



Estimate Integration to Cloud Platform



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	30-AUG-2021	Initial publication.
2.0	08-SEP-2021	Cloud Platform naming schema changes throughout document.
3.0	27-SEP-2021	Additional content added to Data Included and Excluded from Estimate.
4.0	31-May-2022	Verbiage added to tags in Estimate and CE Mhr calculations.
5.0	10-MAY-2023	Removed unique resources to a cost item verbiage. Added schedule id, start date, finish date to Considerations under CBS cost items, in Data Included and Excluded from Estimate. Added cost items with cost source of detail, pay hours are used for current estimate manhours, and not work hours.
6.0	31-MAY-2023	Added verbiage about Platform phase must be in Execution when publishing.
7.0	10-AUG-2023	Added verbiage about Country and State fields for Cloud are not editable.
8.0	8-APR-2024	Various changes which include revamping this document to be Cloud specific.

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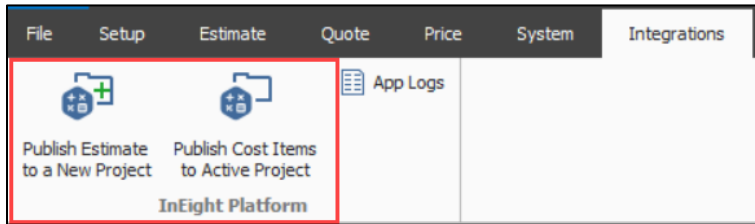
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Introduction

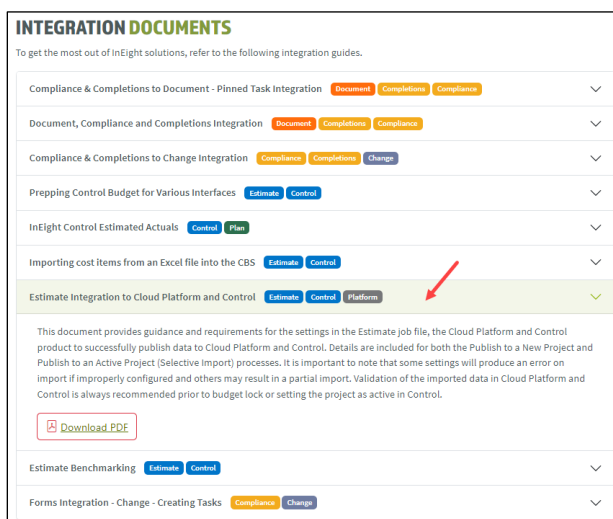
This document provides guidance and requirements for the settings in the Estimate job and the Cloud Platform and Control products. The purpose of this document is to help you successfully publish data to Cloud Platform and Control from Estimate, with the objective of initializing and maintaining a project's budget. Instructions are provided for both the Publish to a New Project and Publish Cost Items to an Active Project (Selective Import) processes.



It is important to note that some settings will produce an error on import if improperly configured and may result in a partial import. Validation of the imported data in Cloud Platform and Control is always recommended prior to budget lock or setting the project as active in Control. If either of the publish process has already been executed, and the budget is locked on a job, do not unlock the budget and re-import again.

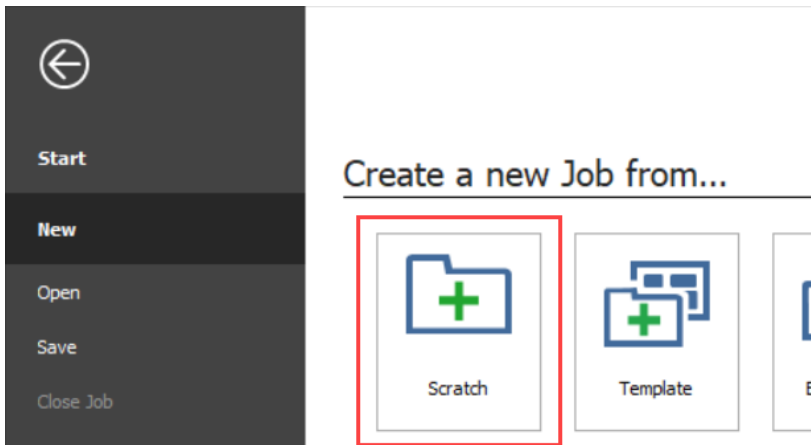
Estimates are often created at a greater level of detail than what is necessary or appropriate for tracking the progress of the work using a Control budget. It is common for companies to change the structure of their estimate by rolling up and consolidating cost items or changing the overall structure of costs to line it up with an established coding scheme, providing project execution team a common way of tracking the work from job to job. This process is referred to as conforming the budget, and varies by company, often driven by the tools used in the field to track the work, and the back-office accounting systems used to produce financial reports for the company. The following documentation explains the process in more detail and can be used to assist in conforming your budgets.

[Prepping Control Budget for Various Interfaces](#)

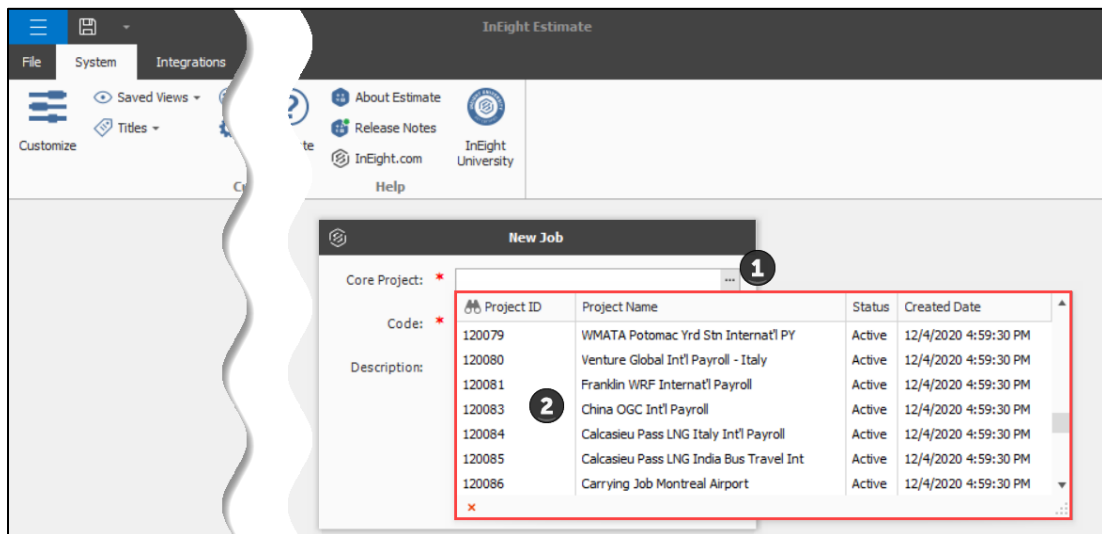




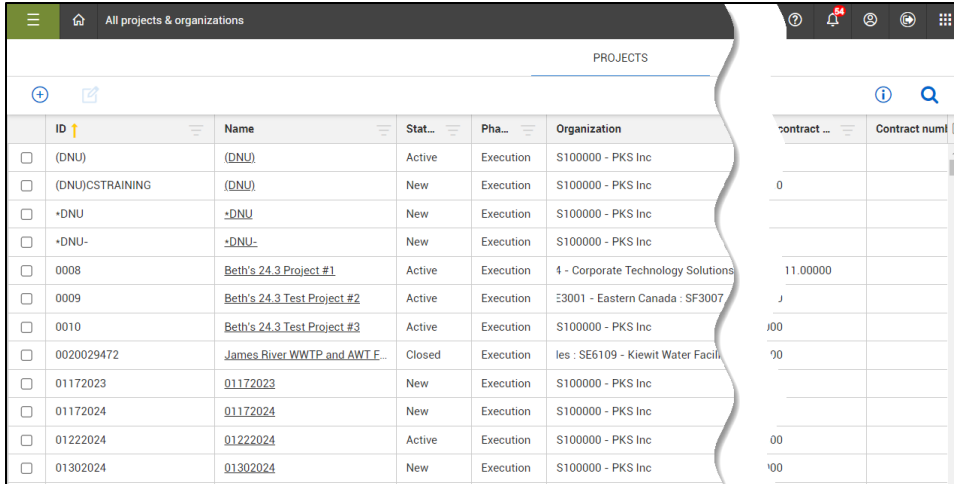
2. Select **Create a new Job from Scratch**.



3. Select the **ellipsis** icon to the right of the Core Project field, and then select a Platform project.



In Platform, the Platform projects shown below show a complete list of projects derived from Platform's All projects & organizations form.

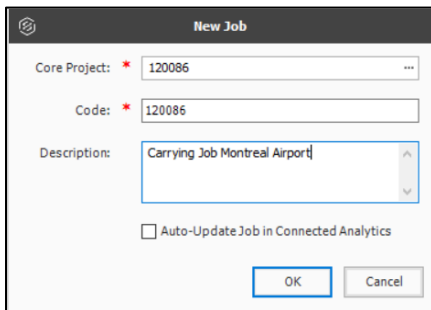


ID	Name	Status	Phase	Organization
(DNU)	(DNU)	Active	Execution	S100000 - PKS Inc
(DNU)CSTRAINING	(DNU)	New	Execution	S100000 - PKS Inc
-DNU	-DNU	New	Execution	S100000 - PKS Inc
-DNU-	-DNU-	New	Execution	S100000 - PKS Inc
0008	Beth's 24.3 Project #1	Active	Execution	4 - Corporate Technology Solutions
0009	Beth's 24.3 Test Project #2	Active	Execution	E3001 - Eastern Canada ; SF3007
0010	Beth's 24.3 Test Project #3	Active	Execution	S100000 - PKS Inc
0020029472	James River WWTP and AWTLE...	Closed	Execution	les : SE6109 - Kiewit Water Facili
01172023	01172023	New	Execution	S100000 - PKS Inc
01172024	01172024	New	Execution	S100000 - PKS Inc
01222024	01222024	Active	Execution	S100000 - PKS Inc
01302024	01302024	New	Execution	S100000 - PKS Inc

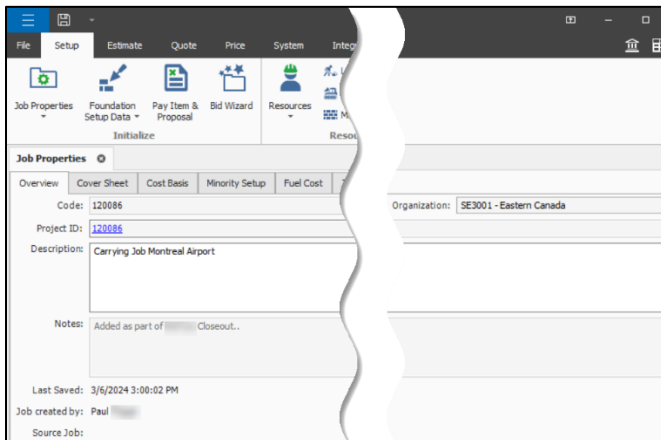
Once a Platform project is selected, the Project ID automatically populates into the Code field. You can either keep the same code or change it.

You can also keep the description in the Description field or change it.

4. Select **OK**.



The Estimate to Platform project association process could take several minutes to finalize, depending on the size of the project.



The project ID in Estimate’s Job Properties will get pushed to that project when the publish to Project Suite process is completed. This is the project that Estimate will publish the budget to.

For more information on Platform project association, see [Job Creation](#).

Prepare to Publish a budget from Estimate

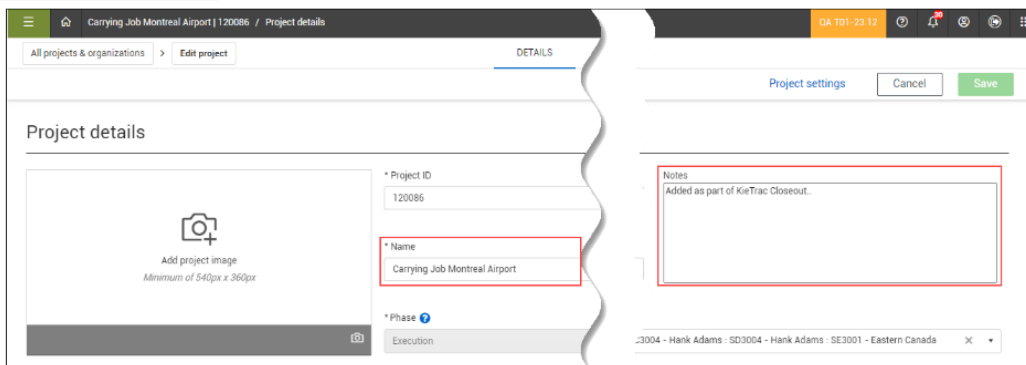
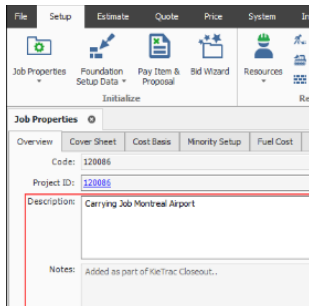
At this point in the process, work has been estimated and submitted, the contract is going to be executed soon, and you are now ready to start tracking progress against work on the contract.

The use of this interface has requirements and validations that are required to setup prior to sending a project to Cloud Platform and Control. No setup is required in Estimate prior to publishing from Estimate in the Cloud into Platform, however, there are certain areas in Estimate to validate prior to running the publish process to Project Suite.

Estimate Job Properties

Overview Tab

In the Job Properties tab, some of the Estimate data will be prepopulated or linked back to the data from Platform Project, such as Job Description, Notes or the job's location fields. The Project ID field is a hyperlink that can be used to easily navigate to the Project Details page in Project Suite to maintain these details should they need to be updated.



Cost Basis Tab

In the Cost Basis tab, under the Currency section, check the default currency. The default currency must match the project base currency for the project in Cloud Platform. Currencies do not sync between Estimate and Project Suite.

Make sure the currency symbol descriptions match in both Estimate and Control. If the currency symbol is in AUS dollars in Estimate, it must be in AUS dollars in Control and not U.S. dollars.

Foundation Setup Data Register

Unit of Measure Names must exist in both Estimate and Cloud Platform.

NOTE:

Be aware of proper syntax. The UOM Names in Estimate must match the UOM Names in Cloud Platform. A mismatch in the account code's UOM will cause the job publish to fail.

Estimate							Cloud Platform				
Unit of Measure Name	Measurement Type	Conversion Factor	Base Name	Measurement System	Default Alternate Measurement	Age	Name	Measurement type	Base UoM	Conversion factor	Measurement system
1000 GALLONS	Unit	1	NA	Both	1000 GALLONS	E	Acre	Area	Square Meter	0.404685642000	English
25 Millimeter Meter	Depth Length	25	Millimeter Meter	Metric	Inch Feet	E	Bag	Unit	None	1.000000000000	Both
Acre	Area	4046.8564224	Square Meter	English	Hectares	E	Barrel	Unit	None	1.000000000000	Both
Barrel	Unit	1	NA	Both	Barrel	E	BF	Unit	None	1.000000000000	Both
Board Feet	Volume	0.002359737216	Cubic Meter	English	Cubic Meter	E	BGSF	Area	Square Meter	0.092903040000	English
Calendar Day	Unit	1	NA	Both	Calendar Day	E	Board Feet	Volume	Cubic Meter	0.002359737216	English
Centimeter	Length	0.01	Meter	Metric	Inch	E	Cal Day	Unit	None	1.000000000000	Both
Chain	Length	20.11684	Meter	English	Meter	E	Can	Unit	None	1.000000000000	Both
							ccm	Volume	Cubic Meter	0.000001000000	Metric
							Cell	Unit	None	1.000000000000	Both

- You must create a project, and the External Project ID in Cloud Platform must match the Job Code in Estimate.
- All the units of measure assigned to cost items and resources must match the units of measure in Cloud Platform. It is recommended that you open the Job's Foundation and Setup Data register and check, line by line, the units of measure in both systems.

Unit of Measure Name	Measurement Type	Name	Measurement type
Acre	Area	Acre	Area
Bag	Unit	Bag	Unit
Barrel	Unit	Barrel	Unit
BF	Unit	BF	Unit
BGSF	Area	BGSF	Area
Cal Day	Unit		
Can	Unit		

It is important to verify the UOM in both Estimate and Control. For example: if UOMs of LS and Lump Sum both exist in Estimate, make sure that the UOM you select matches in both Estimate and Control.

- The project must have a status of **New**.

* Status

New ▼

Account Codes

Verify that the Account Code structure in Estimate has been finalized. This is critical as any account codes used in Estimate are required to be established in Control prior to publish. Account Code use is optional but if account codes are used that are not in Cloud Platform the publish will fail.

The screenshot shows two overlapping windows from the software. The top window is titled 'Foundation Setup Data Register' and displays a table of account codes. The bottom window is titled 'Master data libraries / Account codes' and displays a detailed list of account codes with their descriptions, units, and currencies.

Utilized	Account Code	Description	Unit of Measure	Secondary Unit Of Measure	Currency	Auto-Quantity (Primary)
<input type="checkbox"/>	1001.345	Remove insulation	Each		U.S. Dollar	<input type="checkbox"/>
<input type="checkbox"/>	1010	Environmental Work	Lump Sum		U.S. Dollar	<input type="checkbox"/>
<input type="checkbox"/>	1019.234	Remove heater piping	Each			
<input type="checkbox"/>	1020	Mobilization	Each			
<input type="checkbox"/>	1020100	Mobilization	Lump Sum			
<input type="checkbox"/>	1034.778	Remove heater with Overhea...	Each			
<input type="checkbox"/>	1110	Clearing and Grubbing	Acre			
<input type="checkbox"/>	1120	Aggregate Base	Ton			
<input type="checkbox"/>	1120.100	Furn and Haul Base Material	Ton			
<input type="checkbox"/>	1120.200	Place Aggregate Base	Ton			

Account code	Description	UoM primary	Currency
00.03.01.010.38	OH - Estimating - Engineering - Controls / Systems	MWk	US Dollar
00.03.01.010.40	OH - Estimating - Engineering - Startup / Commissioning	MWk	US Dollar
00.03.01.010.42	OH - Estimating - Engineering - Buildings	MWk	US Dollar
00.03.02	OH - Estimating	MWk	US Dollar
00.03.02.003	OH - Estimating - Order of Magnitude	MWk	US Dollar
00.03.02.003.02	OH - Estimating - Order of Magnitude - Estimate Leads	MWk	US Dollar
00.03.02.003.04	OH - Estimating - Order of Magnitude - Indirect	MWk	US Dollar
00.03.02.003.06	OH - Estimating - Order of Magnitude - Civil	MWk	US Dollar
00.03.02.003.08	OH - Estimating - Order of Magnitude - Drainage	MWk	US Dollar
00.03.02.003.10	OH - Estimating - Order of Magnitude - Utilities	MWk	US Dollar

Cost Breakdown Structure Register

Dependent cost items

Dependent Cost Items are a special type of cost Item only found in the Estimate application. Dependent cost items have a cost that is derived from other cost items in the estimate and get updated in real time as the estimate progresses. The dynamic nature of these cost items are highly desirable when estimating because it is efficient, but when managing a projects budget where changing costs is part of a controlled process, having costs automatically change is not desirable.

When publishing the budget from Estimate to Control, consideration needs to be given to the handing of dependent cost items. Because Control does not support dependent cost items, it is important to know if they are included in the budget, they will not behave the same in Control as they do in Estimate.

Dependent cost items are included when the budget is published, and the total cost of the dependent item is included in the budgets cost item. The cost however does not appear unless the cost source is changed from detail to plug.

Also, in Estimate, dependent cost items can be positioned at the top of the CBS structure as items with no CBS Position Code. The capability to not have a CBS position code on a cost item is not available in

Control and can produce undesirable results when published. It is recommended to move the dependent cost item in Estimate to a location in the CBS register that ensures the dependent cost item is given a valid position code.

When dependent cost items are included in the Estimate, the recommended practice when preparing to publish the budget is to replace the dependent cost item with a regular cost item, setting the new cost items cost source to plug. and copying over the total cost from the dependent cost item to the newly created cost item. This keeps the cost in the budget and eliminates the issues that accompany sending unsupported cost item types from Estimate to Control.

Dependent Cost Items are pushed over from Estimate to Control for both the Publish Estimate to a New Project process and the Publish Cost Items to Active project process.

Dependent cost items are cost items with values calculated based on a percentage of the cost of other items. Examples include insurance the company carries, bonds, and labor overhead.

Cost Breakdown Structure (CBS) Register									
Drag columns here to group									
CBS Position Code	Description	Forecast (T/O) Quantity	Unit of Measure	Unit Cost	Total Cost (Forecast)	Currency	Labor Total Cost	Owned Equipment Total Cost	
[-]	JOB	20.00	Mile	\$295,398.26	\$5,907,965.12	U.S. Dollar	\$831,904.91	\$966,787.96	
+	Prime Bond	1.00	Lump Sum	\$47,283.88	\$47,283.88	U.S. Dollar	\$0.00	\$0.00	
+	Price % Add-On	1.00	Lump Sum	\$296,854.88	\$296,854.88	U.S. Dollar	\$0.00	\$0.00	
+	Job Financing	1.00	Lump Sum	\$20,232.63	\$20,232.63	U.S. Dollar	\$0.00	\$0.00	
+	Indirect Cost Escalation	1.00	Lump Sum	\$2,131.11	\$2,131.11	U.S. Dollar	\$2,131.11	\$0.00	
+	Direct Cost Escalation	1.00	Lump Sum	\$15,048.80	\$15,048.80	U.S. Dollar	\$15,048.80	\$0.00	
+	Indirect Cost Add-On	1.00	Lump Sum	\$6,608.73	\$6,608.73	U.S. Dollar	\$2,611.98	\$1,810.64	
+	Direct Cost Add-On	1.00	Lump Sum	\$104,088.34	\$104,088.34	U.S. Dollar	\$13,931.25	\$17,488.90	

Dependent cost items in Estimate do not have a cost source defined. When dependent cost items are pushed from Estimate to Control, they come over as a Detail cost source.

Cost Breakdown Structure (CBS) Register				
Drag columns here to group				
CBS Position Code	Description	Cost Source	Forecast (T/O) Quantity	
[-]	JOB		20.00	
+	Prime Bond		1.00	
+	Price % Add-On		1.00	
+	Job Financing		1.00	
+	Indirect Cost Escalation		1.00	
+	Direct Cost Escalation		1.00	
+	Indirect Cost Add-On		1.00	
+	Direct Cost Add-On		1.00	

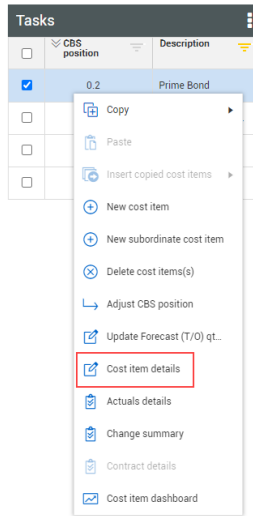
[Click here](#) for more information on dependent cost items on learn.ineight.com.

In Control, Dependent cost items created by publishing data from Estimate will show costs when the Cost Source is set to Plug. By default, cost items get initialized with a Cost Source of Detail and the item will appear to not have any costs. You will need to change the items cost source from detail to plug to see the dependent cost item costs in the budget.

Tasks			Current estimate	
<input type="checkbox"/>	CBS position	Description	CE total MHrs	CE total cost
<input checked="" type="checkbox"/>	0.2	Prime Bond	0.000	\$ 0.000

If you have costs in your estimate that are dependent costs, and you want them in your Control budget, follow the below steps:

1. Right click on a cost item and select **Cost Item Details**.



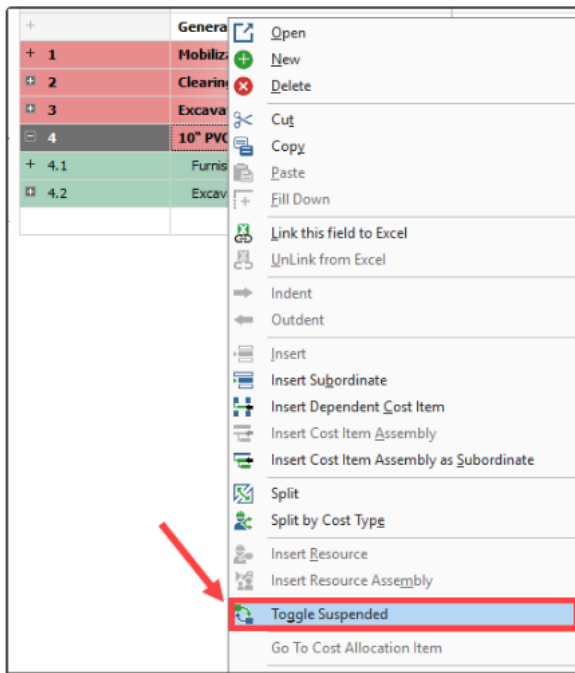
2. In the Cost Source field, select Plug from the drop-down menu. This brings in the CE total cost.

Tasks			Current estimate	
<input type="checkbox"/>	CBS position	Description	CE total MHrs	CE total cost
<input checked="" type="checkbox"/>	0.2	Prime Bond	0.000	\$ 47,127,512

You can then move the dependent cost items anywhere in the CBS structure in Control.

Suspended Cost Items

Cost items that are suspended do not go over to Control. Suspending a cost item lets you turn a cost item *Off* to perform “what-if” scenarios to evaluate alternative approaches to the estimate.



A cost item can be suspended in Estimate for various reasons including the following:

- Manually suspended cost items
- Suspended parent
- Parent with cost source that is not Detail (plugged or quoted)
- Parent cost item with a zero quantity
- Pay item is suspended
- Allocated cost items
- Alternate scenarios:
 - Overridden by another alternate
 - Alternative is not active

Suspended cost items do not contribute any cost to the job's total value. Suspended items can be un-suspended at any time to be included in the total project value.

Pay Item and Proposal Register

The Estimate integration to Cloud Platform pushes pay items. If you want pay items pushed, then add them to the Pay Item and Proposal register. This is not required, but you have the option to set up pay items from Estimate if preferred.

Position Code	Pay Item Number	Lock Quantity	Lock Price	Description	Pay Quantity	Forecast (T/O) Quantity	Unit of Measure	Total Distribution	Unit Mar (current)
1	200			SITWORK & ROADWAY				\$646,223.97	
+ 1.1	641 0100			Mobilization	1.00	1.00	Lump Sum	\$6,541.26	
+ 1.2	201 0102			Clearing & Grubbing	10.00	10.00	Acre	\$19,912.22	
+ 1.3	202 0183			Unclassified Excavation	50,000.00	50,000.00	Cubic Yard	\$82,226.09	
+ 1.4	303 5912			Aggregate Base	40,000.00	45,000.00	Ton	\$165,008.44	
+ 1.5	303 4263			Asphalt Concrete Hot Mix Type A	38,000.00	35,000.00	Ton	\$372,535.96	



Pay item position	Pay item number	Description	Current price	Current unit price	UoM	Current billing method	Forecast (T/O) - Pay qty delta	Current pay qty
		Unapproved revenue						
0	200	SITWORK & ROADWAY	\$ 3,402.70...	\$ 3,402...		Unit price	0.000	1.0
1	400	WATER & SEWER	\$ 718,550...	\$ 718.5...		Unit price	0.000	1.00
1	2	Utility Coordination	\$ 718,550...				-1,000,000.000	
1.1	641 0100	Mobilization	\$ 395,600...	\$ 395.6...	Lump S...	Unit price	0.000	
1.2	201 0102	Clearing & Grubbing	\$ 59,000.000	\$ 5,900...	Acre	Unit price	0.000	10.0
1.3	202 0183	Unclassified Excavation	\$ 275,000...	\$ 5.500	Cubic Y...	Unit price	0.000	50,000.00
1.4	303 5912	Aggregate Base	\$ 1,060,00...	\$ 26.500	Ton	Unit price	0.000	40,000
1.5	303 4263	Asphalt Concrete Hot Mix T...	\$ 1,613.10...	\$ 42.450	Ton	Unit price	0.000	38,000

Prepare project for Execution

Before you can initialize the budget, you need to change the phase of the project from pre-execution to execution. When the Estimate is published, it will be published to the Platform project with the estimate it has been associated with. Prior to publishing the Estimate, you will want to change the status of the Platform project to **New**, to indicate that the project is moving into execution so the control budget can be initialized. Navigate to Project Suite > **Project Details** to view or change the status of the project.

Project details

* Project ID: 102447

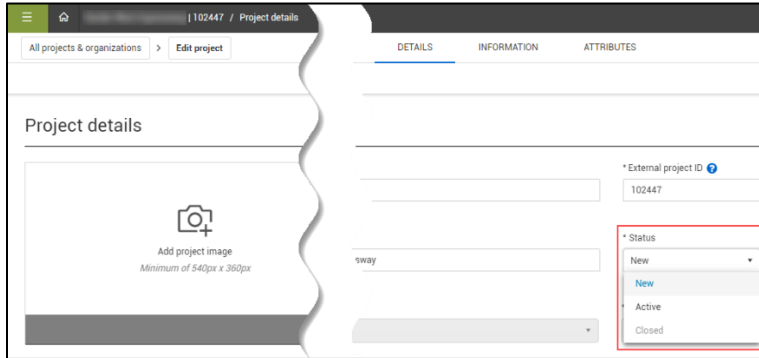
* External project ID: 102447

* Name: Border West Expressway

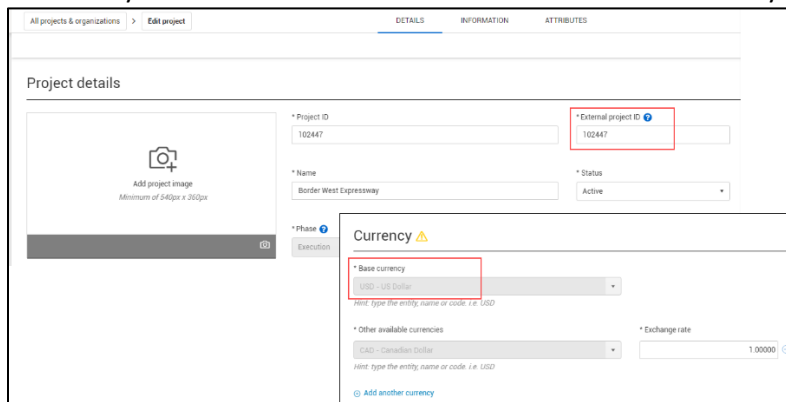
* Phase: Execution

* Status: **New**

1. In Cloud platform, the project status must be set to **New** before executing the Publish Estimate to a New Project process.
2. You can set the appropriate project status by navigating to Project Suite > Project Details > **Details**. Select the Status drop-down and choose the correct status.



3. Currency in Cloud Platform must match with Estimate currency.



NOTE: It is not required to have the account codes in Estimate, but using account codes in Estimate can help to ensure accurate benchmarking functionality. The account codes can be applied to the WBS items in Control after the publish.

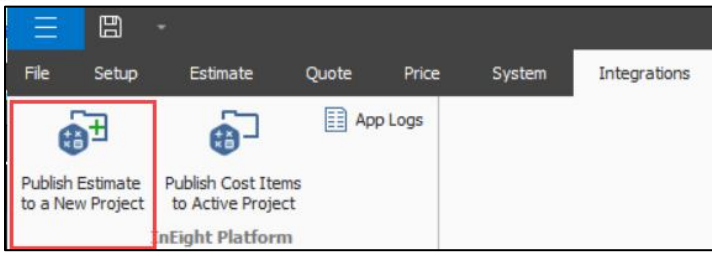
4. Click **Save** to create the project.

Steps to Publish Estimate to a New Project

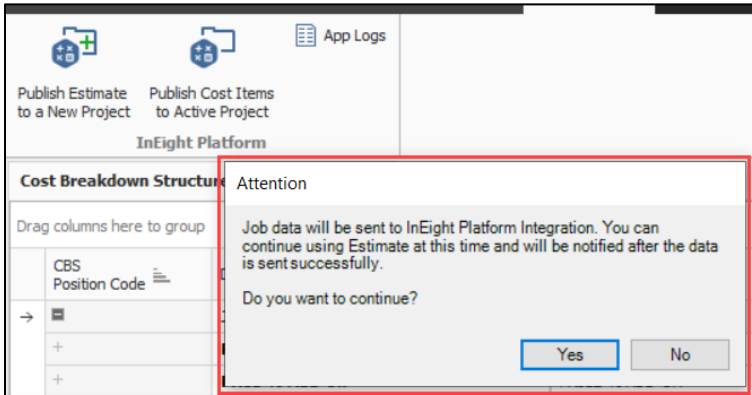
Publishing Estimate to a new project in Control will remove all cost items, pay items, and change orders that previously existed in the project when the project is re-imported.

Use the following steps to publish an entire Estimate job to Cloud Platform.

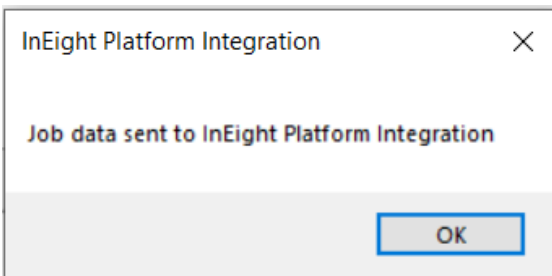
1. In Estimate, open the job you want to publish.
2. Navigate to the **Integrations** ribbon tab, and then select **Publish Estimate to a New Project**.



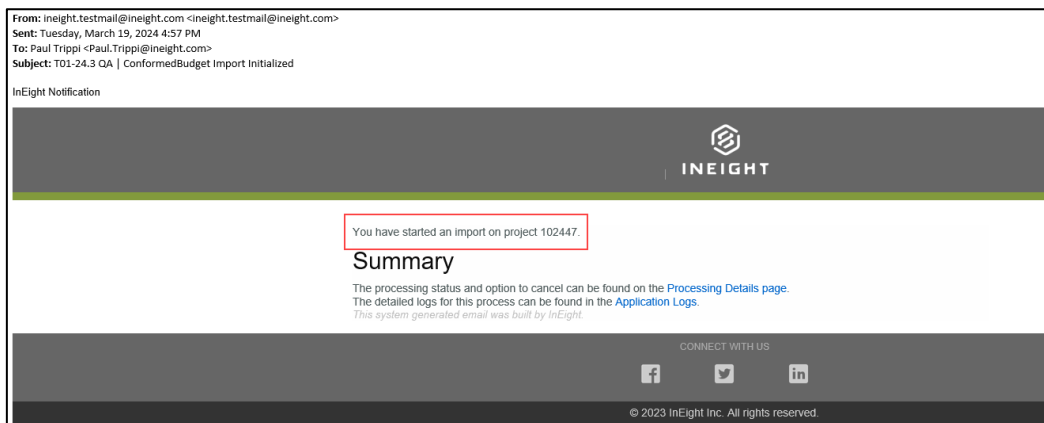
An attention dialogue box shows, asking if you want to send job data to Platform.



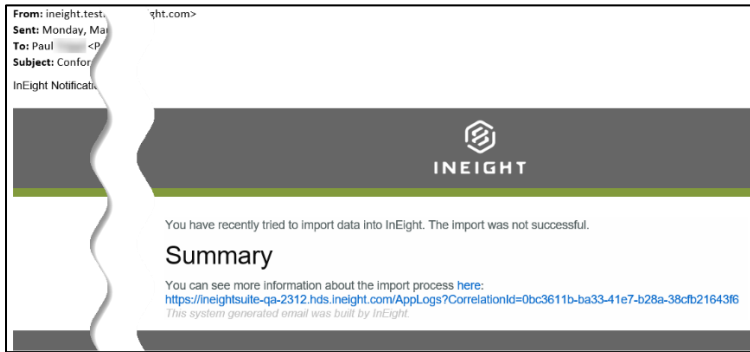
3. A confirmation dialogue box shows when the job data is sent to Platform. Select **OK**.



The integration is now running and could take several minutes depending on the size of the estimate. You will receive the below email, letting you know that you have started an import.



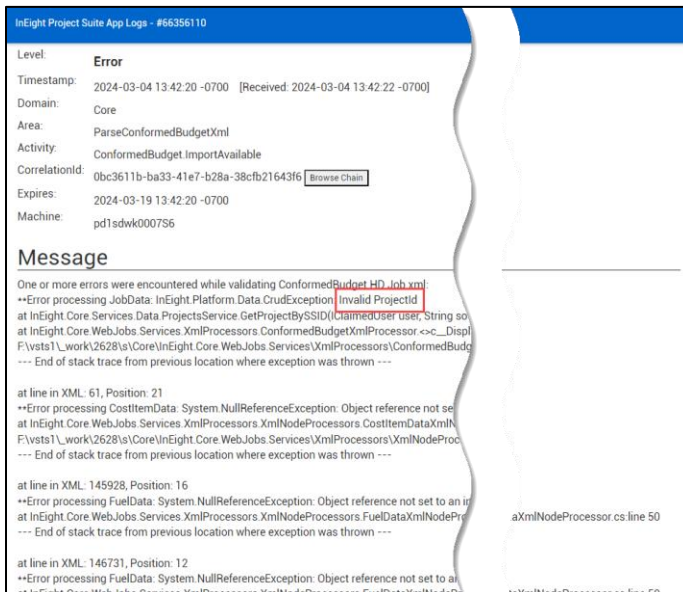
- If the import was unsuccessful, and there are errors, you will receive an email like the image below. Click on the link shown under **Summary** to view the errors.



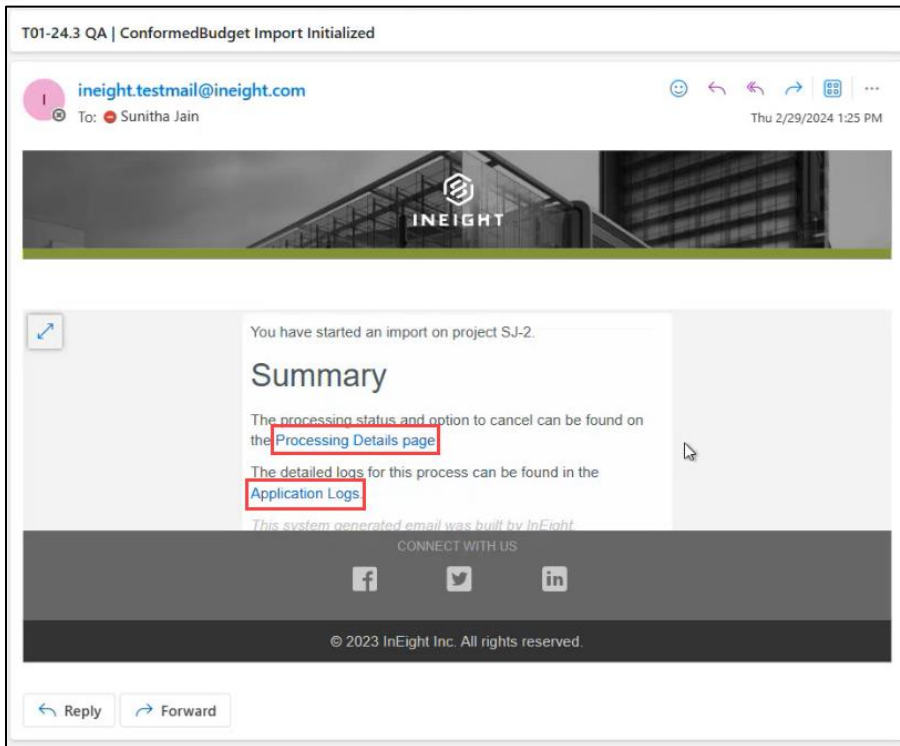
- Click **Details** for unsuccessful integration process on the far left of the AppLogs form in Project Suite.

	Lev...	Time	Domain	Area	Message	ExceptionMessage
Details	Error	2024/03/04 1:42:20 PM	Core	ParseConformedBudg...	One or more errors were encountered	...g JobData: InEight...
Details	Warn	2024/03/04 1:42:21 PM	Estimate	ProcessOrchestratedl...	Import failed. One or more errors we...	**Error processing Jo...
Details	Error	2024/03/04 1:42:21 PM	Estimate	ProcessOrchestratedl...	Job ended unsuccessfully. One or p...	...t HD Job xml: **Error p...

- Review the **AppLog detail** to help troubleshoot any errors.



- If the integration is in the process of loading, you will receive an email stating that you have initiated an import. You have the option to view the processing status and to also cancel the import in AppLogs.



Click the Processing Details link on the email, (which takes you to Suite Administration > Import History > **Import Details**) to view the processing status.

Suite administration / Import history

QA 23.12

Import history > Import details

Cancel

Last updated: 03/04/2024 2:46:36 PM

	Task ID	Descriptor	Status	Message	Total records
<input type="checkbox"/>	69993	HDJobProperties	Completed	Import succeeded or no errors captured, the status is : Completed	1
<input type="checkbox"/>	69994	ProjectFuelType	Initiated	Import has been parsed to a dto (ProjectFuelType).	3
<input type="checkbox"/>	69995	CostCurve	Initiated	Import has been parsed to a dto (CostCurve).	7
<input type="checkbox"/>	69996	CostItemResource	Initiated	Import has been parsed to a dto (CostItemResource).	3
<input type="checkbox"/>	69997	CostItem	Initiated	Import has been parsed to a dto (CostItem).	15

Click on the Import Log icon to view a full list of import logs.

The screenshot shows the 'Suite administration / Import history' page. On the left, there is a table with columns 'Task ID' and 'Descriptor'. On the right, there is a 'Cancel' button and a search icon. Below that, a notification says 'Last updated: 03/04/2024 2:48:36 PM'. A red arrow points to the 'Import logs' link. Below the link is another table with columns: 'Log', 'Timed app', 'Log level', 'Message', and 'Exception message'.

Log	Timed app	Log level	Message	Exception message
<input type="checkbox"/> 66356783	03/04/2024 2:44:11 PM	Warn	Parsed import type [InEight Ext...	
<input type="checkbox"/> 66356784	03/04/2024 2:44:11 PM	Warn	Parsed import type [InEight Ext...	
<input type="checkbox"/> 66356785	03/04/2024 2:44:11 PM	Warn	Parsed import type [InEight Ext...	
<input type="checkbox"/> 66356786	03/04/2024 2:44:11 PM	Warn	Parsed import type [InEight Ext...	
<input type="checkbox"/> 66356787	03/04/2024 2:44:11 PM	Warn	Parsed import type [InEight Ext...	
<input type="checkbox"/> 66356791	03/04/2024 2:44:27 PM	Warn	Error deserializing data from htt...	Cannot deserialize the current J...

Alternatively, you can **click** the Application Logs link to view the same logs as described in step 5.

If the integration process is successful, you will receive an Import Success email.

The email notification is from 'ineight.testmail@ineight.com' and is dated Monday, March 4, 2024 2:51 PM. The subject is 'ConformedBudget Import Success'. The body of the email includes the InEight logo and the following text:

You have recently tried to import data Training Job (Training Job). The import was successful.

Summary

You can see more information about the import process here:
<https://ineightsuite-qa-2312.hds.ineight.com/AppLogs?CorrelationId=bf47a334-1444-4900-a6f0-ced90d02be61>
 This system generated email was built by InEight.

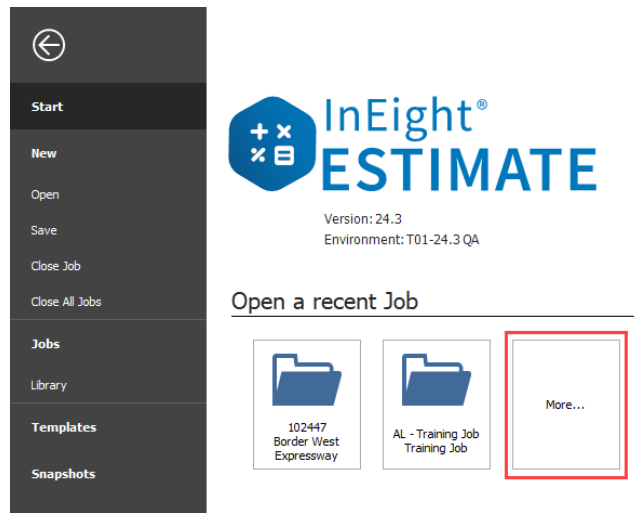
NOTE: There's no validation during the send operation from Estimate. if the job is successfully received by Cloud Platform, you will receive the above message.

Steps to Publish Cost Items to Active Project

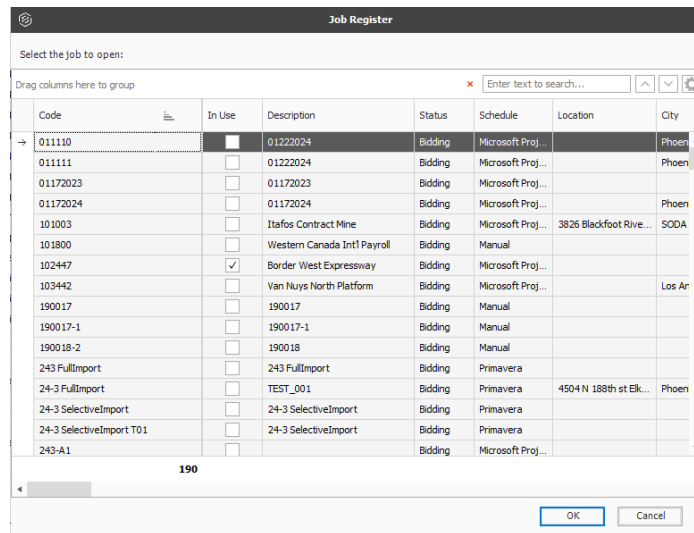
After an Estimate has been published and progress is being tracked against a budget, it's not uncommon for new scope to be added to a project as the work progresses. It's possible to estimate the cost of this new scope using Estimate and then publish the newly estimated costs to a project in execution by using the **Publish Cost Items to Active Project** command. This can be accomplished either by modifying the existing estimate already associated with the Platform projects or from a

brand-new estimate that is not associated with the Platform project. Once the new estimate data is published, the new scope can be selectively imported into the Control budget from within Control. The following steps illustrate this process.

1. Select an active project using the **More** button on the Estimate Start page.

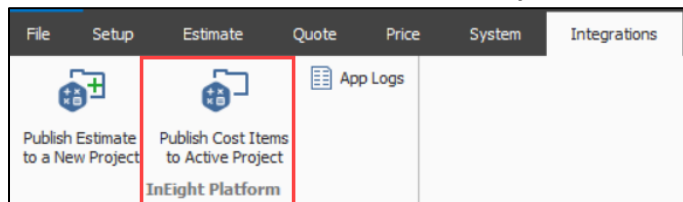


- a. The Job Register shows a list of projects that are active that you can actively push.

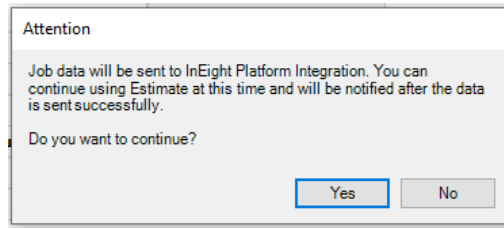


Note: The project ID from Estimate to Control do not have to match in a selective import.

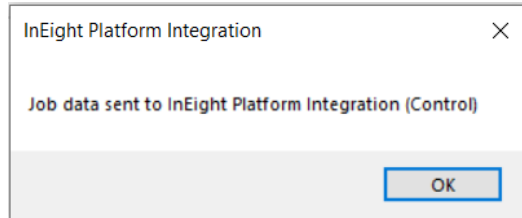
2. In Estimate, on the main ribbon select the **Integrations** tab.
3. Select the **Publish Cost Items to Active Project** button.



- a. This option activates the selective cost item import process from Estimate to Control.
- b. The Attention dialog box appears letting you know that job data will be sent to Platform. Select **Yes**.



- c. The InEight Platform Integration dialog box appears letting you know that job data has been sent.



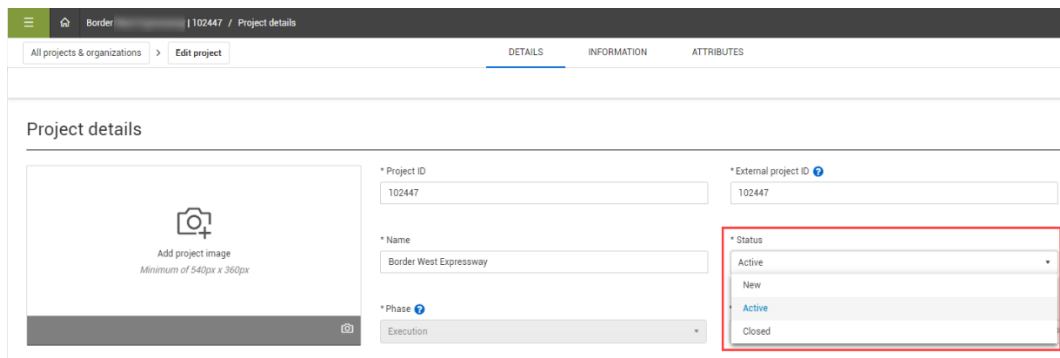
- 4. Click **OK** to close the dialog box.
 - a. The project name from the list will then appear in your Import history as the top line item. Most likely the project is still in a pending status at this point in the import.
 - b. The selective import brings in only new cost items.

NOTE: We cannot guarantee that the CBS position code in Estimate is the same CBS position code your cost item will occupy in Control. We do keep the same type of hierarchy structure.

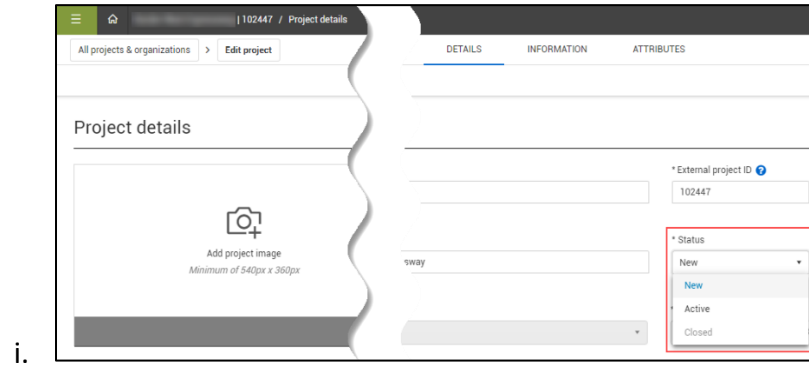
For example, if you were importing every cost item from CBS position code 1.2 and below, you would still see that hierarchy. However, it would be placed under the lowest position available in Control. You can then move it around to your desired CBS position.

If you had cost item codes of 1, 2, 3, and 4 in Control and you wanted to import the cost item code 1.2, that cost item would most likely go to a CBS position of 5 unless your settings specified that you cannot create a new level 1 cost item CBS position code.

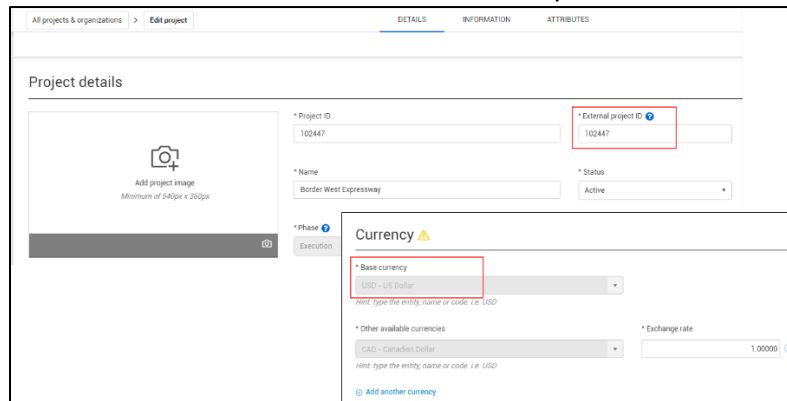
When an Estimate is published, it will be published to the Platform project with the estimate that it has been associated with. Prior to publishing the Estimate, you will want to change the status of the Platform project to **Active**, to indicate that the project is moving into execution so the control budget can be initialized. Navigate to Project Suite > **Project Details** to view or change the status of the project.



1. In Cloud platform, the project status must be set to **Active**, before executing the Publish Cost items to Active Project process.
2. You can set the appropriate project status by navigating to Project Suite > Project Details > **Details**. Select the Status drop-down and choose the correct status.



3. Currency in Cloud Platform must match with Estimate currency.

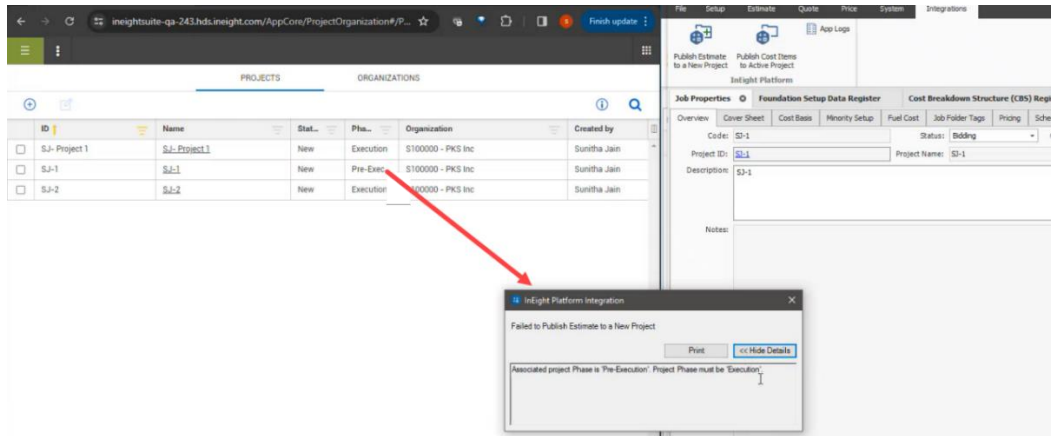


NOTE:

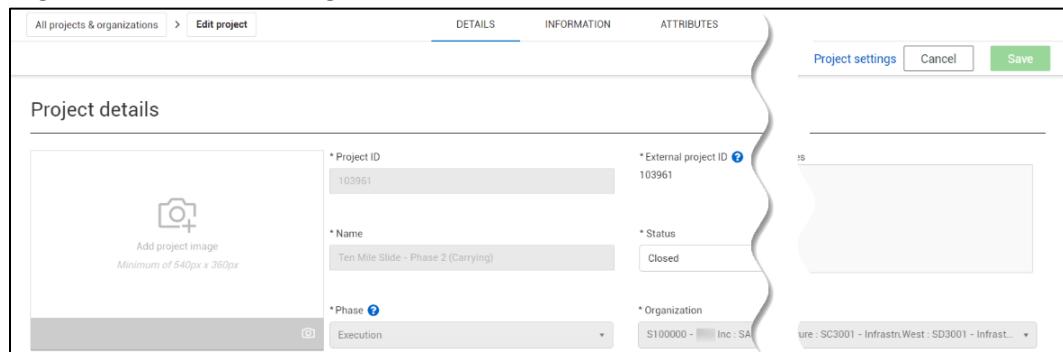
It is not required to have the account codes in Estimate. The account codes can be applied to the WBS items in Control after the publish.

4. In Platform, the project must be created first before creating the estimate in Estimate.
 - a. Project ID – Enter the Project ID
 - b. External Project ID – Enter the External Project ID (must match the Job ID in Estimate)
 - c. Project Name – Does not have to match the ID, or the project name in Estimate
 - d. Status – Set to **New** when executing the Publish Estimate to a New Project process. The budget becomes initialized when the status is set to New. Set to **Active** when executing the Publish Cost Items to Active Project Status.
 - e. Phase - The phase status must be in **Execution** phase prior to publishing. This should happen before the budget is published. If the phase status is not in an Execution status, the following error will show the error below.

- f. If the Project ID needs to change, or you need a new project for execution, you can copy the Estimate over, and change the phase. Makes sure the External Project ID matches with the ERP project ID.



- g. Organization – select an organization from the list



- h. Currency – set the project currency to match the currency set for the job in Estimate.
5. Click **Save** to create the project.
- a. You must create a project, and the External Project ID in Cloud Platform must match the Job Code in Estimate.
 - b. All the units of measure assigned to cost items and resources must match the units of measure in Cloud Platform. It is recommended that you open the Job’s Foundation and Setup Data register and check, line by line, the units of measure in both systems.

Unit of Measure Name	Measurement Type
Acre	Area
Bag	Unit
Barrel	Unit
BF	Unit
BGSF	Area
Cal Day	Unit
Can	Unit

Name	Measurement type
Acre	Area
Bag	Unit
Barrel	Unit
BF	Unit
BGSF	Area

- c. The project must have a status of **New**.



Data Included and Excluded from Estimate – Publish Estimate to a New Project

Purpose

Check the status of the import file in Cloud Platform.

Summary

The status of the full import shows if the import is successful, pending, or failed.

Considerations

The full import will not import everything in Estimate. The full import will import your current estimate information. The Estimate XML import will bring over the following information:

- CBS cost items
 - Control uses pay hours and not work hours when populating current estimate man-hour values, as pay hours drive current estimate costs. You may see differences in current estimate man-hours if pay hour and work hours rules are not aligned. Control uses pay hours to populate current estimate man-hours
 - Forecast takeoff quantity and Current estimate values
 - All attributes on a cost item including:
 - Tags
 - User defined fields
 - Account codes
 - Schedule ID
 - Start Date
 - Finish Date
 - WBS phase code
 - Resources associated to a cost item their attributes and cost
 - CBS hierarchy
 - This includes all cost items in the Cost Breakdown Structure organized in the same order before the import is activated.
- Pay items
 - Attributes
 - Tags
 - User Defined
 - Billing Method
 - Total Price
 - Pay Quantity
 - Unit Price

Forecast T/O Qty

- Estimate Resources
 - Type
 - Billing Rates
 - Costs
 - Attributes
- Master data
 - Tag field values
 - Fuel

These attributes will import without an issue if you have the attributes set up correctly in both Estimate, Cloud Platform and Control.

The publish process will not bring over the following information:

- For cost items with a cost source type of detail, the pay hours will be used for the current estimate manhours, not the work hours
- Depending on the version of Estimate and Control you are on, if you have suspended cost items in Estimate may or may not be handled. In older versions, it is suggested to remove all suspended cost items from Estimate. However, Control will ignore the suspended cost items when publishing the budget.

Estimate Breakdown Structure (CBS) Register		Foundation Setup Data Register					
Account Codes	Tags	Work Breakdown Structures	Quantity Roll-Ups	Quote Group Tags	Units of Measure	Currencies	Res
drag columns here to group							
Code	Description	Register	Field				
Tag 10	Tag 10						

- If there are maintenance manhours included from the Estimate to Cloud Platform push, the maintenance manhours may not be included in some of the CE Mhr calculations in Estimate. However, they would be included in CE Mhr calculations in Control.



- If an estimate resource of type rented construction has maintenance against it, the maintenance cost is displayed in the construction equipment cost category in Control. In Estimate it is in the rented equipment cost category.

Troubleshooting

Import History

Purpose

Reviewing failed import information.

Summary

The Estimate import can fail. The Cloud Platform Import details show exactly what failed in the Estimate full import.

Considerations

On a resource, many failures could be observed if a resource has more than 11 characters in front of the decimal. Cloud Platform only accepts 11,11 for decimal values/numeric values.

A full import could also fail due to an account code assigned in Estimate that is not in the corporate list in project suite. The full import might fail because there is nothing to roll up into the account code.

Quick Steps

1. If the full import failed, select the line item with the **project title** of the failed Estimate import.
 - The Import logs appear.
2. In the Log level column, select the **inverted pyramid**.
3. In the drop down, select **Contains**.
4. Type in **Error** in the empty text box to filter down to only errors from the failed import.
 - You can view the full error description in the **Exception message** column.
 - In the Import details tab, you can see where the import failed.

NOTE:

An email is sent to you that informs you if the import succeeds or fails based on the email address from your user login information.

5. Go to the Descriptor column to see a summarized description of the failed imported item.
6. Go to the Status column to see which step Completed or Failed.
7. Hover over the **details** in the Message column to see the full description of the failed imported item.

What's Next

See also the selective import topics for more information on importing Estimate cost items to Control.

Troubleshooting AppLogs

To troubleshoot the send, go to the AppLogs page in Project Suite. You can navigate to the AppLogs based off the URL in the email that you receive.

NOTE: You will need the DevOps Admin role to access the applogs.

In the applogs, you're looking for **Error** level messages (**Warn** level messages can be ignored). The **message** field should indicate the problem:

HD Suite App Logs				
EXPORT TO EXCEL				
	Level	Domain	Area	Message
Details	Warn	Core	ProcessOrchestratedImp	Import failed. Target project [SourceSystemId/SourceSystemName=Training Job/ConformedBudget] not found in HDSuite
Details	Error	Core	ProcessOrchestratedImp	Job ended unsuccessfully. Target project [SourceSystemId/SourceSystemName=Training Job/ConformedBudget] not found in HDS
Details	Error	Plan	Plan Service ::	Bad request.
Details	Error	porting.WebApi	BaseApiController.LogExc	Ineight.Reporting API Exception:
Details	Error	porting.WebApi	BaseApiController.LogExc	Ineight.Reporting API Exception:
Details	Error	porting.WebApi	BaseApiController.LogExc	Ineight.Reporting API Exception:

Job was not created in Suite:

Job ended unsuccessfully. Target project [SourceSystemId/SourceSystemName=Training Job/ConformedBudget] not found in HDS

UOM does not exist:

CostItemResource [Plug] referenced Unit of Measure [LT] that was not found in supported Units of measure CostItemResource [Plug]

For account codes and UOMs, clicking on **Details** will open the details page which will list all the missing items:

Message

Job ended unsuccessfully. CostItemResource [Plug] referenced Unit of Measure [LT] that was not found in supported Units of measure
CostItemResource [Plug] referenced Unit of Measure [CF] that was not found in supported Units of measure
CostItemResource [Plug] referenced Unit of Measure [TN] that was not found in supported Units of measure
CostItemResource [Plug] referenced Unit of Measure [TN] that was not found in supported Units of measure
CostItemResource [Plug] referenced Unit of Measure [TN] that was not found in supported Units of measure
CostItemResource [Plug] referenced Unit of Measure [TN] that was not found in supported Units of measure
CostItemResource [Plug] referenced Unit of Measure [TN] that was not found in supported Units of measure
CostItemResource [Plug] referenced Unit of Measure [TN] that was not found in supported Units of measure
CostItemResource [Plug] referenced Unit of Measure [TN] that was not found in supported Units of measure
CostItemDetail [bd5263578407496f97f472728c2ec73d] referenced Unit of Measure [LT] that was not found in supported Units of measure
CostItemDetail [bd5263578407496f97f472728c2ec73d] referenced Unit of Measure [LT] that was not found in supported Units of measure
CostItemDetail [bd5263578407496f97f472728c2ec73d] referenced Unit of Measure [LT] that was not found in supported Units of measure
CostItemDetail [cd534af7a6cc45ee93d64ed12082e2d9] referenced Unit of Measure [CF] that was not found in supported Units of measure
CostItemDetail [cd534af7a6cc45ee93d64ed12082e2d9] referenced Unit of Measure [CF] that was not found in supported Units of measure
CostItemDetail [cd534af7a6cc45ee93d64ed12082e2d9] referenced Unit of Measure [CF] that was not found in supported Units of measure
CostItemDetail [4543dac4f7bd4bd29ae076ce63dc9272] referenced Unit of Measure [TN] that was not found in supported Units of measure

Troubleshooting Publish Estimate to a New Project

Purpose

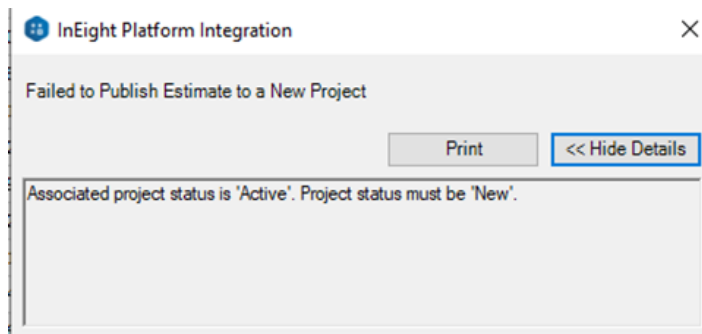
Checking the publish estimate to a new project import status in Control.

Summary

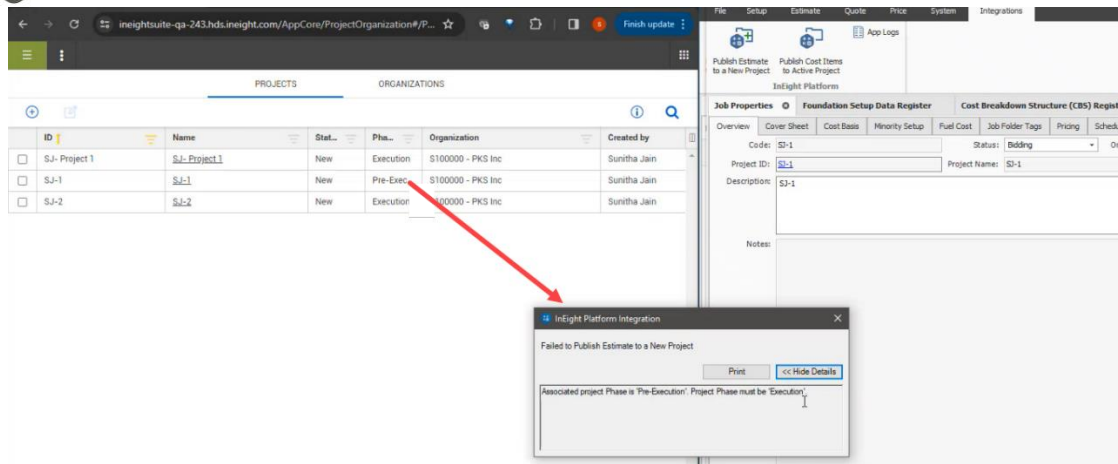
After activating the publish estimate to a new project from Estimate, you can check the status of the import in Control.

Considerations

- While an import is in process, you will not be able to add any cost items in the CBS.
- The Project Status in Cloud Platform must be set to **New** before executing the publish cost items to a new project process. If not, the following error message will show.

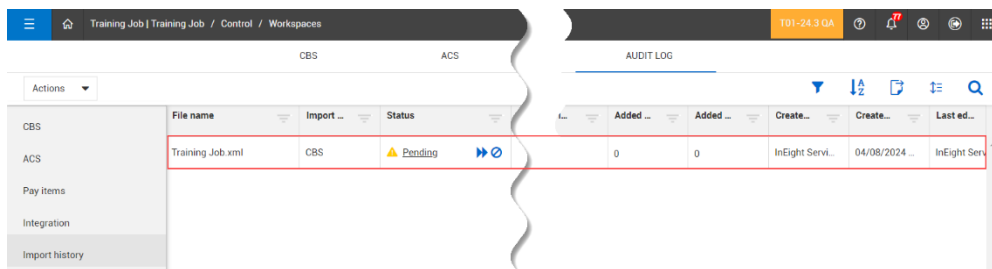


- If the Project ID needs to change, or you need a new project for execution, you can copy the Estimate over, and change the phase. Makes sure the External Project ID matches with the ERP project ID.

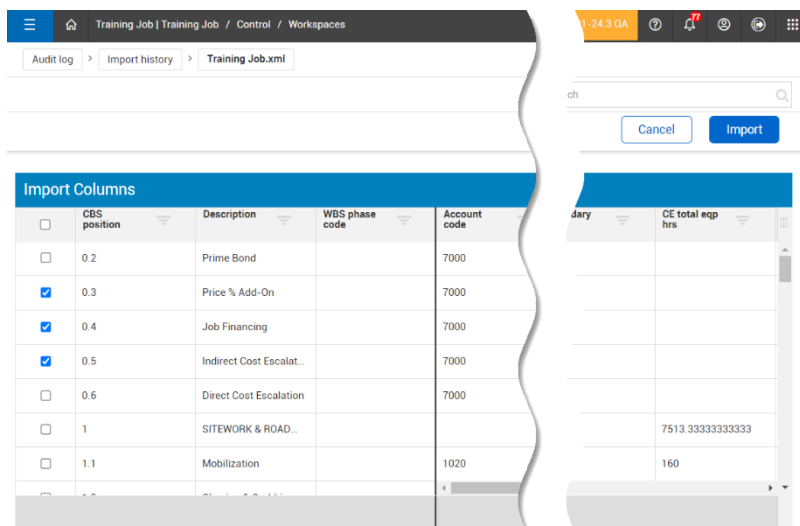


Quick Steps

1. In Control, navigate to Control > Workspaces > Audit **Log** tab.
2. Select **Import history** in the left pane.
 - a. The new file name recently imported should include the label **.xml** at the end of the name as it was an XML file that was imported into Control.
 - b. The line item shows a status of Pending and has not updated anything in CBS yet.



3. Select the **Pending** status for the newly imported line item.
 - a. A new data box shows all the cost items in the imported Estimate job.



4. Select the cost items you want to keep in Control. If you decide you want to select only a few cost items, select the **check box** next to your desired cost items.
5. Then select **Import**. You can also select all using the check box just underneath the Import Columns data box title.
6. When a selective import is still pending and you attempt to make those changes, a dialog box appears stating that: **This project is currently locked due to an import in process**.
 - a. You are prohibited from going into the CBS to add new cost items or activate any syncs because Control is still processing where those cost items can be placed in the hierarchy.
7. Go to the Import history to view the import in process.
 - a. The Import history does not refresh automatically. You have to manually refresh your screen to see what the updated process is.

NOTE:

An email is sent to you that informs you if the import succeeds or fails based on the email address from your user login information.

Data Included and Excluded from Estimate – Publish Cost Items to Active Project

Purpose

Importing information from Estimate to Control using the selective import option.

Summary

The selective import from Estimate imports your current estimate information into Control. You would activate a selective import to price out a large change order. You would use Estimate to complete the initial estimating and then import some or all the cost items into Control for executing that large change order.

Considerations

The selective import will not import everything in Estimate. This import will import the same attribute information from cost items that the full import brings in. The selective import will bring over the following information:

- Cost item Unit of measure
- Forecast takeoff quantity
- Description
- Resources associated to a cost item
- Tags

- User defined fields
- CBS tag number option
 - As long as you had a valid option in both Estimate and Control, this attribute will be mapped correctly.
- Current Estimate information

The selective import will not bring over the following information:

- CBS position
- WBS phase code if it is auto numbered – if it turned off, then it comes over
 - If you have the WBS phase code set to auto numbering, Estimate imports the next WBS phase code in line.
- Current budget – will require a budget move or contract adjustment if you want it included
- Forecast method – defaults to current estimate

What's Next

See the Checking selective import status topic to view if the import completed, is pending, or failed.

Troubleshooting Publish Cost Items to Active Project

Purpose

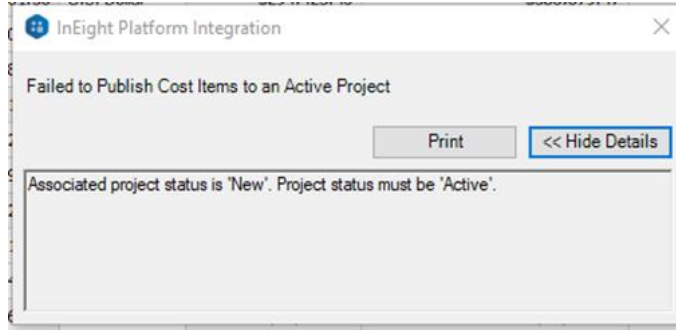
Checking the selective import status in Control.

Summary

After activating the selective import from Estimate, you can check the status of the import in Control.

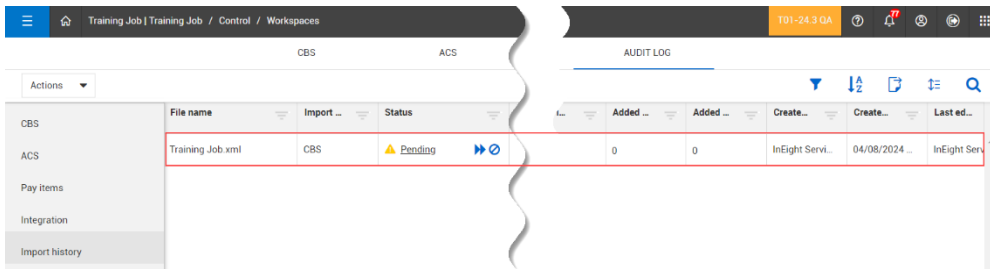
Considerations

- While an import is in process, you will not be able to add any cost items in the CBS.
- The Project Status in Cloud Platform must be set to **Active** before executing the publish cost items to active project process. If not, the following error message will show.

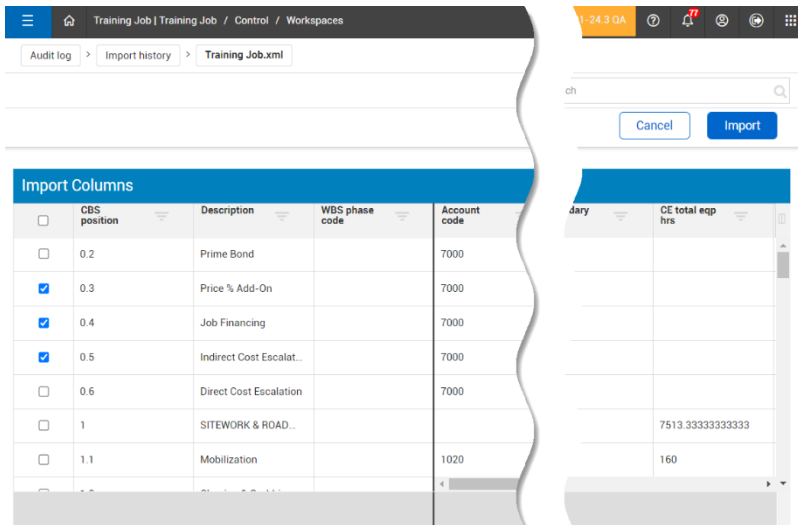


Quick Steps

1. In Control, navigate to Control > Workspaces > Audit **Log** tab.
 2. Select **Import history** in the left pane.
- a. The new file name recently imported should include the label **.xml** at the end of the name as it was an XML file that was imported into Control.
 - b. The line item shows a status of **Pending** and has not updated anything in CBS yet.



3. Select the **Pending** status for the newly imported line item.
- a. A new data box shows all the cost items in the imported Estimate job.



4. Select the cost items you want to keep in Control. If you decide you want to select only a few cost items, select the **check box** next to your desired cost items.
5. Then select **Import**. You can also select all using the check box just underneath the Import Columns data box title.

6. When a selective import is still pending and you attempt to make those changes, a dialog box appears stating that: **This project is currently locked due to an import in process.**
 - a. You are prohibited from going into the CBS to add new cost items or activate any syncs because Control is still processing where those cost items can be placed in the hierarchy.
7. Go to the Import history to view the import in process.
 - b. The Import history does not refresh automatically. You have to manually refresh your screen to see what the updated process is.

NOTE:

An email is sent to you that informs you if the import succeeds or fails based on the email address from your user login information.

What's Next

See the topic [Cost Item Setup](#) to adjust the position of cost items in the CBS hierarchy structure.

Adjusting the CBS Position – Publish Cost Items to Active Project

Purpose

Adjust the CBS position of cost items from the selective import.

Summary

In the selective import, you can adjust your CBS cost item positions and move your structure around. This is the last step before the import is complete.

Considerations

Some adjustment of the CBS is required as we cannot guarantee that the cost items brought over will show in the same CBS position code numerical order as it was in Estimate. However, it will be structured the same. For example, a level 1 and a level 2 cost items will not change switch the order in which they were organized. Even if those cost items turn into level 3 and level 4 cost items after being imported into Control, they will still appear with the same data order as level 1 and level 2 cost items had in Estimate.

The selective import lets you choose which cost items you want to import to Control. You can see the selective import process in the Import history.

Quick Steps

1. After the selective import has completed successfully, a dialog box appears stating **Import complete. Would you like to adjust the CBS position for the updated and/or newly imported cost items?**
2. Select **Adjust CBS position**.
 - a. If you selected to **Close**, the cost item will instead appear at the bottom of your hierarchy structure.
3. A window appears. Drag and drop your cost items to your desired CBS position in the hierarchy structure.
4. Select **Save** in the upper right to save the CBS cost item position changes.

What's Next

After the selective import, if they didn't want those cost items, they would have to delete them in Control.

CBS Position Hierarchy Settings - Publish Cost Items to Active Project

Purpose

Configure CBS position hierarchy settings.

Summary

There is a setting in Control, similar to Estimate, where you can decide the level you want to have a cost item start after an import has been activated.

Considerations

This setting can be used if you do not want anyone else to create any more level 1 cost items in the hierarchy.

Quick Steps

1. In Control, go to the Suite Administration drop down and select your **current project name**.
2. Under the Project sub-section, select **Settings**.
3. Under the Control settings, go to the sub-section **Tasks**.
4. Go to the **Maintain CBS Structure at a specific level** slider bar.
5. Switch the slider bar to **Yes**.
6. Then under the section Level to Maintain CBS Structure at, enter the **number** to maintain.

- a. If you enter in the number 1, then the cost item phase code can no longer be created at a level one when you do a selective import. It can then only be created at a level 2 which is at the lowest level available for the hierarchy.
7. If the slider is switched to **No**, then the cost item will be created at a level 1.

What's Next

Move around your cost items in the hierarchy if they do not show in the same order as they were in Estimate.