

InEight Control Estimated Actuals



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-May-2022	Initial publication
2.0	21-July-2022	Change to estimate actuals settings to only enable actual types for either Control or Progress.

Contents

Estimated Actuals Overview	4
Rationale	4
Settings	5
Enabling actuals for Progress	8
Enabling actuals for Control	8
Daily plan steps for estimating actuals.....	9
Daily Planning	9
Daily plan execution	11
Daily plan review and approval	11
CBS estimated actuals columns	12
Estimated actuals process overview	13
Reversing estimated actuals.....	13
Estimated actuals calculations.....	15

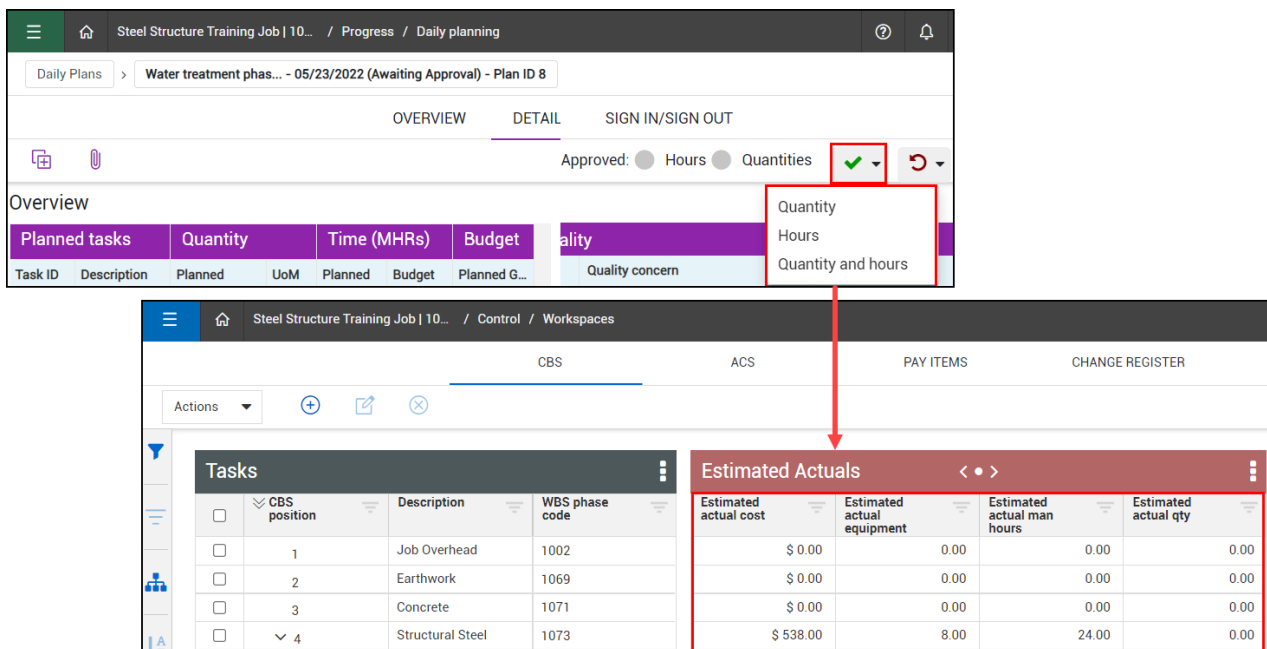
Estimated Actuals Overview

Control's Estimated Actuals was initially introduced in version 21.3 to let you view real-time Progress quantities, man-hours, equipment hours, and cost in Control's Cost Breakdown Structure. You can also generate estimated cost, man-hours, and equipment hours from quantities claimed in Control. This feature lets you accurately forecast earlier in the project lifecycle.

You can also generate estimated costs based on quantities claimed in Control and InEight Progress or InEight Plan.

When a daily plan is approved in Progress, the estimated hours and costs from the timecard flow into Control as an estimated actual value. This is important because it lets you see real-time progress information in the field.

In the example below, after quantities and hours are approved in Progress > **Daily Planning**, those quantities and hours flow into Control > **Workspaces** as estimated costs and hours.



The top screenshot shows the 'Daily planning' screen for 'Steel Structure Training Job | 10...'. The 'Approved' dropdown is set to 'Quantity and hours'. The bottom screenshot shows the 'Workspaces' screen for the same job, with the 'Estimated Actuals' table highlighted. A red arrow indicates the data flow from the 'Quantity and hours' selection to the 'Estimated Actuals' table.

Estimated actual cost	Estimated actual equipment	Estimated actual man hours	Estimated actual qty
\$ 0.00	0.00	0.00	0.00
\$ 0.00	0.00	0.00	0.00
\$ 0.00	0.00	0.00	0.00
\$ 538.00	8.00	24.00	0.00

Rationale

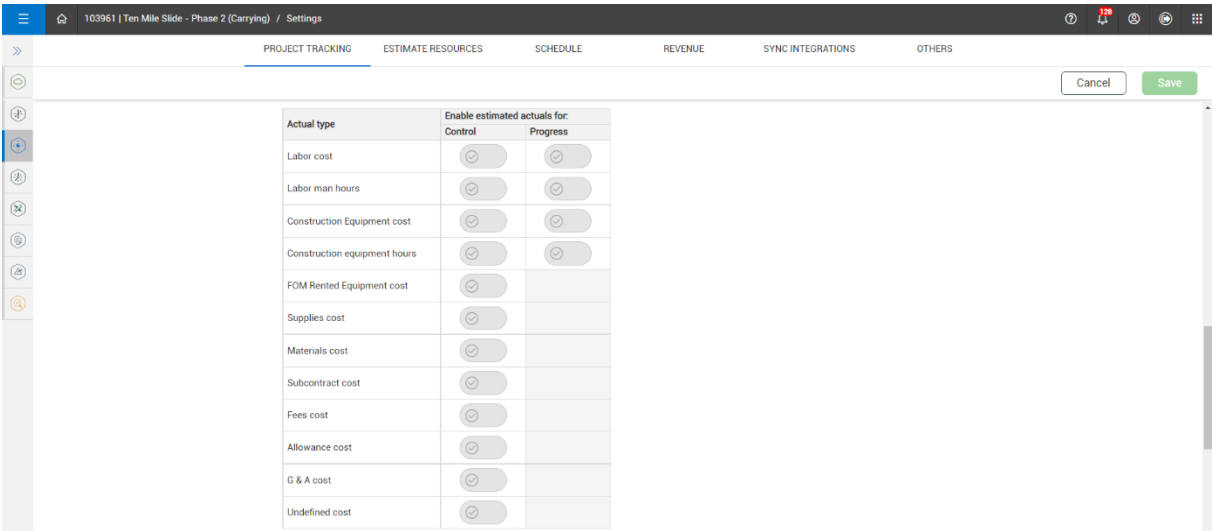
Some customers choose to have payroll run on a monthly or biweekly basis, so hours and costs are often behind. Estimated actuals let you estimate those delayed hours and costs at any time to keep your forecasts and earned values up to date.

You might not have a grace period after month end, so the values from the current week are needed to facilitate forecasting considerations.

API connectivity to ERP systems might not be available to pull in actual values. The actuals values being pulled in from Progress are most likely considered true actuals, and not preliminary actuals. After a period close, you would then need to reconcile via a manual adjustment, if the values are different from the values pulled into Progress.

Settings

You can turn on estimated actuals by navigating to a project, then selecting Settings > Control > **Project Tracking**.



Turn on estimated actuals by switching the toggle to *On*.

Estimated actuals

Turn on estimated actuals:



Actual type	Enable estimated actuals for:	
	Control	Progress
Labor cost		
Labor man hours		

The toggles enable estimated actuals for both Control and Progress.

As a best practice, it is recommended to only select the actual types from the Control column, or the Progress column. Selecting an actual type when both columns are enabled could result in the duplication of records. *Example:* When the labor cost is enabled for both Control and Progress, those hour values could potentially double in Control.

Estimated actuals

Turn on estimated actuals: ☒

Actual type	Enable estimated actuals for:	
	Control	Progress
Labor cost	☒	☒
Labor man hours	☒	☒
Construction Equipment cost	☒	☒
Construction equipment hours	☒	☒
FOM Rented Equipment cost	☒	
Supplies cost	☒	
Materials cost	☒	
Subcontract cost	☒	
Fees cost	☒	
Allowance cost	☒	
G & A cost	☒	
Undefined cost	☒	

Instead, only select actual value types for either Control or Progress. This will ensure that when cost and quantities are claimed, Control will only import the costs and quantities from either Control or Progress, and not both.

Estimated actuals

Turn on estimated actuals:



Actual type	Enable estimated actuals for:	
	Control	Progress
Labor cost	☐	☒
Labor man hours	☐	☒
Construction Equipment cost	☐	☒
Construction equipment hours	☐	☒
FOM Rented Equipment cost	☒	
Supplies cost	☒	
Materials cost	☒	
Subcontract cost	☒	
Fees cost	☒	
Allowance cost	☒	
G & A cost	☒	
Undefined cost	☒	

You can also choose certain actual types and manually turn them to either on or off.

These settings drive where your estimated actuals will come from.

Turn on estimated actuals:



Actual type	Enable estimated actuals for:	
	Control	Progress
Labor cost		
Labor man hours		
Construction Equipment cost		
Construction equipment hours		
FOM Rented Equipment cost		

Enabling actuals for Progress

Using an example for Progress, if you have labor cost and man-hours enabled and there is an approved daily plan, those man-hours flow to Control automatically as estimated man-hours. Then, those man-hours generate an estimated cost based on the operational rates for that resource. In this case, it uses the Standard time rate, the Double time rate, and the Overtime rate.

The same process can happen for construction equipment and equipment hours. For example, if you claim equipment hours in Progress and they are in an approved daily plan, those hours flow to Control as estimated equipment hours. The operational and equipment resources also have a unit cost. Those hours times for that unit cost can then be used to generate an estimated construction equipment cost.

Enabling actuals for Control

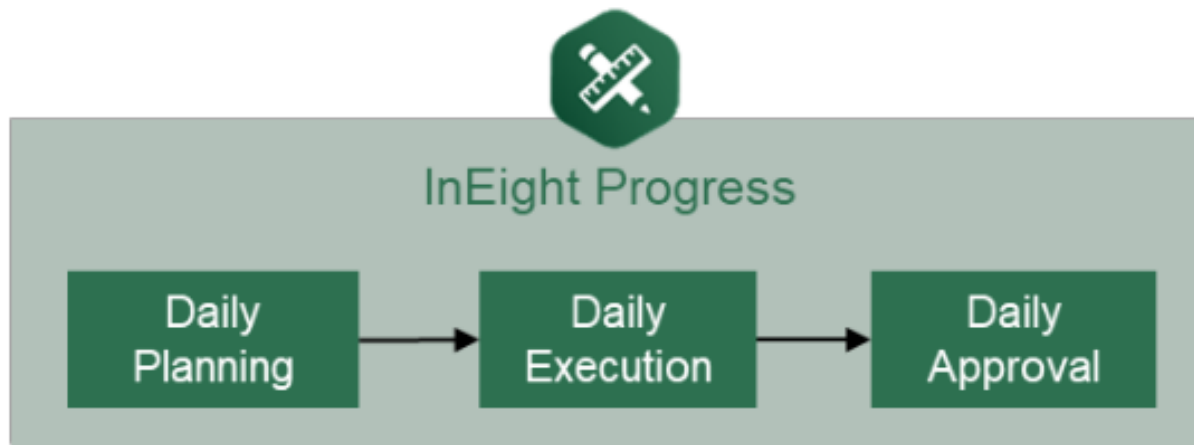
You can generate estimated man-hours and equipment hours when you claim a quantity, and have man-hours and equipment hours enabled, if there are CE amounts on those hours. For example, CE man-hours and equipment hours are estimated when those hours are nonzero, and you claim quantity.

Daily plan steps for estimating actuals

A daily plan must first be created by a project member to specify the tasks to be completed by a given crew, and to ensure that productivity targets are met.

A daily plan first must be created from scratch, from an existing work package, or by copying it from another plan.

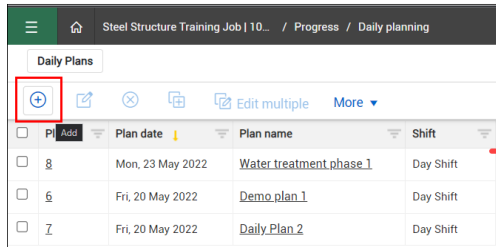
Once a daily plan is created, resources with their associated quantities, hours, and any applicable notes must be entered into a timesheet, along with any applicable notes. After these tasks are completed, crew members or someone on their behalf must sign off on actual hours worked.



Daily Planning

Daily plans let you select specific components and resources (labor and equipment) from a work package and assign it in daily production increments.

Add a daily plan by navigating to Progress > Daily Planning > **Add**.



Plan ID	Plan date	Plan name	Shift
8	Mon, 23 May 2022	Water treatment phase 1	Day Shift
6	Fri, 20 May 2022	Demo plan 1	Day Shift
7	Fri, 20 May 2022	Daily Plan 2	Day Shift

Add daily plan

• Plan date:

• Plan name:

Shift:

Work plan/package ID - Name:

Planner notes:

Location:

Hint type "123" or "Site"

• Approvers (1 Required)
No approvers added
[Add approver](#)

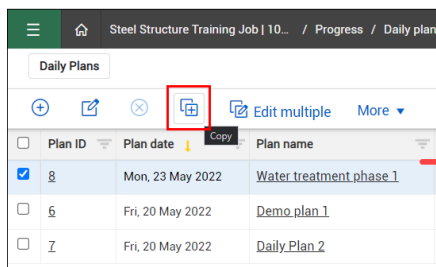
• Executors (1 Required)
No executors added
[Add executor](#)

[Skip planning](#) [Cancel](#) [Create plan](#)

More information on creating daily plans can be found on www.learn.ineight.com under the [Daily Plan Web](#) topic.

Video tutorials on these topics are also available for [creating a daily plan via the web and mobile devices](#).

Copy a daily plan by navigating to Progress > Daily Planning > **Copy**.



Plan ID	Plan date	Plan name
8	Mon, 23 May 2022	Water treatment phase 1
6	Fri, 20 May 2022	Demo plan 1
7	Fri, 20 May 2022	Daily Plan 2

Copy daily plan

• Plan date:

• Plan name:

• Multiple days (starting with plan date): Days

☐ Exclude weekends

Shift:

Location:

Hint type "123" or "Site"

Include the following:

- ☒ Tasks
- ☒ Components
- ☒ Resources
- ☒ Extra pay
- ☒ Resource hours
- ☒ Notes and tags
- ☒ Toolbox talks

• Approvers (1 Required)
 [Add approver](#)

• Executors (1 Required)
 [Add executor](#)

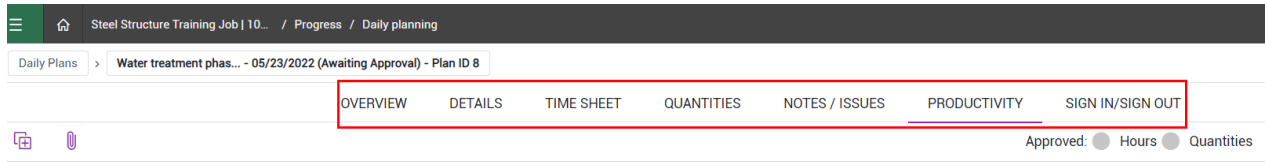
[Skip planning](#) [Cancel](#) [Create plan](#)

More information on copying daily plans can be found on www.learn.ineight.com under the [Daily Plan Web](#) topic.

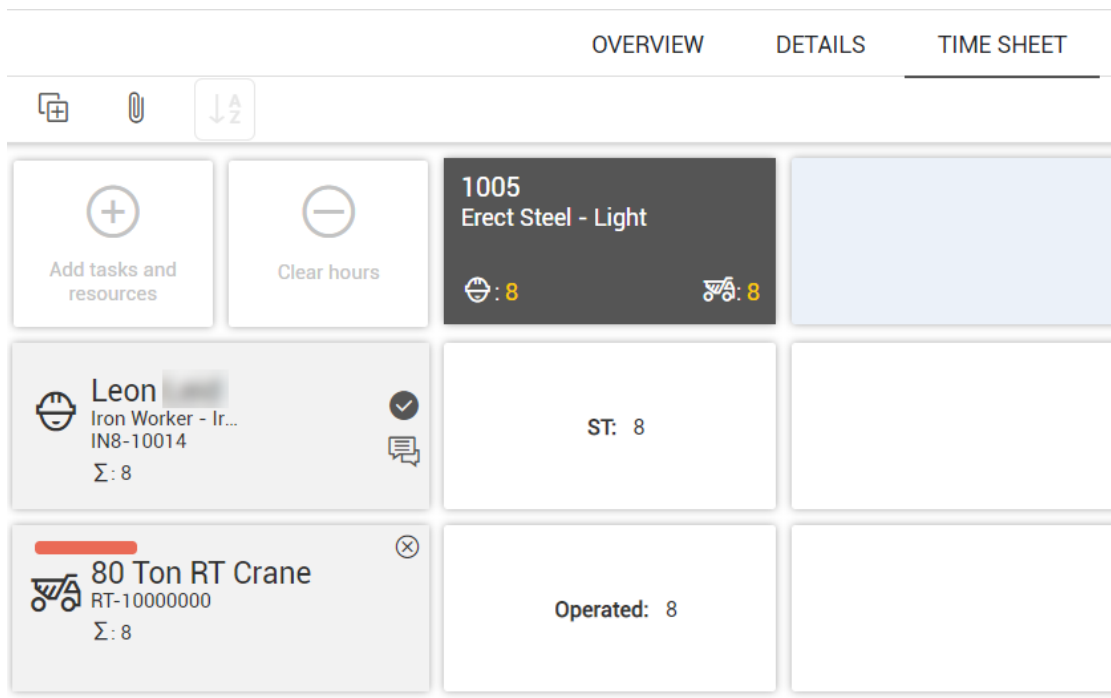
Video tutorials on these topics are also available for [copying a daily plan via the web and mobile devices](#).

Daily plan execution

Daily plan execution lets you capture and claim actual hours, quantities, notes/issues, and productivity.



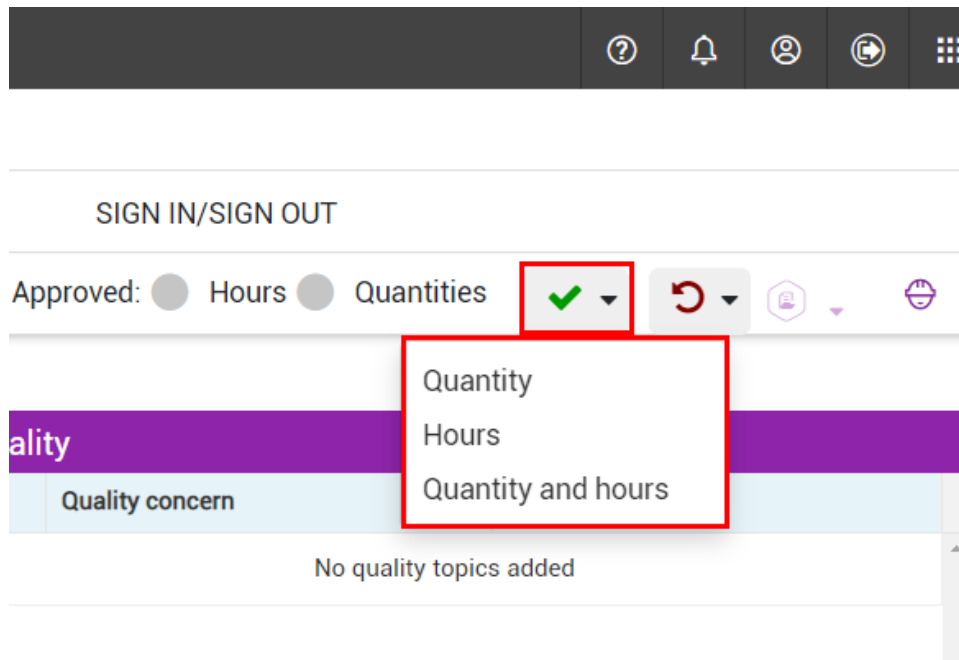
You can also document the number of hours worked for each employee and machine assigned to a task, then eventually sign out employees.



More information on executing daily plans can be found on www.learn.ineight.com under the [Execution](#) topics for both Web and Mobile.

Daily plan review and approval

Daily approval lets you review actual hours, quantities, notes/issues, and productivity that were entered during the execution phase. This gives supervisors a chance to review information before the hours are sent to the ERP payroll system and quantities are claimed in Progress.



More information on how to accomplish this can be found on www.learn.ineight.com under the [Daily Plan Mobile](#) topics.

Video tutorials on these topics are also available for [copying a daily plan via the web and mobile devices](#).

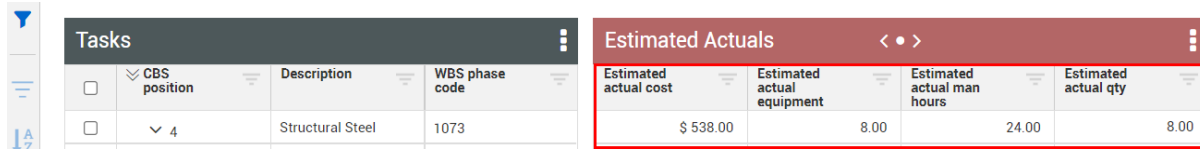
CBS estimated actuals columns

View real-time Plan and Progress quantities, man-hours, equipment hours, and cost in the cost breakdown structure (CBS). You can also generate estimated man-hours and equipment hours from quantities claimed in Control

Steel Structure Training Job 10... / Control / Workspaces				
CBS ACS PAY ITEMS CHANGE REGISTER				
Actions + ✎ ✕				
Tasks				Estimated Actuals
☐	CBS position	Description	WBS phase code	Estimated actual cost
☐	1	Job Overhead	1002	\$ 0.00
☐	2	Earthwork	1069	\$ 0.00
☐	3	Concrete	1071	\$ 0.00
☐	4	Structural Steel	1073	\$ 538.00
				Estimated actual equipment
				0.00
				0.00
				0.00
				8.00
				Estimated actual man hours
				0.00
				0.00
				0.00
				24.00
				Estimated actual qty
				0.00
				0.00
				0.00
				0.00

Estimated actuals process overview

Once you sync everything from Progress, it will show in your ERP system. You can then bring in the man-hours and equipment hours through the sync.



Tasks			
☐	CBS position	Description	WBS phase code
☐	4	Structural Steel	1073

Estimated Actuals			
Estimated actual cost	Estimated actual equipment	Estimated actual man hours	Estimated actual qty
\$ 538.00	8.00	24.00	8.00

After the sync complete, you can reverse the estimated actuals as they have been accounted for as confirmed actuals by bringing the actuals through the sync.

The Estimated columns are only general estimates. They are not confirmed hours until synced with an ERP system or an external payroll system. With an ERP system, you can make changes to where you can have added taxes, which would raise the price for the estimated actuals. Estimated actuals that go into Control from Progress are not guaranteed to be correct. Your ERP system is what confirms the final cost.

Reversing estimated actuals

When you bring in values from your ERP system, you can reverse your estimates with the actual values as the replacement.

Note: If you keep the estimated values without reversing after syncing with ERP system, those values are detected as double values.

1. From the CBS, select the cost items you want to revert actuals.
2. Select the **Actions** drop-down menu.
3. Hover over Reverse estimated actuals. Then, select **Reverse estimated actual equipment hours and construction equipment cost entries for the selected cost items.**

Actions

- Global forecast method..
- Set forecast method
- Claim multiple CBS quantities
- Budget move and contract adjustment ▶
- Lock/unlock budget ▶
- Add required cost items
- Sync ▶
- Reverse estimated actuals ▶
 - Reverse estimated actual cost
 - Reverse estimated actual entries for the selected cost items
 - Reverse estimated actual Mhrs and labor cost
 - Reverse estimated actual equip hrs and constr...

Vendor	
Actual vendor Mhrs (to date)	Actual Mhrs (to date)
0.000000000000	0.000
0.000000000000	7,030.500
0.000000000000	0.000
0.000000000000	0.000

4. Click **Yes** to confirm reversal.

This action will remove all estimated actual equipment hours and construction equipment cost entries for the indicated cost items. Are you sure you want to continue?

5. In the CBS, look for the Last estimated actual man hours reversal, Last estimated actual cost reversal, and the Last estimated actual equipment hours reversal columns.

Tasks			Vendor		
☐	CBS position	Description	Last estimated actual eqp hours reversal	Last estimated actual cost reversal	Last estimated actual man hours reversal
☐	1	Financial Results ...	05/31/2022 09:24 AM	05/31/2022 09:24 AM	12/19/2019 09:00 AM

Those columns show the date of the last time you reversed the amount.

In the Actuals History slide-out panel, located in Control > Workspaces > Actuals Details > **Actuals History**, the reversal shows as negative entries when you have successfully reversed the estimated actuals

1020

1.1.1.1.1.2 CR - S1 - Soil Stabilization



CLAIM ACTUALS

ACTUALS HISTORY

COMMITMENTS

Posting date	Actuals type	Actuals completed	Cost category	Changed by	Notes
06/10/2022	Estimated equipment h...	-9.000		Control - Estimated act...	
06/07/2022	Estimated equipment h...	9.000		Control - [Service Acco...	

The CBS Audit Log also shows the estimated actuals reversal.

CBS

ACS

PAY ITEMS

CHANGE REGISTER

AUDIT LOG

Audit ID	Data type	Item type	Description	WBS	Attribute	Changed by	Changed date	Value before	Value after	Actuals completed
33739966	Actuals	Cost Item	CR - S1 - Soil Stabi...	1020	Estimated actual equip hrs	Paul Trippi	06/10/2022 2:53:3...	9.000	0.000	-9.000
33739965	Actuals	Cost Item	CR - S1 - Soil Stabi...	1020	Estimated actual equip hrs	Service Account	06/10/2022 2:52:2...	0.000	9.000	9.000

Estimated actuals calculations

Estimated cost:

- From claimed man hours
 - In Progress
 - $(\text{Claimed ST hours} * \text{ST rate}) + (\text{Claimed OT hours} * \text{OT rate}) + (\text{Claimed DT hours} * \text{DT rate})$
- From claimed eqp hours
 - In Progress
 - $\text{Claimed equipment hours} * \text{Equipment rate}$
- From claimed qty
 - In Control
 - $\text{Claimed quantity} * [(\text{CE Cost category level cost}) / (\text{Forecast T/O Qty})]$
 - In Progress/Plan
 - $\text{Estimated Qty} * [(\text{CE Cost category level cost}) / (\text{Forecast T/O Qty})]$

Estimated man hours:

- From claimed qty
 - In Control
 - $\text{CE MHrs/unit} * \text{Claimed quantity}$
 - In Progress
 - $\text{CE MHrs/unit} * \text{Estimated quantity}$
 - In Plan
 - $\text{CE MHrs/unit} * \text{Estimated quantity}$

Estimated eqp hours:

- From claimed qty
 - In Control
 - $\text{CE equipment-hrs/unit} * \text{Claimed quantity}$
 - In Progress
 - $\text{CE equipment-hrs/unit} * \text{Estimated quantity}$
 - In Plan
 - $\text{CE equipment-hrs/unit} * \text{Estimated quantity}$