cost

Current budget total cost

Committed total cost

Forecast total cost

Current estimate total cost

12.1.11.5 ESTIMATED ACTUALS

This feature 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 enabled, you can choose to turn on or off estimated actuals based on the cost category. You can enable estimated actuals in both Control and InEight Progress.

When any one of the following cost categories are enabled, the 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 | | |

You access the Claim actuals tab from the Control > Workspaces page by right-clicking the cost item on the CBS tab and selecting Actuals details. The Actuals details slide-out panel is then shown where you can select the estimated actuals option.

CLAIM ACTUALS
ACTUALS HISTORY

QUANTITIES

 MAN HOURS

 EQUIPMENT HOURS

 COST

Forecast (T/O) qty
200.00

Qty complete (to date)
0.00

Claimed quantity

 Posted date

☒ Estimated actual cost to be added on claiming:

| | |
|-------------|---------|
| Supplies | \$ 0.00 |
| Materials | \$ 0.00 |
| Subcontract | \$ 0.00 |

Notes

[+ Add claimed quantity](#)
[Claim quantities for multiple cost items](#)

On the CBS tab, the estimated actuals are shown as columns. These values can be added to the Confirmed actuals (actuals that were imported into Control or manually entered in Control) to get all the actuals for the project that are available. This helps you more accurately forecast your project.

CBS
ACS
PAY ITEMS

Live forecast
 10/17/2019

★ Forecast method

Current estimate

Actuals 10/17/2019 to 10/17/2019

| | |
|-----------------------|----------------------|
| Confirmed actual cost | Confirmed actual qty |
| \$ 0.00 | 0.00 |

12.1.11.6 ENABLING ACTUALS FOR PROGRESS

Using an example for Progress, if you have labor cost and man hours enabled for Progress and there is an approved daily plan in Progress, those man-hours go over to Control automatically as estimated man-hours. Then, those man-hours generate an estimated cost based on the operational rates for that

resource. In this case, it would be using the Straight time rate, the Double time rate, and the Over time rate.

The same process can happen for construction equipment and equipment hours. For example, if you claim equipment hours in Progress and they are in an approved daily plan, then those hours go over to Control as estimated equipment hours. The operational and equipment resources also have a unit cost. Those hours times for that unit cost can then be used to generate an estimated construction equipment cost.

12.1.11.7 ENABLING ACTUALS FOR CONTROL

If man-hours and equipment hours are enabled, then you claim a quantity, it can generate estimated man-hours and equipment hours if there are CE amounts on those hours. For example, CE man hours per unit and CE equipment hours per unit can be estimated. If those are nonzero and you claim quantity, then the estimated man hours and equipment hours are generated.

| Tasks | | | | < > | | | | | | | |
|--------------------------|----------------|-------------|----------------|---------------|---------------------------|-----------------------|----------------------------|----------------------------|--------------|-----------------------|--|
| <input type="checkbox"/> | ↕ CBS position | Description | WBS phase code | Hrs (to date) | Equipment hours (to date) | Estimated actual cost | Estimated actual man hours | Estimated actual equipment | CE Mhrs/Unit | CE equipment-Hrs/Unit | Last estimated actual man hours reversal |
| <input type="checkbox"/> | 41 | Cost item 1 | 01 | 0.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| <input type="checkbox"/> | 42 | Cost item 2 | 02 | 0.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |
| <input type="checkbox"/> | 43 | Cost item 3 | 03 | 100.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | 10.00 | 1.00 | 03/29/2021 3:07:2 |
| <input type="checkbox"/> | 44 | Cost item 4 | 04 | 0.00 | 0.00 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |

If you do not have estimated actuals enabled in the project settings, you do not see any of the Estimated actuals columns, and you also cannot add them to your view. Some of these columns are a direct correlation with Progress.

Some of these columns are also from Control. The columns from Progress generate actual man-hours and equipment hours from claimed quantity in Control. These columns come over directly from Control and they affect your forecasts. Any estimated man-hours are included in your man-hours to date and then the estimated actual cost is included in your total cost to date.

Your forecast equations look for total cost to date, man-hours to date, and equipment hours to date to generate forecasts.

12.1.11.8 ESTIMATED ACTUALS PROCESS OVERVIEW

When you have synced everything from Progress, it is now in your ERP system. You can then bring in the man-hours and equipment hours through the sync.

| | Estimated actual cost | Estimated actual man hours | Estimated actual equipment | CE Mhrs/Unit | CE equipment-Hrs/Unit | Last estimated actual man hours reversal | Last estimated actual equip hours reversal | Issue |
|---|-----------------------|----------------------------|----------------------------|--------------|-----------------------|--|--|-------|
| 0 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | |
| 0 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | |
| 0 | \$ 1,250.00 | 110.00 | 20.00 | 10.00 | 1.00 | 03/29/2021 3:07:2... | 03/29/2021 3:08:7 ... | |
| 0 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | |

After the sync is completed, you can reverse the estimated actuals as they have been accounted for as confirmed actuals by bringing the actuals through the sync.

The Estimated columns are only general estimates. They are not confirmed hours until synced with an ERP or an external payroll system. With an ERP you can make changes to where you can have taxes added on which would raise the price for the estimated actuals. Estimated actuals that go into Control from Progress are not guaranteed to be 100% correct. Your ERP is what confirms the final cost.

12.1.11.9 REVERSING ESTIMATES

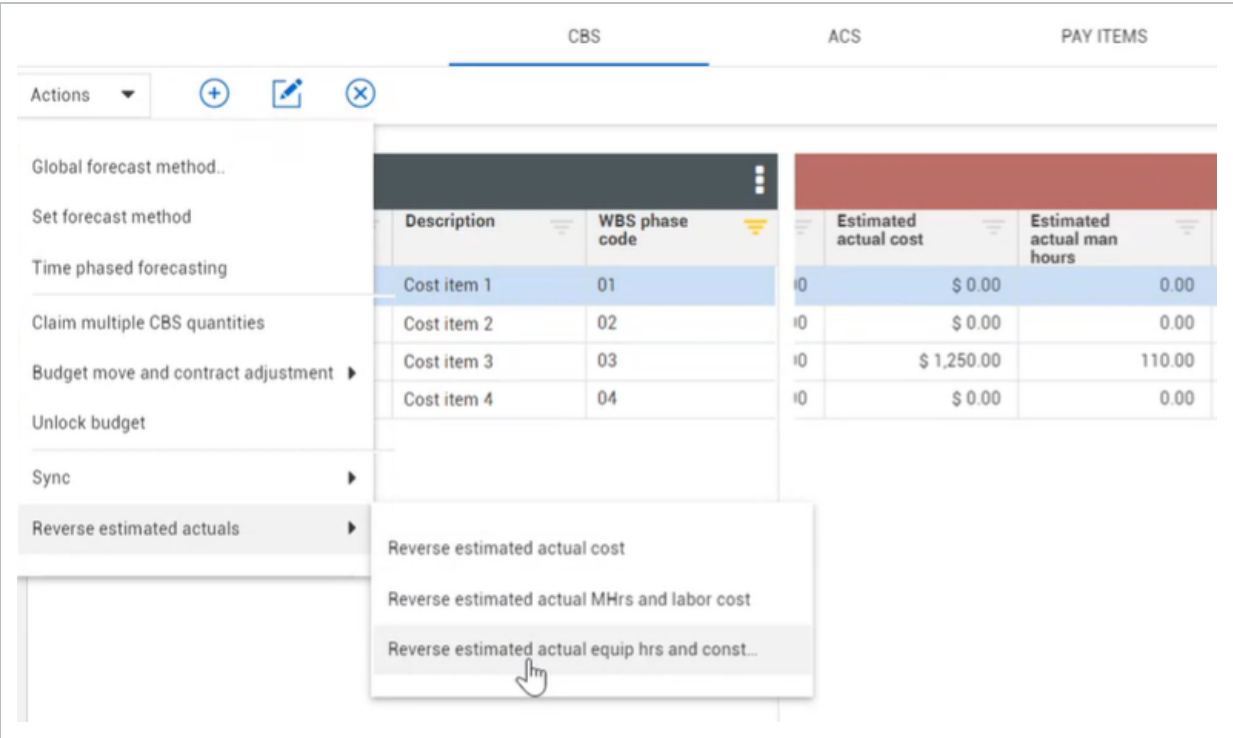
When you bring in values from your ERP system, you can reverse your estimates with the actual values as the replacement.

NOTE

If you keep the estimated values without reversing after syncing with ERP system, those values are detected as double values.

REVERSING ESTIMATED ACTUALS

1. From the CBS, select the cost items you want to revert actuals.
2. Select the Actions drop-down menu.
3. Hover over Reverse estimated actuals. Then, select **Reverse estimated actual eqiup hrs and const....**



- 4. Click **Yes** to confirm reversal.
- You can also select Reverse estimated actual cost or Reverse estimated actual MHrs and labor cost.
- 5. In the CBS, look for the Last estimated actual man hours reversal or Last estimated actual equipment hours reversal columns.

| | Estimated actual cost | Estimated actual man hours | Estimated actual equipment | CE Mhrs/Unit | CE equipment-Hrs/Unit | Last estimated actual man hours reversal | Last estimated actual equip hours reversal | Issue |
|---|-----------------------|----------------------------|----------------------------|--------------|-----------------------|--|--|-------|
| 0 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | |
| 0 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | |
| 0 | \$ 1,250.00 | 110.00 | 20.00 | 10.00 | 1.00 | 03/29/2021 3:07:2... | 03/29/2021 3:08:7 ... | |
| 0 | \$ 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | |

Those columns show the date of the last time you reversed the amount.

In the actual history, the reversal shows as negative entries when you have successfully reversed the estimated actuals.


12.1.11.10 TIME PHASING BUDGET

Time phasing your forecast lets you take your forecast and break it down into more consumable, estimate related time blocks/periods. This gives you more visibility into what activities and costs are going to occur in smaller time periods. Time Phasing is explained further within the Forecasting lesson, under Time Phased Forecasting.

Time phasing the budget lets you plan out where to spend money in the months of the active fiscal calendar for your project. Time Phased Budget is explained further within the Revenue lesson, under Time Phased Budget.

Time phasing

Enable time phasing for the following:

Budget 



Edit past Time phased budget values




12.1.12 FORECAST (ORGANIZATION & PROJECT LEVEL)

12.1.12.11 TIME PHASING

Time phasing your forecast lets you take your forecast and break it down into more consumable, estimate related time blocks/periods. This gives you more visibility into what activities and costs are going to occur in smaller time periods. Time Phasing is explained further within the Forecasting lesson, under Time Phased Forecasting.

Time phasing

Enable time phasing for the following:

Forecasting 



Push Time phased forecast to Live forecast



Commitments 



12.1.12.12 FORECAST

The image and table below give a brief explanation of Project Tracking: Forecast.

Overview - Project Tracking: Forecast

| Title | | Function |
|-------|---|---|
| 1 | % complete for delta from straight-line | <p>% complete threshold for delta from straight-line calculation:</p> <p>By configuring the value of % Complete threshold, 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.</p> <p>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.</p> <p>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</p> |

You can set manual forecast notes to be mandatory when switching to a manual forecast type. When the Mandatory notes for manual Forecasts switch is set to *On*, entering forecast notes is mandatory for Manual (EAC) and Manual (ETC) forecasts.

Forecast

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

5

Mandatory notes for Manual forecasts

When manually forecasting, notes are required to be entered in the Forecast Notes dialog box. Once confirmed, the notes are captured, and the forecast method automatically changes to *Manual*.

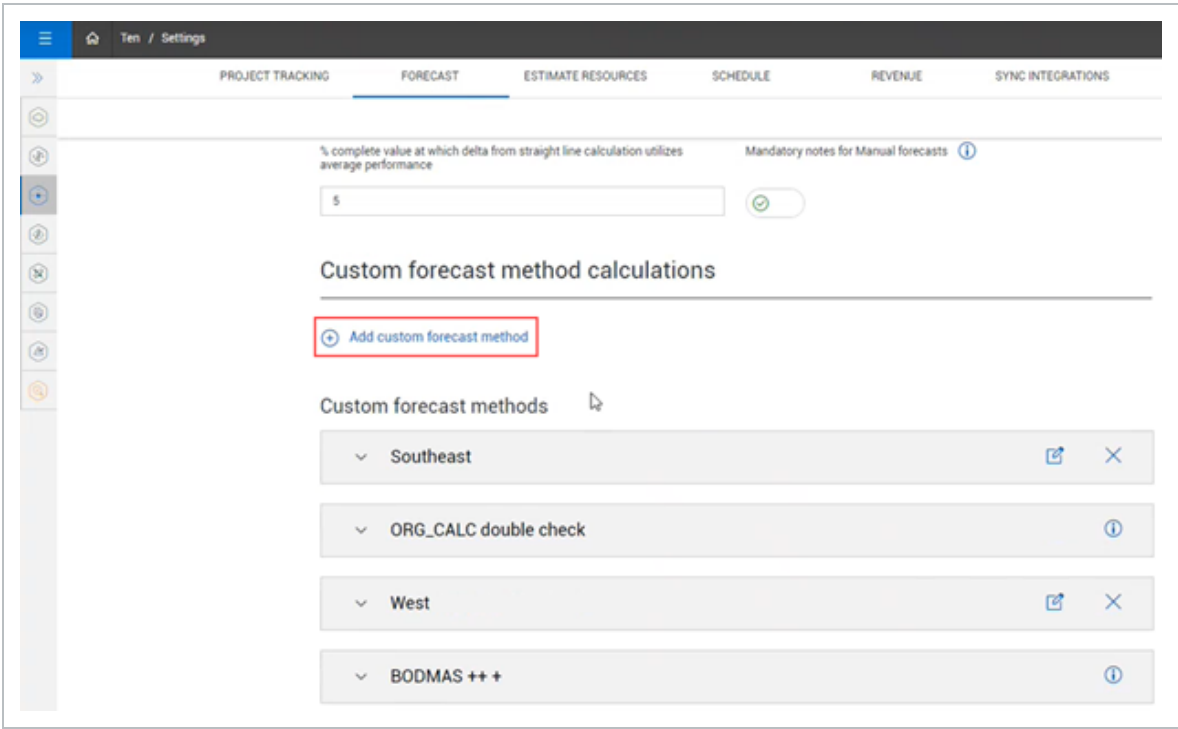
This feature helps to keep track of manually entered forecasts. You can use the notes to explain the forecast. For example, you can enter a rationale for why a manual forecast is being used.

The screenshot displays the 'Forecast' section of a software interface. On the left, there is a 'Tasks' table with columns for 'CBS position', 'Description', 'it', and 'UoM'. The main area shows a 'Forecast' table with columns for 'Forecast total cost', 'Forecast notes', 'Latest forecast note', and 'Forecast method'. A modal dialog titled 'Forecast notes are required' is open, prompting the user to 'Please enter a note to update your forecast.' The dialog includes a text input field with the placeholder text 'Changed forecast total cost to \$3,048.24' and a character count of 500. Red arrows indicate the flow: one arrow points from the 'Forecast notes' column in the table to the input field, and another points from the 'OK' button to the 'Forecast method' column, which currently shows 'Manual (EAC)'.

| Forecast total cost | Forecast notes | Latest forecast note | Forecast method |
|---------------------|----------------|---|-----------------|
| \$ 3,048.24 | | Changed forecast total cost to \$3,048.24 | Manual (EAC) |
| \$ 2,453,29.03 | | | Rollup |
| \$ 0.00 | | | |
| \$ 52,000.00 | | | |

12.1.12.13 CUSTOM FORECAST METHOD CALCULATIONS

You can create custom forecast methods at both the project and organization levels by configuring your own calculations.



To create a custom Forecast Method, click Add custom forecast method, and then enter the Forecast Method Name, Forecast Total Cost and Forecast Total Mhrs calculations. You can create a maximum of 10 custom organization and project level forecast methods each at one time.

Select the **Formula** icon to choose fields to include in your forecast formula.

+ Add custom forecast method

New custom forecast method

1 Define calculations

2 Enable for cost items

* Forecast method name
Midwest Forecast

* Forecast total cost ⓘ
1000-4000+6000+3000+10

* Forecast total Mhrs ⓘ
[Actual eqp hrs (to date)]

Cancel Next

Search...

% complete

Actual cost (to date)

Actual eqp hrs (to date)

Actual labor cost (to date)

Actual labor cost/MHr (to date)

Actual labor unit cost (to date)

Actual Mhrs (to date)

Actual Mhr/unit (to date)

Custom forecast methods

Midwest Forecast

In the CBS you can set the Custom Forecast Method for a cost item at the organization or project level, which updates the Forecast Total Cost and Forecast Total Mhrs based on the calculations created in Settings.

Steel Structure Training Job | 105091 / Control / Workspaces

CBSACSPAY ITEMS

Actions

Tasks

| | CBS position | Description | WBS phase code |
|-------------------------------------|--------------|-----------------------|----------------|
| <input type="checkbox"/> | 1 | Job Overhead | 1002 |
| <input type="checkbox"/> | 2 | Earthwork | 1069 |
| <input type="checkbox"/> | 3 | Concrete | 1071 |
| <input type="checkbox"/> | 4 | Structural Steel | 1073 |
| <input checked="" type="checkbox"/> | 4.1 | Erect Steel - Heavy | 1074 |
| <input type="checkbox"/> | 4.2 | Erect Steel - Light | 1005 |
| <input type="checkbox"/> | 4.3 | Bolted Connections | 1006 |
| <input type="checkbox"/> | 5 | Materials | 1084 |
| <input type="checkbox"/> | 5.1 | Earthwork - Mater... | 1085 |
| <input type="checkbox"/> | 5.2 | Concrete - Materi... | 1086 |
| <input type="checkbox"/> | 5.3 | Structure Steel - ... | 1087 |
| <input type="checkbox"/> | 6 | | 1088 |

Forecast

InEight Control

| CB forecast total MHR G/L | Delta from straight line | Forecast notes | Forecast method |
|---------------------------|--------------------------|----------------|--------------------|
| 0.00 | 250,000.00 | | Current estimate |
| -8,000.00 | 400,000.00 | | Current estimate |
| -30,000.00 | 1,500,000.00 | | Current estimate |
| -4,999.10 | 1,516,282.48 | | Rollup |
| 0.00 | 1,266,327.48 | | Canada West Region |
| -4,000.00 | 200,000.00 | | |
| -999.10 | 49,955.00 | | |
| 0.00 | 0.00 | | |
| 0.00 | 0.00 | | |
| 0.00 | 0.00 | | |
| 0.00 | 0.00 | | |
| 0.00 | 0.00 | | |

12.1.12.14 ENABLE FORECAST METHODS BASED ON ALLOW AS-BUILT SELECTIONS

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 forecast 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.

Enable Forecast methods based on Allow as-built selections

Non-terminal cost items

When Allow as-built is set to *All or Cost*
Enable the following Forecast methods for non-terminal cost items when Allow as-built is set to *All or Cost*

| | | | |
|---------------------|-------------------------------------|--------------|-------------------------------------|
| Current estimate | <input checked="" type="checkbox"/> | Manual (ETC) | <input checked="" type="checkbox"/> |
| Current budget | <input checked="" type="checkbox"/> | Manual (EAC) | <input checked="" type="checkbox"/> |
| Average performance | <input checked="" type="checkbox"/> | None | <input checked="" type="checkbox"/> |
| Committed cost | <input checked="" type="checkbox"/> | Contract | <input checked="" type="checkbox"/> |

Default Forecast method for non-terminal cost items when Allow as-built is set to *All or Cost*

Current estimate

Only enabled selections above are eligible. 'Manual (ETC)' and 'Manual (EAC)' cannot be default options.

When Allow as-built is set to *Quantity*
Enable the following Forecast methods for non-terminal cost items when Allow as-built is set to *Quantity*

| | | | |
|---------------------|-------------------------------------|--------------|-------------------------------------|
| Current estimate | <input checked="" type="checkbox"/> | Manual (ETC) | <input checked="" type="checkbox"/> |
| Current budget | <input checked="" type="checkbox"/> | Manual (EAC) | <input checked="" type="checkbox"/> |
| Average performance | <input checked="" type="checkbox"/> | None | <input checked="" type="checkbox"/> |

Default Forecast method for non-terminal cost items when Allow as-built is set to *Quantity*

Current estimate

Only enabled selections above are eligible. 'Manual (ETC)' and 'Manual (EAC)' cannot be default options.

When Allow as-built is set to *None*
Enable the following Forecast methods for non-terminal cost items when Allow as-built is set to *None*

| | | | |
|--------------|-------------------------------------|--------------|-------------------------------------|
| Rollup | <input checked="" type="checkbox"/> | None | <input checked="" type="checkbox"/> |
| Manual (ETC) | <input checked="" type="checkbox"/> | Manual (EAC) | <input checked="" type="checkbox"/> |

Default Forecast method for non-terminal cost items when Allow as-built is set to *None*

Rollup

Only 'Rollup' may be the default option.

Terminal cost items

When Allow as-built is set to *All or Cost*
Enable the following Forecast methods for terminal cost items when Allow as-built is set to *All or Cost*

| | | | |
|---------------------|-------------------------------------|--------------|-------------------------------------|
| Current estimate | <input checked="" type="checkbox"/> | Manual (ETC) | <input checked="" type="checkbox"/> |
| Current budget | <input checked="" type="checkbox"/> | Manual (EAC) | <input checked="" type="checkbox"/> |
| Average performance | <input checked="" type="checkbox"/> | None | <input checked="" type="checkbox"/> |
| Committed cost | <input checked="" type="checkbox"/> | Contract | <input checked="" type="checkbox"/> |
| Detailed ETC | <input checked="" type="checkbox"/> | | |

Default Forecast method for terminal cost items when Allow as-built is set to *All or Cost*

Current estimate

Only enabled selections above are eligible. 'Manual (ETC)' and 'Manual (EAC)' cannot be default options.

When Allow as-built is set to *Quantity*
Enable the following Forecast methods for terminal cost items when Allow as-built is set to *Quantity*

| | | | |
|---------------------|-------------------------------------|--------------|-------------------------------------|
| Current estimate | <input checked="" type="checkbox"/> | Manual (ETC) | <input checked="" type="checkbox"/> |
| Current budget | <input checked="" type="checkbox"/> | Manual (EAC) | <input checked="" type="checkbox"/> |
| Average performance | <input checked="" type="checkbox"/> | None | <input checked="" type="checkbox"/> |

Default Forecast method for terminal cost items when Allow as-built is set to *Quantity*

Current estimate

Only enabled selections above are eligible. 'Manual (ETC)' and 'Manual (EAC)' cannot be default options.

When Allow as-built is set to *None*
Enable the following Forecast methods for terminal cost items when Allow as-built is set to *None*

| | | | |
|------|-------------------------------------|--|--|
| None | <input checked="" type="checkbox"/> | | |
|------|-------------------------------------|--|--|

Default Forecast method for terminal cost items when Allow as-built is set to *None*

None

12.1.13 ESTIMATE RESOURCES (ORGANIZATION & PROJECT LEVEL)

The Wage rate composition determines what percentage of each labor hour will be calculated at the scale 1, scale 2, or scale 3 rate.

Wage rate composition

| | |
|--|--|
| <p>Scale 1</p> <input type="text" value="80"/> | <p>Scale 2</p> <input type="text" value="10"/> |
| <p>Scale 3</p> <input type="text" value="10"/> | |

12.1.14 SCHEDULE (ORGANIZATION & PROJECT LEVEL)

Under the Schedule sub-tab, you can define the data source for your project's schedule using manual entry or import using and XER type file. You can also create custom cost curves to apply to your progressed work, based on actual costs and schedule. Plug day calculations and Schedule ID's are also maintained in the Schedule tab.

Define project schedule

Schedule data source:

Manual entry

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 |
|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> Back Loaded | 2 |
| <input type="checkbox"/> Linear | |
| <input type="checkbox"/> Employed i | |
| <input type="checkbox"/> Front Load | Plug days default rollup calculation |
| <input type="checkbox"/> Bell Shape | Longest child |

Plug Day Calculation

Schedule ID

Schedule ID settings will only affect newly created cost items

Schedule ID prefix

PS

Example schedule ID: PS.0000001

Schedule ID start value

0000001

Example schedule ID: PS.0000001

Define the delineator

Period .

Example schedule ID: PS.0000001

12.1.15 REVENUE (PROJECT LEVEL)

12.1.15.15 REVENUE AND COST TIMING

Revenue and Cost Timing

| Category | Retention | Tax | Payment timing | Next ... months |
|-----------------------------|-----------|--------|----------------|-----------------|
| Labor cost | 0.00 % | 0.00 % | Same month | |
| Construction Equipment cost | 0.00 % | 0.00 % | Same month | |
| FOM Rented Equipment cost | 0.00 % | 0.00 % | Same month | |
| Supplies cost | 0.00 % | 0.00 % | Same month | |
| Materials cost | 0.00 % | 0.00 % | Same month | |
| Subcontract cost | 0.00 % | 0.00 % | Same month | |

| | Payment timing | Next ... months |
|--------------------------------|----------------|-----------------|
| Subcontract Retention released | Same month | |
| Client Retention released | Same month | |

Average calendar days elapsed from billing to collection End of project date

Enforce change order price values to match between Control and Change ☒

Billing method default earnings rules

Default cost item earnings amounts ⓘ

Fixed final price
Earnings amounts based on:
☐ Forecast (T/O) qty
☒ CE total cost

Unit price
Earnings amounts based on:
☒ Forecast (T/O) qty
☐ CE total cost

Pay item to Cost item Forecast (T/O) qty relationship

Enable pay item Forecast (T/O) qty rollups ⓘ ☒ Enable pay item Forecast (T/O) qty roll down ⓘ ☒

Markup

Default markup percent

| Cost categories | Markup percent | Current estimate resources | Markup percent |
|------------------------|----------------|-------------------------------|----------------|
| Labor | 0.00 % | Labor | 0.00 % |
| Construction Equipment | 0.00 % | Construction equipment | 0.00 % |
| FOM Rented Equipment | 0.00 % | Rented construction equipment | 0.00 % |
| Supplies | 0.00 % | Installed material | 0.00 % |
| Materials | 0.00 % | Installed equipment | 0.00 % |
| Subcontract | 0.00 % | Supplies | 0.00 % |
| Fees | 0.00 % | | |
| Allowance | 0.00 % | | |

Unique resources will apply markup percent by cost category

You can change the Retention percentage, Tax rate, and Payment Timing at the cost category level.

Revenue and Cost Timing

| Category | Retention | Tax | Payment timing | Next __ months |
|-----------------------------|-----------|--------|----------------|----------------|
| Labor cost | 5.00 % | 0.00 % | Same month | |
| Construction Equipment cost | 2.00 % | 0.00 % | Same month | |
| FOM Rented Equipment cost | 0.00 % | 0.00 % | Same month | |

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 options available in the drop-down menu.

You can also enter a default retainage percent that 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.

When changing the Default retainage percent setting 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.

Average calendar days elapsed from billing to collection

Default retainage percent

End of project date

Project end date

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

When it is time to bill for a pay item, the retainage percentage is used to automatically withhold the percentage of the bill specified in the Billed Revenue details slide-out panel. You can also see your adjusted net bill which excludes the retention withheld amount.

| BILLED | RETENTION | BILLED HISTORY |
|--|---|-------------------------------|
| Pending billable qty 144.00 | Pending billable revenue \$ 13,300.00 | Retainage % 10.00 % |
| <div> Billed revenue \$ 100.00 </div> <div> Cost category Undefined </div> <div> Retention withheld: \$ 10.00 Net bill: \$ 90.00 </div> | | |

On the Pay Items page, the Net billed revenue shows \$90.00, while \$10.00 is being withheld.

| <input type="checkbox"/> | Pay item position | Pay item number | Description | Billed revenue | Retention released | Retention withheld | Net billed revenue | Retainage % | Billed qty | Reven... earned |
|-------------------------------------|-------------------|-----------------|------------------------------|----------------|--------------------|--------------------|--------------------|-------------|------------|-----------------|
| <input type="checkbox"/> | 1 | 001 | Earthwork - Labor & Material | \$ 5,000.00 | \$ 0.00 | \$ 0.00 | \$ 5,000.00 | 0.00 % | 100.00 | \$ 0.00 |
| <input checked="" type="checkbox"/> | 2 | 002 | Concrete - Labor & Material | \$ 100.00 | \$ 0.00 | \$ 10.00 | \$ 90.00 | 10.00 % | 0.00 | \$ 0.00 |
| <input type="checkbox"/> | 3 | 003 | Steel - Labor & Material | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | 0.00 % | 0.00 | \$ 32.28 |

You can also release and track your full or partial retention amounts in both Billed Revenue Details and Bill Multiple Pay Items, set a retention release date, then view the results in the Pay Item register.

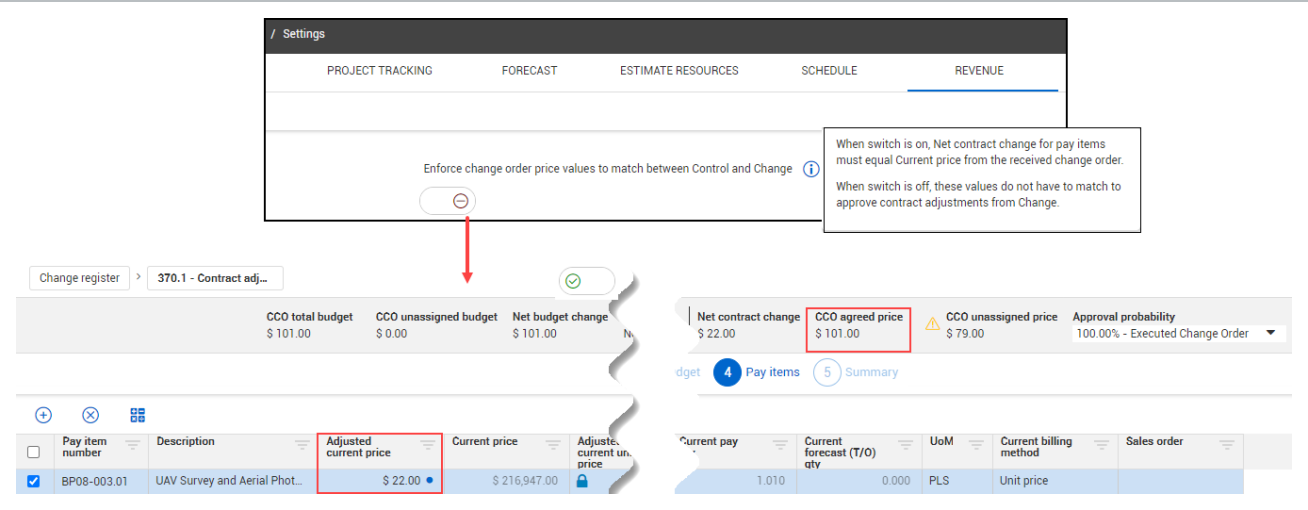
| BILLED | RETENTION | BILLED HISTORY |
|---|--|----------------|
| Retention withheld \$ 0.00 | Retention released (to date) \$ 0.00 | |
| <div> Retention released \$ 10.00 </div> <div> * Retention released date 02/28/2022 </div> <div> Notes Notes </div> <div> <input type="button" value="Cancel"/> <input type="button" value="Apply"/> </div> | | |

| Billed revenue | Retention released | Retention withheld | Net billed revenue | Retainage % |
|----------------|--------------------|--------------------|--------------------|-------------|
| \$ 5,000.00 | \$ 0.00 | \$ 0.00 | \$ 5,000.00 | 0.00 % |
| \$ 100.00 | \$ 10.00 | \$ 0.00 | \$ 90.00 | 10.00 % |
| \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | 0.00 % |

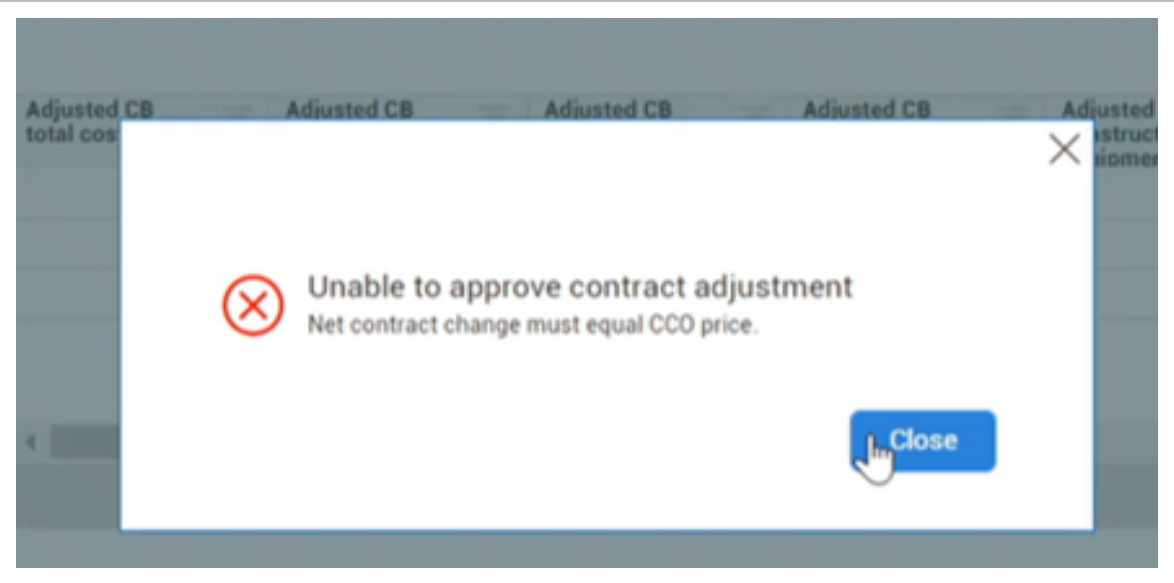
When approving contract adjustments from Change to Control, pay item amounts are not required to equal the amount received from Change if the Enforce change order price values to match between

Control and Change is turned off. In Settings > Control > **Revenue**, disabling the switch to the *Off* position is ideal when pay items are not being used in a contract adjustment.

The example below shows a CCO agreed price of \$101.00 and an Adjusted current price of \$22.00. When advancing to the Summary page, you can now approve the contract adjustment without the CCO agreed price and Adjusted current price matching.



When the Enforce change switch is enabled, the error message below stating that the contract adjustment cannot be approved shows when the Adjusted current price does not equal the CCO price.



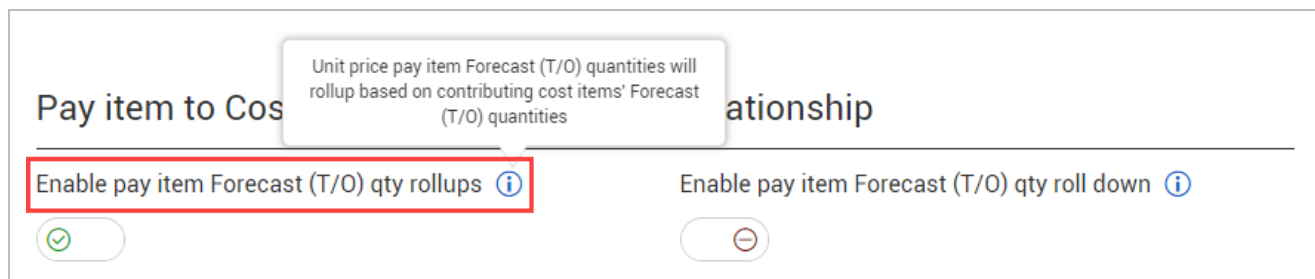
12.1.15.16 BILLING METHOD DEFAULT EARNINGS RULES

You can also manage the settings for billing method default earning rules, pay item forecast quantity rollups, and the markups. You can select the default earnings amounts based on forecast takeoff quantity. 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 of the cost items assigned to that pay item to generate the percentage.

The Fixed final price and Unit price settings let 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 of 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.

12.1.15.17 PAY ITEM FORECAST TAKEOFF QUANTITY ROLLUPS

In the Revenue tab, you can manage settings for Pay Item Forecast takeoff quantity rollups. This setting is used for pay item unit price only.



Pay item to Cost Relationship

Unit price pay item Forecast (T/O) quantities will rollup based on contributing cost items' Forecast (T/O) quantities

Enable pay item Forecast (T/O) qty rollups ⓘ

Enable pay item Forecast (T/O) qty roll down ⓘ

The 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 enabled, you can no longer edit your pay item forecast takeoff quantity in the Pay item register. If you click a field, you can no longer edit that field.

The Fixed final price and Cost plus values can be edited. The calculation is the sum of all the contributing cost item's forecast takeoff quantities. It can contribute to the pay item forecast if it has the same unit of measure.

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.

CBSACS

PAY ITEMSCHANGE REGISTERAUDIT LOG

Revenue snapshot: Current revenue forecastBilled date: 09/06/2017 to 04/06/2021

Pay item - demo

| Pay item number | Description | Total price | Unit price | Fore... T/O Qty | U... |
|-------------------------------------|------------------|-------------|-------------|-----------------|------------|
| <input checked="" type="checkbox"/> | Pay item - de... | Demo | \$ 2,700.00 | \$ 100.00 | 150.00 BOX |
| <input type="checkbox"/> | Pay item - de... | Demo 2 | \$ 5,000.00 | \$ 5,000.00 | 0.00 PLS |

Pay item - demo

Demo

Total Price\$ 2,700.00

Pay Quantity27.00

Unit Price\$ 100.00

Billing methodUnit price

DETAILS

ATTRIBUTES

CHANGE ORDERS

COST ITEMS

COST CATEGORIES

Earnings amounts based on: ☒ Forecast (T/O) quantity ☐ CE final cost

CBS Position

Description

Forecast (T/O) qty

UoM

CE final cost

| | | | | |
|----|-------------|--------|-----|-------------|
| 41 | Cost item 1 | 150.00 | BOX | \$1,500.00 |
| 42 | Cost item 2 | 100.00 | Bag | \$200.00 |
| | | | | \$ 1,700.00 |

Update earning rules

In the image above, 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.

Pay item ID

Description

Total Price

Pay item - demo

Demo

\$2,700.00

Calculate earning amounts by:

☒ Forecast (T/O) quantity

☐ CE final cost

| CBS Position | Descript... | Pay item contrib... quantity | Earning % | Earning Amount (Forecast) | Earnings Timing | WBS Phas |
|--------------|-------------|-------------------------------------|-----------|---------------------------|------------------|----------|
| 41 | Cost item 1 | <input checked="" type="checkbox"/> | 100.00 % | \$ 15,000.00 | Percent complete | 1 |
| 42 | Cost item 2 | <input type="checkbox"/> | 0.00 % | \$ 0.00 | Percent complete | 2 |
| | | | | 100.00 % | \$15,000.00 | |

☒ Default Earning Rules

Cancel

Save

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.

CBS

ACS

PAY ITEMS

CHANGE REG

Actions

+

Tasks

☐

CBS position

Description

WBS phase code

☐

41

Cost item 1

01

☒

42

Cost item 2

02

☐

43

Cost item 3

03

☐

44

Cost item 4

04

Task details

Resource

Forecast (T/O) quantity

UoM

150.00

BOX

100.00

Bag

100.00

PLS

1.00

PLS

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.

NOTE

When you turn on the pay item forecast quantity 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 brought into your view, it remains there until you deselect it from the columns chooser.

Pay item - demo

Demo

Total Price

\$ 2,700.00

Pay Quantity

27.00

Unit Price

\$ 100.00

Billing method

Unit price

DETAILS

ATTRIBUTES

CHANGE ORDERS

COST ITEMS

COST CATEGORIES

Earnings amounts based on:

Forecast (T/O) quantity

CE final

Pay item contribute quantity

Update earning rules

| CBS Position | Description | Pay item contribute quantity | Earning % | Earning Amount (Forecast) |
|--------------|-------------|-------------------------------------|-----------|---------------------------|
| 41 | Cost item 1 | <input checked="" type="checkbox"/> | 60.00 % | \$ 15,000.00 |
| 42 | Cost item 2 | <input checked="" type="checkbox"/> | 40.00 % | \$ 10,000.00 |
| | | | 100.00 % | \$25,000.00 |

When you are in the Update earnings rule dialog box, the Pay item contribute quantity column is a default column in that view because it column is editable in the Update earning rule dialog box. That 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 if the setting is off or if you are looking at a unit price pay item. If the setting was turned on and a user brought in the column and then decided to turn that setting off, then those columns would disappear.

12.1.15.18 PAY ITEM FORECAST TAKEOFF 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 cost items by setting the Enable pay item Forecast (T/O) qty roll down switch to *On* in Settings > Control > **Revenue**.

Pay item to Cost item Forecast (T/O) qty relationship

Enable pay item Forecast (T/O) qty rollups

Enable pay item Forecast (T/O) qty roll down

☐

☒

Unit price pay item Forecast (T/O) quantities will roll down to the contributing cost items' Forecast (T/O) quantities

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.

| CBS | | | ACS | | | PAY ITEMS | | |
|---|-------------------|-----------------|-------------|--------------------|-----------------|----------------------------|-----|------------------------|
| <div>Actions</div> <div> + × 👤 📁 Move to </div> <div>Drag a column header and drop it here to group</div> | | | | | | | | |
| <input type="checkbox"/> | Pay item position | Pay item number | Description | Current unit price | Current pay qty | Current forecast (T/O) qty | UoM | Current billing method |
| <input type="checkbox"/> | 3 | BP | Office | \$ 124,730.58 | 1.000 | 8.000 | PLS | Cost plus |

| Carrying Job ... / Control / Workspaces | | | | |
|--|--------------|-------------|--------------|--------------------|
| <div>Actions</div> <div> + 📝 × </div> | | | | |
| Tasks | | | Task details | |
| <input type="checkbox"/> | CBS position | Description | Resources | Forecast (T/O) qty |
| <input type="checkbox"/> | 2.1.1.1 | Site ... | | 1.000 |
| <input type="checkbox"/> | 2.1.1.1.1 | Site ... | 6 | 73,181.000 |
| <input type="checkbox"/> | 2.1.1.1.2 | Temp... | 9 | 8.000 |

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

12.1.15.19 MARKUP

For more information, see [Markup](#).

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

General

Capital

Control

Plan

Progress

Compliance

Contract

Change

Design

PROJECT TRACKING

ESTIMATE RESOURCES

SCHEDULE

REVENUE

OTHERS

Markup

Default markup percent

I

0.00 %

| Cost categories | Markup percent |
|------------------------|----------------|
| Labor | 0.00 % |
| Construction Equipment | 0.00 % |
| FOM Rented Equipment | 0.00 % |
| Supplies | 0.00 % |
| Materials | 0.00 % |
| Subcontract | 0.00 % |

| Resources | Markup percent |
|-------------------------------|----------------|
| Labor | 0.00 % |
| Construction equipment | 0.00 % |
| Rented construction equipment | 0.00 % |
| Installed material | 0.00 % |
| Installed equipment | 0.00 % |
| Supplies | 0.00 % |

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 are prompted with this dialog box confirming that you are making a change to an existing markup.

You are making a change to an existing cost category/resource markup on this project.

How would you like to proceed?

Update all existing cost categories and resources in the project.
This will change the current charge rates

Update matching existing cost categories and resources.
This will change the current charge rates for cost items they were modified

Only apply to cost items and resources created in the future

Cancel

Confirm

From this dialog box, you can choose to update all existing cost categories. For this example, it adds 10% resource markup percent for all labor resources.

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The option to update matching existing cost categories selection changes the current charge rates for cost items that were modified. Anything that has not been modified such as a labor resource that has not been manually modified, this option overrides it with 10%.

You can also specify whether to only apply cost items and resources created in the future. When selected, no changes are made to existing resources. Any newly created resources, in this example labor resources, have a 10% markup added to them.

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 column Markup amount uses the following formula:

- 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. So if this is a detailed cost item, this is just showing your billing rate markup amount for all of those resources.

The column CE billable amount uses the following formula:

- The Current estimate amount + your Billing rate markup amount = CE billable amount.

The column CE revenue amount uses the following formula:

- The 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.

12.1.16 SYNC INTEGRATIONS (PROJECT LEVEL)

Schedule sync integrations to run at specific times such as Pushing the CBS structure or Pushing Billed Revenue.

Sync Integrations schedule

[+ Add sync schedule](#)

Select one

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

Time to run sync

12:00 AM

Through previous pay period

Job to date

* Sync type

Select one

* Time zone

(UTC-07:00) Mountain Time (US & Canada)

* Start Date

03/03/2022

* Time to run sync

12:00 AM

* Repeat

Never

Daily

Weekly

Monthly

Cancel

Add

Scheduled syncs

Push CBS structure

Sync type: Push CBS structure

Time to run sync: 12:00 AM MST

Repeat: Never

Start date: 03/08/2022

Repeat on:

End: After 1 occurrence(s)

12.1.17 OTHERS (PROJECT LEVEL)

12.1.17.20 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 Yes.

Required cost items

Prevent project from syncing if required cost items are not added ☒

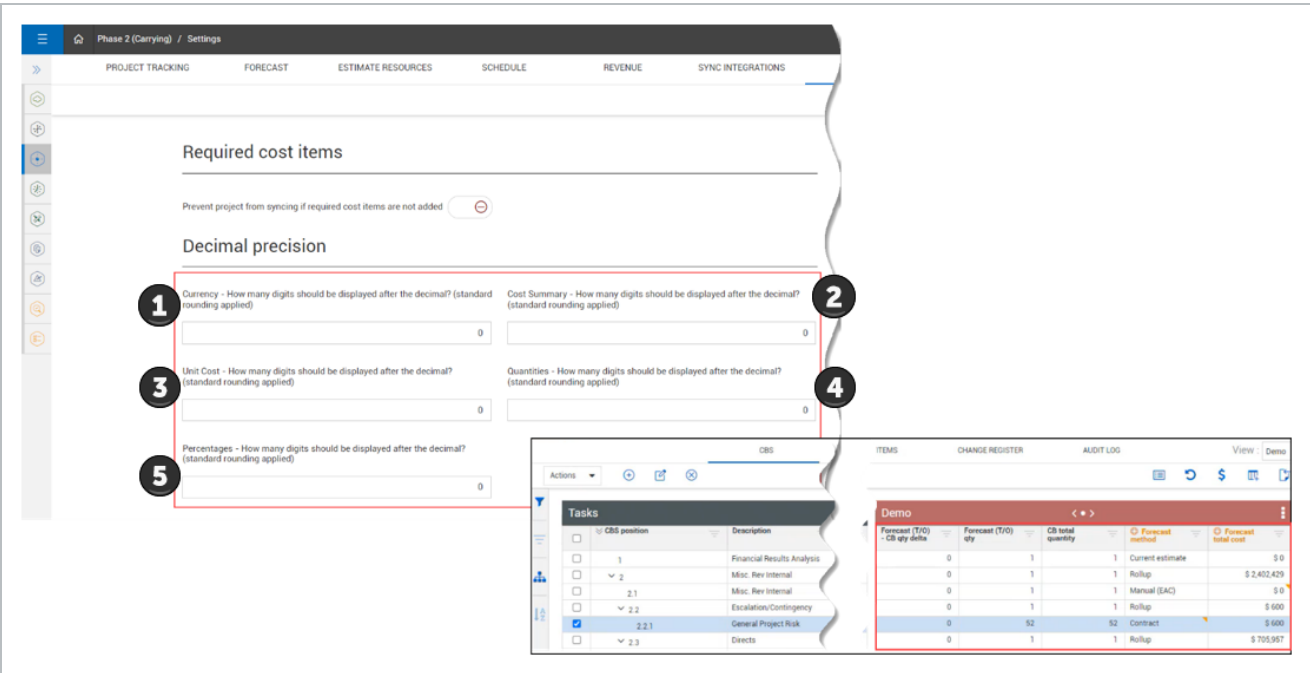
12.1.17.21 DECIMAL PRECISION

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

Overview - Decimal Precision

| 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. |

Numeric fields can be configured to omit decimals for currency, unit cost, percentages, cost summary and quantities.



12.1.18 OTHERS (ORG LEVEL)

12.1.18.22 REQUIRED COST ITEMS

A *Prevent project from syncing if required cost items are not added* toggle has been added to prevent the project from syncing if required cost items are not added. The Required cost items feature lets you create standardized or most commonly used cost items at the organization level and then add them at the project CBS level.

Required cost items

Prevent project from syncing if required cost items are not added



| <input type="checkbox"/> | Description | WBS phase code | UoM | Account code | Allow as-built |
|--------------------------|-------------|----------------|-------------|--------------|----------------|
| <input type="checkbox"/> | RC1 | 44446666 | Acre | 99.99 | Quantities |
| <input type="checkbox"/> | RC2 | 44445555 | Cubic Meter | | Quantities |
| <input type="checkbox"/> | RC3 | 44447777 | Barrel | 00.03.01.010 | Quantities |
| | | | | | |

12.1.18.23 CHANGE ORDER DETAILS

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

After the toggle is set to *On*, the Discipline, Issue #, and CCO fields are validated in the drop-down list values. When the toggle is set to *Off*, these fields are free 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.

PROJECT TRACKINGFORECASTESTIMATE RESOURCESSCHEDULEOTHERS

Required cost items ?

Prevent project from syncing if required cost items are not added

| | Description | WBS phase code | UoM | Account code | Allow as-built |
|--------------------------|---------------------|----------------|--------|----------------------|----------------|
| <input type="checkbox"/> | RCL1 | 888888 | Bag | | All |
| <input type="checkbox"/> | RCL2 | 58900 | cm2 | | All |
| <input type="checkbox"/> | RequiredTest1233434 | 9834343 | Acre | 00.03.01.004.5thr... | None |
| <input type="checkbox"/> | ROCI_1 | 56789 | Barrel | | All |
| <input type="checkbox"/> | ROCI_12 | 7788990 | Bag | 00.03.01.004 | None |

Change order details

Make fields validated dropdowns ?

Choose your Budget move workflow

Associated Issues

Search

| Issue ID | Issue name |
|--|---|
| <input checked="" type="checkbox"/> 11 | test issue |
| <input checked="" type="checkbox"/> 10 | issue - demo |
| <input checked="" type="checkbox"/> 9 | Asbestos removal |
| <input checked="" type="checkbox"/> 8 | Extra camera request |
| <input checked="" type="checkbox"/> 7 | Frayed cable |
| <input checked="" type="checkbox"/> 5 | Schedule delay |
| <input type="checkbox"/> 4 | Cracked concrete |
| <input type="checkbox"/> 3 | Broken valve |
| <input type="checkbox"/> 2 | Scope increase |
| <input type="checkbox"/> 1 | Feed motor on drill malfunction, procure M... |

Clear

Cancel

Assign

CCO

Issue #

11 - test issue

10 - issue - demo

9 - Asbestos remo...

8 - Extra camera re...

7 - Frayed cable

5 - Schedule delay

Discipline

Change management tag 1

Change management tag 2

Change management tag 3

Change management user defined 1

Change management user defined 2

Change management user defined 3

REVIEW

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

 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