

InEight Integration

On Center On-Screen installation and integration



Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

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Estimate On Center integration

On Center On-Screen integration enables the display of digital plans at scale and allows interaction with the physical parameters in the plan to easily calculate a wide range of quantity types, such as counts, lengths, and areas. Estimate then imports quantities and incorporates them into the Estimate cost model to derive labor and equipment hours, resource costs, overheads, and contingencies, and more.

This topic provides guidance for the installation of the Estimate On Center integration and importing cost items from On Center On-Screen Takeoff.

Install the Estimate On Center integration

NOTE:

If you are installing the integration on a server, the InEight Estimate Server service will restart at the end of the installation process.

Use the following steps to install the Estimate On Center Integration module.

1. Start Microsoft Windows and then exit out of any programs that are currently running.
2. Launch the Estimate installer downloaded from the InEight website.
3. At the User Account Control screen, click **Yes** to allow the InEight Estimate application to make changes to your computer.
4. On the Installation Package screen, click **Install** to continue.
5. Click **Install Estimate** to continue.
6. At the License Agreement screen, select **I Accept the Agreement**. Then, click **Continue**.
7. If other Estimate client/server applications have already been installed on the server, select **Install** on the Upgrade, or Install dialog box. Then click **Next** to continue.
8. On the Components screen, under Third Party Integration Components, select the **OnCenter** check box, and then click **Next**.
9. At the Select Destination Location screen, define the installation folder for the OnCenter integration.

NOTE:

To define a different installation folder, click the **Browse** button, and then navigate to your folder.

10. Click **Next** to continue.
11. Click **Install** to start the installation.
12. On the Ready to Install dialog box, click **Install** to continue.
13. At the Installation Summary screen, click **Next** to continue.
14. Click **Finish** to complete the installation and exit the setup program.

Import cost item from On Center On-Screen takeoff

This topic provides guidance for importing cost items from On Center On-Screen Takeoff. On Center On-Screen Takeoff enables the display of digital plans at scale and allows interaction with the physical parameters in the plan to easily calculate a wide range of quantity types, such as counts, lengths, and areas. Estimate then imports quantities and incorporates them into the Estimate cost model to derive labor and equipment hours, resource costs, overheads, and contingencies, and more.

The import gives you the ability to import cost items, and employ Estimate resources and assemblies to cost items, as a means of setting up a preliminary estimate in Estimate. Specifically, this import provides a means for you to define cost item data in the Cost Breakdown Structure (CBS) Register.

You can create new Level 1 cost items or add subordinate cost items under existing cost items in the Cost Breakdown Structure (CBS) Register.

Any new units of measure found in the cost items imported from On Center On-Screen Takeoff are automatically added to the job's Units of Measure register.

It is recommended that you review these new units of measure and modify them as appropriate (e.g., define conversion factors and alternate units of measure).

Design Data Integrator

The Estimate Design Data Integrator shows the take-off items and quantities from the selected On Center On-Screen Takeoff Project that are available to import into the Cost Breakdown Structure (CBS) Register.

Status Field

The Status column on the Estimate Design Data Integrator register indicates the relationship between the source project and the Estimate job:

- **New** - This item is not currently included in the Estimate job.
- **Imported-Current** - This item has been imported into the Estimate job, and it has not changed in the source project since import.
- **Imported-Not Current** - This item has been imported into the Estimate job, but it has changed in the source project, and it needs to be updated in Estimate to keep the information synchronized.

View Options

Use the following options to personalize your view of the **Estimate Design Data Integrator** screen:

- Select the **Show source items not imported** check box to display all items with a status of *New*.
- Select the **Show source items already imported** check box to display all items with a status of *Imported-Current* or *Imported-Not Current*.

- Select the **Only show imported items that have changed** check box (only available when the Show source items already imported check box is selected) to show all items with a status of *Imported-Not Current* and hide all items with a status of *Imported-Current*.
- Click **Hide selected** to hide all currently selected (checked) items.
- Click the **Refresh** button to display any previously hidden items.
- Click the **Tile w/ CBS** button to display the Estimate Design Data Integrator and the Cost Breakdown Structure (CBS) Register side by side.

Imported Columns

When importing an item into the CBS from the Estimate Design Data Integrator, the following fields are filled on the Cost Breakdown Structure (CBS) Register:

- The **Description column for imported Cost Items** in the Cost Breakdown Structure (CBS) Register is populated from the Name column in the Estimate Design Data Integrator.
- The **Description column for employed Resources** in the Cost Breakdown Structure (CBS) Register, along with related cost information, is populated from the Resource Rate Register.
- The **Description column for employed Assemblies** in the Cost Breakdown Structure (CBS) Register, along with the Assembly field and the assembly's line items, is populated from the Resource Assembly Register.
- The **Forecast (T/O) Quantity** column in the Cost Breakdown Structure (CBS) Register is populated from the Quantity column in the Estimate Design Data Integrator.
- The **Unit of Measure** column in the Cost Breakdown Structure (CBS) Register is populated from the UM column in the Estimate Design Data Integrator.
- The **Notes** column in the Cost Breakdown Structure (CBS) Register is populated from the Notes column in the Estimate Design Data Integrator.
- The **Data Source** column on the Cost Breakdown Structure (CBS) Register is populated with On Center:<On Center Project name>.

Import Cost Items

Use the following steps to import cost items.

1. From the Cost Breakdown Structure (CBS) Register Actions tab, choose Import/update CBS > **On Center On-Screen Takeoff**. The Estimate Design Data Integrator shows.
2. If the CBS does not show next to the Estimate Design Data Integrator, select the **Tile w/CBS** check box.
3. On the CBS, highlight the row where you want to add the cost items:
 - To create Level 1 cost items, highlight the first blank row on the register.

- To create subordinate cost items, highlight the existing cost item under which you want to create subordinates.
4. On the Estimate Design Data Integrator, select the check box next to each item that you want to import.

NOTE: To select or unselect all the items, click the **Select All** toggle button.

5. Click the **Import/Update options...** link. The Import/Update Rules dialog shows.
6. On the Import/Update Rules dialog, select **Cost Item** from the Import/Update as: combo box and click **OK**.

NOTE: The check boxes on the Import/Update Rules dialog are only used when updating an item already in the CBS. All this information is automatically included when importing a new item.

7. Click the **Update CBS** button to import the selected items. The new cost items appear in green on the CBS.

Employ Resources and Assemblies

Use the following steps to employ resources and assemblies.

1. From the Cost Breakdown Structure (CBS) Register Actions tab, choose Import/update CBS > **On Center On-Screen Takeoff**.
2. The Estimate Design Data Integrator shows. If the CBS does not display next to it, select the **Tile w/ CBS** check box.
3. On the CBS, highlight the cost item (row) that you want to employ a resource or assembly.
4. On the Estimate Design Data Integrator, click the **Import/Update options** link. The Import/Update Rules dialog shows.
5. On the Import/Update Rules dialog box, select from the following options:
 - To employ a resource, select Resource Employment, and then click **OK**.
 - To employ an assembly, select Assembly Employment, and then click **OK**.

NOTE: The check boxes on the Import/Update Rules dialog are only used when updating an item already in the CBS. All information is automatically included when importing a new item.

6. On the Estimate Design Data Integrator, select the check box next to the item that you want to employ as a resource or assembly to the selected cost item.
7. Click in the Resource column on that row, and then click on the arrow in that cell to show a selection register.
8. Select the resource or assembly on the selection register, and then click **OK**.
9. Click the **Update CBS** button to import the selected item. The new resource or assembly is now employed to the cost item and shows in green text in the CBS.

NOTE: To employ multiple resources or assemblies to the same cost item, select the check box and choose the resource or assembly code on each applicable row in the Estimate Design Data Integrator before clicking Update CBS.

Update Previously Imported Items

The Update feature is used to refresh quantities, descriptions, units of measure and notes on items that have a status of *Imported-Not Current* in the Estimate Design Data Integrator.

After a resource or assembly has been employed to a cost item in the Estimate Design Data Integrator, the resource or assembly assignment can only be changed from within the CBS. It cannot be changed directly in the Estimate Design Data Integrator.

Use the following steps to update previously imported items.

1. From the Cost Breakdown Structure (CBS) Register Actions tab, choose Import/update CBS > **On Center On-Screen Takeoff**.
2. The Estimate Design Data Integrator shows. If the CBS does not display next to it, select the **Tile w/CBS** check box.
3. To view only the Estimate Design Data Integrator items that need to be updated in Estimate:
 - a. Deselect the **Show source items not imported** check box.
 - b. Select the **Show source items already imported** check box.
 - c. Select the **Only show imported items that have changed** check box. Only the items with a status of *Imported-Not Current* are now shown.
4. In the Estimate Design Data Integrator, select from the following items to update:
 - o To update all the items, click the **Select All** button.
 - o To update selected items, select one or more individual check boxes.
5. Click the **Import/Update options** link. The Import/Update Rules dialog shows.
6. Select the appropriate check boxes to update quantities, descriptions, units of measure, and notes, and then click **OK**.

NOTE:

The combo box on the Import/Update Rules dialog is only used when importing a new cost item or employing a new resource or assembly. It is not used when updating items already existing in the CBS.

7. Click the **Update CBS** button to update the selected items.