

QUICK GUIDE

PROGRESS MEASUREMENT



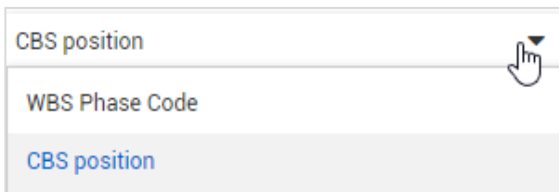
IMPORT ACTUALS

- ❑ 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

1. On the right toolbar click **Import**.



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



6. Click **Next**.

[CONTINUED]

7. 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

8. Click to save your mapping for future use.
9. 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

10. 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

1. On the right toolbar click **Import**.



2. Select **Commitment values** from the drop-down.
3. Browse to your Excel file and click **Open**.
4. Select a Cost item matching criteria (CBS Position or WBS Phase Code).
5. Click **Next**.
6. 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

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

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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 ▾

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 ▾

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 see less detail.