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InEight Integration
US Cost import

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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.

Rev	Date	Description
1.0	18-FEB-2025	Initial publication.

Contents

Import CBS from US Cost

This topic provides guidance to import the Cost Breakdown Structure (CBS) from US Cost. Both the Master Cost Breakdown Structure (CBS) and a job's Cost Breakdown Structure provide you with the ability to import from US Cost. This import provides you with the ability to update existing cost items, crews, and resources in the Master CBS Register or the job's CBS Register from a US Cost estimate. Specifically, this import from US Cost provides a means for you to import and update cost item data and its associated resource employments from a US Cost estimate according to how the data in the US Cost estimate is mapped to Estimate fields. The US Cost estimate data that will be imported consists of cost items (activities), resources and crews, tags, and account codes.

Rules

The source of the data imported into the CBS Register using the import routine is a US Cost estimate (.dbf file).

Invalid Data

Prior to import, the mapped data in the US Cost estimate (intended for import) is validated against the business rules in Estimate. When invalid data exists in the US Cost estimate mapped for import, a dialog box shows identifying the data in the US Cost estimate that is invalid and a brief explanation of why the data is invalid. The data is not imported when invalid data is detected, requiring you to correct the invalid data in the US Cost estimate or modify your import settings and re-import.

Select the Import File

The .dbf file is the source file that contains the US Cost estimate data you want to import.

1. From the Backstage View, select **Library** from the left pane navigation.

2. Select the **Estimate** tab.

3. Under the Master Breakdown Structures section, select **Cost Breakdown Structure (CBS)**. The Cost Breakdown Structure opens.

4. Select the **More Actions** tab.

5. Under the Data Source section, select the **Import / Update** CBS drop-down.

6. Select **US Cost** option.

7. In the File name field, click on the **Browse** button.

8. In the Files of type field, select **Compatible File Names**.

9. Go to your file system to select the .dbf file, and then click **Open**.

10. Select the **Define Field Mapping** button to specify which fields in the US Cost estimate will fill which fields in Estimate.

11. To map the project's Description field section in Estimate to a field in the US Cost estimate, select the **Source Column** drop-down list within the Description row to display a list of the fields in your US Cost estimate.

12. Select the field in your estimate that represents the project's description.

13. Repeat this process for each of the Project Properties, Cost Breakdown Structure, and Cost Item Identifiers fields from which you want to import data from your US Cost estimate.

NOTE:	You are not required to map all the fields in Estimate to fields in the US Cost estimate. You can map any number of fields you want, and you can map different fields or sets of fields each time you import.

NOTE:	When updating existing items, the data fields for existing items are updated to reflect what is currently in the US Cost estimate for the currently mapped fields. The items in the US Cost estimate are matched to the items in the Cost Breakdown Structure (CBS) Register, based on the matching field specified on the Define Field Mapping dialog.

In addition to defining your field mappings, the mapping tool is also the place where you specify which field will be used as the matching identifier. The matching identifier is important because it tells the import routine which cost item in the US Cost estimate matches which cost item in the CBS when updating cost items. Select the field on which you want to match from the drop-down list in the **Use the following field as the matching identifier** field.

It is recommended that you select a field for the matching identifier that you will use most often (e.g., Description). While you can change the field that is the matching identifier at any time, doing so may result in unexpected results.

The field that you define as the matching identifier must be mapped whenever you import data from the spreadsheet. The mapped field must be unique for each cost item.

NOTE:	If you decide to change the field that is the matching identifier after importing data, be sure that unique data for the new matching field has already been imported before making the change. Failure to do so may result in unexpected results.

14. After you define the mapping, click **OK**.

15. Click the **Cost Categories** button to specify which cost categories in Estimate you want the costs from the US Cost estimate to populate.

16. For Tax, Level Markup, Prime Contractor Markup, Subcontractor Markup, and Distributed costs, specify whether you want these costs to be included in the cost of the cost items or included as part of the Direct Cost Add-On dependent cost item.

17. Click **OK**.

18. In the US Cost estimate, select **Import Resources and Crews** and whether you want to employ your preferred resources and crews to the cost items that are imported.

19. Select whether you want to create records in Estimate for missing tags by selecting or deselecting the **Create missing tags** option. When importing cost items from a US Cost estimate, the values defined for the tag fields may or may not exist in the corresponding Foundation Setup Data's Tags register.

    The Master CBS Register and the CBS Register in Estimate each have 20 user defined tag fields. When updating the Master CBS Register, these tag fields are validated against the Master Foundation Setup Data's Tags register. When updating a job's CBS Register, the tag fields are validated against that job's Foundation Setup Data's Tags register.

    - **Create missing tags** - When selected, the value in the US Cost estimate will be added to the Foundation Setup Data's Tags register with the Code field defined with the value in the US Cost estimate. After the tag is in the Foundation Setup Data's Tags register, it will no longer be considered invalid data when importing costs items into the Cost Breakdown Structure (CBS) Register (job or Library).
    - **Do not create missing tags** - When not selected, and the tag values in the US Cost estimate import do not exist in the corresponding Foundation Setup Data's Tags register, the import stops, and no data is imported. You receive an error dialog box showing the invalid data and a brief explanation of why the data is invalid. You can select from the following options:
        - Select to show of which tags do not exist in the Foundation Setup Data's Tags register. This option results in the import stopping since invalid data exists in the US Cost estimate.
        - Select to have the import create the tags in the Foundation Setup Data's Tags register and complete the import of data.

20. Select whether you want to create records in Estimate for missing Account Codes by selecting or deselecting the **Create missing accounts** option. When importing cost items from a US Cost estimate, the values defined for the account code field may or may not exist in the Foundation Setup Data's Account Code register.

    Cost items and resource employments on cost items in the CBS Register have an Account Code field that lets you assign a cost account for budgeting purposes. The account code field is validated against the Foundation Setup Data's Account Code register.

- **Create missing accounts** – When selected, the value in the US Cost estimate will be added to the Foundation Setup Data's Account Code register with the Account Code field defined with the value in the US Cost estimate. After the account code is in the Foundation Setup Data's Account Code register, it will no longer be considered invalid data when importing cost items for the current job.

- **Do not create missing accounts** – When not selected, and the account codes in the US Cost estimate do not exist in the Foundation Setup Data's Account Code register, the import stops, and no data is imported. You receive an error dialog box showing the invalid data and a brief explanation of why the data is invalid. You can select from the following options:

  o Select to show which account codes do not exist in the Foundation Setup Data's Account Code register. This option results in the import stopping since invalid data exists in the US Cost estimate.
  o Select to have the import create the account codes in the Foundation Setup Data's Account Code register and complete the import of data. Specify whether you want to create records in Estimate for missing Account Codes. If you choose not to create these missing values, and one or more are encountered during import, the import will stop, and you will be notified of the missing value.

21. Select whether you want to create records in Estimate for missing units of measure by selecting or deselecting the **Create missing units of measure** option. When importing cost items from the US Cost estimate, the values defined for the Unit of Measure field may or may not exist in the Foundation Setup Data's Units of Measure register.

    The units of measure that are assigned to cost items and resource employments on cost items in the CBS Register are validated against the Foundation Setup Data's Units of Measure register.

    - **Create missing units of measure** – When selected, the value in the US Cost estimate will be added to the Foundation Setup Data's Units of Measure register with the unit of measure field defined with the value in the US Cost estimate. After the unit of measure is in the Foundation Setup Data's Units of Measure register, it will no longer be considered invalid data when importing cost items for the current job.
    - **Do not create missing units of measure** – When not selected, and the units of measure in the US Cost estimate do not exist in the Foundation Setup Data's Account Code register, the import stops, and no data is imported. You receive an error dialog box showing the invalid data and a brief explanation of why the data is invalid. You can select from the following options:

      o Select to show which units of measure do not exist in the Foundation Setup Data's Units of Measure register. This option results in the import stopping since invalid data exists in the US Cost estimate.

- o   Select to have the import create the units of measure in the Foundation Setup Data's Units of Measure register and complete the import of data.

22. If you want to save the import settings that you have defined for future imports, select the check box next to the **Save the current import settings for future use** field.

23. Click **Import**.