

InEight Estimate Integration

InEight Change



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	24-SEPT-2024	Initial Release

Contents

Introduction..... 4

Publish cost items for Change Management..... 4

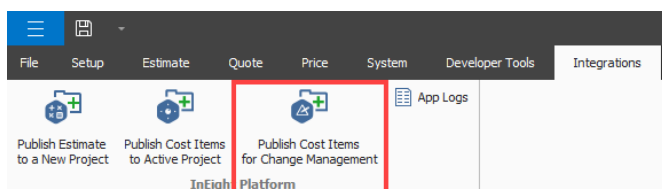
Import Cost Items for Change Management..... 5

 Validate published cost items..... 5

 Import published cost items to Change..... 5

Introduction

This document provides guidance and requirements about the integration of InEight Estimate cost items and InEight Platform (Change Management). Instructions are provided for the Publish Cost Items to Change Management process with the objective of managing change orders in InEight Change.



NOTE: Although all cost items are published, only Plug sourced cost items import to Change.

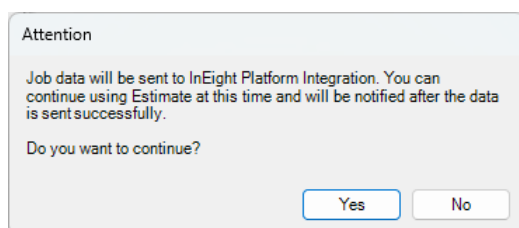
Platform project settings must match the linked Estimate job to publish successfully. For more information about setting up the project, see the **Create Platform Project** section in the [Estimate Integration to Cloud Platform and Control](#) document.

Publish cost items for Change Management

Publishing cost items from Estimate imports all cost items for Change Management. The table below shows which details are published and not published for cost items:

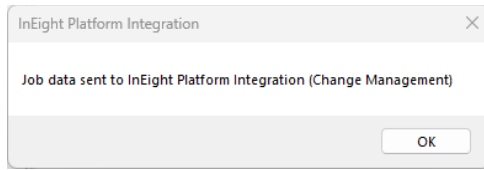
Published	Not published
UoM	WBS phase codes
Forecast takeoff quantity	Resources associated to a cost item
Description	Tags
Current Estimate information	User-defined fields
Plug sourced cost items	Detail sourced cost items

1. On the Estimate integrations tab, click **Publish Cost Items for Change Management**. The Attention dialog box opens.



2. Click **Yes** in the Attention dialog box to continue the process of publishing the cost items.

When the process is completed, an InEight Platform Integration dialog box shows, confirming that the publishing has completed.



3. Click **Ok**.

Import Cost Items for Change Management

In Change, you can go to the Import history page from the Cost item pricing page to view and validate the cost items imported from Estimate. You can select the import file to view the cost items and select which cost items to import into Change.

Validate published cost items

You can check the status of published cost items for a new or existing issue in Change. In the Cost item pricing or the Pricing page of an issue, go to Actions > **View import history**.

Change management > Issue - 1 - Issue B1 > **Import history**

File name	File location	Status	Total records	Errors	Total import...	Last imported by	Last modified on
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/06/2024 08:10 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/05/2024 02:14 PM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/05/2024 09:51 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/05/2024 09:05 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/05/2024 08:57 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	08/01/2024 09:29 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	7	0	View more details	08/02/2024 07:45 AM
101003 - Training Job - Maric...	InEight Estimate	 Complete	11	0	11	View more details	08/01/2024 08:29 AM

The published data shows as a new line item at the top of the page. The File name column shows the Estimate project ID and description (when a description exists), and the Status column shows as *Pending*.

Import published cost items to Change

You can import cost items published from Estimate to Change on the View import history page. The import file shows *Pending*, and the cost items show with an Import status of *Error* because a Cost pricing item has not been assigned to cost items. Cost pricing must be assigned to cost items prior to importing to Change.

After you import the published cost items to Change, the published file changes status to *Complete*. When the status is complete, you can no longer use the file to import additional cost items.

NOTE: Although all cost items are published, only Plug sourced cost items import to Change.

1. Select an existing or new issue from the Issue Log page.
2. Select the **Pricing** tab.
3. Select **Actions**, and then click **View import history**.
4. Click the **Pending** link to open and view the published cost items.

Change management > Issue - 1 - Issue B1 > Import history

File name	File location	Status	Total records	Errors	Total import...	Last imported by	Last modified on
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/06/2024 08:10 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/05/2024 02:14 PM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/05/2024 09:51 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/05/2024 09:05 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	09/05/2024 08:57 AM
101003 - Training Job - Maric...	InEight Estimate	 Pending	11	12	0	InEight Service Account	08/01/2024 09:29 AM
101003 - Training Job - Maric...	InEight Estimate	Pending	11	7	0	Sharon Scott	08/02/2024 07:45 AM
101003 - Training Job - Maric...	InEight Estimate	Complete	11	0	11	Sharon Scott	08/01/2024 08:29 AM

5. Select a Cost pricing item for the cost items you want to import. Use the checkbox on the left to select individual items.

Change management >

☐

Cancel import

Import

	Import status	Adjusted cost	Unit cost
☒	Error	\$ 42,000.00	\$ 1.40
☐	Pending	\$ 1,500.00	\$ 1,500
☐	Pending	\$ 3,500.00	\$ 3,500
☒	Pending	\$ 2,900.00	\$ 2,900
☒	Pending	\$ 2,100.00	\$ 2,100
☐	Error	\$ 1,000.00	\$ 1,000
☐	Error	\$ 1,800.00	\$ 1,800
☒	Pending	\$ 2,100.00	\$ 2,100
☒	Pending	\$ 3,300.00	\$ 3,300
☒	Pending	\$ 3,400.00	\$ 3,400
☐	Error	\$ 1,000.00	\$ 1,000

To import all items, a Cost pricing value must be selected for all items, and no selection needs to be made using check boxes.

6. Select **Import** to import cost items.

When the import is completed, an email is sent with the results. You can view the imported cost items in the issues' cost item Pricing page. The imported file can only be consumed once. After you import cost items to an issue, the imported file's status shows *Complete*, and any remaining cost items are no longer available to import to another Change issue. You must publish the cost items again from Estimate.