

QUICK GUIDE

PROGRESS MEASUREMENT



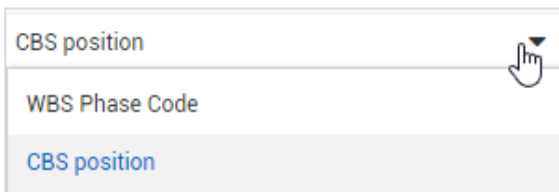
IMPORT ACTUALS

- ☐ Required fields: CBS Position (or WBS Phase Code), Posting Date, Amount, Cost Category
- ☐ You may have: Claimed Quantities, Man Hours, Equipment Hours, Notes
- ☐ You can only import actuals to terminal cost items

- On the right toolbar select **Import**.



- Select **Actuals** from the drop-down.
- Browse to your Excel file and select **Open**.
- Select **Actuals values** for the Import type.
- Select a Cost item matching criteria (CBS Position or WBS Phase Code).



- Click **Next**.

[CONTINUED]

- Double-click and select fields from the spreadsheet to Map to Control fields.

Actuals		
Cost categories	✓	Cost categories
* Posting date	✓	Posting date
Notes	✓	Notes
Claimed quantities		Blank-do not import
Number of man hours		Blank-do not import
Number of equipment hours		Blank-do not import
Cost	✓	Cost

- Click to save your mapping for future use.
- Click **Next**, select date format, then **Next** again.

Select dat...

MM/DD/YYYY

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

Cancel Back Next

- If no errors, click **Next**, then **Import Now**.

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IMPORT COMMITMENTS

- ☐ Cost category names in file must match names in Control
- ☐ Commitment type must be Total Commitment or Open Commitment

- On the right toolbar select **Import**.



- Select **Commitment values** from the drop-down.
- Browse to your Excel file and select **Open**.
- Select a Cost item matching criteria (CBS Position or WBS Phase Code).
- Click **Next**.
- Double-click and select fields from spreadsheet to Map to Control fields.

Control field	Mapped	File columns
Tasks		
CBS position		only used if matching
WBS phase code	✓	WBS phase code
Commitments		
* Commitment type	✓	* Commitment type
Cost	✓	Cost
Cost categories	✓	Cost categories

- Click to save your mapping for future use.
- Click **Next**, the system checks for errors.
- If no errors, click **Next**, then **Import Now**.

QUICK GUIDE

PROGRESS MEASUREMENT



COMMITTED COST FROM CONTRACT

- Go to **Project Settings > Control > Project Tracking > Forecasting**.
- Turn on the **Drive committed cost values from Contract** toggle.

Forecast

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

\$

Drive committed cost values from Contract

- Committed costs will now come into Control automatically from Contract.

TOTAL COMMITMENT = The total PO

OPEN COMMITMENT = PO minus actual spend (to date)

SYNCING QUANTITIES, MHRS & COSTS

✓ Must already have integrations set up.

From the **Actions** ▾

- Actual quantities from InEight Plan & Progress

Sync	Push Forecast revenue	800.00	Ton
	Get Plan quantities		
Subtotals 12	Get Actual cost and MHrs		Through previous pay period
			Job to date

- Actual hours and costs from ERP system

Sync	Push Forecast revenue
	Get Plan quantities
Subtotals 12	Get Actual cost and MHrs

VARIANCE ANALYSIS

Tasks			Progress 05/03/2019 to 08/20/2021				< • >	
	CBS position	Description	Actual qty (to date)	% complete	CB cost earned	Actual cost (to date)	CB MHrs G/L (to date)	CB actual cost G/L (to date)
	1.1...	Retention Piling	60.00	42.86 %	\$ 181,217.14	\$ 175,000.00	68.57	\$ 6,217.14
	1.2	Slab on Grade	7,175.00	33.00 %	\$ 57,400.00	\$ 59,670.00	0.00	(\$ 2,270.00)
	1.3	Slab on Deck	450.00	0.12 %	\$ 1,663.06	\$ 0.00	30.85	\$ 1,663.06
	✓ 2	Shell	56,625.12	14.16 %	\$ 672,382.50	\$ 671,280.00	0.00	\$ 1,102.50
	✓ 2.1	Masonry	0.00	0.00 %	\$ 0.00	\$ 0.00	0.00	\$ 0.00
	✓ 2.2	Steel	0.42	7.08 %	\$ 107,500.00	\$ 109,500.00	0.00	(\$ 2,000.00)
	2.2.1	Steel - Building I&J	40.00	100.00 %	\$ 70,000.00	\$ 64,000.00	0.00	\$ 6,000.00

- ☐ Create a data block to compare earned vs. actual man-hours and costs
- ☐ % Complete based on Actual Quantities to Date
- ☐ G/L = Variance (Earned – Actual)

ACTUALS HISTORY

- Right-click on a cost item and select Actuals details.
- Select the Actuals History tab to review entries.

1074					
4.1 Erect Steel - Heavy		CLAIM ACTUALS		ACTUALS HISTORY	
Posting date	Total quantity	Total cost	Total man hours	Total equipment hours	
08/13/2021	0.00	\$ 3,000.00	0.00	0.00	

- Click on a posting date for additional details.

		CLAIM ACTUALS		ACTUALS HISTORY	
Posting date	Actuals type	Actuals completed	Cost category		
08/13/2021	Confirmed cost	\$ 3,000.00	Labor Base		

- Click on the to go back to less detail.