COMPLETIONS USER GUIDE

SAFETY, QUALITY & COMMISSIONING

INEIGHT

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LESSON 1 – LOGIN AND ACCESS HQ

Lesson Duration: 20 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Install, launch, and login to InEight Completions
- Select a project
- Navigate between tabs

Topics in this Lesson

1.1 Initiate Application 12
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1.1 INITIATE APPLICATION

NOTE The InEight Completions product is highly customizable per your specific project requirements. Tab order and its functionality may differ than what is shown.

InEight Completions is a Windows application that is used for process and document management.

Your Completions Project Administrator should be responsible for creating user accounts, and also providing you with the proper credentials before downloading and installing the InEight Completions application.

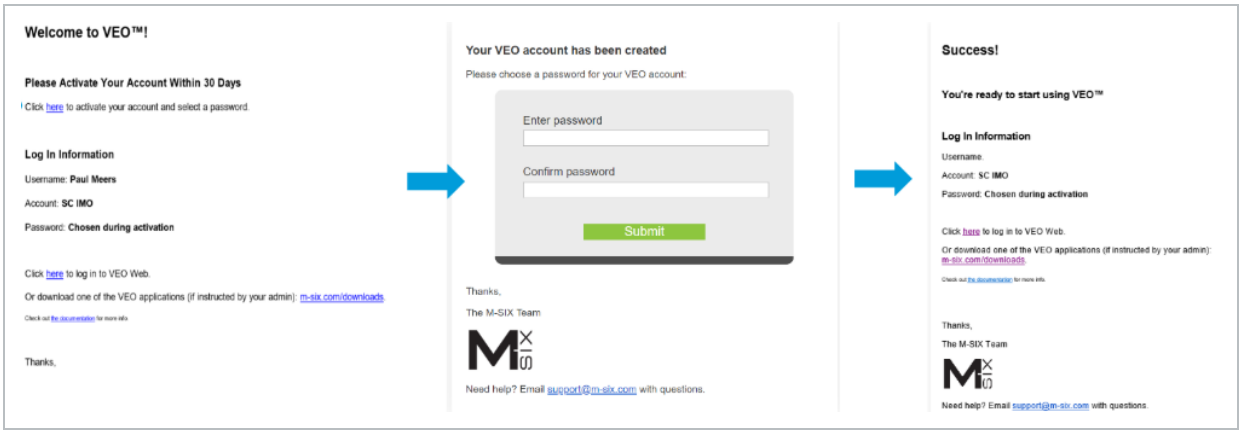
NOTE **System recommendations:**
CPU: 64 bit Pentium 4 (x86or x64)
Operating System: Windows 7/8/10 64 bit (x64).HDD/SSD: 20GB available hard drive space
Memory: 8GB of RAM
Graphics: Integrated Graphics
Solid State Drive is recommended.

1.1.1 Install, Launch, and Enter Login Credentials for InEight Completions

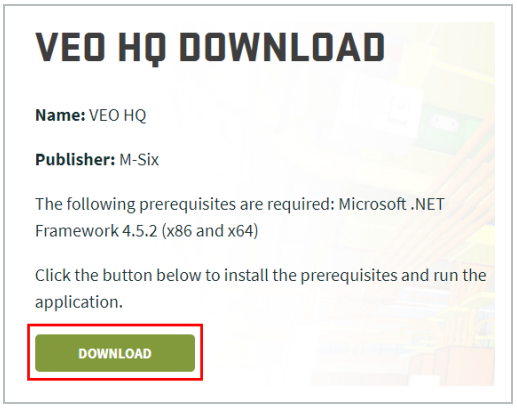
InEight Completions should only be installed if instructed by your Project Administrator.

1.1 Step by Step 1 — Download and Install InEight Completions

1. Once your project administrator creates your user account, and adds you to the system, you will receive an automatic email requesting you to **activate your account**, and set up your password.

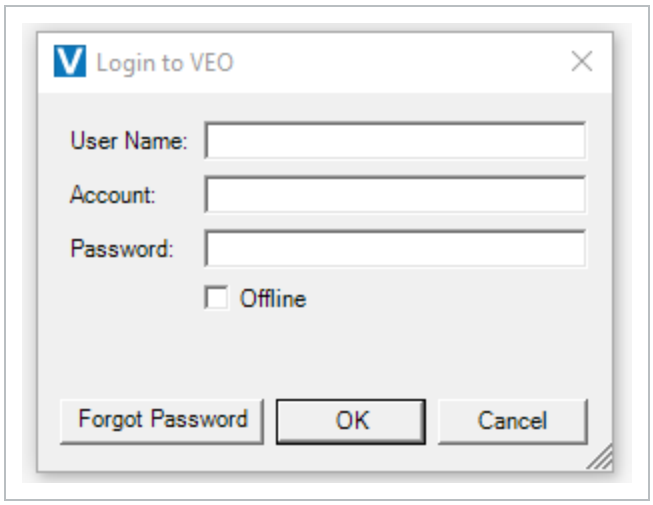


2. Download the **VEO HQ** installer from the Downloads page located on https://ineight.com/veo-hq-installer/.

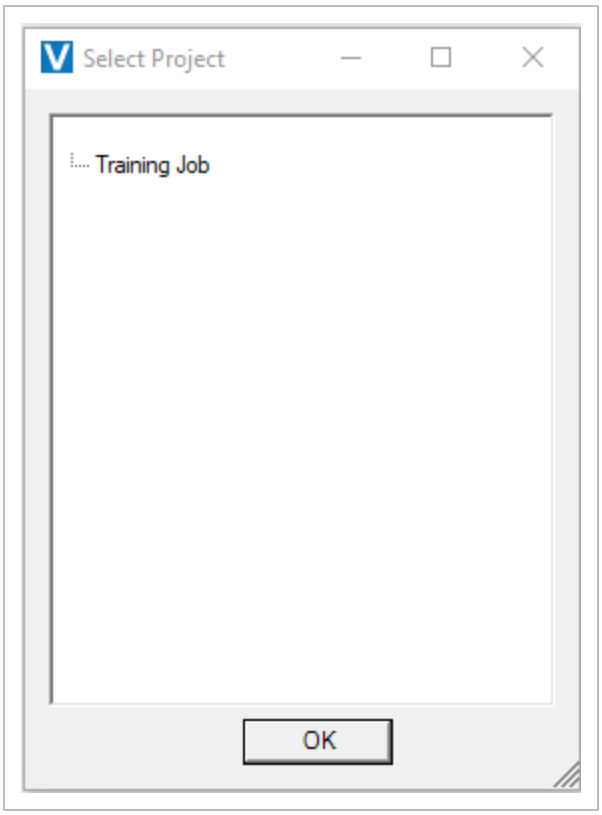


- During installation, A VEO HQ icon gets created on your desktop for you to access. Once installed, the Login to VEO automatically appears on the screen

3. Once the Login to VEO pop-up window appears, enter in the credentials for **User Name**, **Account** provided by your administrator, and the **Password** you previously created.



4. Select **OK**
   - Once logged in, the Select Project pop-up window appears where project selection occurs
   - There can be one or many projects listed within the Select Project pop-up window



1.2 LOAD AND ACCESS A PROJECT

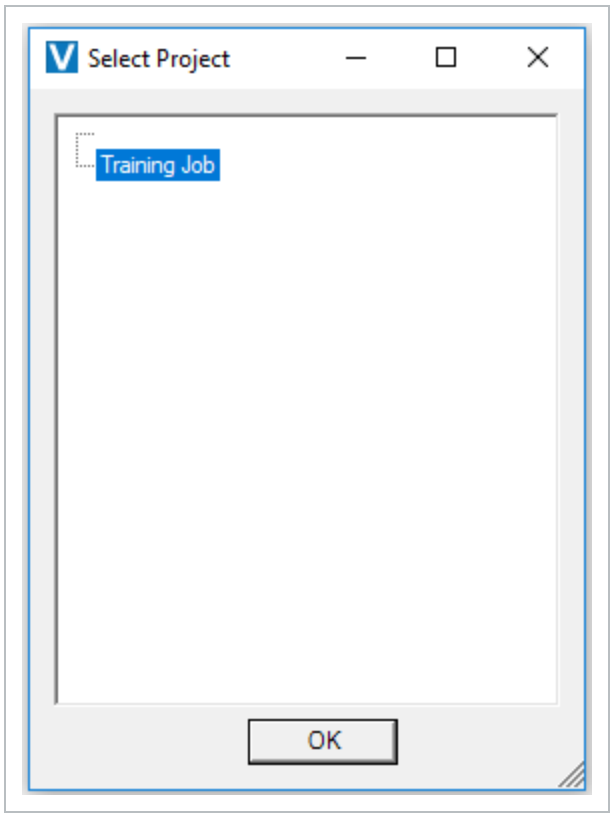
After downloading and installing InEight Completions, and entering in your credentials in the Login to Completions pop-up window, you are ready to:

- Select a project to load
- Enter in project information

1.2.1 Select a Project

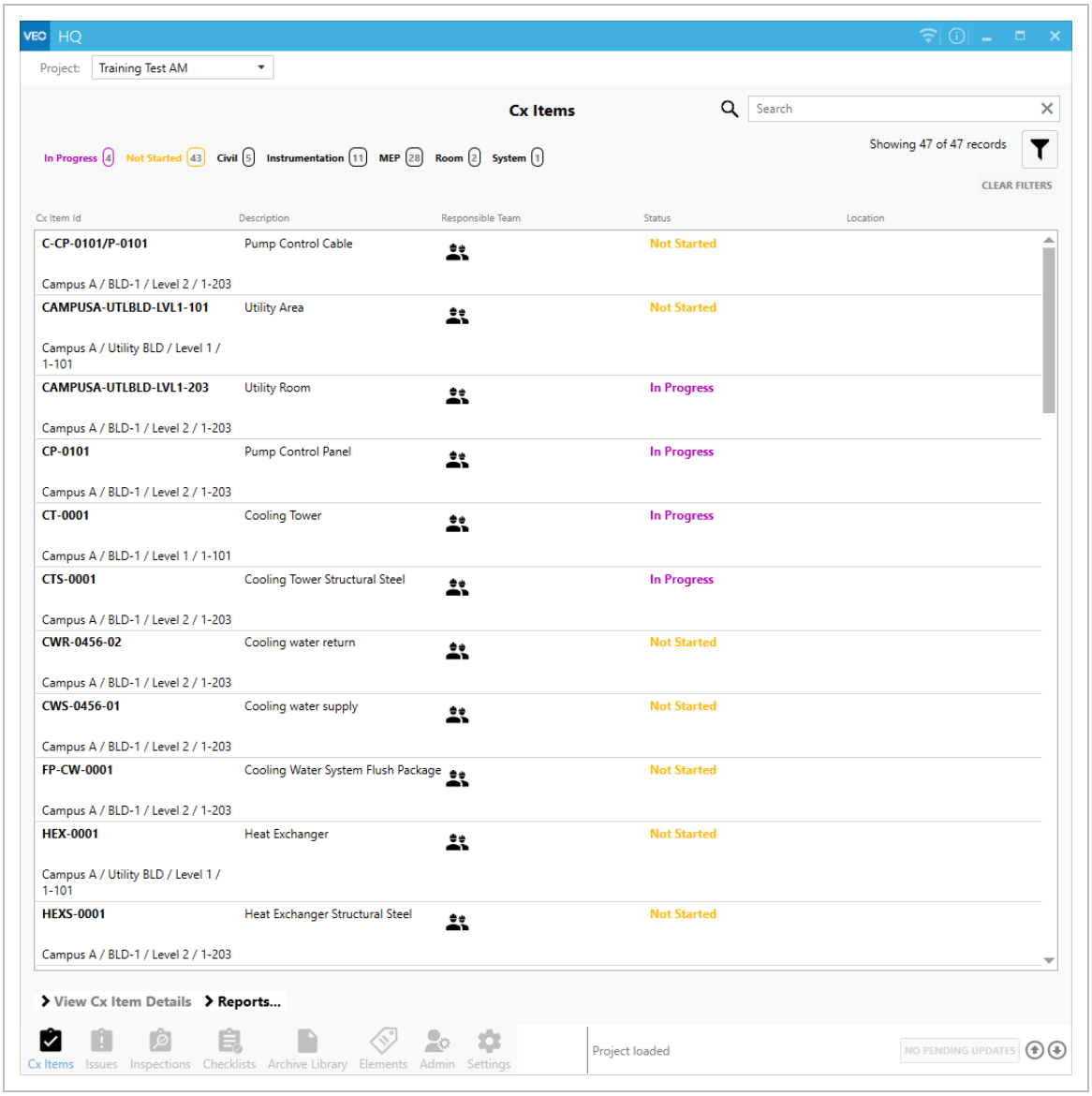
1.2 Step by Step 1 — Select a Project and Enter Information

1. On the Select a Project window, **highlight a project**. Usually, there will be several projects to choose from.



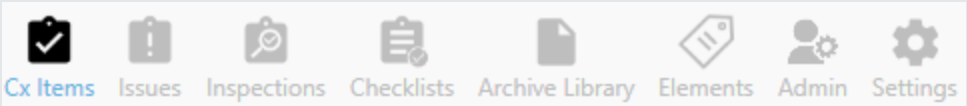
2. Either **double-click** on the project, or select **OK** to load the project.

- The InEight Completions landing page appears
- In the example below, the first screen to appear is the Cx Items screen
- Visibility of tabs and their associated records are based on roles and permissions
- You can navigate between tabs such as Cx Items, Issues and Inspections



NOTE While working in one module, that selected module displays in black, while the other modules are dimmed. In the example below, the Inspections module is being utilized, therefore the remaining modules are not currently

NOTE in use.



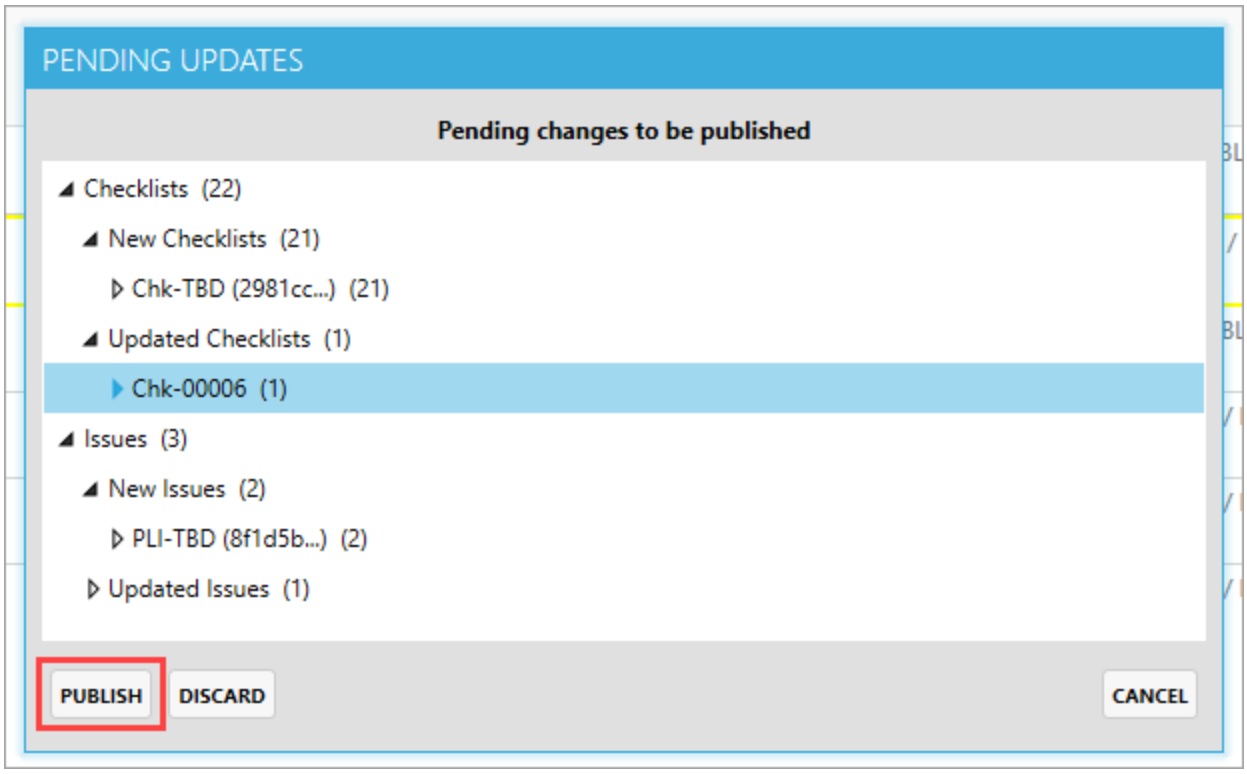
1.2.2 Update Project Status

If you have made changes to your project, don't forget to address any pending issues.

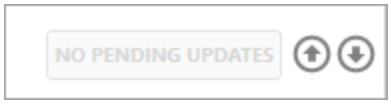
1.2 Step by Step 2 — Update Changes

1. At the bottom of your screen, click on the **Pending Updates** button to see the many changes made.

2. As with other changes you make in Completions, cClick the **Publish** button to send all updates to the server.



- As a result, you will note the icon changes to No Pending Updates



Lesson 1 Review

1. Once InEight Completions is installed on your machine, after selecting a project, the module you are currently in displays as a black tab icon at the bottom of the screen.
   a. True
   b. False

---

2. InEight Completions is a Windows application used for _____ and document management.
   a. Forecasting
   b. Inventory
   c. Process
   d. Scheduling

---

3. Once your project administrator creates your user account, and adds you to the system, you will then:
   a. Receive an email requesting to activate account
   b. Be able to log into account
   c. Log into your account and add new tabs
   d. None of the above

Lesson 1 Summary

As a result of this lesson, you can:

- Install, launch, and login to InEight Completions
- Select a project
- Navigate between tabs

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LESSON 2 – CX ITEMS

Lesson Duration: 20 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Select a Cx Item
- Update a Cx Item
- Close a Phase and Cx Item

Topics in this Lesson

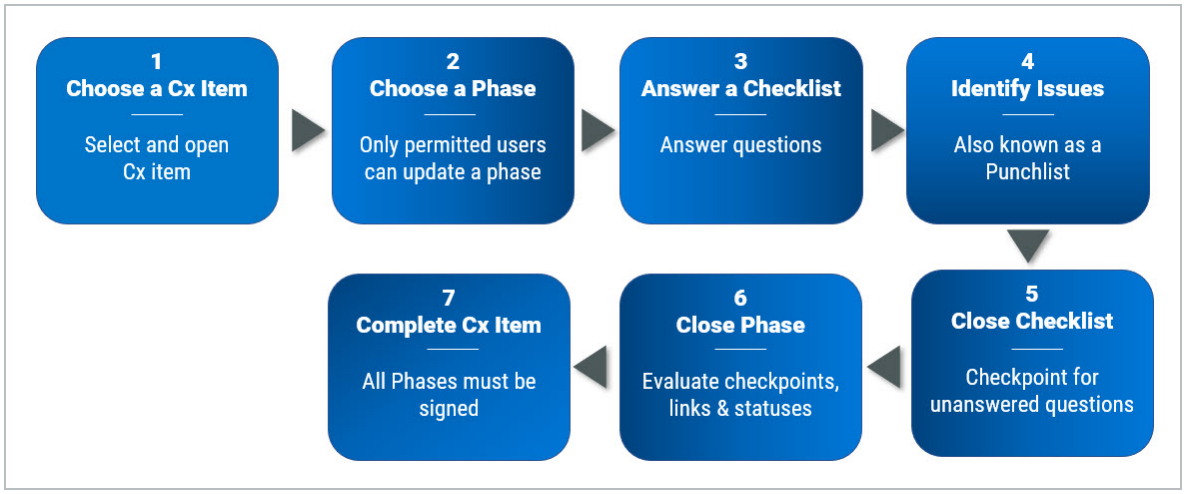
2.1 Work with Cx Items 22
2.2 Cx Item Maintenance 31
2.3 Update and Close a Cx Item Phase 32
Lesson 2 Review 33
Lesson 2 Summary 34

2.1 WORK WITH CX ITEMS

NOTE The InEight Completions product is highly customizable per your specific project requirements. Tab order and its functionality may differ than what is shown.

Cx, or commissioning, is the last process that's required before reaching owner acceptance. That means as a permitted user, you will perform commissioning activities, steps and sign-offs along the way. Each step, or phase, is customizable per project to fit whatever workflow is required.

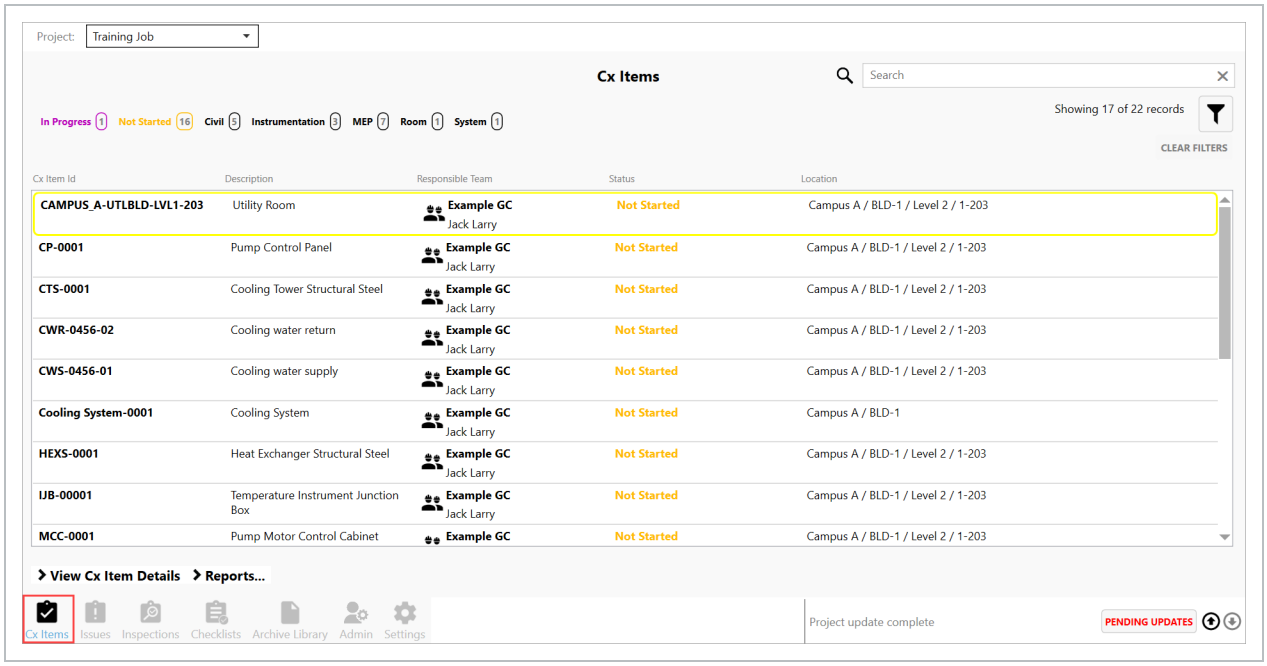
Along with the overall design of the project, your Project Administrator will assign roles to give to different Teams or individual Users which may limit your functionality based on the examples shown in these lessons.



Examples of Cx Items might include such things as loops, circuits, tags, system, and sub-systems.

2.1.1 Cx Item Screen Design

From within a project, clicking on the Cx Items module brings up a list of the Cx Item Id's.



Clicking on any line item, brings up that Cx Item Id.

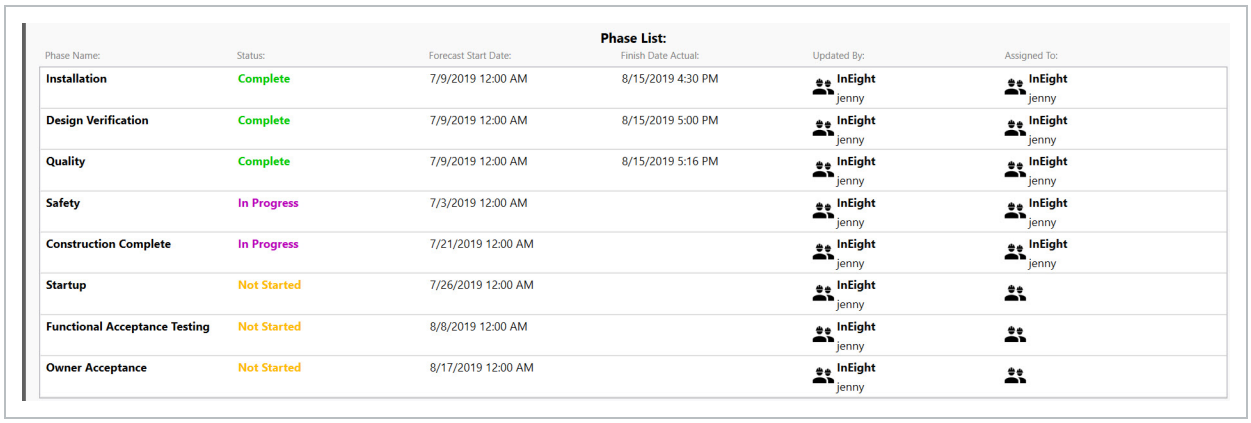
From within the selected Cx Item Id, the screen is divided in two halves.

- The top portion includes all the metadata for the project, along with buttons to access Attachments, Checklists, Comments, Inspections and Issues. Clicking on any of these buttons take you to links specific to that project.
- The bottom portion of the screen identifies the sequence of each Phase of the project, as described below.

NOTE If you have to change the metadata for a project, contact your Project Administrator.

As shown above, when a Cx Item is first created, the phases, and their sequence, also get created by your Project Administrator.

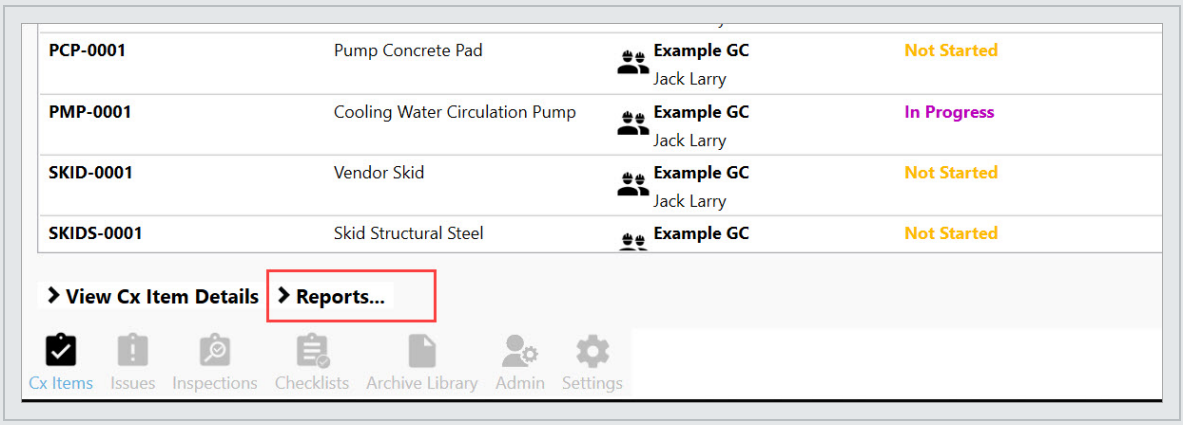
Working through each phase and completing the required components are crucial to overall owner acceptance. As shown in the sample below, within an single Cx Item, the Phases, and their respective Status is shown.



Phase List:

Phase Name:	Status:	Forecast Start Date:	Finish Date Actual:	Updated By:	Assigned To:
Installation	Complete	7/9/2019 12:00 AM	8/15/2019 4:30 PM	InEight jenny	InEight jenny
Design Verification	Complete	7/9/2019 12:00 AM	8/15/2019 5:00 PM	InEight jenny	InEight jenny
Quality	Complete	7/9/2019 12:00 AM	8/15/2019 5:16 PM	InEight jenny	InEight jenny
Safety	In Progress	7/3/2019 12:00 AM		InEight jenny	InEight jenny
Construction Complete	In Progress	7/21/2019 12:00 AM		InEight jenny	InEight jenny
Startup	Not Started	7/26/2019 12:00 AM		InEight jenny	
Functional Acceptance Testing	Not Started	8/8/2019 12:00 AM		InEight jenny	
Owner Acceptance	Not Started	8/17/2019 12:00 AM		InEight jenny	

NOTE If interested in learning more about Reports, accessed by the > Reports tab, check out the Reports lesson.



2.1.2 Phases

Making an update to a Phase begins by selecting a Cx Item.

With a **Cx Item** selected, a Phase is a discernible set of steps that need to be completed before the Commissioned Item gains Owner Acceptance. Phases are shown in sequence within a Phase List, and are color coded by the phrases Complete, In Progress and Not Started.

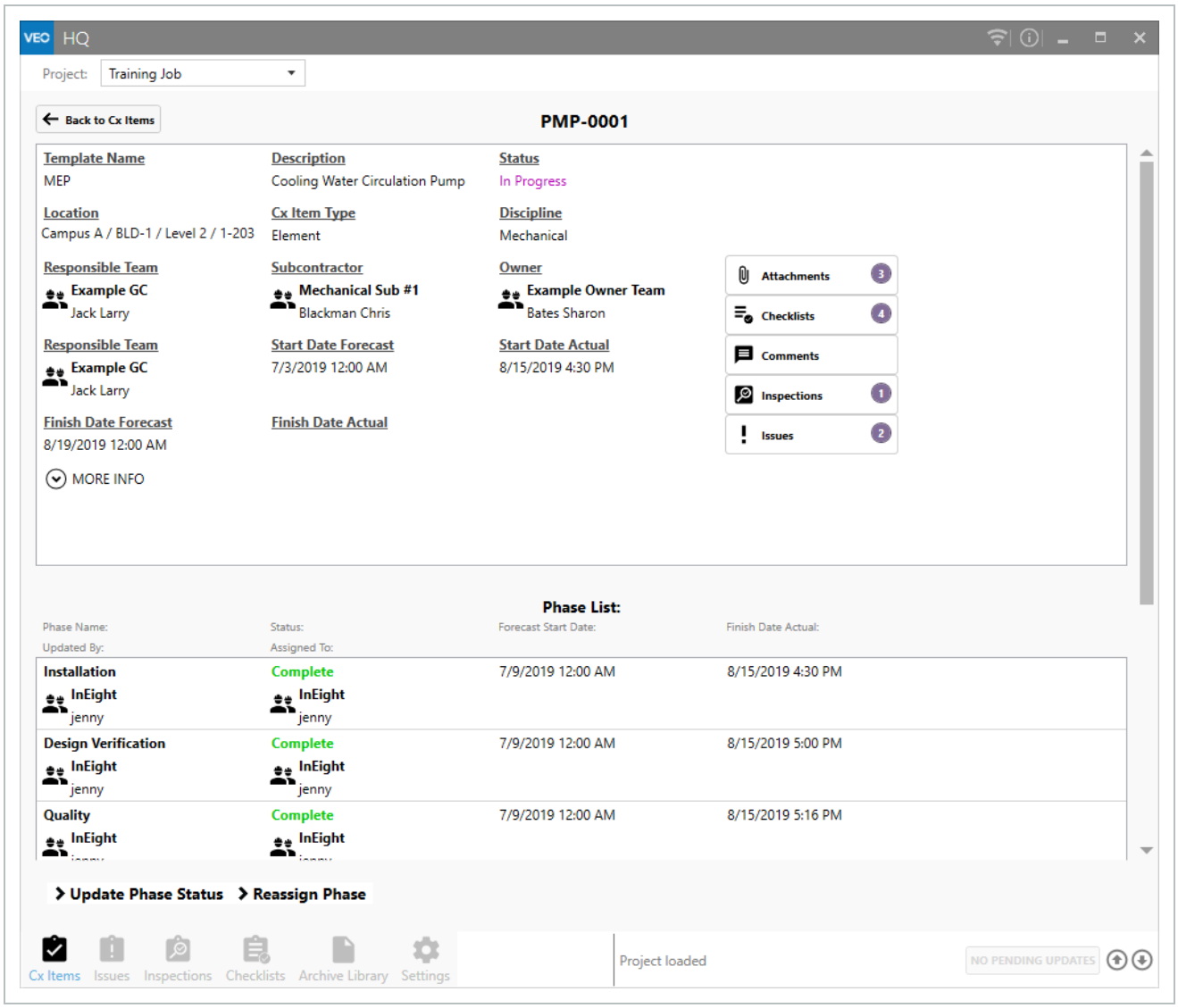
Within any phase the option may exist to add Attachments, Checklists, Comments or Issues.

- By clicking on the **Attachments** button, three options are available: Add a File from Archive Library, Add Attachment, or Download All. You can also click on an existing attachment's Download button which then allows you to View the attachment.
- By clicking on the **Checklists** button you access any pre-identified checklists that need to be completed. You can also click the Add Checklist button to create a new checklist.

- By clicking on the **Comments** button a free-form pop-up allows you to add notes about the phase when the Add Comment button is clicked.
- By clicking on the Issues button you can then click the Add Issue button to add an issue. Alternatively, you can also click on a given Issue to be brought to that screen where you can Update Phase Status, Reassign the Phase, Reschedule or Edit the Issue as your permission allows.

With the data of a specific Cx Item from the Upload File at the top of the page, the lower portion of the page identifies the Phase List. Columns include:

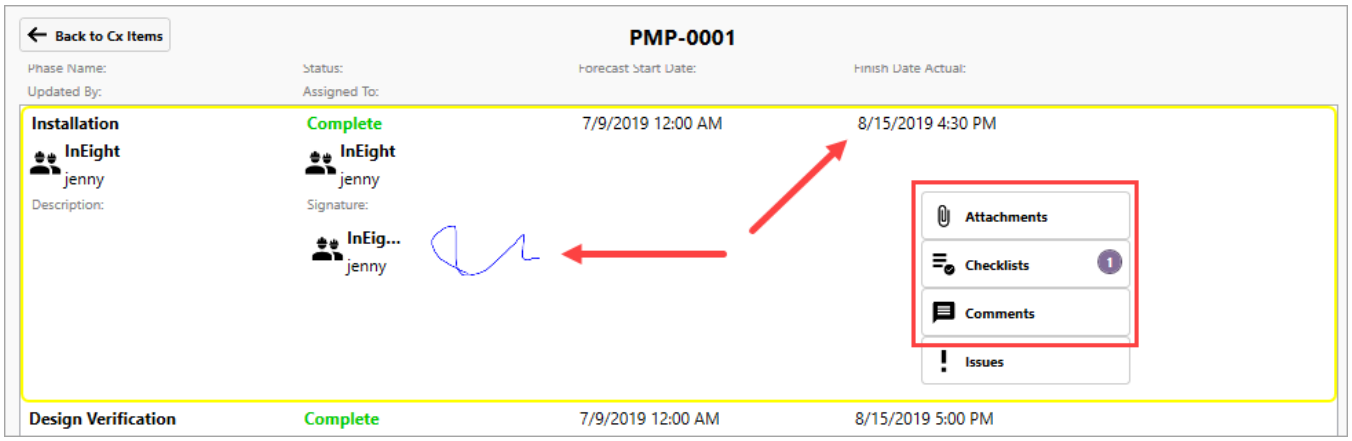
- Phase Name and who updated it last
- Status & to whom it's been assigned
- Forecast Start Date
- Finish Date Actual



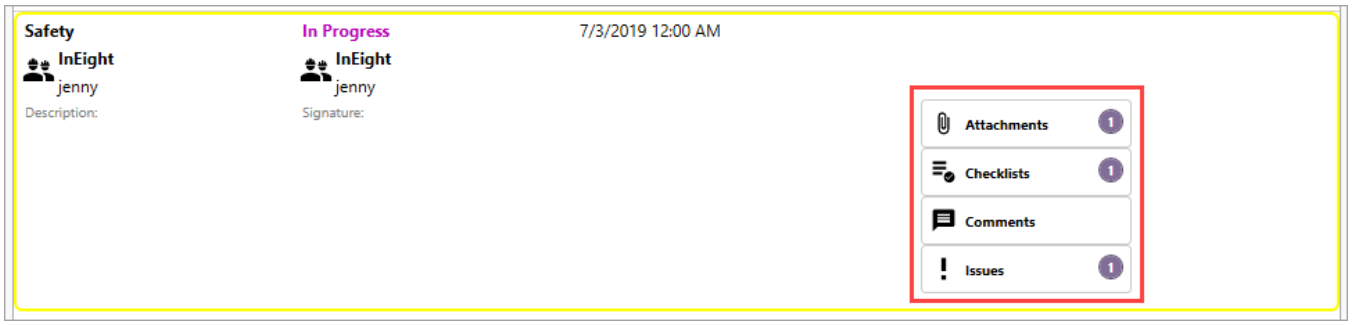
You can review data from Complete, In Progress or No Started phases.

Complete phase tiles mimic the look of In Progress and Not Started tiles, with the exception of

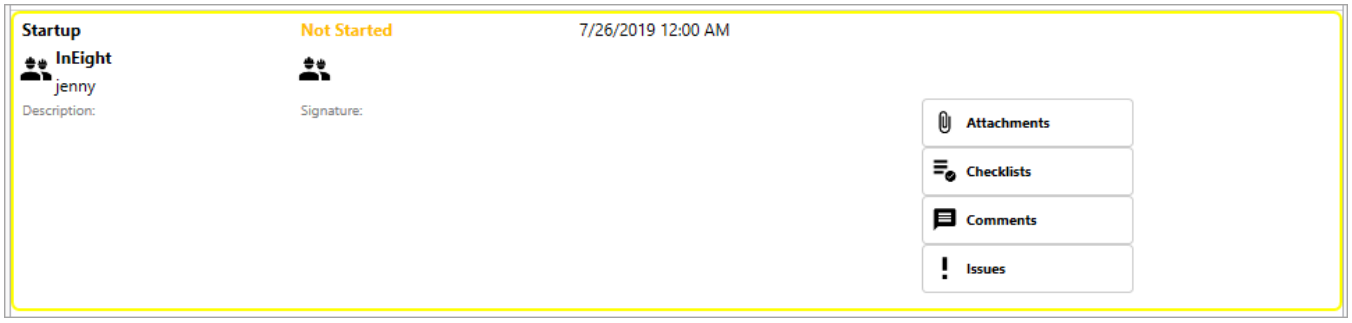
- An electronic signature
- A Finish Date Actual
- Attachments, Checklists and Comments may also be present



In Progress phases may certainly contain Attachments, Checklists, Comments and/or Issues as shown below:

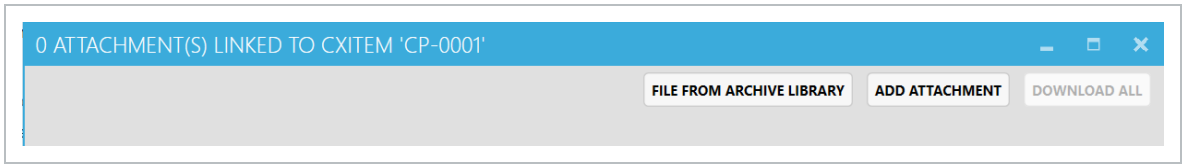


Phases that have Not Started may include Attachments, Checklists, Comments, or Issues.



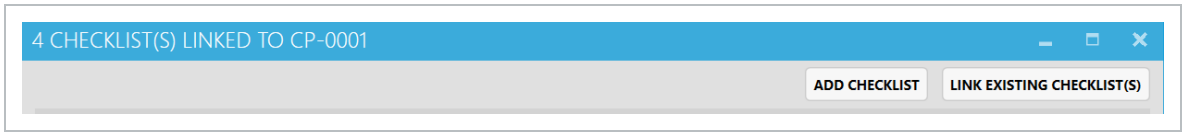
2.1.2.1 Add an Attachment

To learn more about attachments, see the Attachments lesson.



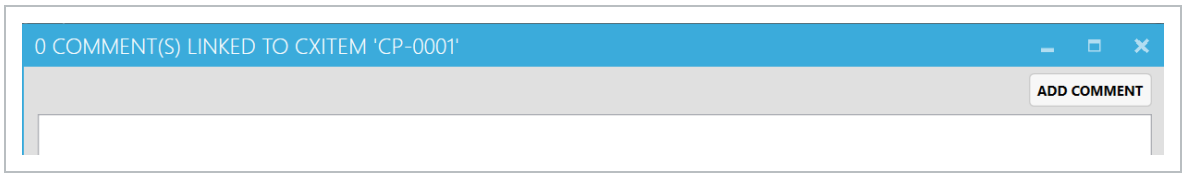
2.1.2.2 Add or Link a Checklist

To learn more about checklists, see the Checklists lesson.



2.1.2.3 Add a Comment

Comments are tied to a specific Cx Item, in this case "CP-001."

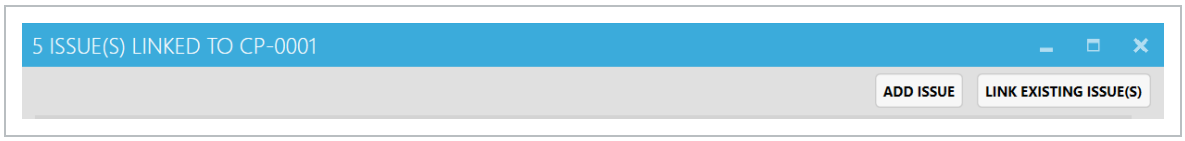


2.1.2.4 Add or Link an Inspection

To learn more about inspections, see the Inspections lesson.

2.1.2.5 Add or Link an Issue

To learn more about issues, see the Issues lesson.

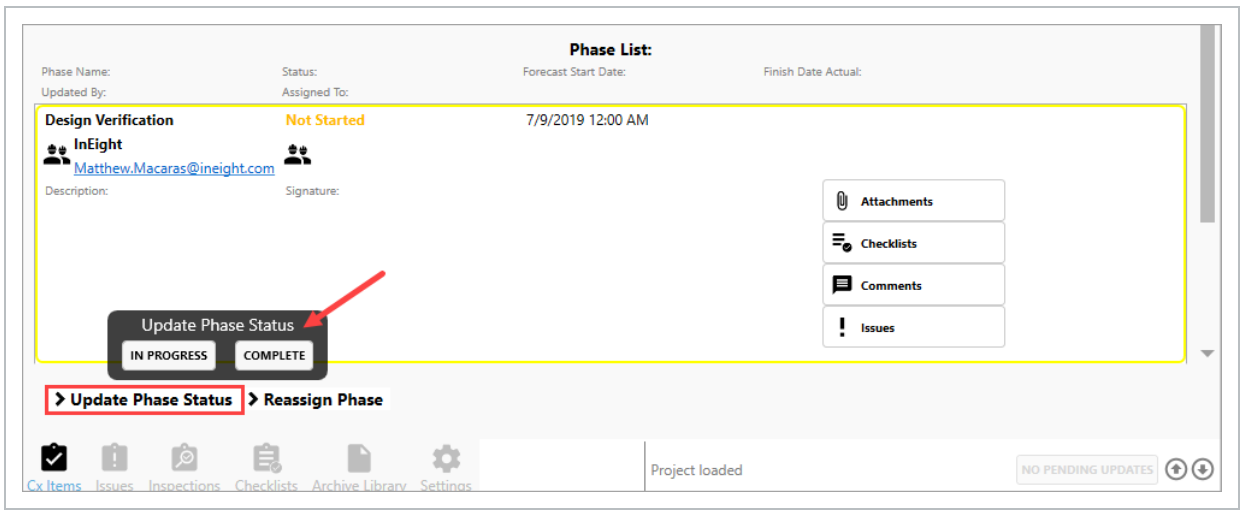


2.1.2.6 Updating Phase Status

With a Cx Item selected, and then a Phase selected, click the Update Phase Status link.

Three options are available:

- Permission Denied
- In Progress
- Complete

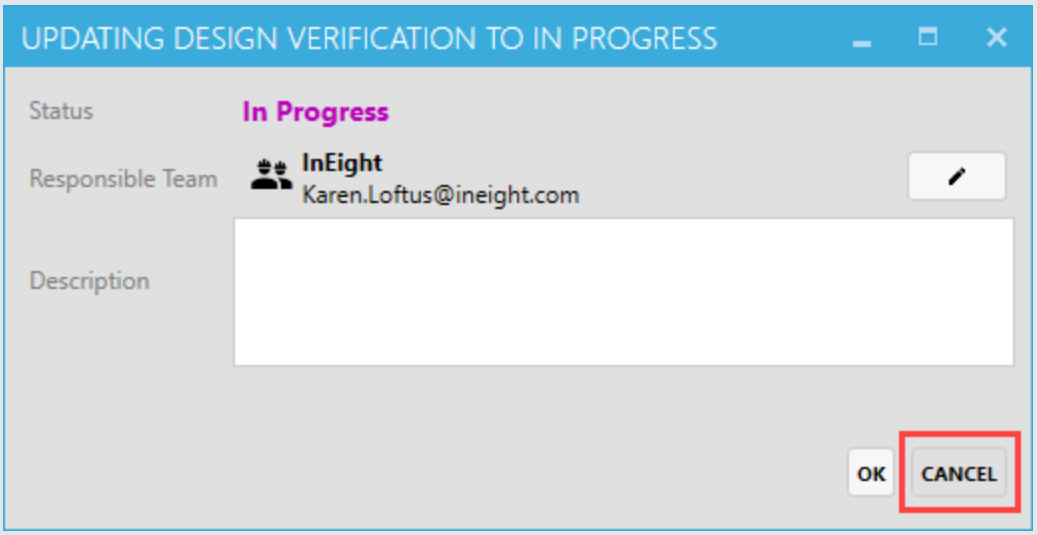


If the In Progress button is selected:

1. Add details to the Description field.
2. Change the Responsible Team, if appropriate.
3. Click OK.

TIP

If you've made an error, and didn't want to update the status, click **In Progress**, then **Cancel** in the subsequent pop-up window.



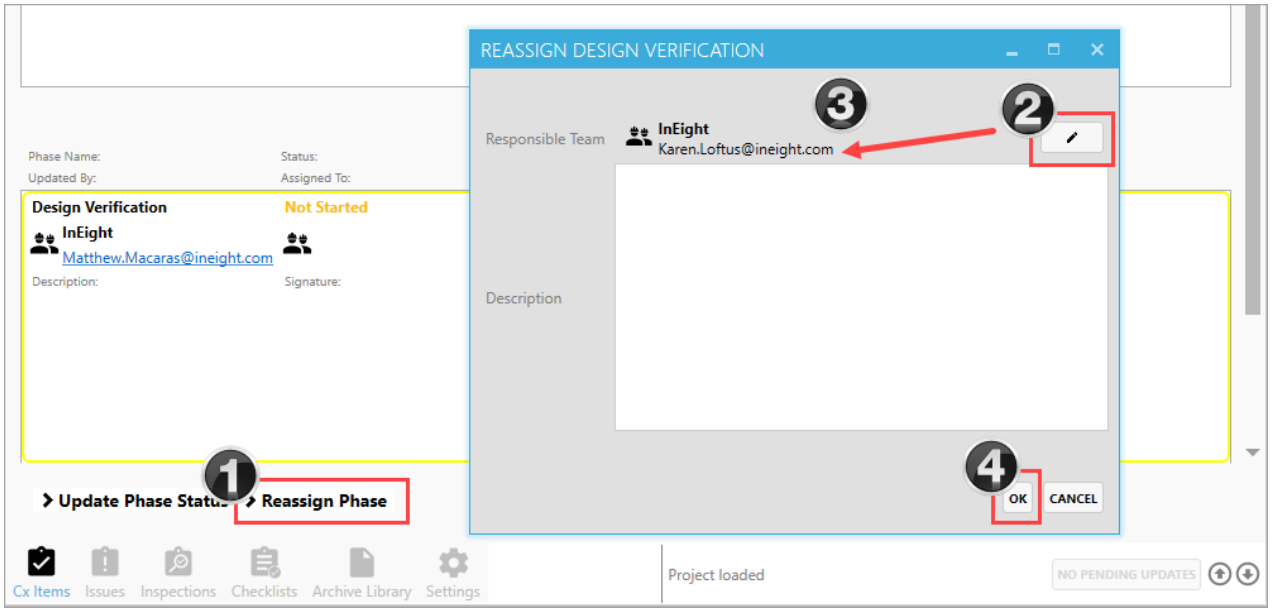
2.1.2.7 Reassign a Phase

While an individual will have ownership of a Phase, any phase can be re-assigned if you have the permission-level to do so.

2.1 Step by Step 1 — Reassign a Phase

1. From within the desired Cx Item, click on the **Reassign Phase** button.
2. Click on the **pencil** icon.
3. From the drop-down list, select the person/team to whom the phase is to be reassigned.

4. Click **OK**.

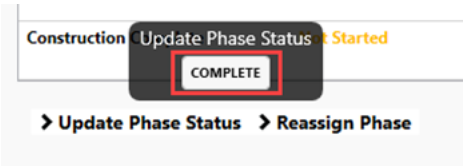


2.1.2.8 Complete a Phase

If you are ready to close out a phase, and all checklists are complete:

2.1 Step by Step 2 — Complete a Phase

1. From within the desired Cx Item, click **Update Phase Status**.
2. Click **Complete**.



3. In the pop-up window, add additional comments if necessary.
4. Click **OK**.
5. In the Signature pop-up, add your **signature**.
6. Click **OK**.

The complete Phase will show the status of Complete, along with a Finish Date Actual, and with the signature of the person.

2.2 CX ITEM MAINTENANCE

2.2.1 Update a Phase

Within any phase the option exists to add Attachments, Checklists, Comments or Issues.

- By clicking on the **Attachments** button, three options are available: Add a File from Archive Library, Add Attachment, or Download All. You can also click on an existing attachment's Download button which then allows you to View the attachment.
- By clicking on the **Checklists** button you access any pre-identified checklists that need to be completed. You can also click the Add Checklist button to create a new checklist.
- By clicking on the **Comments** button a free-form pop-up allows you to add notes about the phase when the Add Comment button is clicked.
- By clicking on the **Issues** button you can then click the Add Issue button to add an issue. Alternatively, you can also click on a given Issue to be brought to that screen where you can Update Phase Status, Reassign the Phase, Reschedule or Edit the Issue as your permission allows.

2.2.1.1 Update Phase Status

With a Cx Item selected, and then a Phase selected, click the **Update Phase Status** link.

Three options are available:

- Permission Denied
- In Progress
- Complete

If the In Progress button is selected:

1. Add details to the Description field.
2. Change the Responsible Team, if appropriate.
3. Click **OK**.

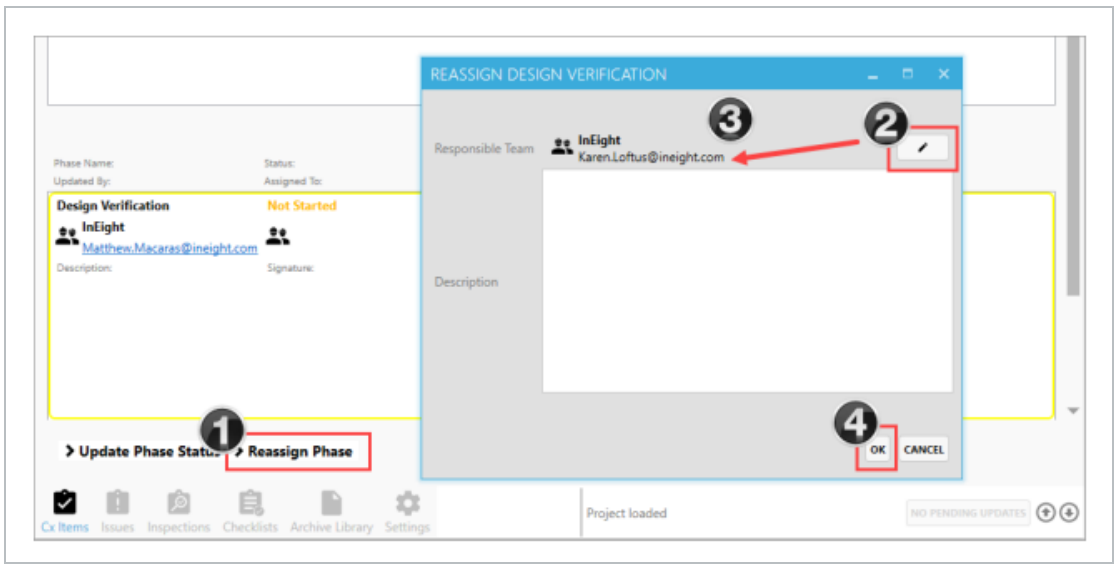
> TIP
> If you've made an error, and didn't want to update the status, click **In Progress**, then **Cancel** in the subsequent pop-up window.

2.2.2 Reassign a Phase

While an individual will have ownership of a Phase, any phase can be re-assigned if you have the permission-level to do so.

2.2 Step by Step 1 — Reassign a Phase

1. From within the desired Cx Item, click on the **Reassign Phase** button.
2. Click on the **pencil** icon.
3. From the drop-down list, select the **person/team** to whom the phase is to be reassigned.
4. Click **OK**.



2.3 UPDATE AND CLOSE A CX ITEM PHASE

2.3.1 Complete a Phase

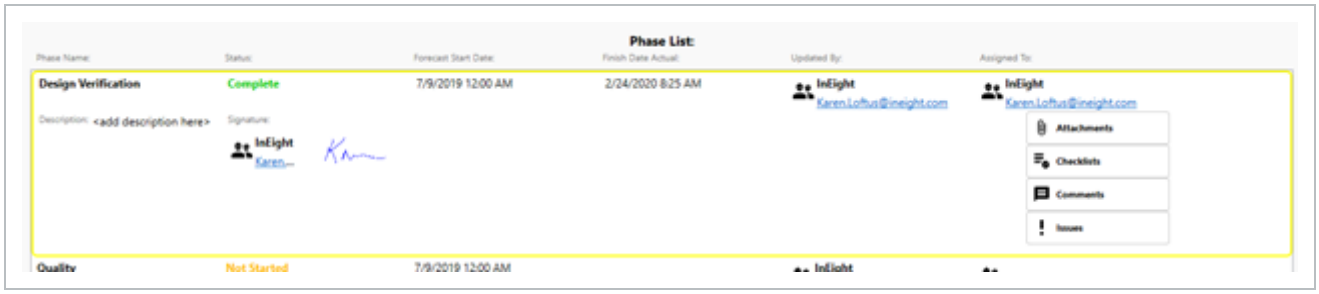
If you are ready to close out a phase, and all checklists are complete:

2.3 Step by Step 1 — Complete a Phase

1. From within the desired Cx Item, click **Update Phase Status**.
2. Click **Complete**.

3. In the pop-up window, add additional comments if necessary.
4. Click **OK**.
5. In the Signature pop-up, add your **signature**.
6. Click **OK**.

The complete Phase will show the status of Complete, along with a Finish Date Actual, and with the signature of the person.



Lesson 2 Review

1. Your Project Administrator will assign the same roles to different Teams or individual Users.
   a. True
   b. False

---

2. Once you click on a singular Cx Item Id, which components are shown? (select all that apply)
   a. The metadata for the project
   b. The sequence of each Phase of the project
   c. The option to reassign a phase
   d. The ability to update phase status
   e. The ability to add or link to attachments, checklists, comments, inspections, and/or issues
   f. Only options A, B & E
   g. Options A through E

---

3. A Phase cannot be completed with open Issues.
    a. True
    b. False

Lesson 2 Summary

- Select a Cx Item
- Update a Cx Item
- Close a Phase and Cx Item

LESSON 3 – CHECKLISTS

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Open & Close an Existing Checklist
- Create a new Checklist
- Add and modify data within a Checklist
- Reassign a Checklist
- Execute a Checklist
- Create a Checklist Placeholder

Topics in this Lesson

3.1 Create a Checklist 36
3.2 Checklist Placeholder 42
3.3 Manipulate and Answer a Checklist 47
3.4 Open and Close a Checklist 57
Lesson 3 Review 64
Lesson 3 Summary 64

3.1 CREATE A CHECKLIST

Checklists in InEight Completions are electronic forms that admin users can generate as a checklist template, which is a list of tasks required, things to be done, a reminder, and/or sign off. Generating checklist templates creates consistency when creating tasks.

Only Project Admins can import checklists via the checklist import tool which allows you to create or import new checklist templates into InEight Completions. The import tool also prevents double-imports by validating against existing checklist template names, and shows errors for missing or incorrectly-configured data.

You can create a checklist from any available Completion tab. As an example, you can create a checklist by selecting the **Inspections** tab.

NOTE	The InEight Completions product is highly customizable per your specific project requirements. Tab order and its functionality may differ than what is shown.

NOTE	As with other components within Completions, the order in which you access the icons at the bottom of the screen depends on how your Project Administrator configured the system.

EXAMPLE: A technician has completed the HVAC unit installation and is now ready to complete the HVAC quality acceptance checklist. The technician navigates to the Checklists tab and Executes the checklist. The technician then documents the checklist's tasks for the day, and clicks Pending Updates. The technician can return to the checklist on subsequent days to complete the checklist, clicking Update Status to close the checklist.

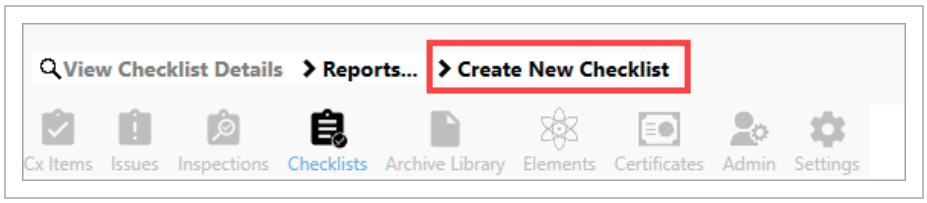
3.1.1 Create a Checklist

In order to create a standalone checklist, do the following:

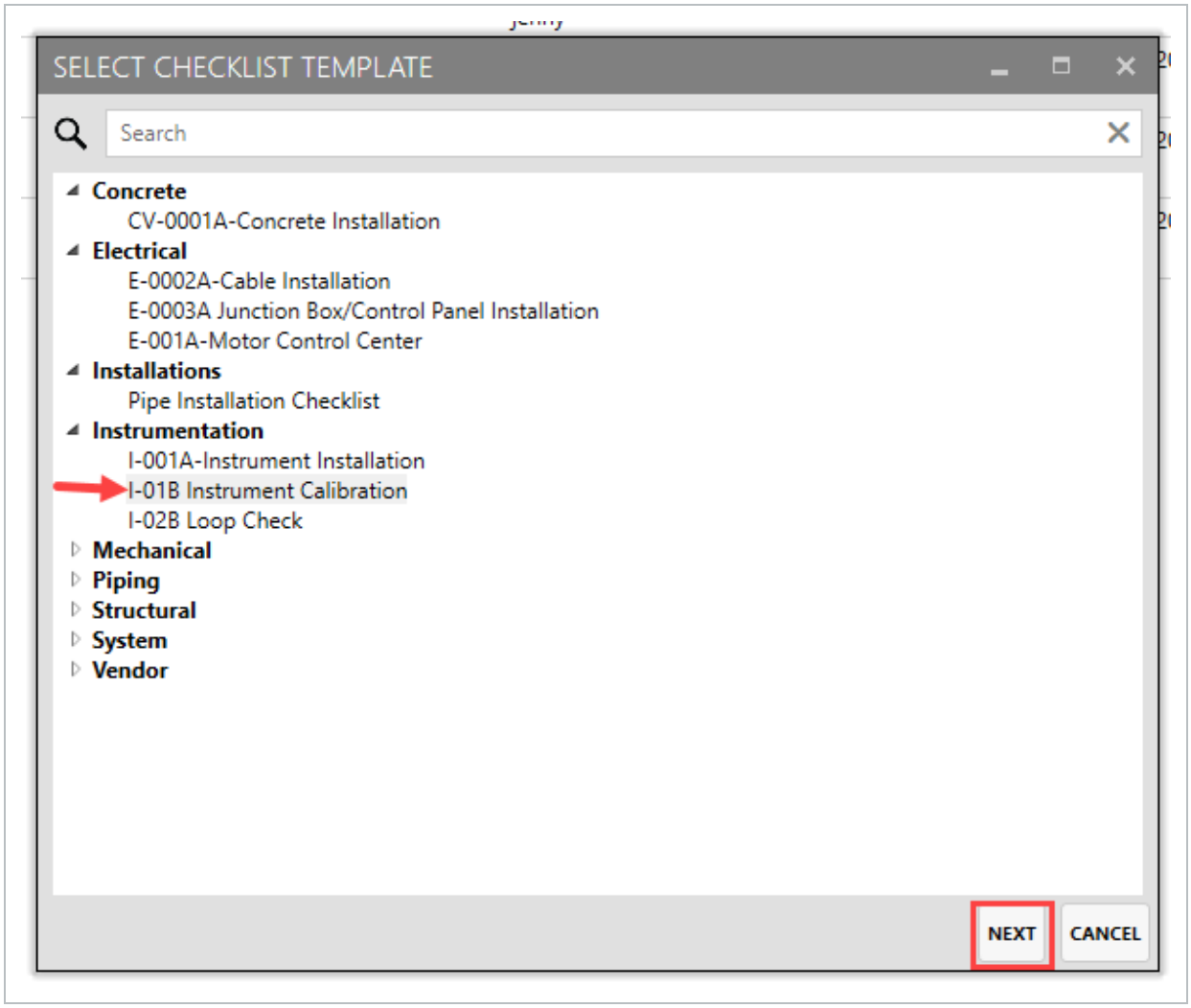
3.1 Step by Step 1 — Create a Standalone Checklist

1. Open a Project.
2. Click the **Checklists** button.

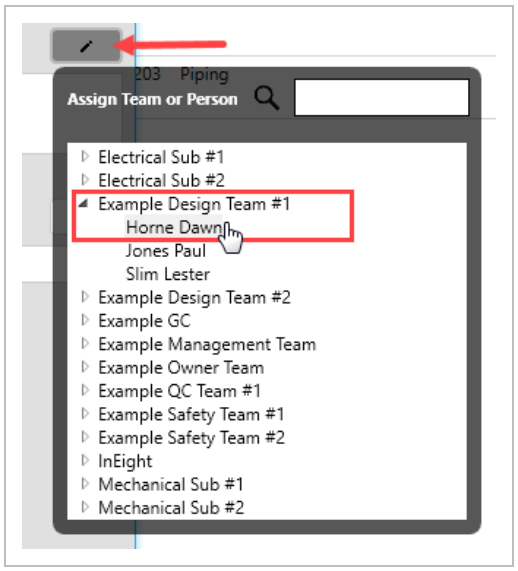
3. Click **Create New Checklists**.



4. In the pop-up dialogue box, click on the system for which you want to create the new checklist, in this example, Instrument Calibration, then click **Next**.

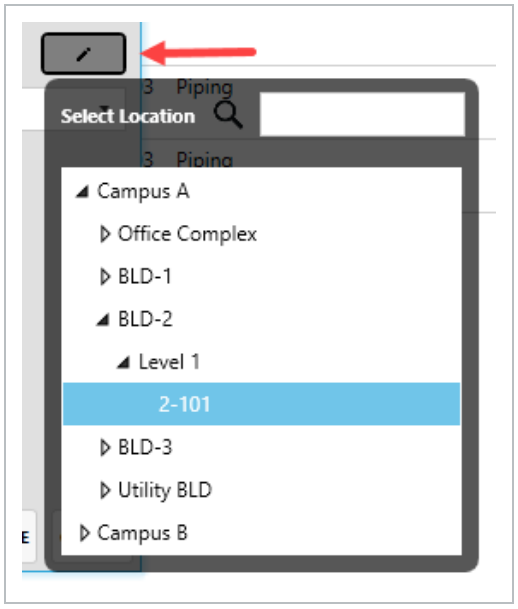


5. Click the **Assign Team or Person** button.
6. Select a **Responsible Team/Team Member**.

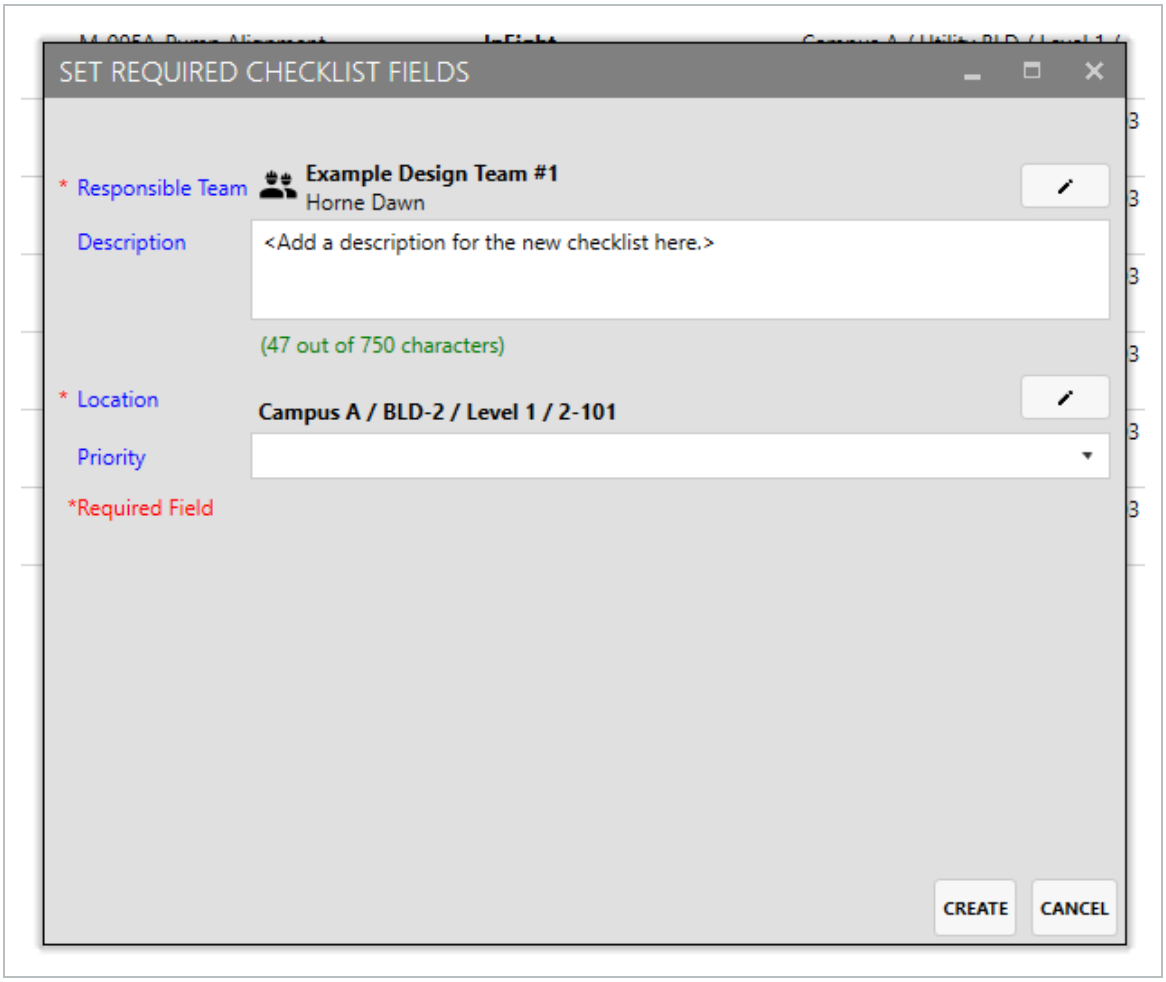


- By doing so, the Team or Person is automatically added to the dialogue box as the Responsible Team

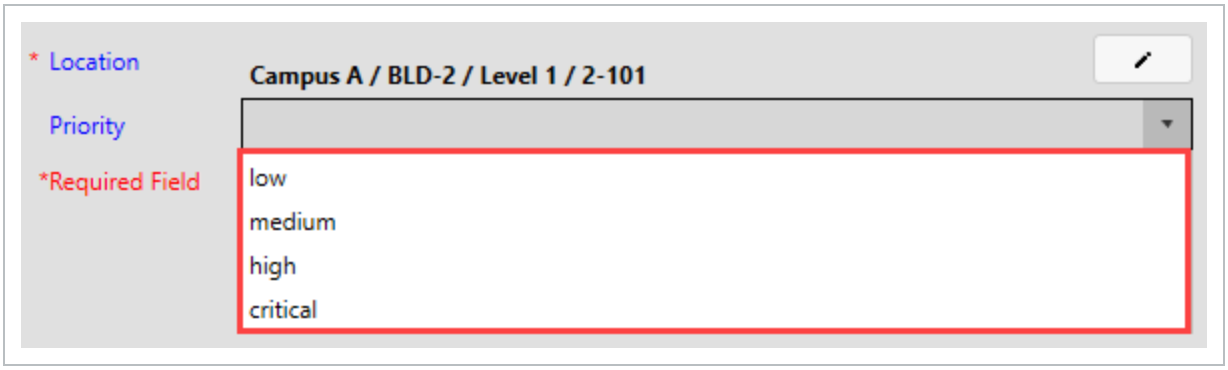
7. Click **inside the Description box** and add a description for the new checklist.
8. Click on the **Select Location** button.
9. From the drop-down, select the appropriate location, knowing you may need to drill down to actual location within a complex or building, as shown below.



- By doing so, the location is automatically added to the dialogue box as the Location



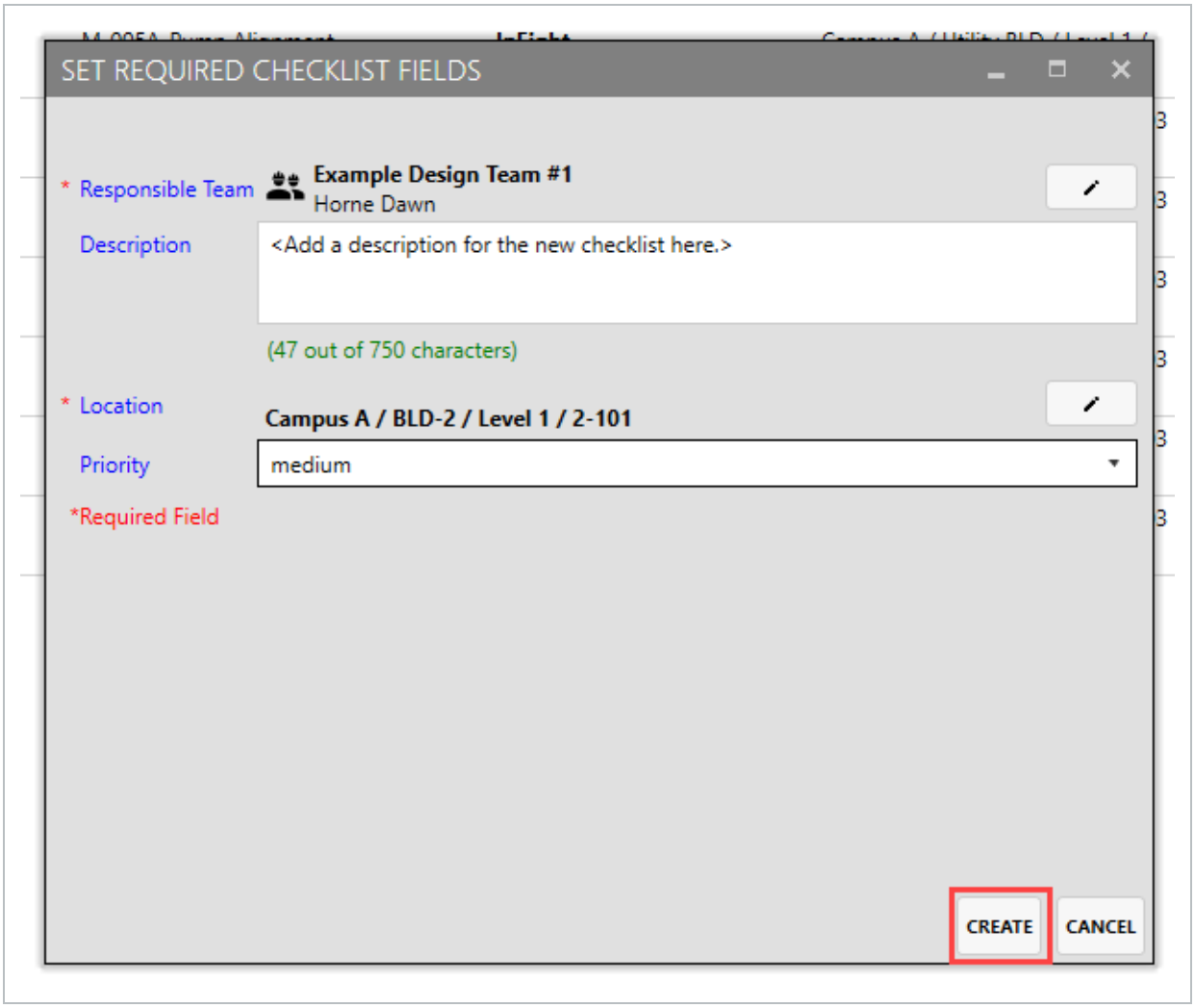
10. Click the **Priority** drop down.



11. Select a **priority level**, medium in this case.

- By doing so, the priority level is automatically added to the dialogue box

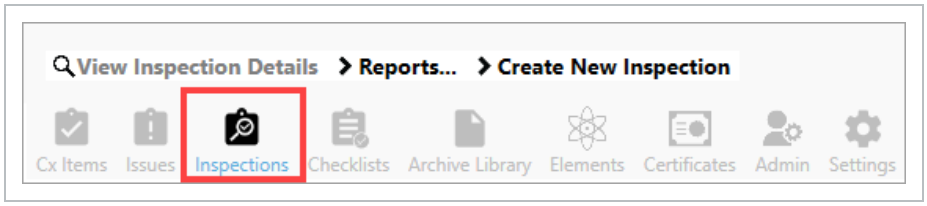
12. Click **Create**.



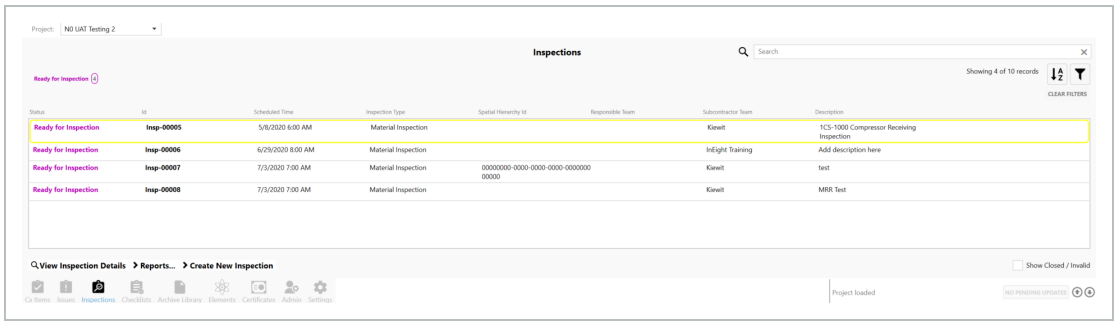
You can create a checklist from any available Completions tab.

3.1 Step by Step 2 — Create a Checklist from any Available Completions Tab

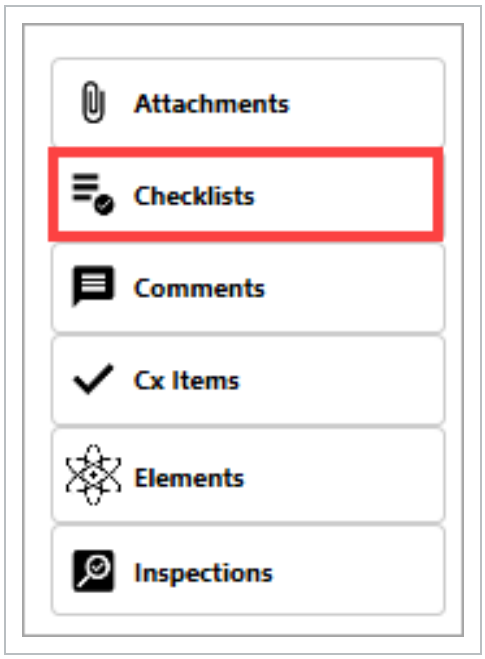
1. As an example, you can create a checklist by selecting the **Inspections** tab.



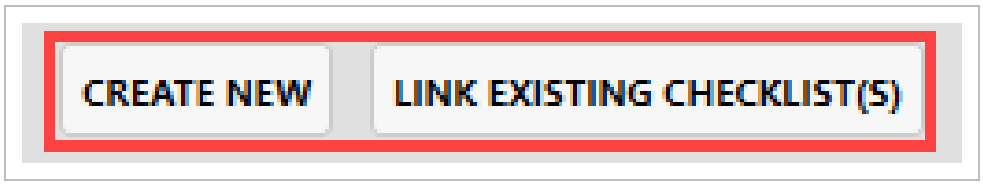
2. Select a specific **Inspection tile**.



3. Click **Checklists**.



There are two options for adding a checklist: either by creating a new one or linking to an existing checklist.



3.2 CHECKLIST PLACEHOLDER

NOTE The InEight Completions product is highly customizable per your specific project requirements. Tab order and its functionality may differ from what is shown.

As defined within the Create a Checklist topic, checklists are electronic forms that admin users can generate as a checklist template, which is a list of tasks required, things to be done, a reminder, and/or sign off. Generating checklist templates creates consistency when creating tasks.

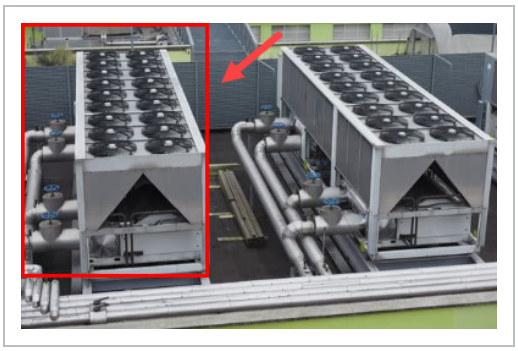
A **Checklist Placeholder** looks exactly like a Checklist Record. There is no differentiation between a Checklist and a Checklist Template, other than a placeholder checklist is not yet finalized and therefore cannot be edited. In order to use a Checklist Template it must first be executed.

For more information on Checklists, visit the "3.1 Create a Checklist" on page 36 topic.

Scenario

In general, quality controllers tend to have more interest in knowing how many checklists need to be completed per day, versus the amount of materials that needs to be installed on a given day.

A quality control engineer is ready to execute the Completions Checklists for section one of an HVAC system, located on the top floor of the building.

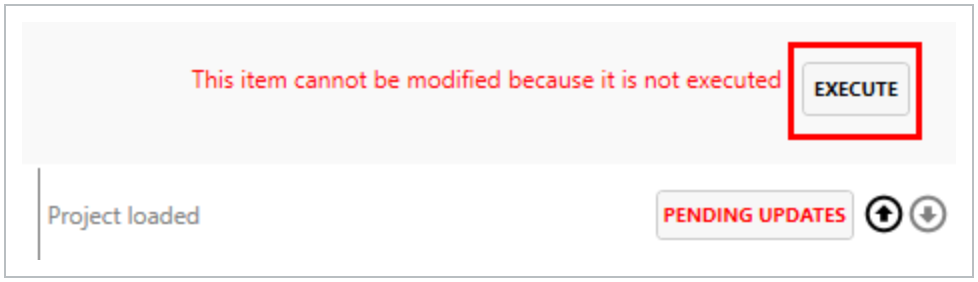


A portion of the HVAC work has already been completed and is ready for quality inspection. As the quality controller navigates to the checklist, he notices that the Answer boxes within the checklist are greyed out, and not able to be completed.

The QC engineer realizes that this is not yet an actual checklist, it's currently a checklist placeholder. In order to convert the checklist placeholder into an actual checklist, it must first be executed.

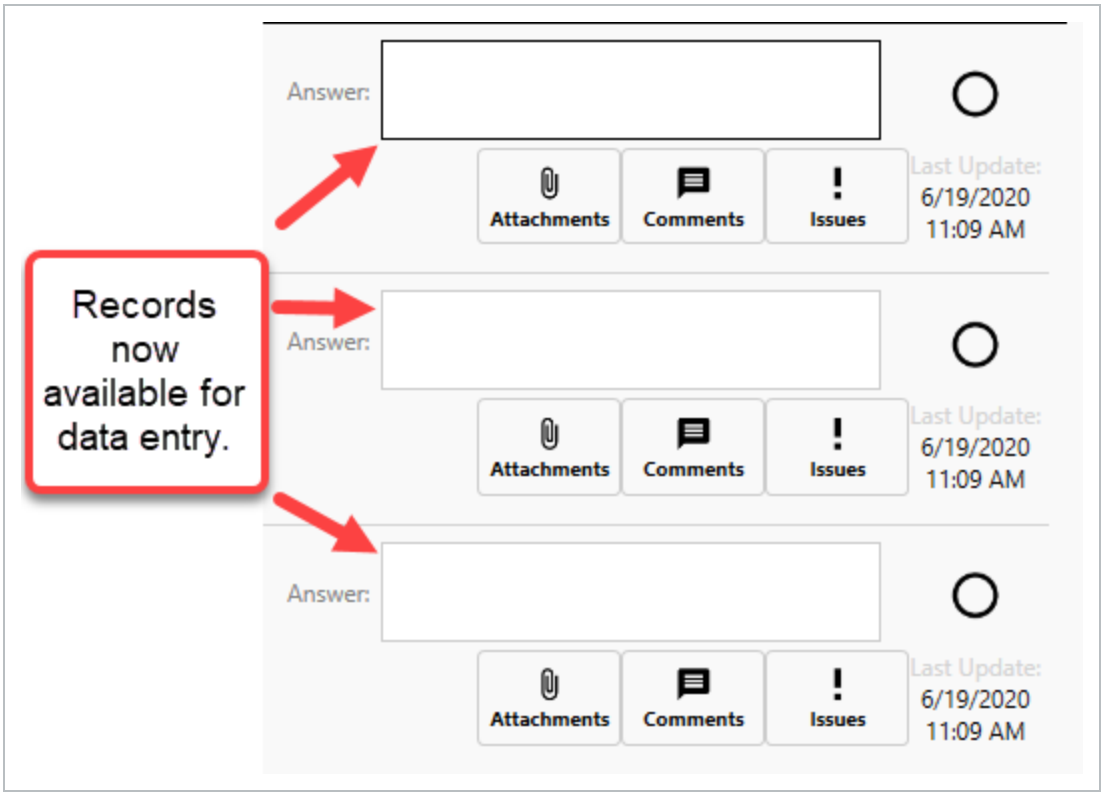
After selecting the Execute button on the bottom right of the screen, the system converts the Checklist Placeholder Records into Checklist Records.

When a checklist is executed, it becomes a snapshot at that point in time.



TIP To ensure quality workmanship, each element will likely have one or more checklists, or placeholders if not yet finalized and executed.

Checklist Records are now ready to be filled out by the QC or person responsible for completing the checklist.

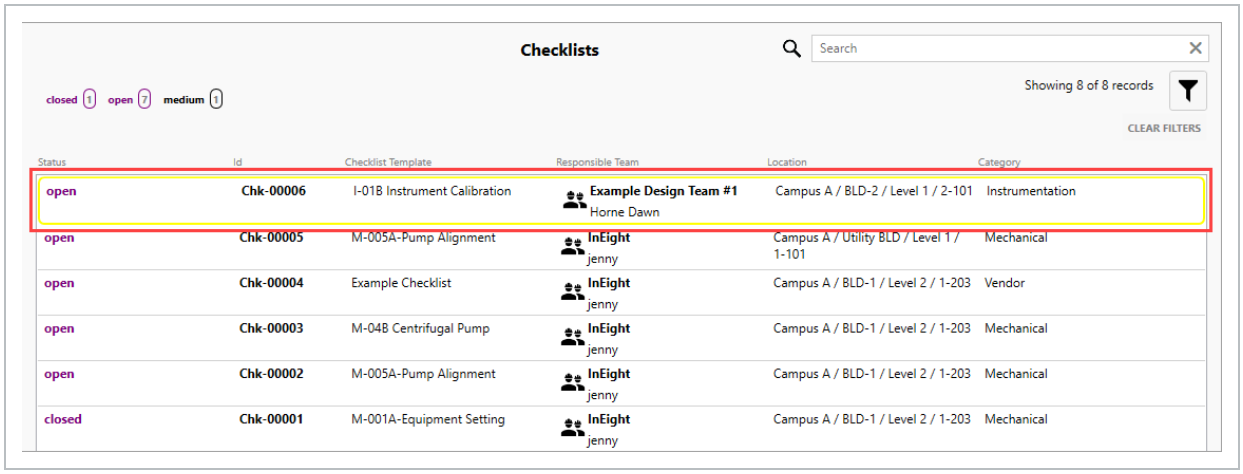


Additionally, the Attachments, Comments, and Issues buttons are also available after the Execute button is selected.

Once all of the Answer boxes are completed, you can now publish and close the checklist.

3.2 Step by Step 1 — Convert a Checklist Placeholder to a Checklist

1. Click on the **Checklists** icon at the bottom of the screen.
    - The list of existing checklists appears
2. Search through the existing checklists, then double-click on an open checklist, such as Instrument Calibration in this example.



- The given checklist appears

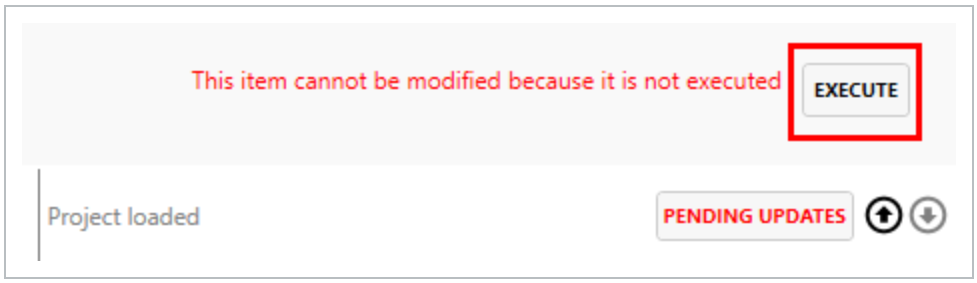
> **NOTE** Clicking on the checklist once places a yellow box around the checklist. Clicking on the checklist a second time opens it.

3. Expand one of the **Categories** so that the questions appear.

- Notice how the Answer checkbox is greyed out, along with the Last Update checkbox

> **NOTE** Categories can include such rows as Header, General, and Acceptance, but can vary from project to project.

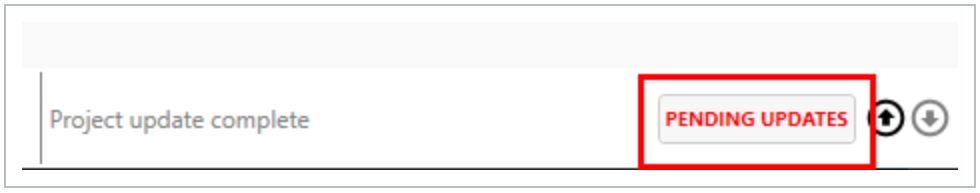
4. Select the **Execute** button at the bottom right of the screen.



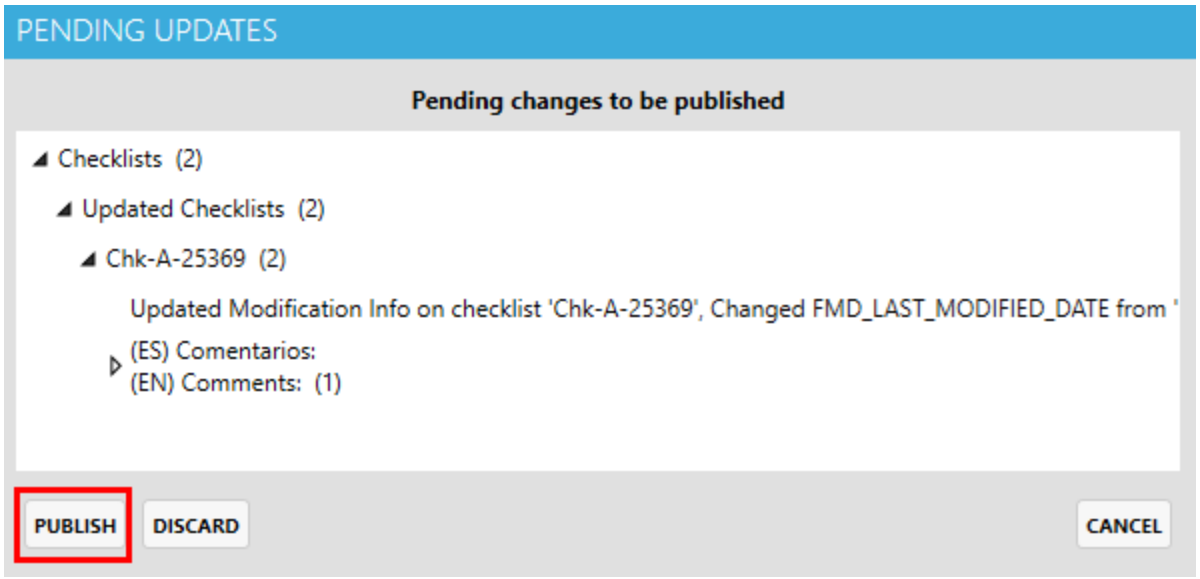
- The Execute button converts the Checklist Placeholder into a Checklist
- Once executed, notice how the Answer checkboxes are now editable

> **NOTE** After selecting the Execute button, the system pulls in the current template that is associated with this checklist.

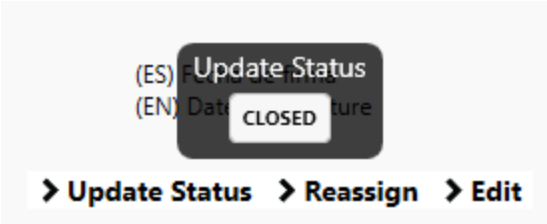
5. Select the **Pending Updates** button.



6. Select **Publish**.



7. Click on the **Update Status** menu option and select **Closed**.



3.3 MANIPULATE AND ANSWER A CHECKLIST

Open checklists are checklists that have not yet been executed, do not have answers, or haven't been finalized and closed.

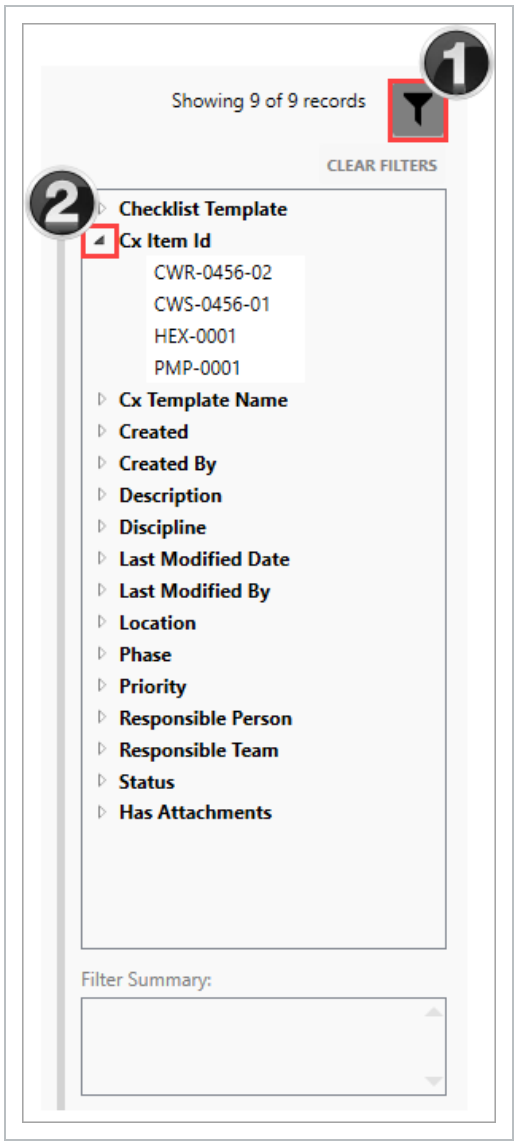
3.3.1 Locate a Checklist

On the main Checklists page, you are able to quickly jump to the desired checklist in two ways:

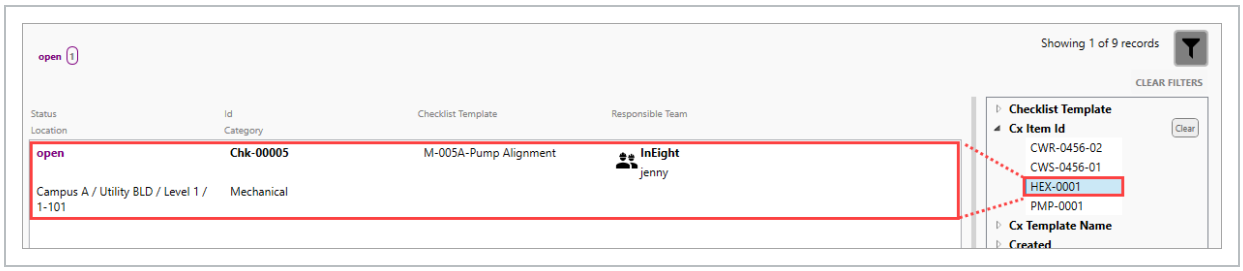
1. Using the Filter function.
2. Clicking on the Closed / Open / High / Medium buttons or as defined by your ADMIN.

3.3 Step by Step 1 — Filter to Locate a Checklist

1. From the main Checklists page, click on the **Filters** button.
    - In this case there are 9 records
2. Click on any of the carrots preceding an item, in this case by **Cx Item Id**.

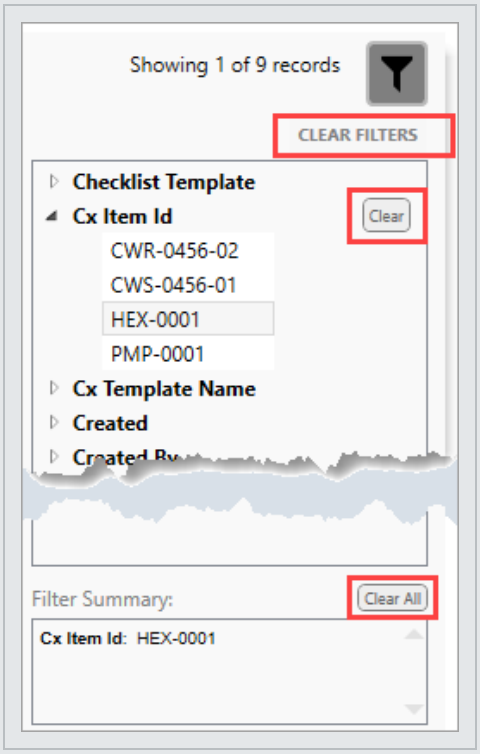


3. Click on an item from the drop down, in this case the **HEX-0001**.



4. Double-click on the checklist to open.

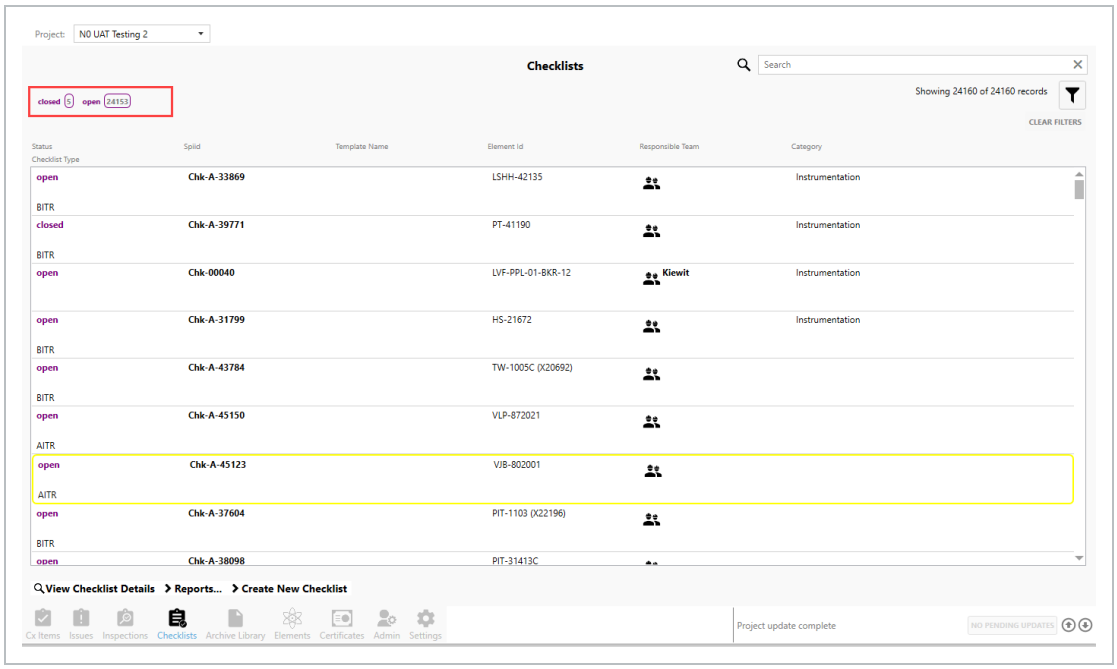
TIP Click either the **Clear Filters**, **Clear** or **Clear All** buttons to remove filtering.



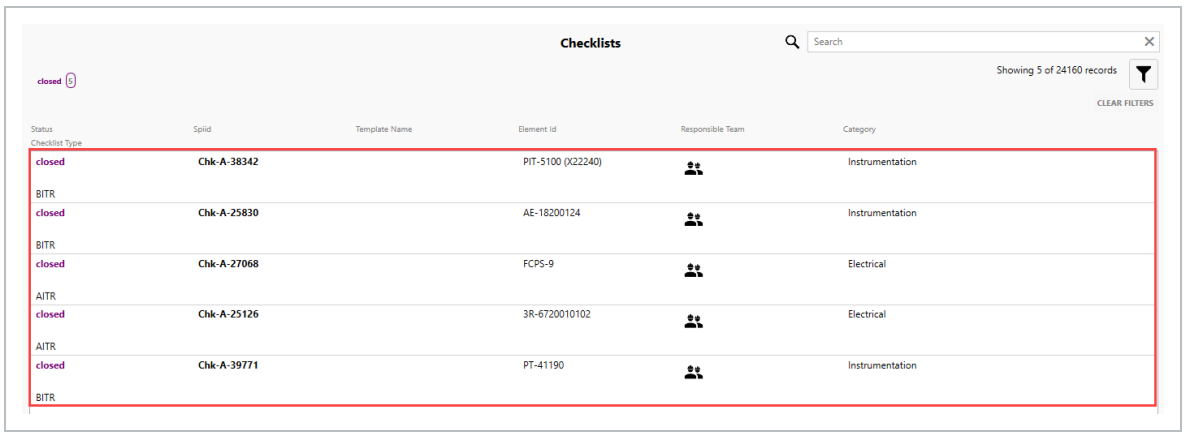
The second way to quickly jump to a checklist from within the Checklists page is to click on any of the **Closed / Open / High / Medium / Low** or otherwise defined buttons. Using this functionality might be important if you are seeking:

- All the **Closed** checklists, regardless of ID, Responsible Person, Location, or Category
- All of the Open checklists so you can begin to prioritize your work, or the work of others

- In this example, there are no **Medium** or Low priority checklists



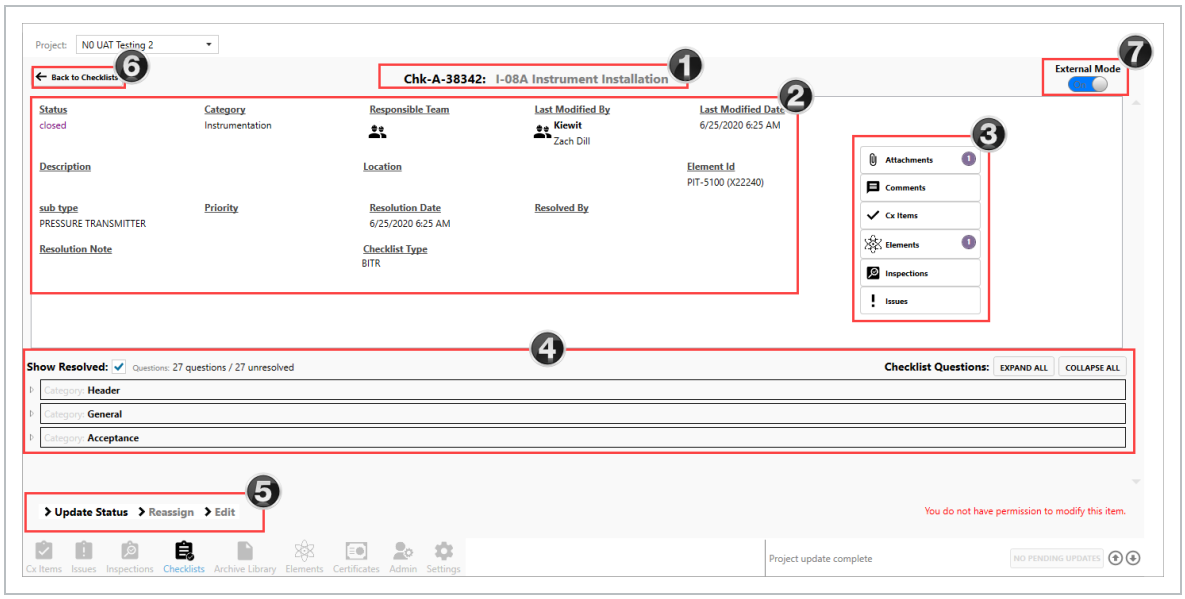
Notice once you click on any one of those buttons, the checklist records page is narrowed, in this case to five closed items.



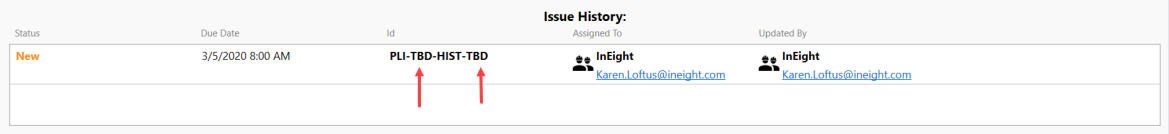
3.3.2 Navigate a Checklist

Within a checklist, there are many options. Some functions are about editing the checklist, while others are about navigating to and from the checklist. In the table below, each aspect is described.

Item	Description
1	Name of the Checklist by ID and Checklist Template name.
2	Data from the checklist regarding the checklist including Status, Category, Responsible Team, Description, Location and Priority, Element Id, Sub type, Priority and Creation, Modification & Resolution information.
3	Depending on project configurations and/or your role, each button creates links or new records with links where you can, at minimum, add new Attachments, Comments, Cx Items, Elements, Inspections and/or Issues.
4	A cascading drop-down, by category, of questions with room for question-specific responses.
5	While project/role/workflow specific, additional pop-ups appear when each of the buttons is clicked. Updating a Status is the first option, Reassigning the Checklist Template option is the second and Editing the primary checklist field is the third option.
6	This button returns you back to the previous window.
7	When On, the External Mode expects to receive a scan of the checklist PDF with a QR code using the ADMIN module, taking the scan to complete the checklist.

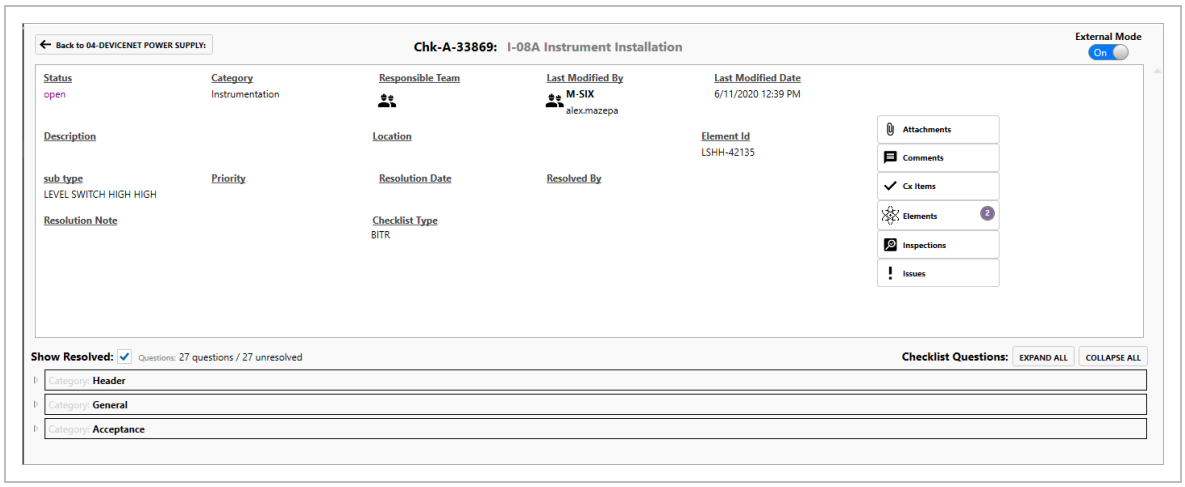


NOTE The below Checklist Issue image shows an extension of TBD under the Id field. This is because the Issue has not yet been published. Once published to the server, the TBD's will turn into a numerical reference point for the Id.



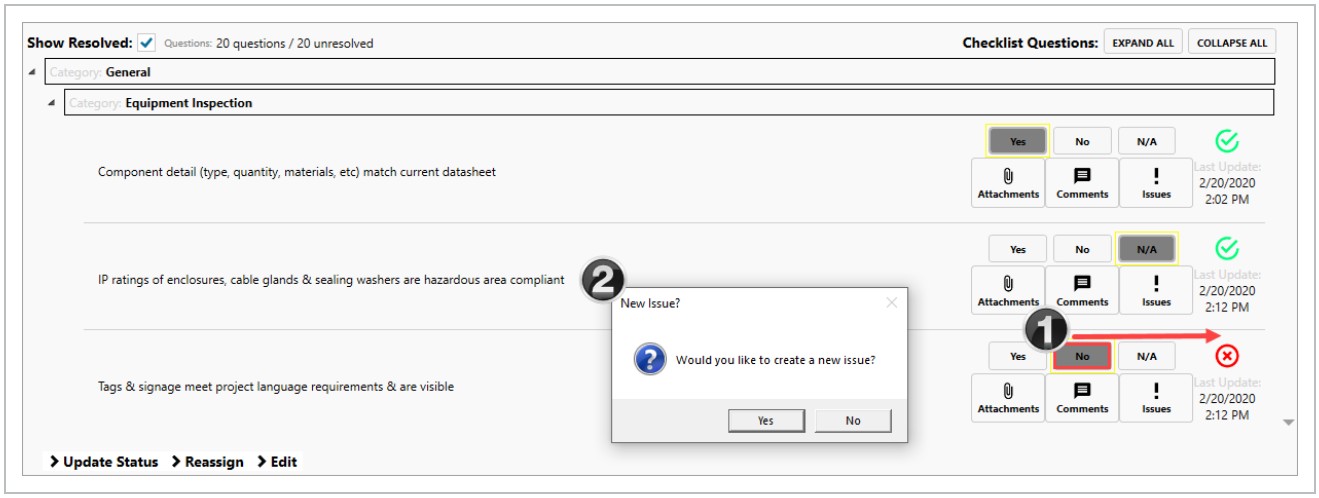
3.3.3 Link Data to a Checklist

Within a checklist, users are able to link data such as issues, attachments, and comments based on user permissions.



Using the first Equipment Inspection checklist item, simply checking the **YES** button makes the green check box appear.

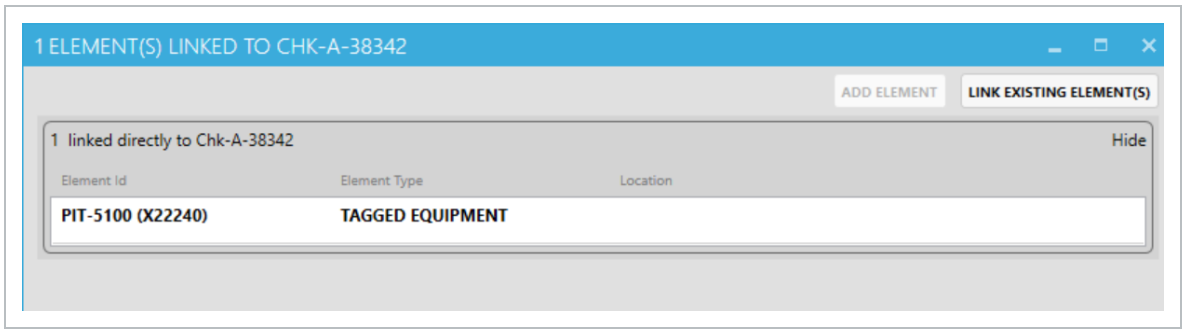
Alternatively, selecting a **NO** response turns the item into a red X, and a new pop-up appears asking if you'd like to create a new issue.



TIP If you create an issue from a question (with prompt or by a manual link using issues buttons) the question's issue description will get the question auto populated for convenience.

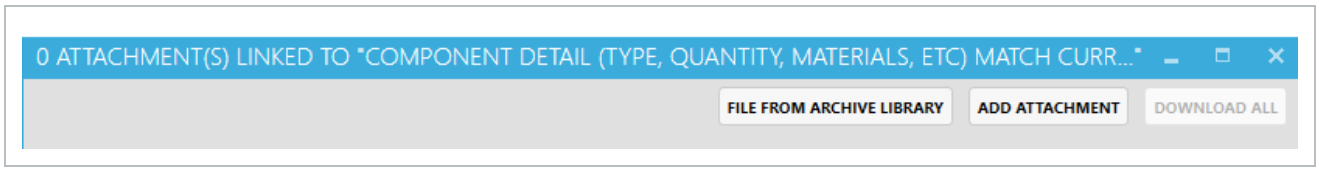
3.3.3.1 Link an Element

To learn more about elements, see the Elements lesson.



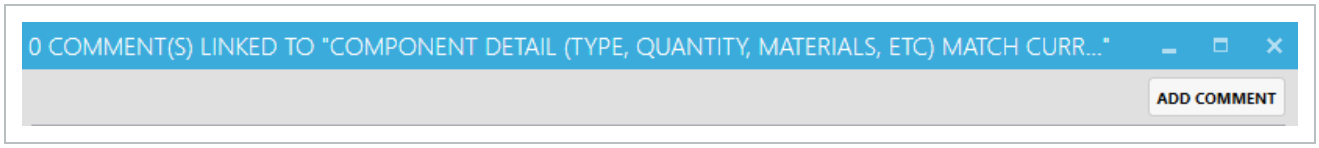
3.3.3.2 Add an Attachment

To learn more about attachments, see the Attachments lesson.



3.3.3.3 Add a Comment

Comments are tied to a specific checklist item, in this case "Component Detail."



3.3.3.4 Add or Link a Cx Item

If the **Link Existing CX item(s)** button is selected, a new pop-up window appears showing all of the Cx Items, that in our case, can be tied to the ID CHK-TBD: E-001A-Motor Control Center.

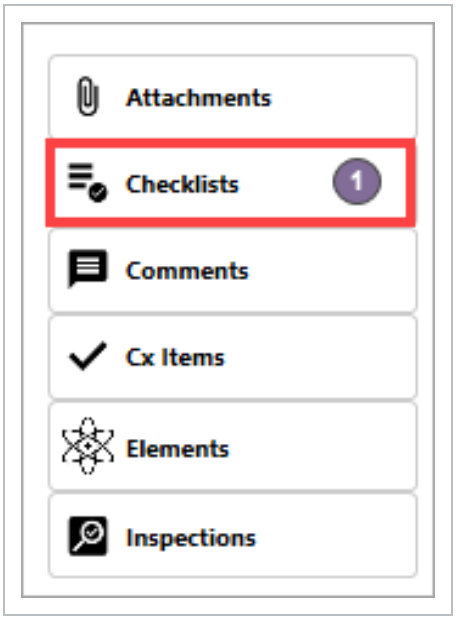
To learn more about Cx items, see the Cx Items lesson.

NOTE As a configurable item, your project may not have Cx Items, or you may not have the permission to link to it.

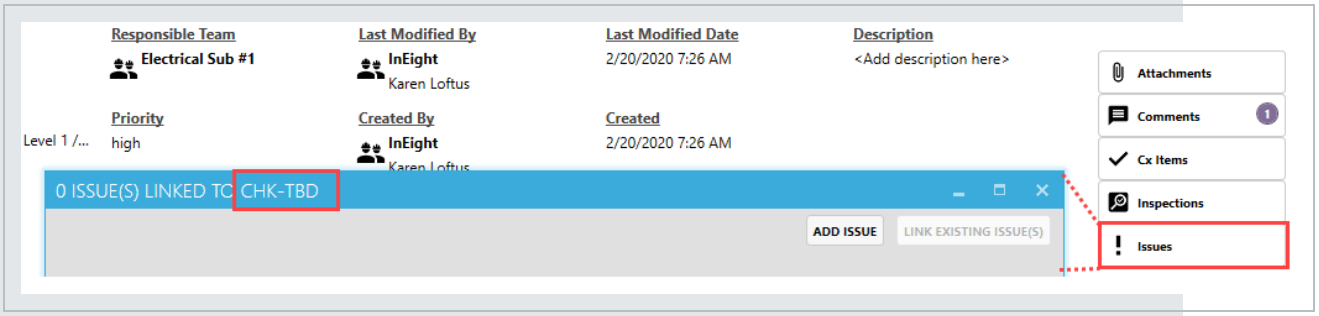
3.3 Step by Step 2 — Link a Checklist to a Completions Tab

1. From within a Cx Item, click the **Checklists** button, using our example.
    - While there may already be a checklist shown, you can also add other checklists to this Cx Item Id
2. Click the **Link Existing Checklist(s)** button. Alternatively, "3.4 Open and Close a Checklist" on page 57 as in a previous lesson.
3. Select the desired checklist to link.
    - By holding down the CTRL key, you can select multiple checklists

4. Click the **Link Selected Checklist(s)** button.
    - A pop-up appears asking if you want to link the identified Cx Item(s)
5. Check either Yes or No to confirm the linkage.
    - If no, you will return to the same screen
    - If yes, the Checklist(s) are linked and will appear on the Checklists' pop-up and a circled numeral will appear next to the Checklists button



TIP If you add an attachment, comment or issue at the top right side of the page, it is automatically linked to the specific record.

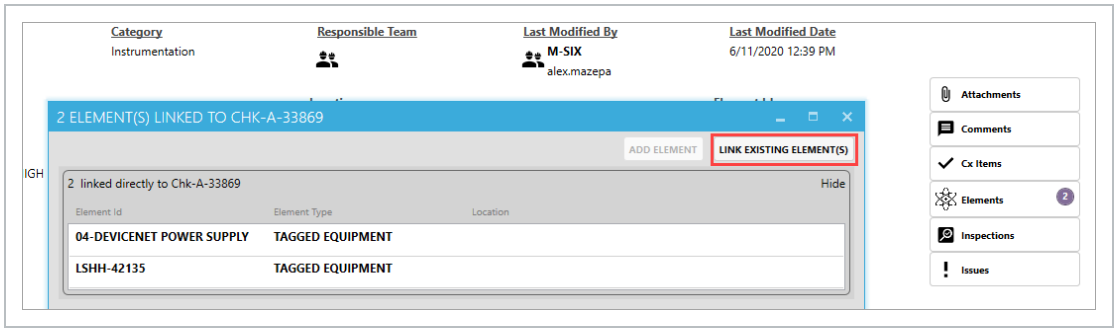


The following step by step outlines the process of linking an element to a checklist.

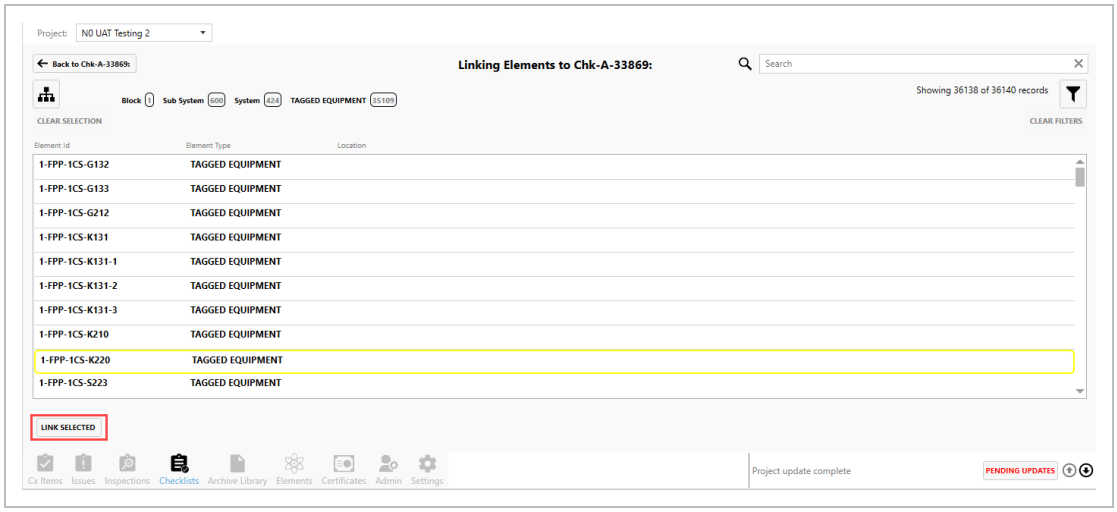
3.3 Step by Step 3 — Link an Element to a Checklist

1. From the Checklists tab, double-click on the desired Checklist.

2. Click on the **Elements** button.
3. Click the **Link Existing Element(s)** button.



4. In the resulting pop-up, select the desired **Element Id(s)**.
5. Click the **Link Selected** button.



1. Click **Yes** to confirm the linkage(s).
2. Click **Pending Changes** and then **Publish**.

3.3.3.5 Add or Link an Inspection

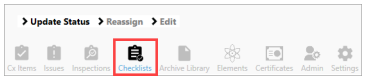
To learn more about inspections, see the Inspections lesson.

3.3.3.6 Add or Link an Issue

To learn more about issues, see the Issues lesson.

3.4 OPEN AND CLOSE A CHECKLIST

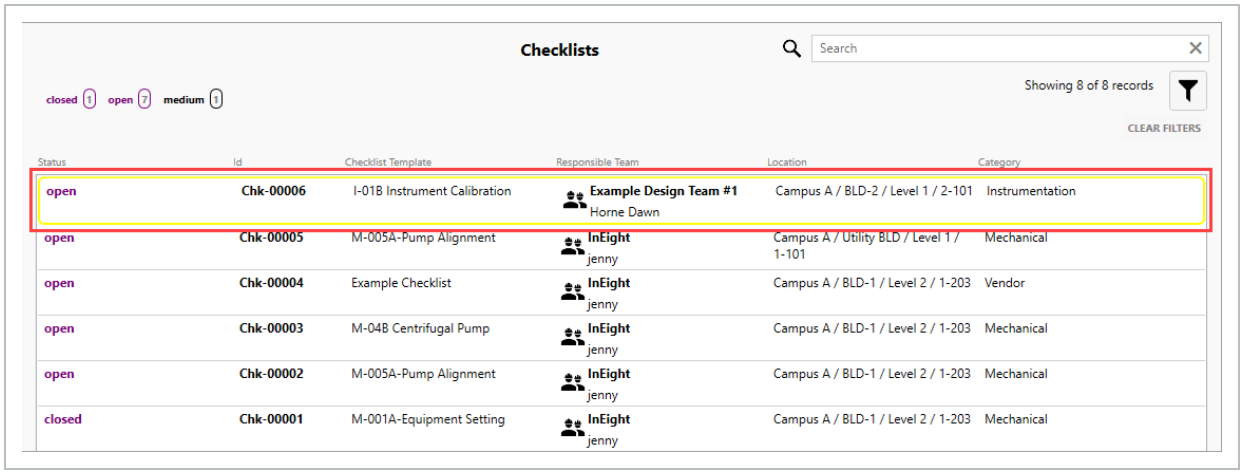
You can access Checklists by selecting the Checklists icon at the bottom of the screen.



3.4.1 Open a Checklist

3.4 Step by Step 1 — Open an Existing Checklist

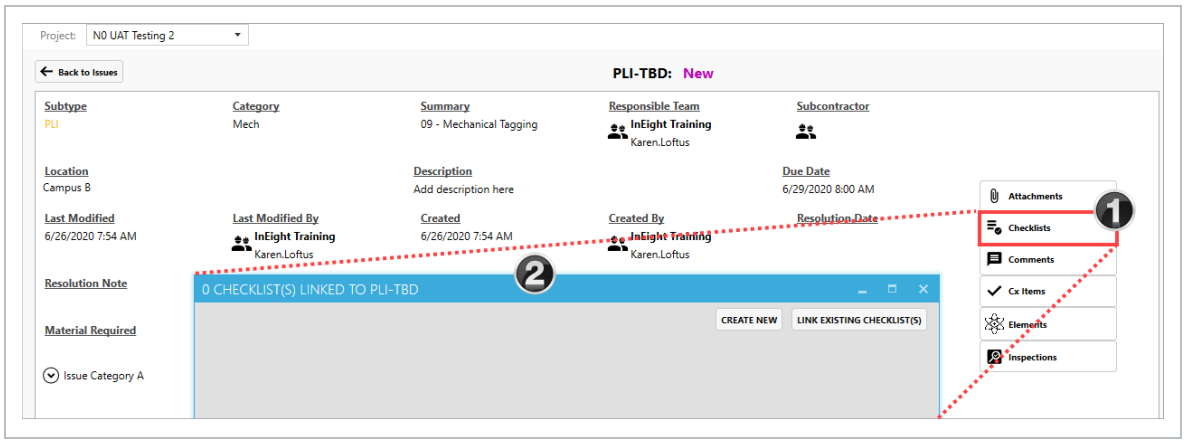
1. Click on the **Checklists** icon at the bottom of the screen.
    - The list of existing checklists appears
2. Search through the existing checklists, then double-click on the desired checklist, Instrument Calibration in our example.



- The given checklist appears

> **NOTE** Clicking on the checklist once, places a yellow box around the checklist. Clicking on the checklist a second time opens it.

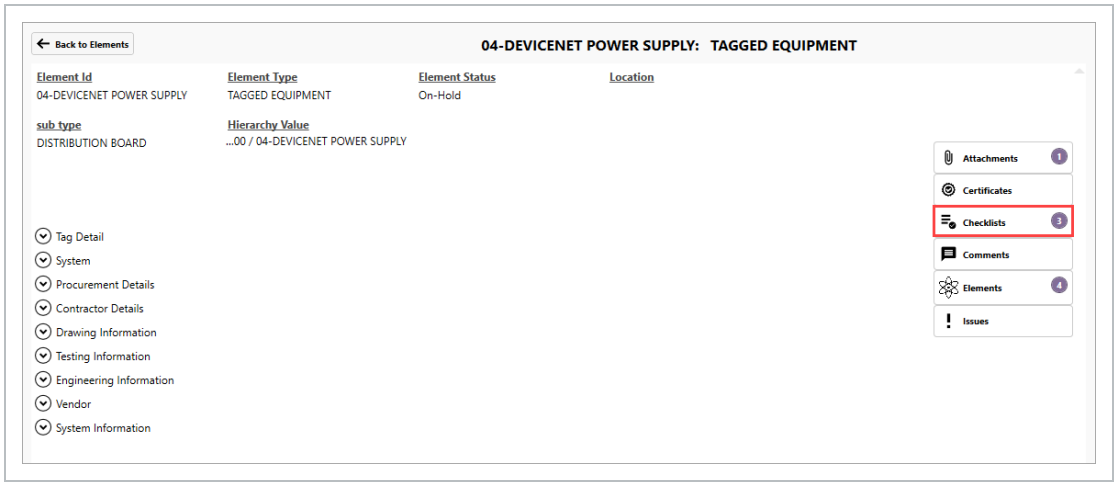
Where available, you can also open a checklist from within a specific Cx Item, Issue, Inspection or Element. Though the Checklists button is available to select, it doesn't mean that each item has an existing checklist created, as shown in this Inspection.



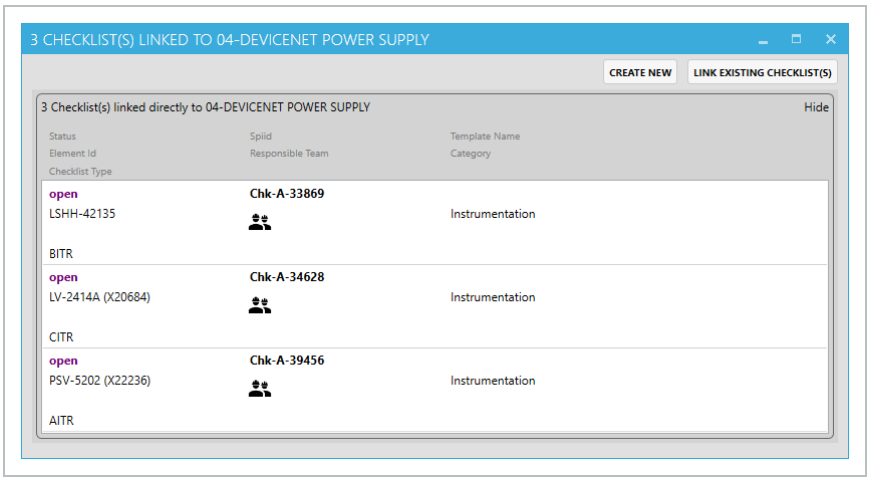
If there were a checklist to address, there would be a number to the right of the Checklists button.

3.4 Step by Step 2 — Open a Checklist From Within Another Tab

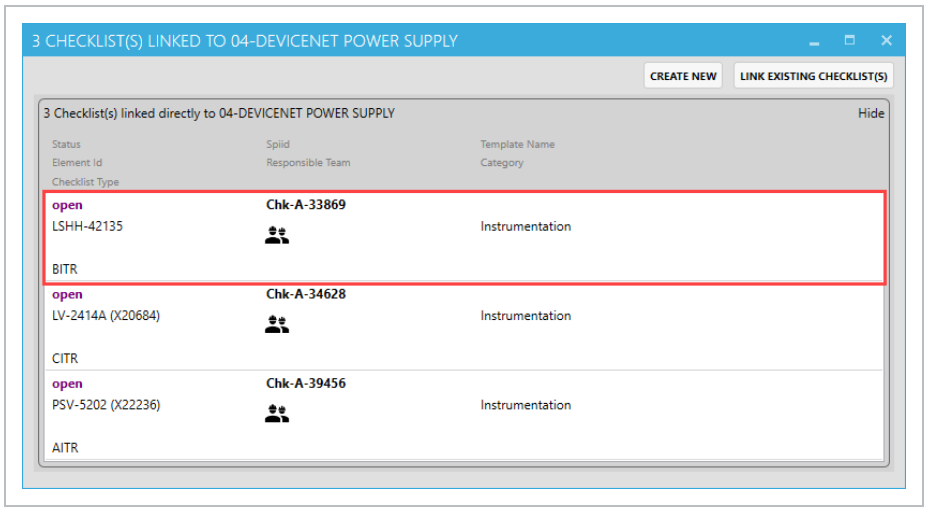
1. Open a **Cx Item**, **Issues**, **Inspections** or **Elements** tab.
2. Double-click on a specific item, in this case Element **04-DEVICENET POWER SUPPLY**.
3. Seeing there are 3 linked checklists, click on the **Checklists** button.



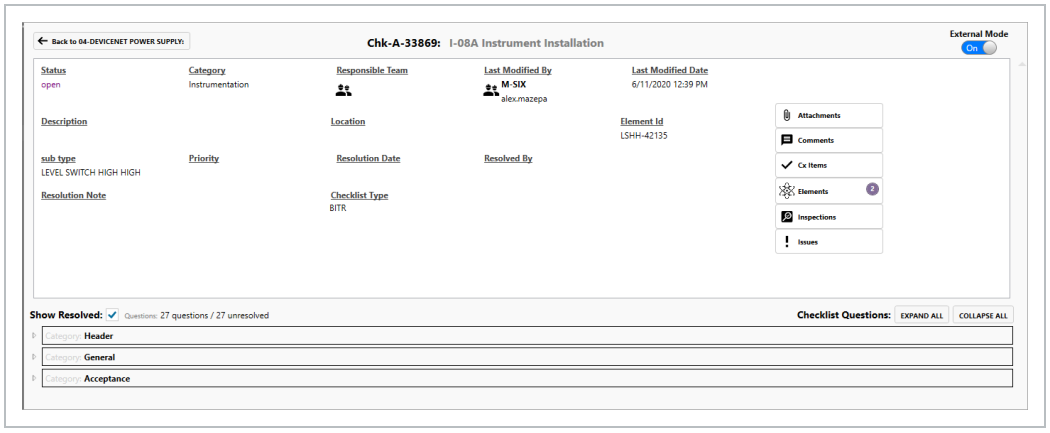
- In the pop-up box, the link of checklists appear



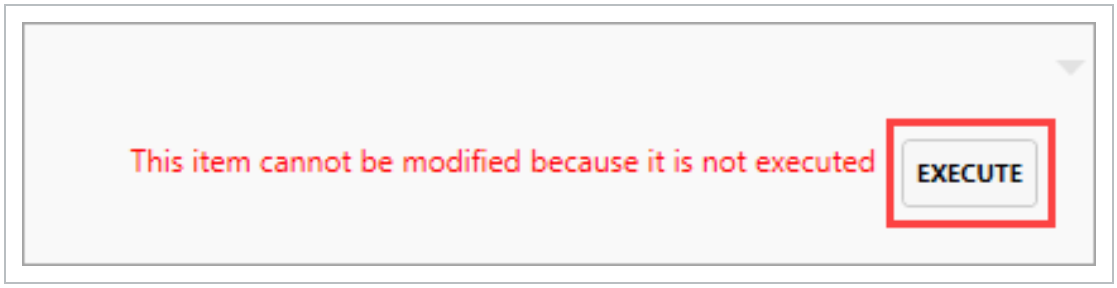
4. Double-click on a checklist, ID # **Chk-A-33869** is our example.



- The checklist appears



5. Assuming you have the authority to do so, click the **Execute** button, ensuring the most current Checklist is applied to the Element.



6. Click the **carrot** to the left of each Category to view each drop-down list of questions.

7. Answer each checklist question. Doing so turns the question into a resolved item -- with a green check mark appearing along the right column, and an update date and time.

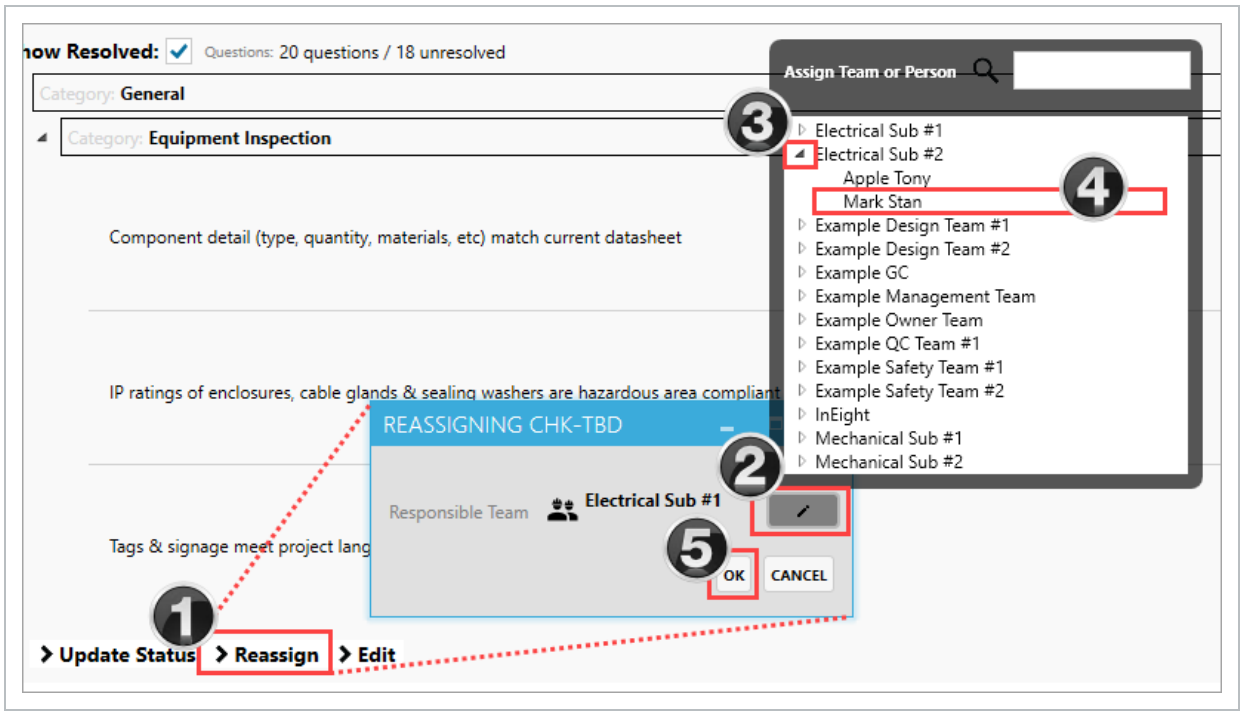
3.4.2 Reassign a Checklist

Reassigning a checklist may be important when:

- Another individual or team is more knowledgeable
- Another team or person has the subject matter expertise, and want to get to the project site more quickly
- An improper team was initially identified to complete the checklist
- You have been pulled off this project
- You are going on vacation and won't return until after the checklist is due

3.4 Step by Step 3 — Reassign a Checklist

1. Click the **Reassign** button.
2. In the resulting pop-up window, click on the **Pencil** icon.
    - Another pop-up appears showing the list of teams and people to be assigned
3. Click on the team, and further drop down as needed to indicate the proper person/team.
4. Select **OK**.



3.4.3 Close a Checklist

For those checklists you create, and where you have authority to do so, you will have the ability to edit and close the checklist.

While an entire Checklist must ultimately be completed, you may only have the need or time to answer a portion of the questions in one sitting.

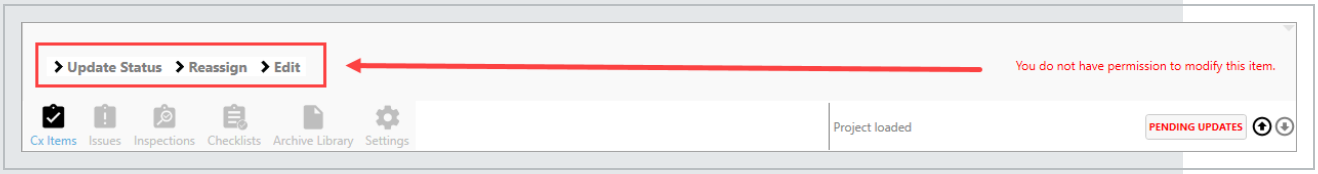
After each series of questions have been answered, click the **Pending Changes** button. This ensures your responses are locked in and cannot be overwritten by another user.

Once all questions have been answered in the checklist, click **Update Status**.

Add a comment to the Resolution Note field and click **OK**.

NOTE	If all questions have not been resolved, a pop-up appears indicating the checklist cannot be closed, because either there are questions still unanswered, or haven't been saved.

NOTE When you pull up an existing checklist, you may not have the ability to modify it. When that is the case, a comment appears advising you of this, and the Update Status > Reassign > Edit link is disabled, as shown below. Either way, you can close the checklist by clicking the **<-- Back to Checklists** button.



Lesson 3 Review

1. As a Completions user, you will be able to...? (Check all that apply)
    a. Open an existing checklist
    b. Create a new checklist
    c. Modify an existing checklist regardless of your permission level
    d. All of the above

---

2. You can only filter checklists two ways: 1) by Open & Closed status and 2) by Priority status?
    a. True
    b. False

---

3. Within a checklist, to add an Issue at a specific checklist step:
    a. Click on the Issues button on the Inspections page
    b. Click on the Issues button to the right of the desired Inspection step
    c. None of the above
    d. All of the above

Lesson 3 Summary

As a result of this lesson, you can:

- Open & Close an Existing Checklist
- Create a new Checklist
- Add and modify data within a Checklist
- Reassign a Checklist
- Execute a Checklist
- Create a Checklist Placeholder

LESSON 4 – ISSUES

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Create a new Issue
- Update, reassign, reschedule and edit Issues
- Resolve an Issue

Topics in this Lesson

4.1 Create an Issue 66
4.2 Issue Maintenance 72
4.3 Resolve an Issue 82
Lesson 4 Review 86
Lesson 4 Summary 86

4.1 CREATE AN ISSUE

> **NOTE** The InEight Completions product is highly customizable per your specific project requirements. Tab order and its functionality may differ than what is shown.

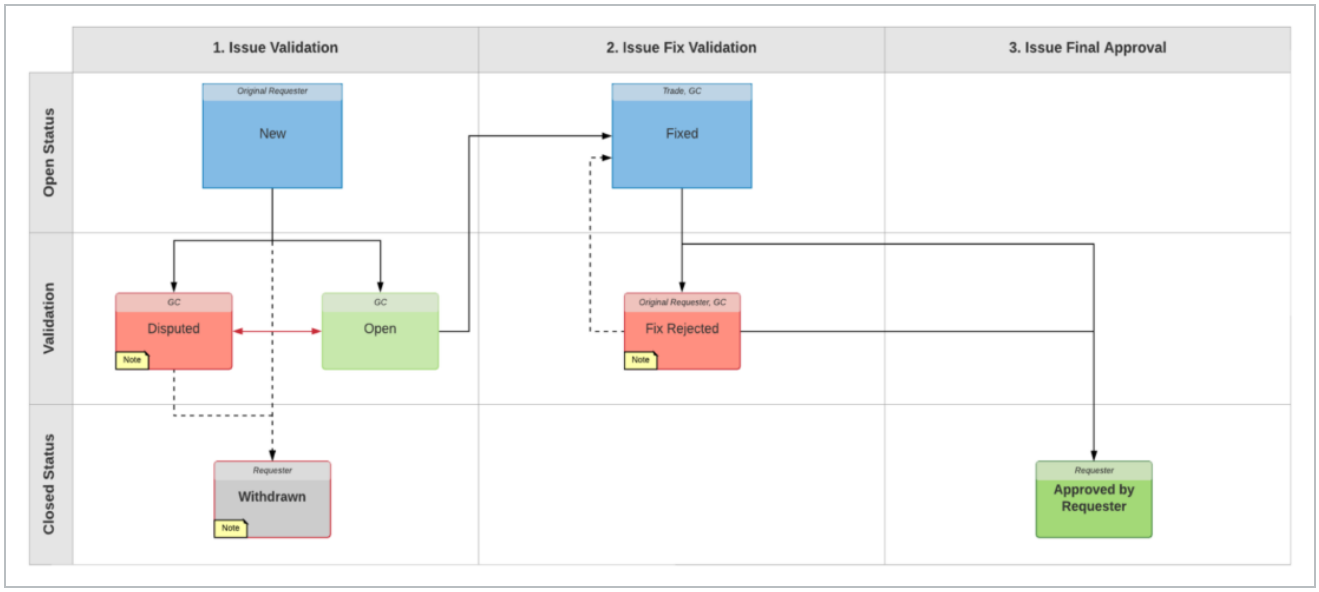
InEight Completions Issues can be defined as: a to-do list, a type of a deviation, or a type of non-conformance that eventually needs to be corrected.

A Completions Issue can be created at several points during the Completion process.

Example: "A safety manager notices a safety hazard related to a piece of equipment. The safety manager finds the relevant item, opens the safety phase, and creates the issue as "New" to be reviewed and fixed.

Below is an example of how an Issue could flow through your project. This is only one representation of an Issue flow; your organization may have a completely different setup.

1. Issue Validation
2. Issue Fix Validation
3. Final Approval



Overview – Create New Issue

Section	Description
1	A **Subtype** is a pre-defined classification for the issue.
2	This is a drop-down option. A **Category** describes the issue that is being reported. Both **Category** and **Summary** are conditional to one another.
3	This is a drop-down option. The **Summary** depicts issue. Both **Category** and **Summary** are conditional to one another
4	The **Responsible team** is in charge of making sure the issue gets fixed. Each project can interpret **Responsible team** differently, depending on business needs, procedures, and associated people.
5	The **Subcontractor** is responsible doing the actual work to get the issue fixed. Each project can interpret **Subcontractor** differently, depending on business needs, procedures, and associated people.
6	The **Location** is where the Issue has taken place. This is a pre-defined set of options.
7	This is brief **Description** of the issue with a 750 character length.
8	The **Due Date** is the date when the Issue is expected to be fixed.

NOTE The Create New Issue fields and their associated values (drop-downs, text fields, etc.) are all configurable. Each project has the ability to construct the appropriate field types and their definitions.

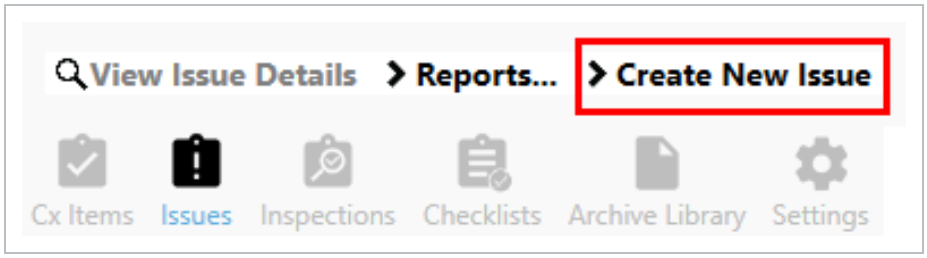
TIP In the Description field, it is important to provide a clear description of the issue in order for the Responsible Team clearly understands the issue.

4.1.1 Create a Standalone New Issue

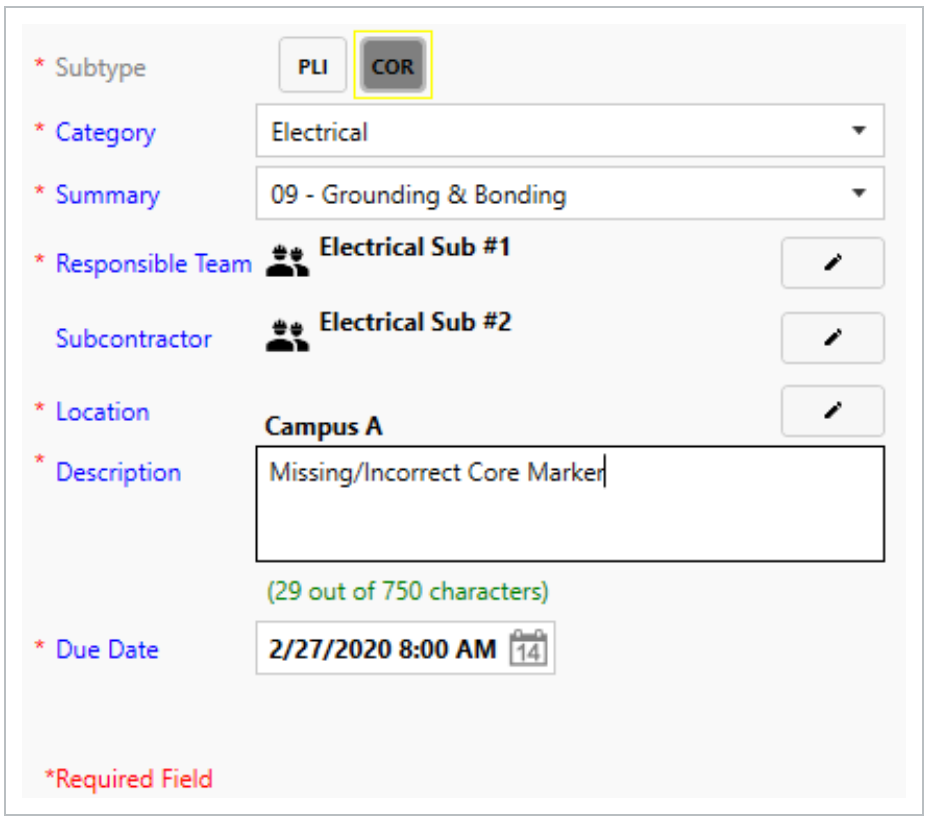
Once you determine a deviation or an action item for another party, you can start to create your Issue. In the Step by Step below, some of the selection options may not be available to choose from.

4.1 Step by Step 1 — Create a New Issue

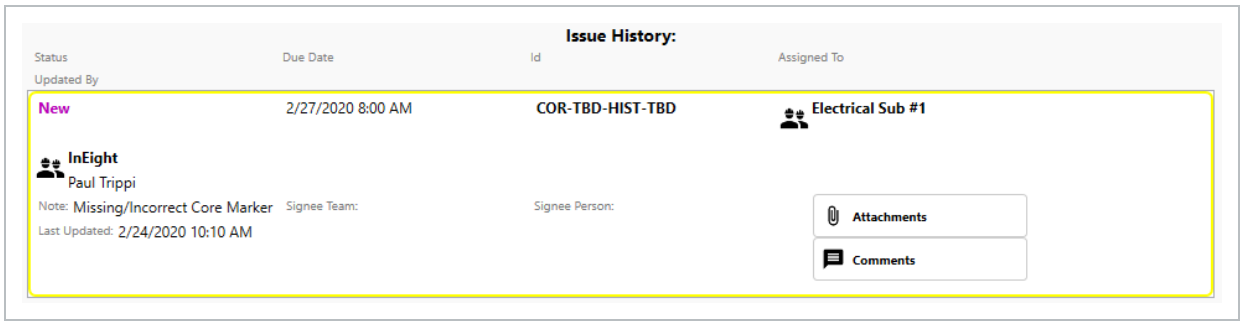
1. Select the **Issues module**.
2. Click on **Create New Issue**.



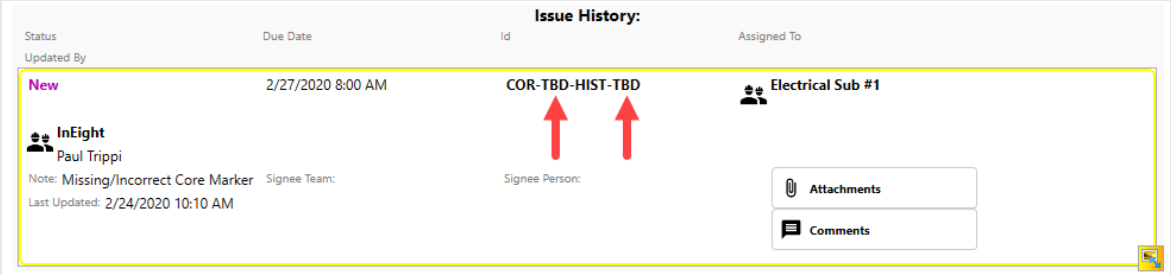
2. For Subtype, select **COR**.
3. For Category, select **Electrical**.
4. For Summary, select **09-Grounding and Bonding**.
5. For Responsible Team, select **Electrical Sub #1**.
6. For Subcontractor select **Electrical Sub #2**.
7. For Location select **Campus A**.
8. For Description type **Missing/Incorrect Core Marker**.
9. Leave the Due Date as **current date**.



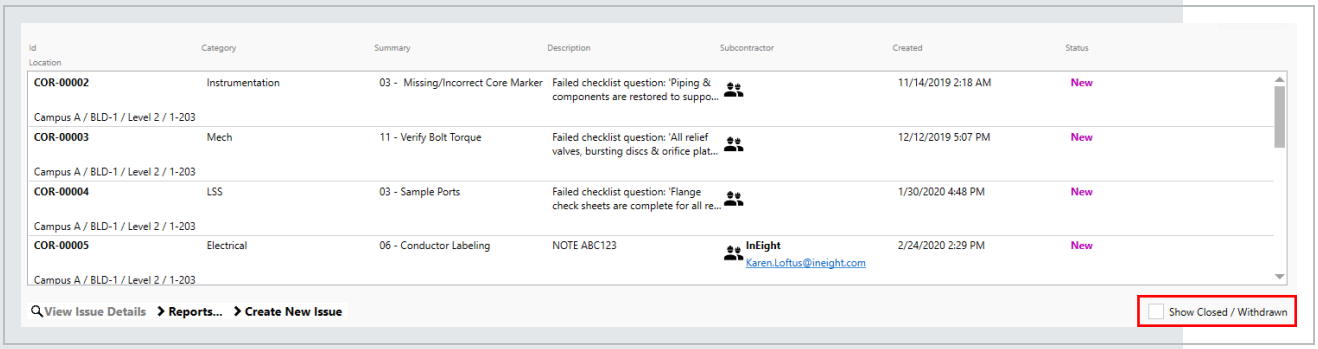
10. Select **OK**. The newly created Issue should look similar to what's shown below.



NOTE The below image shows an extension of TBD twice under the Id field. This is because the Issue has not yet been published. Once published to the server, the TBD's will turn into a numerical reference point for the Id.



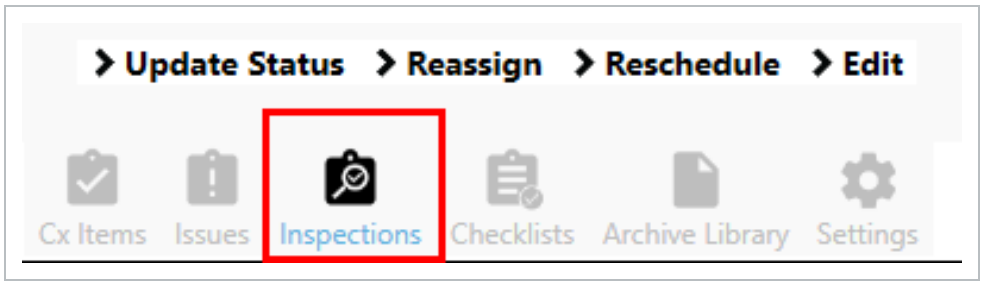
TIP The Issues screen by default displays open issues currently associated with this project. Select the Show Closed/Withdrawn checkbox to view all Issues.



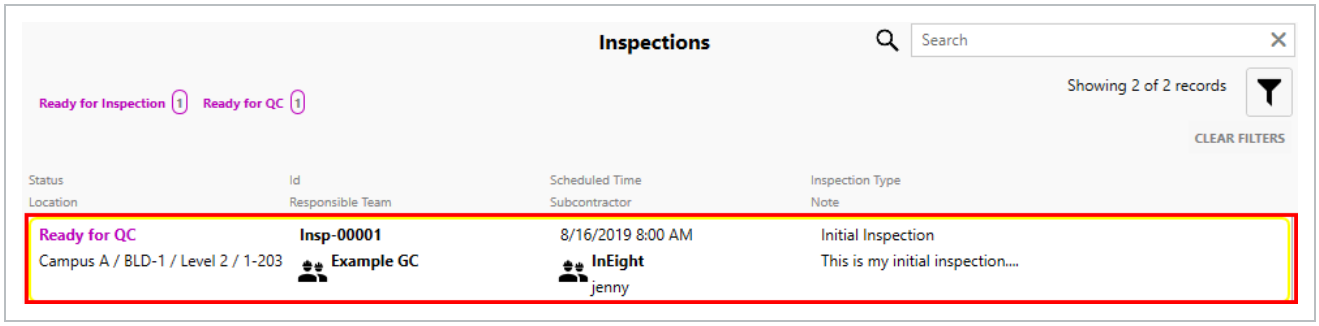
4.1.1.1 Create an Issue from any Available Completions Tabs

As an example, you can create an issue by selecting the Inspections tab. To learn more about inspections, see the Inspections lesson.

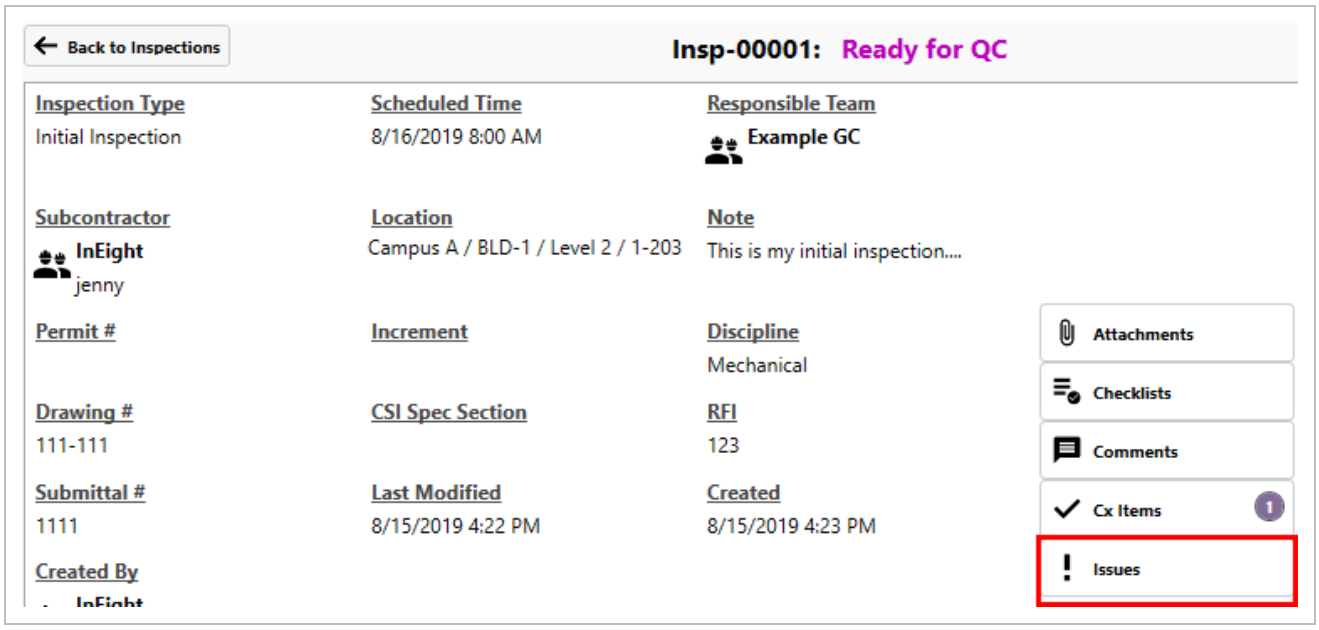
- Some tabs may not be available as they are dependent on how roles and permissions are defined



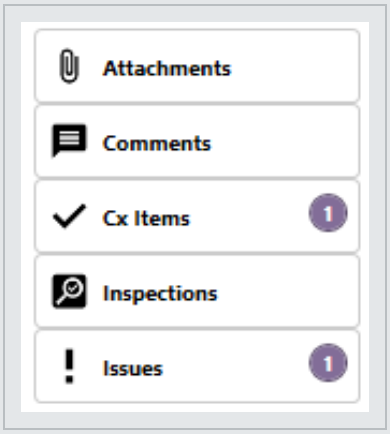
Within Inspections, double click on an open inspection.



Select the Issues icon located at the bottom right of the page.



NOTE The buttons on the right of the screen are all customizable, and also permission based.



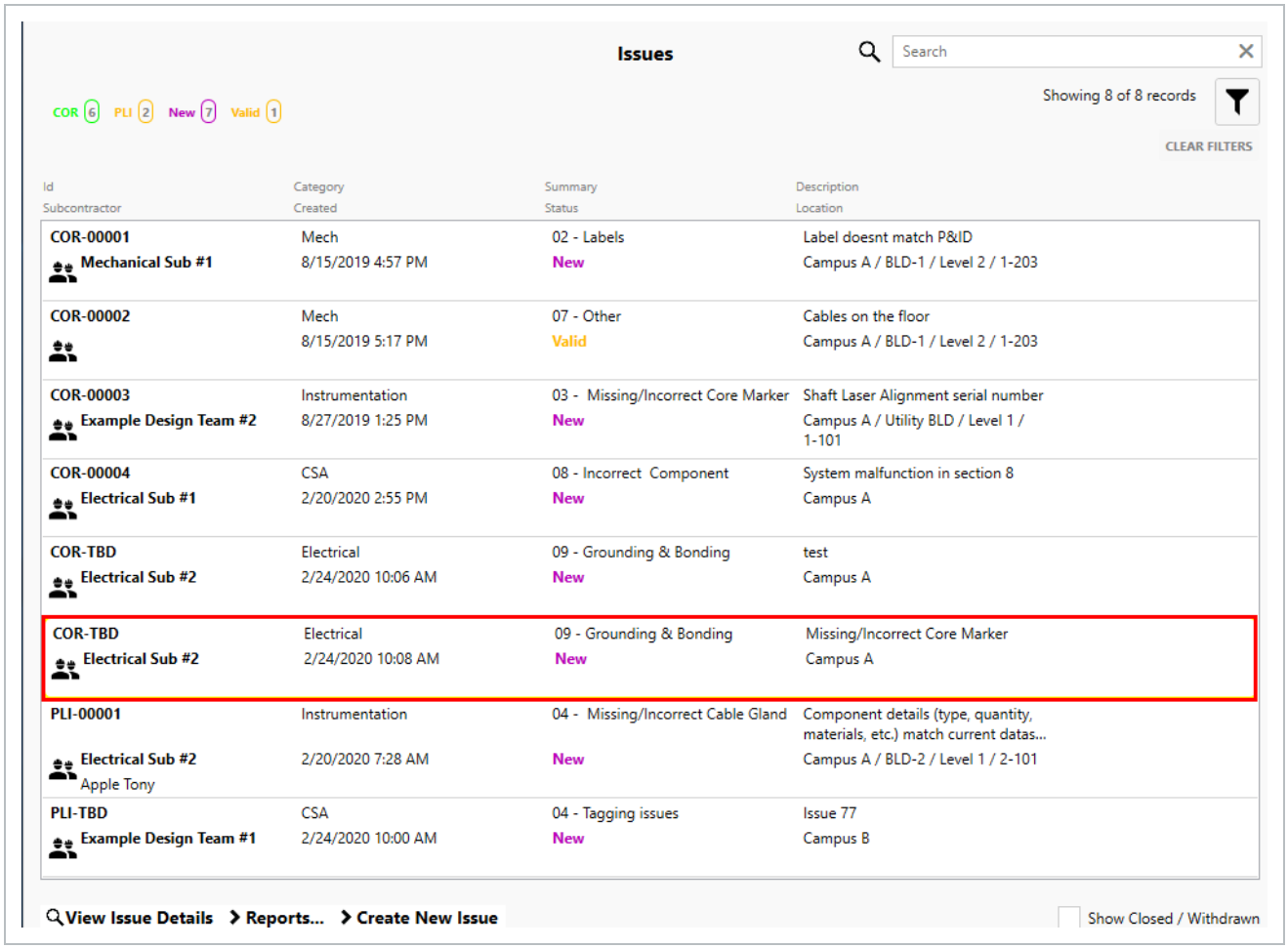
4.2 ISSUE MAINTENANCE

An Issue's situation can often change during the Completions lifecycle, and need to be updated to reflect its current position.

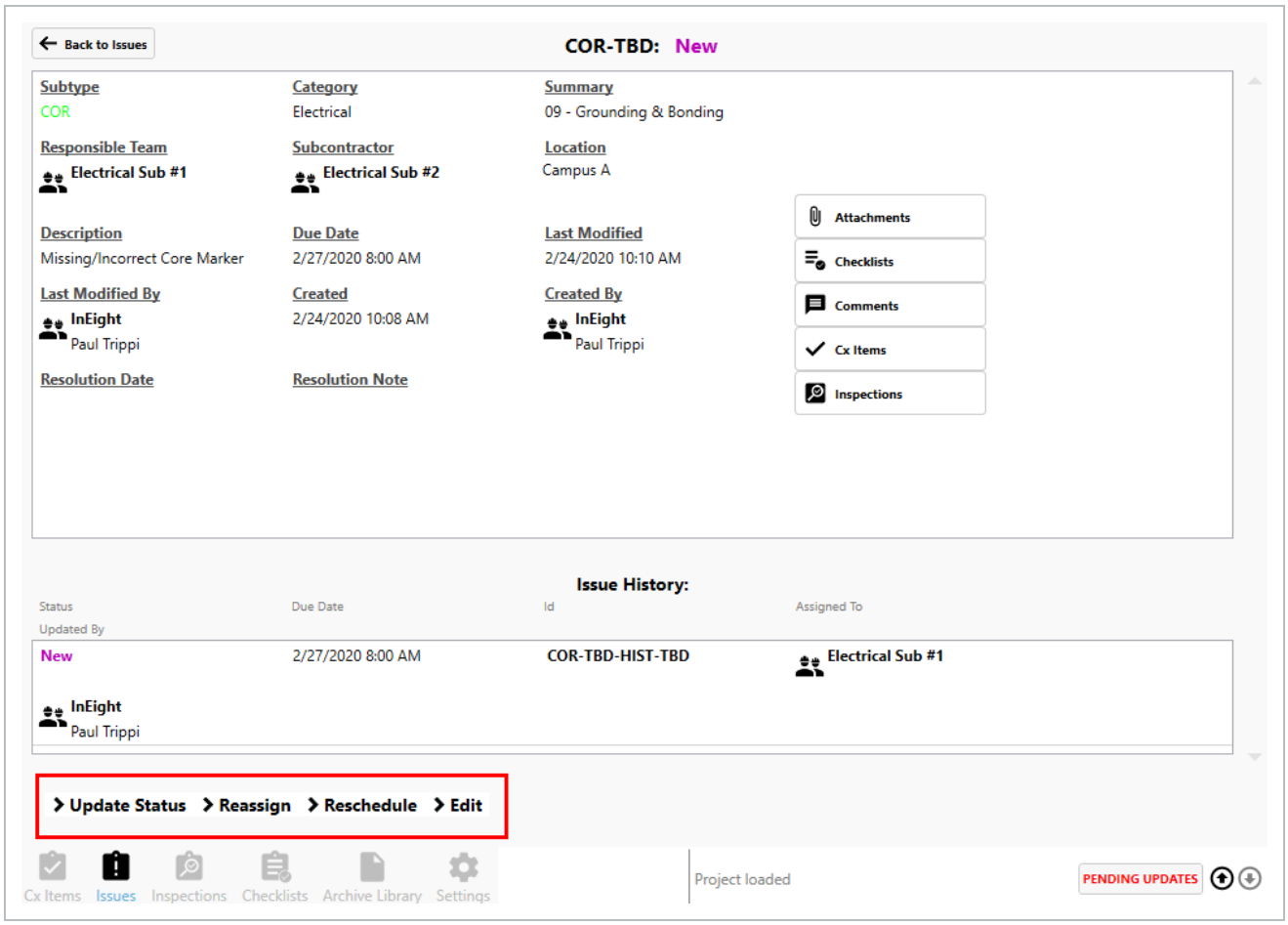
In these cases, it's possible to update the current situation of an Issue using any of the following four status updates:

- Update Status
- Reassign
- Reschedule
- Edit

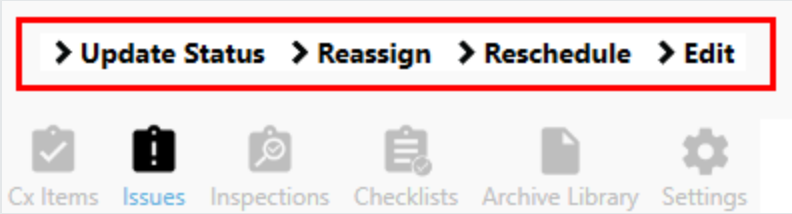
From the Issues tab, double click an issue that needs its status changed.



On the bottom left of the Issues screen, notice the four options that play a key role in the maintenance of an issue.



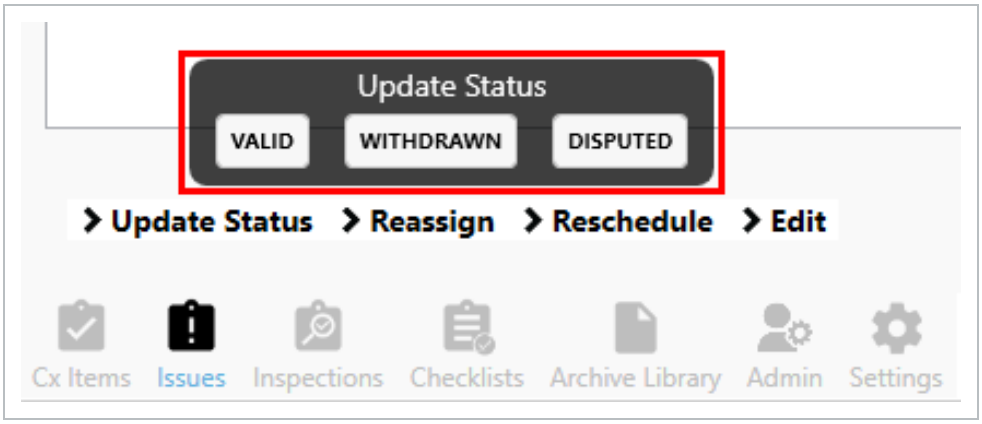
NOTE The options for Update Status, Reassign, Reschedule, and Edit options are all customizable, and depends on how your system is configured. Options depend on how your system is configured and your user permission level.



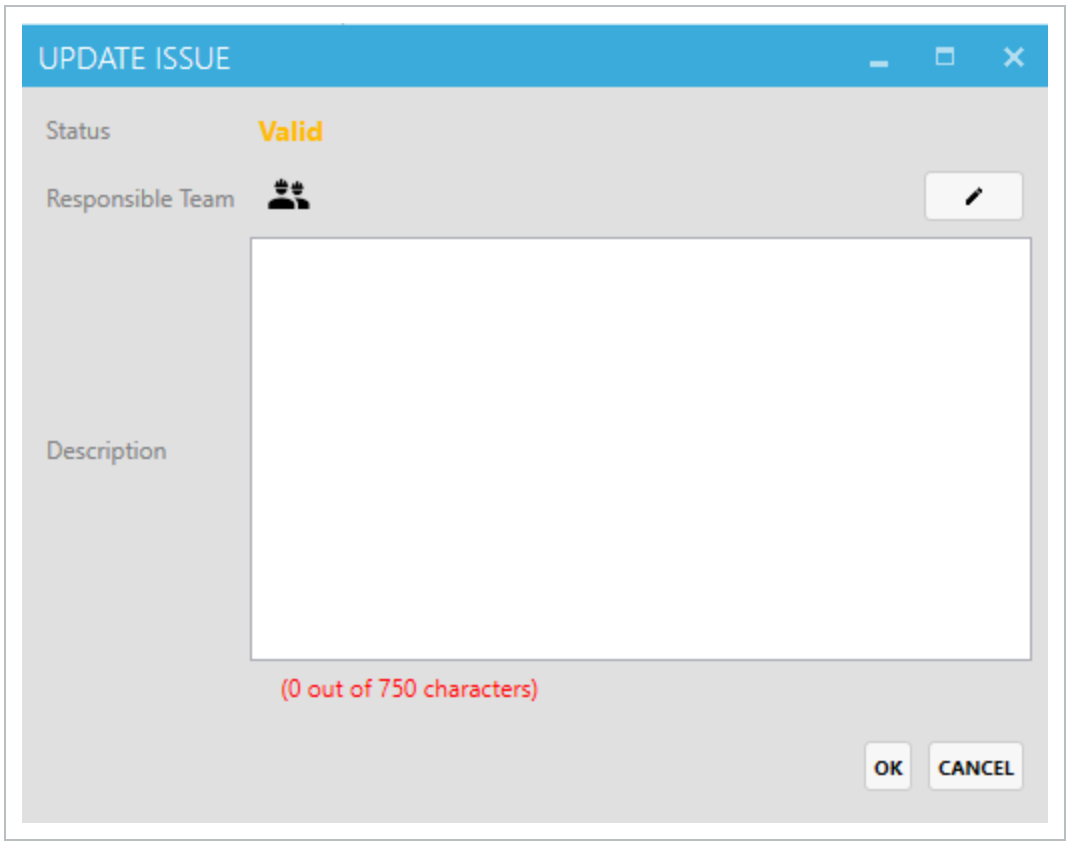
4.2.1 Update Status example

The options within the Update Status button can be configured to show various levels of issue progression, depending on your role and permissions level.

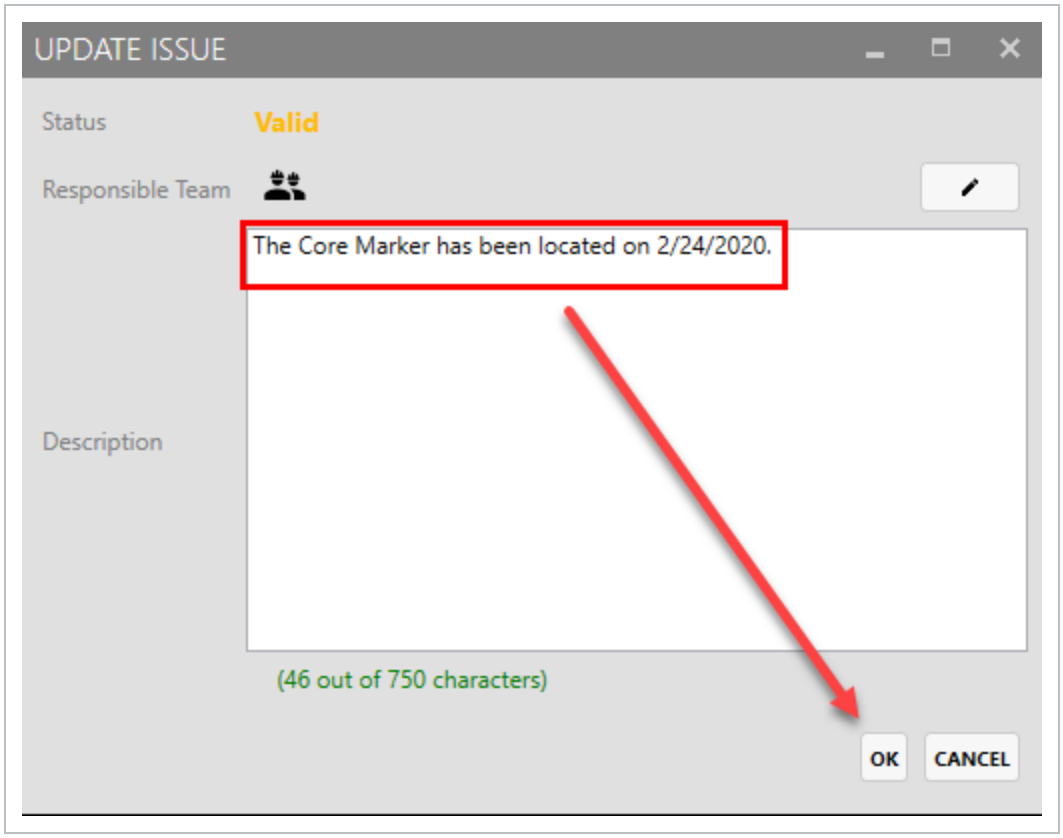
Update Status options are specific to a project. In the below example, the project administrator has created three Update Statuses: Valid, Withdrawn, and Disputed. Your company may choose a different variation of statuses. Resolving an issue is discussed in the Resolve and Issue topic.



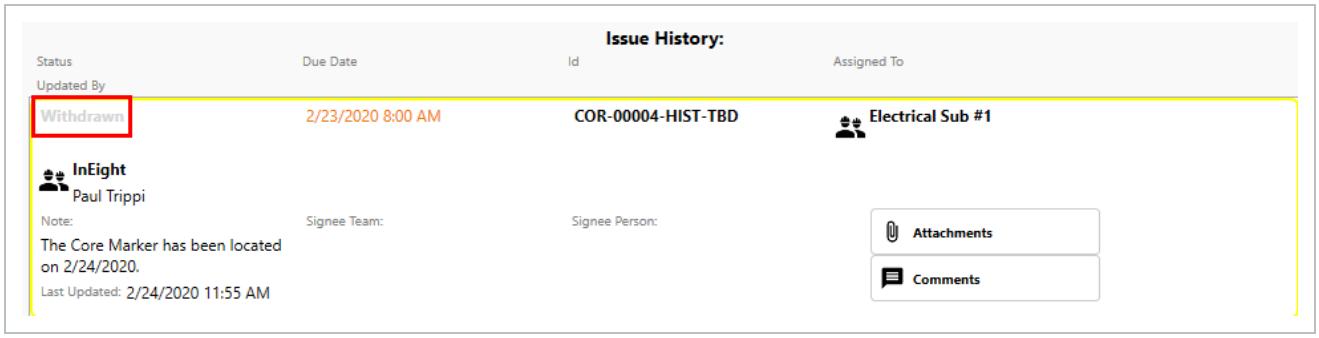
After selecting a status, the Update Issue pop-up window appears, like the one below.



Type in a description for why the Issue is being withdrawn, and select **OK**.

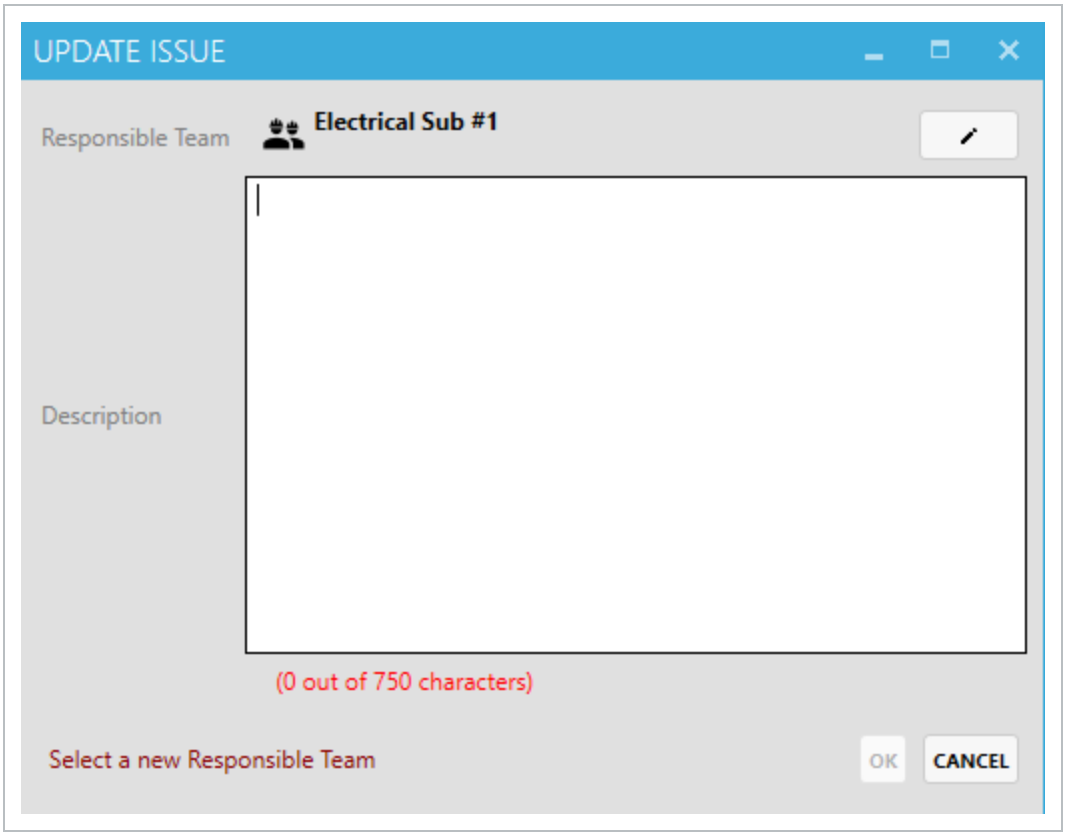


After selecting OK, you return back to the Issues Detail view, where you can see all the history events of this issue including the latest update.

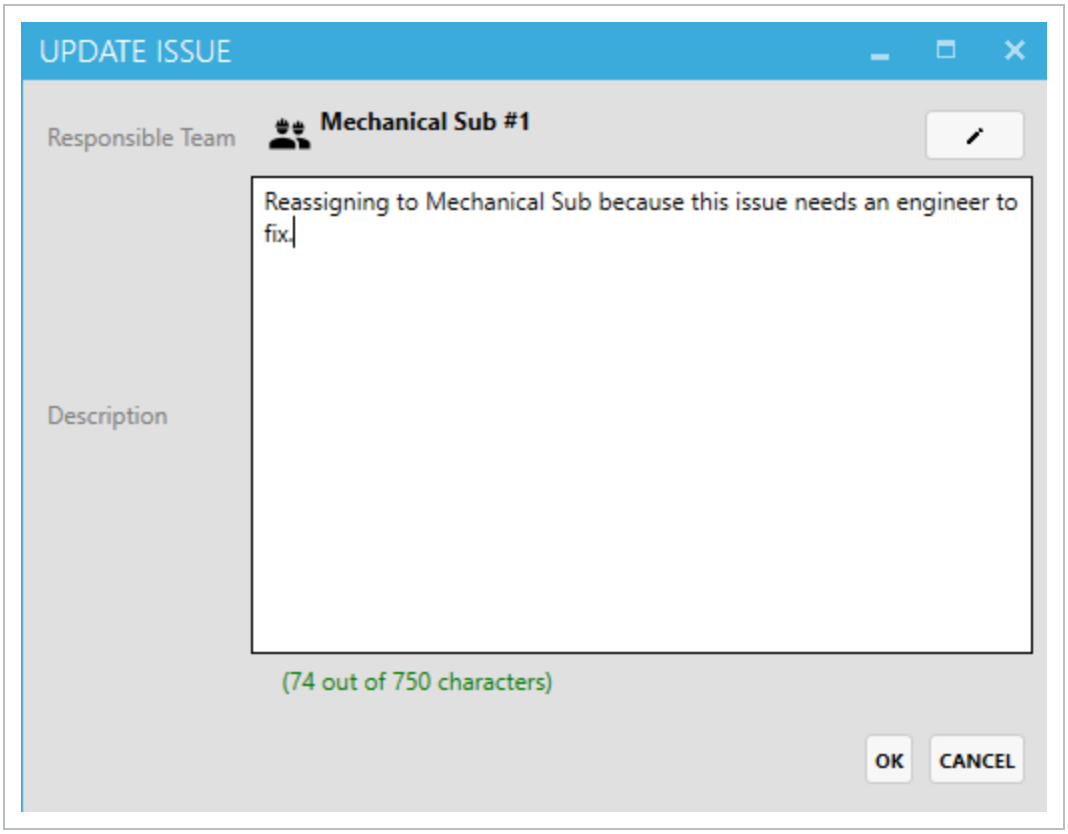


4.2.2 Reassign

By selecting the Reassign button, you are able to reassign the issue to another party.

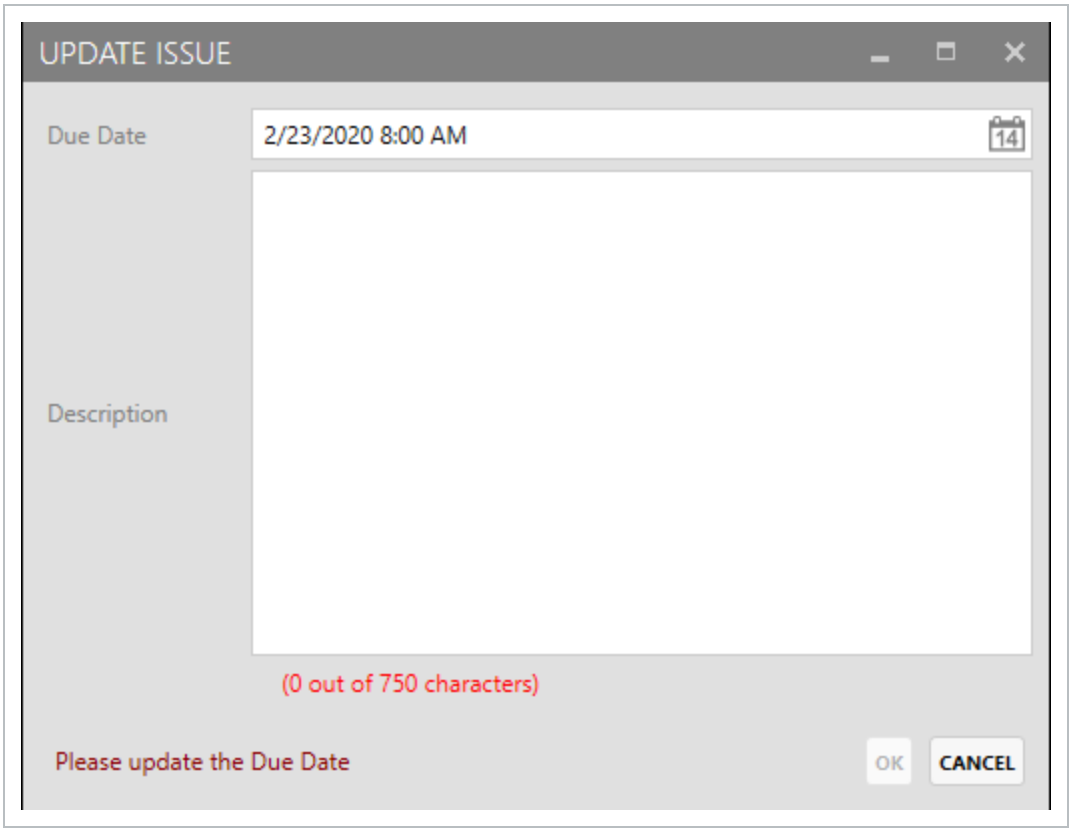


Click the **Pencil** icon to change the Responsible team, and type in a description for the reassignment change, then select **OK**.

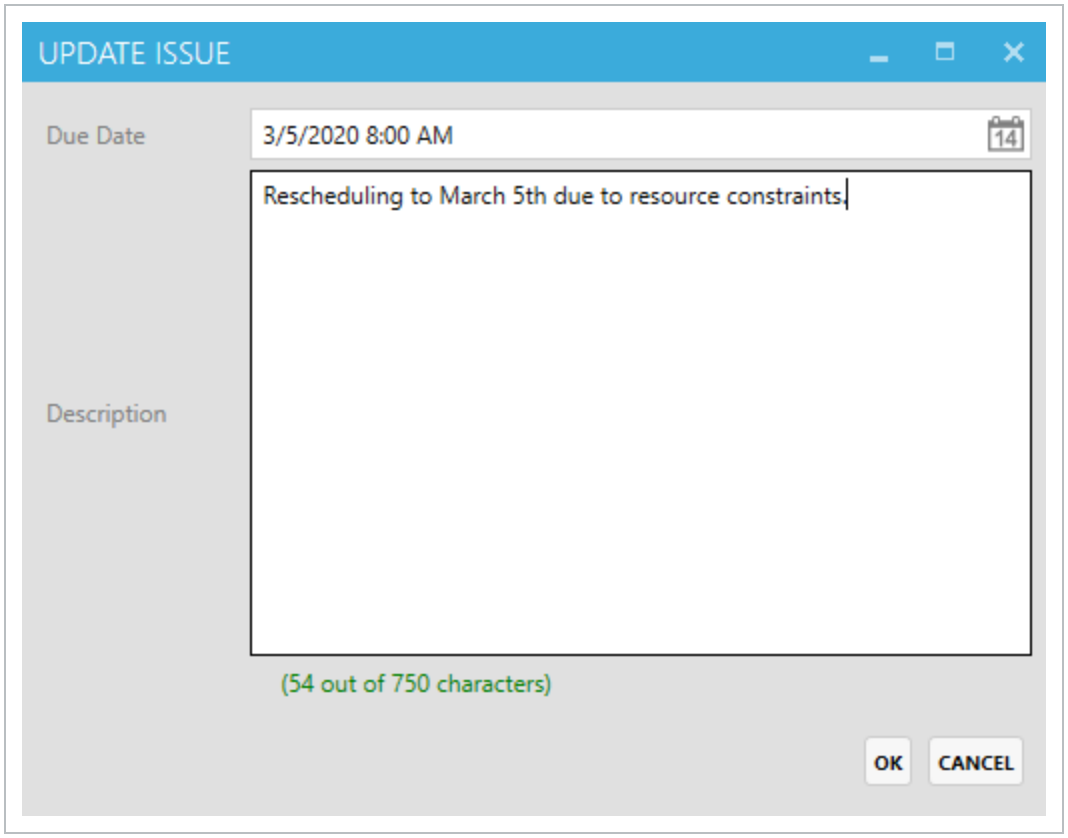


4.2.3 Reschedule

Selecting the Reschedule button allows you to reschedule the issue.

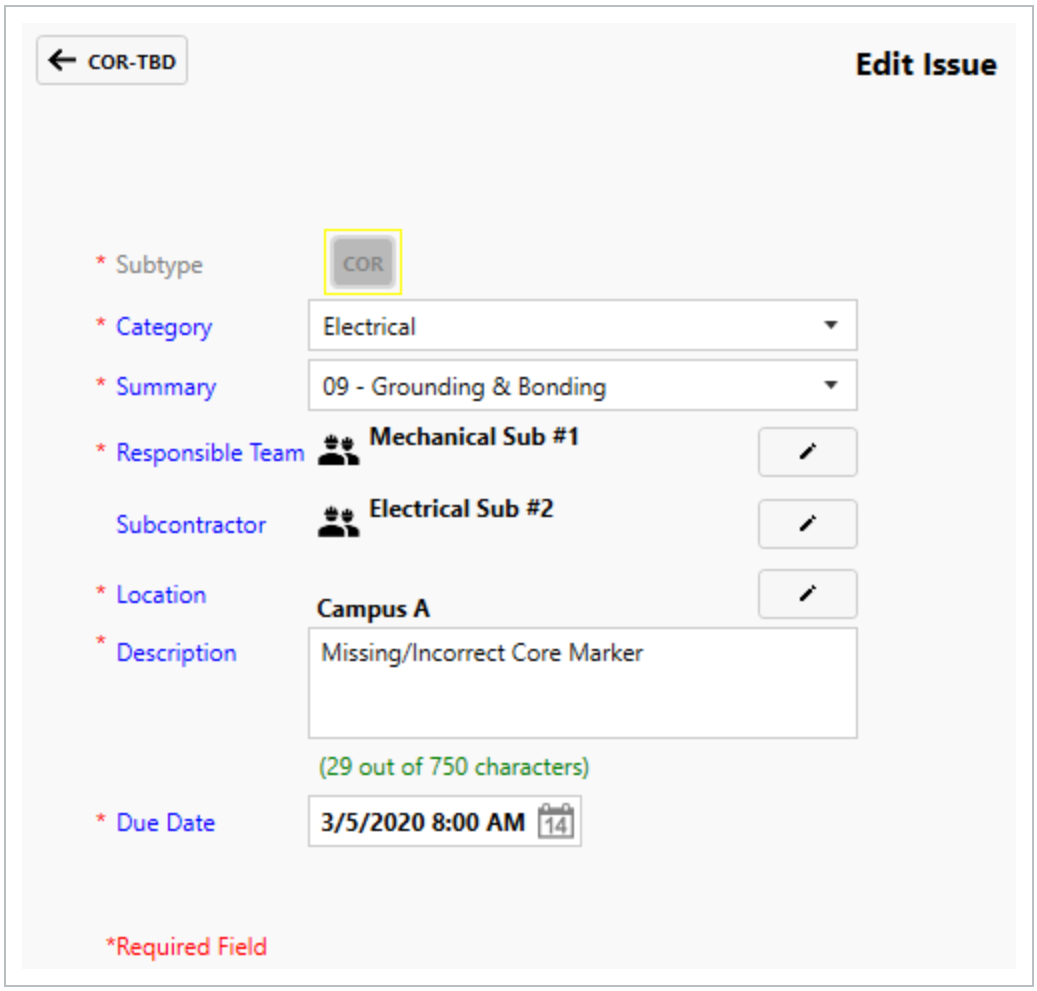


Change the Due Date to the desired date, then enter a description for the reschedule reason.



4.2.4 Edit

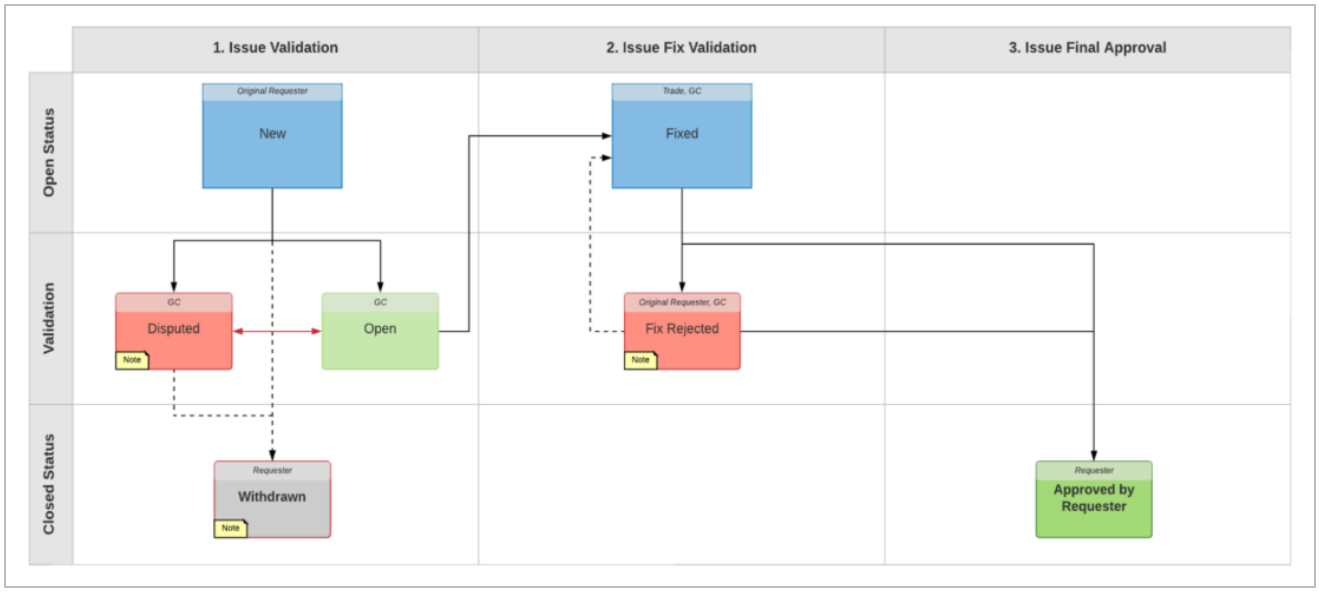
Selecting the Edit button allows you to edit an existing issue, as long as the correct roles and permissions are assigned.



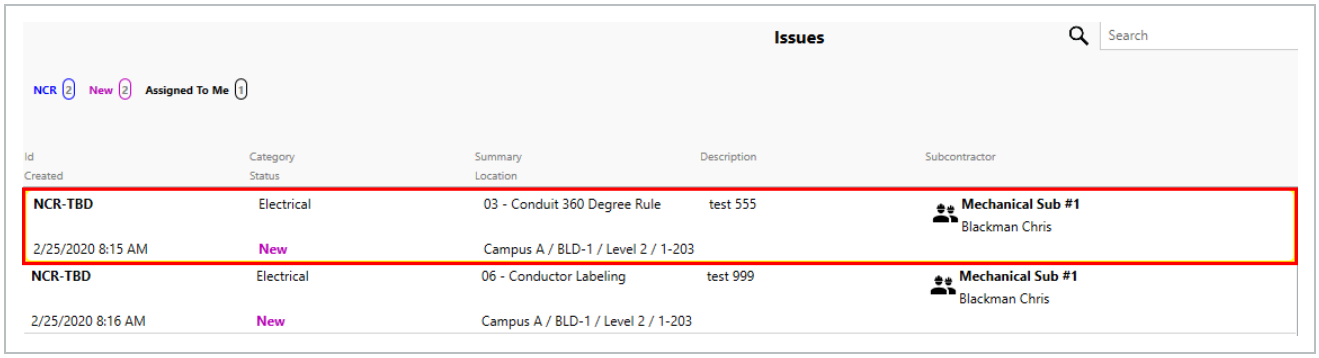
4.3 RESOLVE AN ISSUE

Below is an example of how an Issue could flow through your project. This is only one representation of an Issue flow; your organization may have a completely different setup.

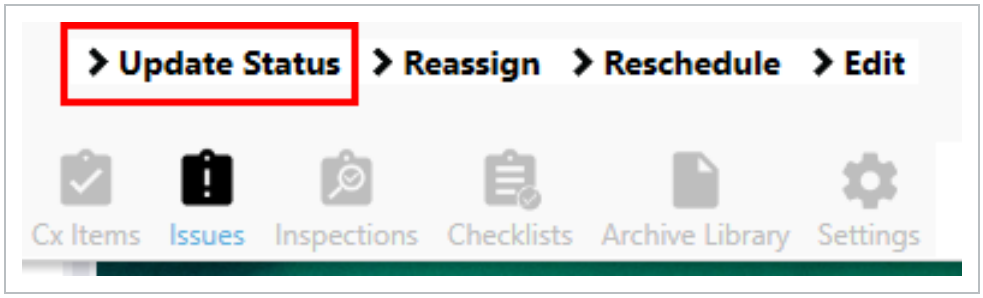
1. Issue Validation
2. Issue Fix Validation
3. Final Approval



An Issue can be resolved by first navigating to the Issues tab, then double-clicking into the desired issue record.

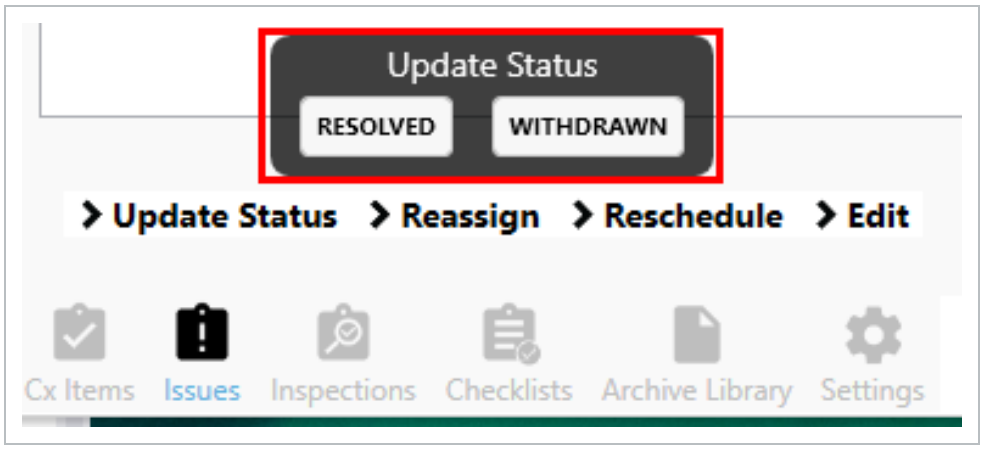


At the bottom of the screen select the **> Update Status** menu option.



Your project administrator is responsible for creating the Update Issue status types. The status types are determined by your project management team during the project kickoff meeting.

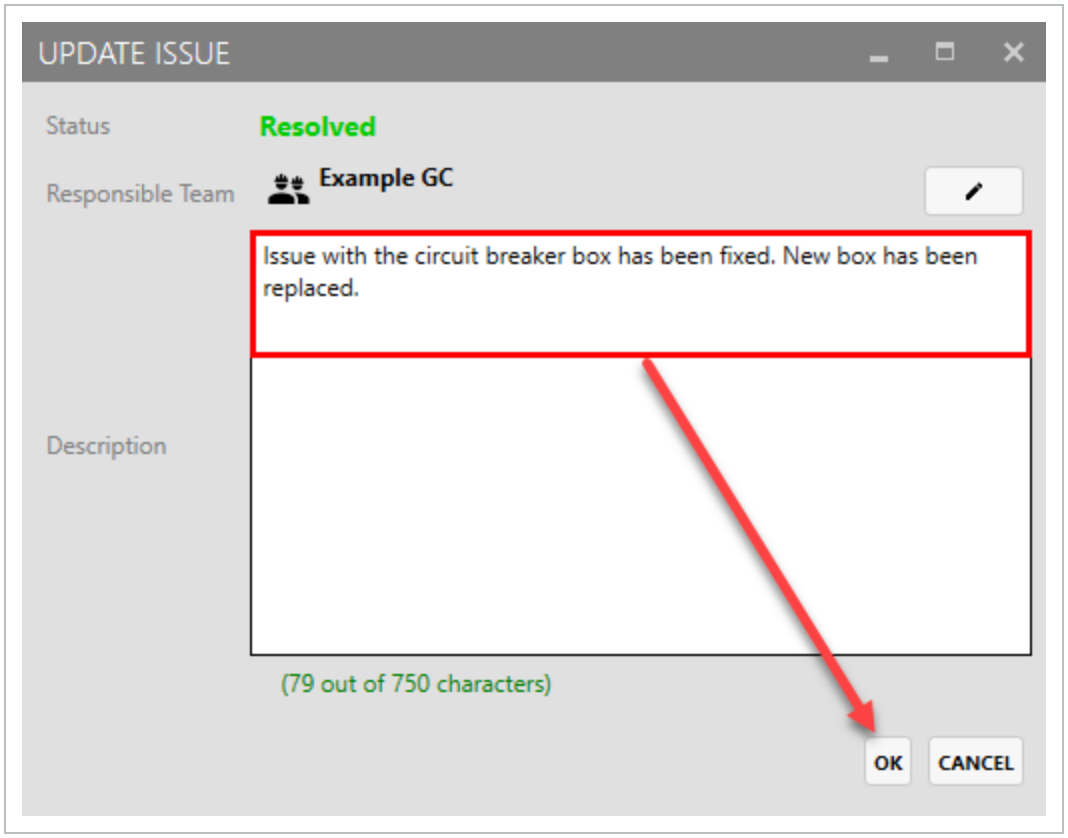
Below is showing an example of two possible Issue Update Status options.



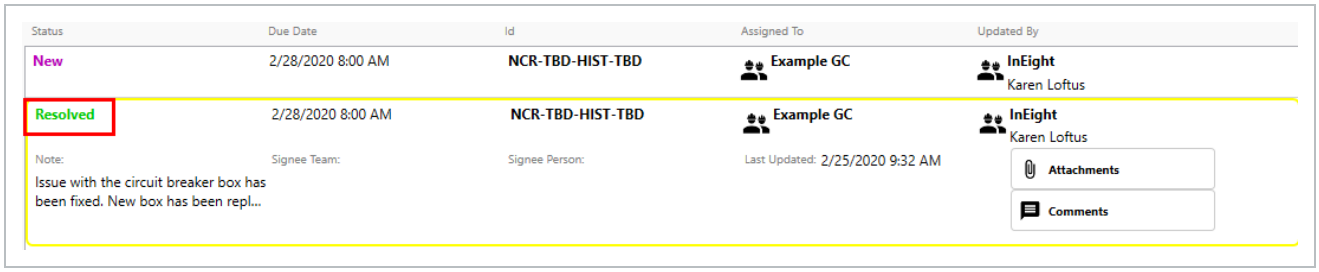
In this example, after selecting Resolved, an Update Issue pop-up box appears allowing you to:

- Modify the Responsible Team
- Add a resolved issue description

After typing in some notes to describe the resolution, select **OK**.



The Issue is now resolved.


Status
Due Date
Id
Assigned To
Updated By
New
2/28/2020 8:00 AM
NCR-TBD-HIST-TBD
Example GC
InEight
Karen Loftus
Resolved
2/28/2020 8:00 AM
NCR-TBD-HIST-TBD
Example GC
InEight
Karen Loftus
Note:
Issue with the circuit breaker box has been fixed. New box has been repl...
Signee Team:
Signee Person:
Last Updated: 2/25/2020 9:32 AM
Attachments
Comments

Lesson 4 Review

1. A Completions Issue can be created at several points during the Completion process.
   a. True
   b. False

---

2. If an Issue displays as TBD within Issue History, this means that the:
   a. Issue cannot be published
   b. Issue has already been published
   c. Issue has not yet been published
   d. None of the above

---

3. A Completions Issue can be created at several points during the Completion process.
   a. True
   b. False

Lesson 4 Summary

As a result of this lesson, you can:

- Create a new Issue
- Update, reassign, reschedule and edit Issues
- Resolve an Issue

LESSON 5 – INSPECTIONS

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Create an Inspection
- Link Existing Issues to an Inspection
- Edit an Inspection
- Complete an Inspection

Topics in this Lesson

5.1 Create / Open an Inspection 88
5.2 Inspection Maintenance 94
5.3 Complete an Inspection 98
Lesson 5 Review 102
Lesson 5 Summary 102

5.1 CREATE / OPEN AN INSPECTION

NOTE The InEight Completions product is highly customizable per your specific project requirements. Tab order and its functionality may differ than what is shown.

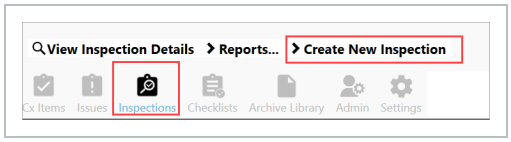
EXAMPLE: A field engineer is performing a weekly walk. He finds the relevant inspection, updates the information, assigns the responsible parties, and finally updates the inspection status.

5.1.1 Create a New Inspection

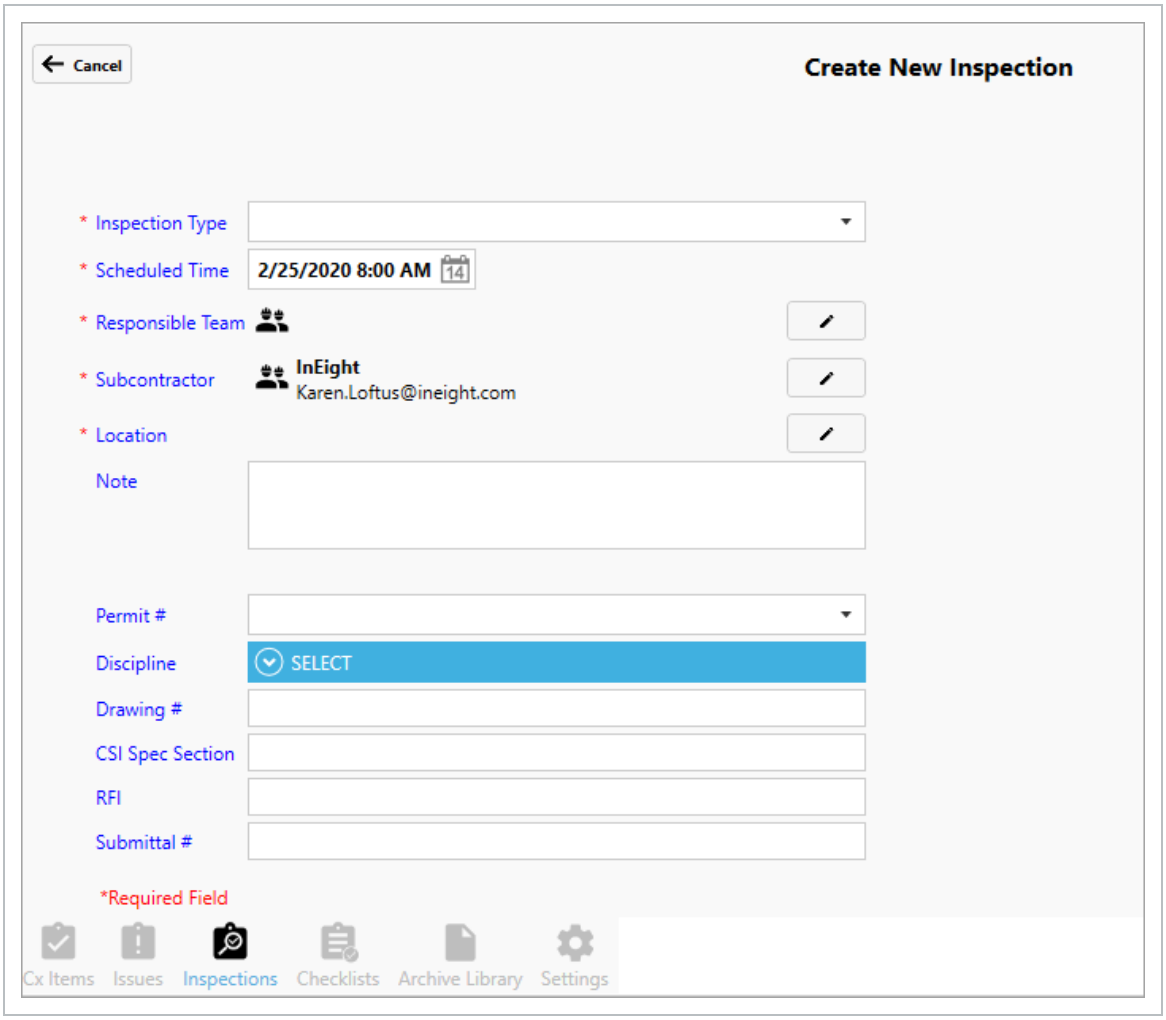
In order to create a Inspection, do the following:

5.1 Step by Step 1 — Create a New Standalone Inspection

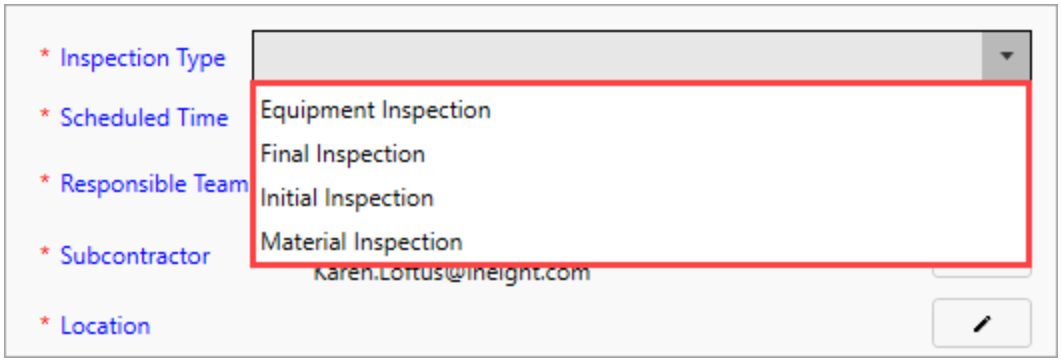
1. Click on the **Inspections** tab.
2. Click on the **Create New Inspection** button.



- The Create New Inspection window appears

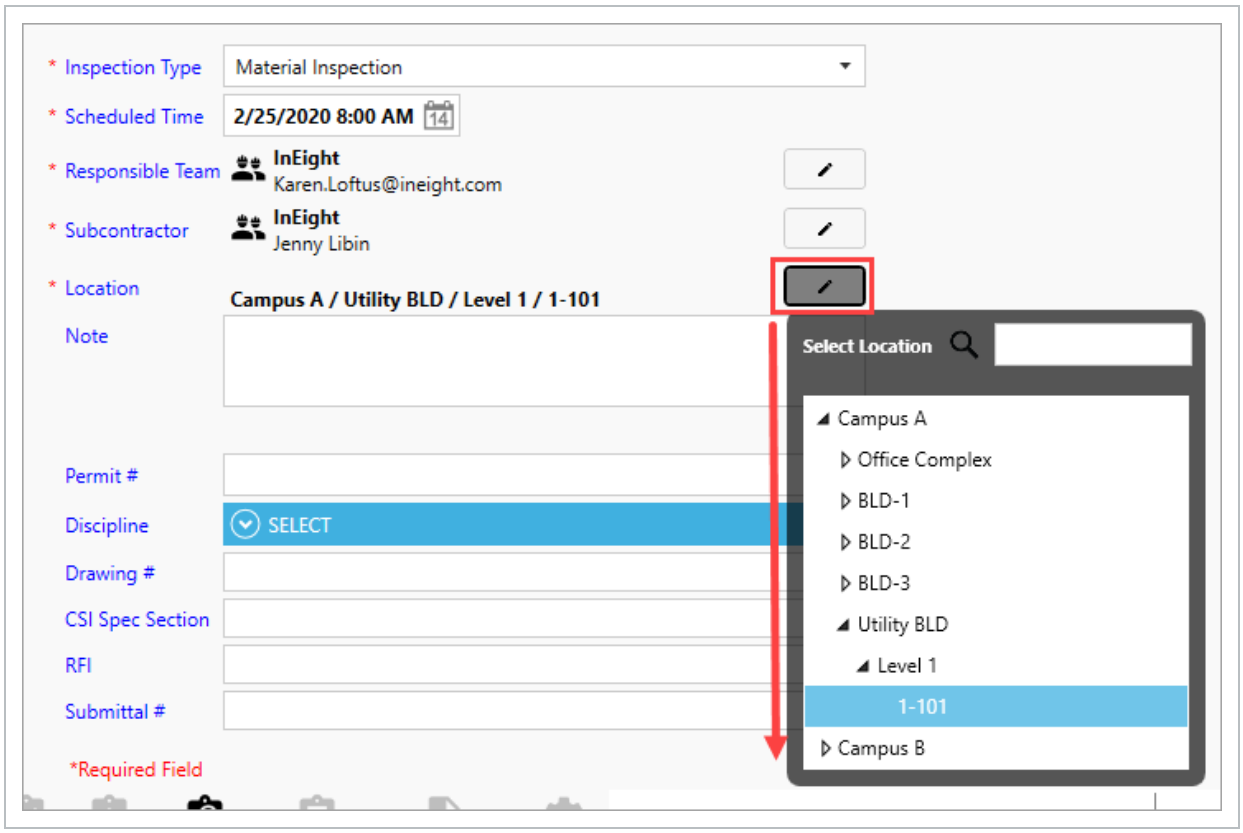


3. Select the Inspection Type from the drop-down.



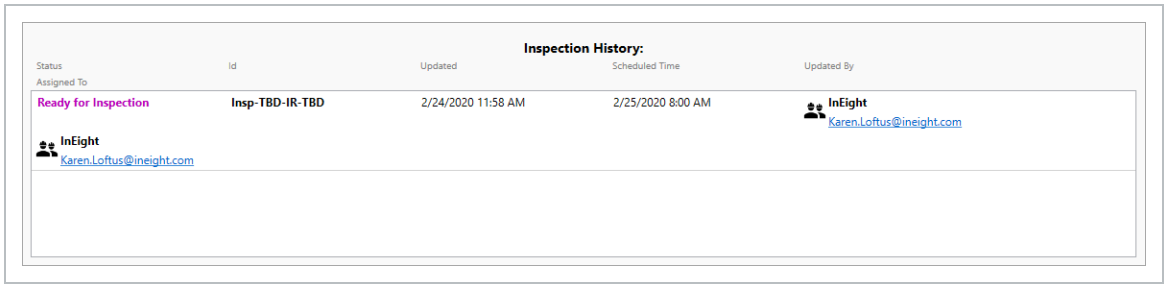
4. Update the Scheduled Time if not accurate by clicking on the **Calendar** icon.
5. Select a Responsible Team/Person by clicking on the **Pencil** icon, and drilling down as needed.
6. Select the Subcontractor by clicking on the **Pencil** icon.

7. Select the Location by clicking the **Pencil** icon and drill down to the appropriate location.



- These first five fields are mandatory, as noted by the red asterisk to the left of the field's name

8. Complete the remaining fields as appropriate.
9. Click **OK**.
   - As a result, the new Inspection item will appear in the Inspection History



5.1.2 Open an Existing Inspection

With one or more inspections already planned and assigned, you might need to pull up an existing inspection.

By double clicking on any singular Inspection tile, edits can be made via:

- Adding an Attachment
- Making a Comment
- Identifying an Issue

5.1.2.1 Add an Attachment

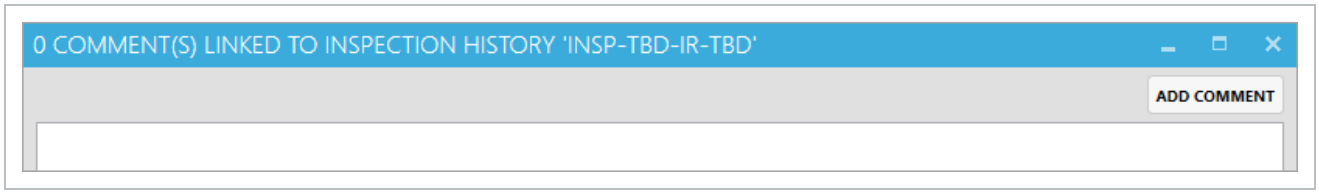
To learn more about attachments, see the Attachments lesson.

5.1.2.2 Add or Link a Checklist

To learn more about checklists, see the Checklists lesson.

5.1.2.3 Add a Comment

When added, comments are tied to a specific inspection, in this case "INSP-TBD-IR-TBD."



5.1.2.4 Add or Link Cx Items

To learn more about Cx Items, see the Cx Items lesson.

5.1.2.5 Add or Link an Issue

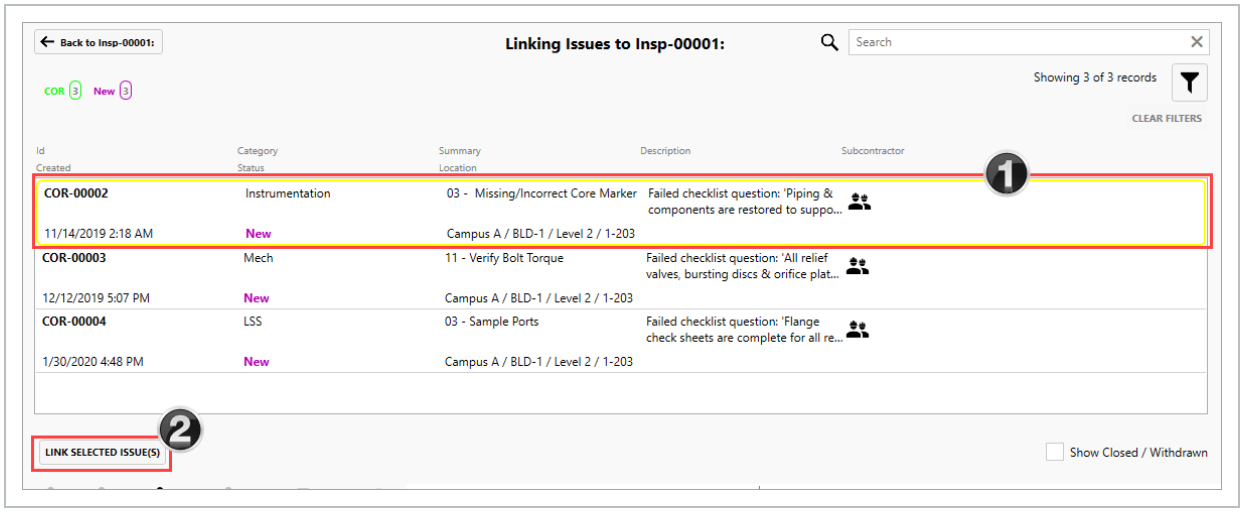
If the **Issues** button is selected, a new pop-up window appears where an Issue can be added, or links made to current, existing issues.

To learn more about issues, see the Issues lesson.

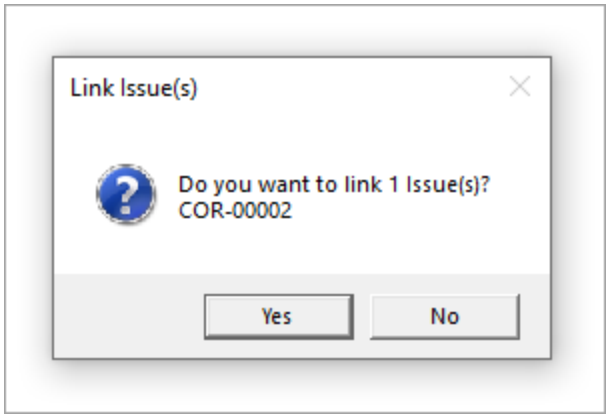
If the Link Existing Issues button is selected, a new pop-up appears identifying New Issues.

5.1 Step by Step 2 — Link Existing Issues to an Inspection

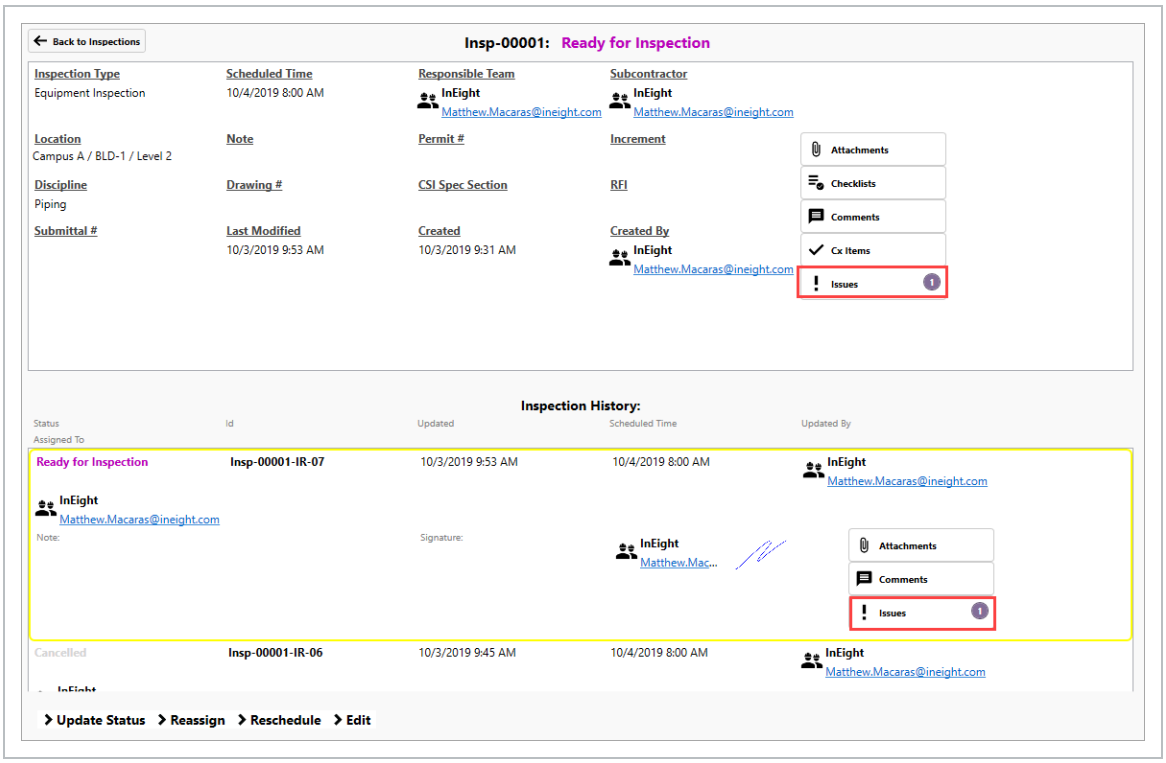
1. Click on **Inspections**.
2. Double-click on an Inspection **line item**.
3. Click on the most current **Ready for Inspection line item** in the Inspection History.
4. Click on the **Issues** button.
5. Click the **Link Existing Issue(s)** button.
6. From the resulting pop-up window, select the **New Issue to link**.
7. Click on the **Link Selected Issue(s)** button.



8. Click **Yes** to confirm linkage.



- Now the issues button has a new item identified



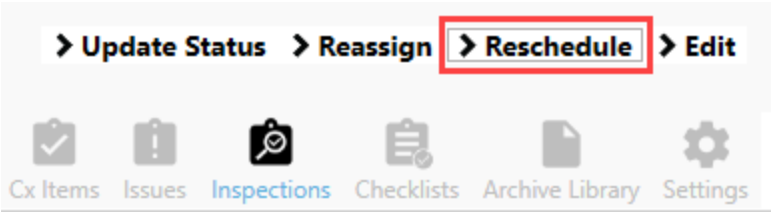
5.2 INSPECTION MAINTENANCE

5.2.1 Reschedule Inspections

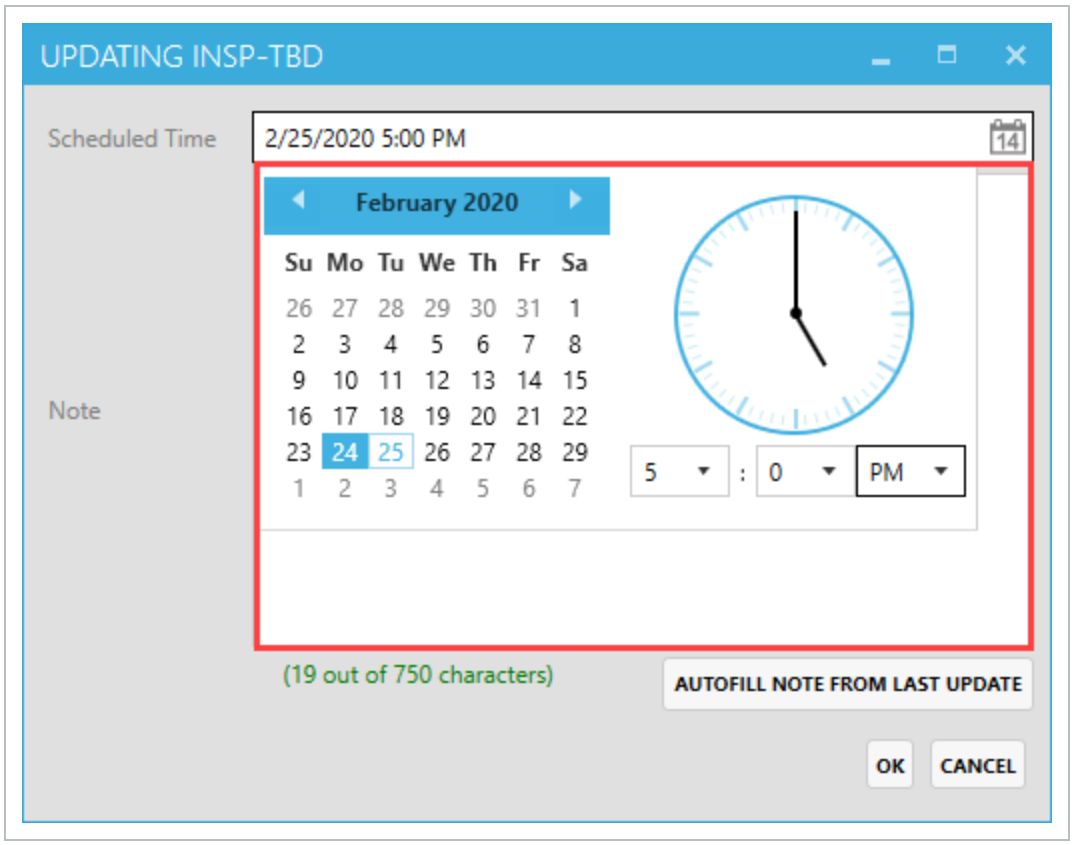
At times, rescheduling an Inspection may be necessary.

5.2 Step by Step 1 — Reschedule an Inspection

1. Click on the **Inspections** tab.
2. Double click on a particular Inspection history tile.
3. Click on the **Reschedule** button.

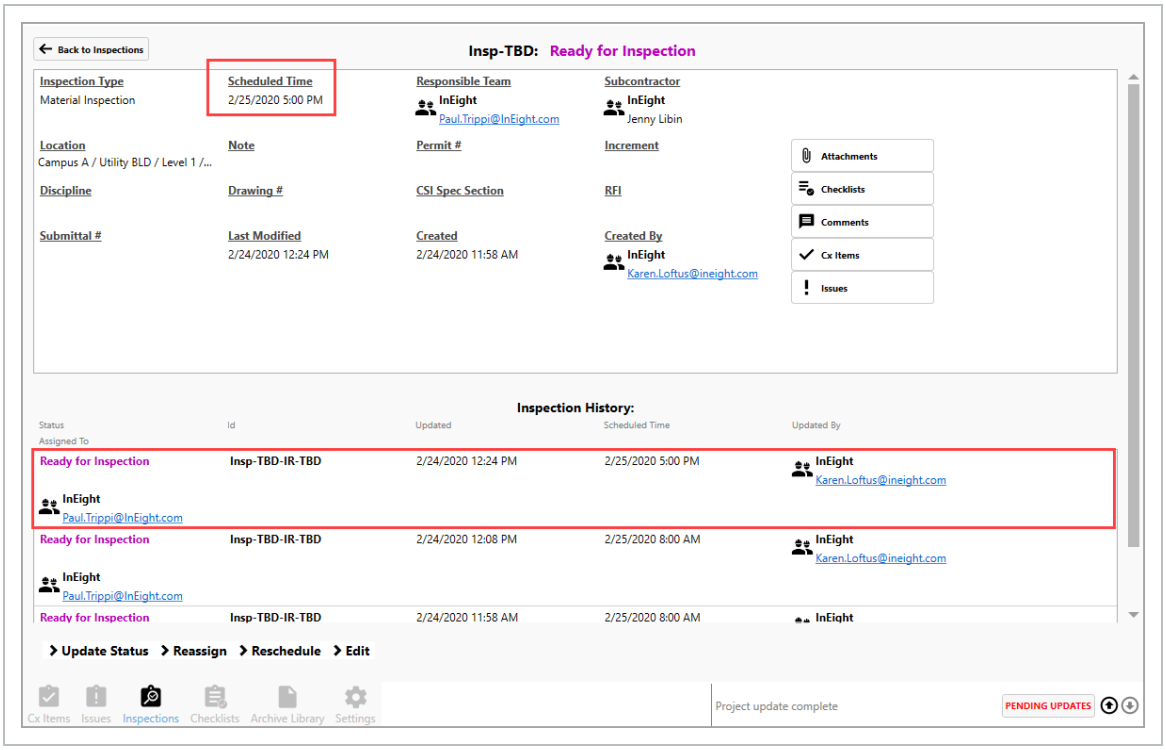


4. Click on the **Calendar** icon.
5. From within the pop-up window, select a new date and time for the inspection.



6. Click **outside the calendar window area** to return to the main pop-up window.
7. Type in an **explanatory note**.

8. Click **OK**.
    - As a result, the Scheduled Time and Inspection History will be updated



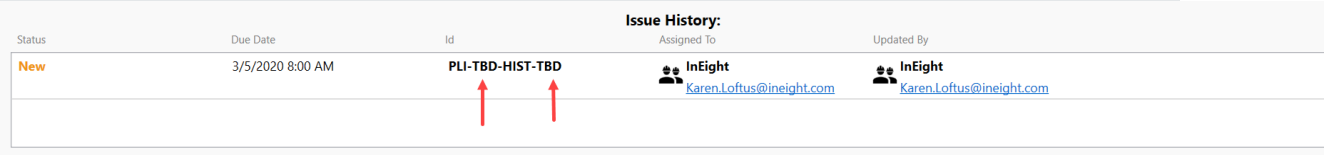
5.2.2 Edit an Inspection

Editing an inspection, especially by adding data in non-required fields can be helpful to yourself and others if you infrequently work on a given project, or as further information becomes available such as a Submittal number, Permit number, Drawing number, etc.

5.2 Step by Step 2 — Edit an Inspection

1. Click on the **Inspections** tab.
2. Click on the **Edit** button.
3. Update fields as appropriate.
4. Click **OK**.

NOTE The below Inspection Issue image shows an extension of TBD under the Id field. This is because the Issue has not yet been published. Once published to the server, the TBD's will turn into a numerical reference point for the Id.



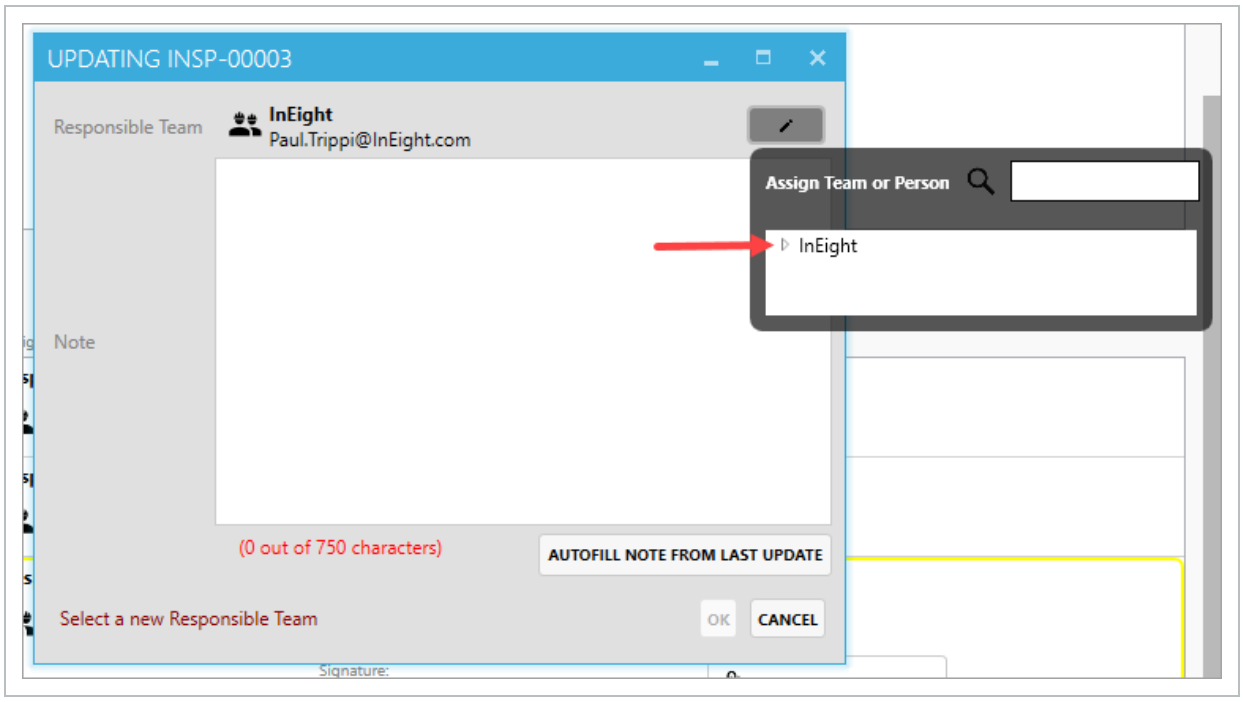
5.2.3 Reassign an Inspection

At times, it may be appropriate to reassign an inspection to another team/person.

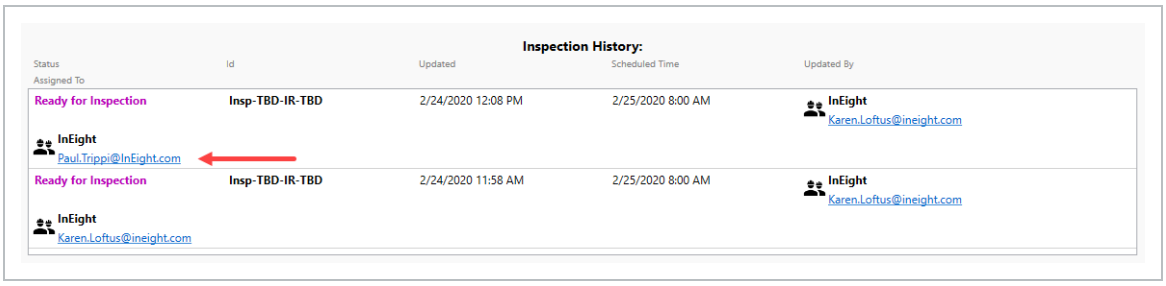
5.2 Step by Step 3 — Reassign an Inspection

1. Click on the **Inspections** tab at the bottom of the screen.
2. Double click on a particular Inspection tile.
3. Click the **Reassign** button.
4. In the resulting pop-up window, click on the **Pencil** icon.

5. Select a **person or team** from the list, drilling down as necessary.



6. Type in an **explanatory note**.
7. Click **OK**.
   - As a result, the Inspection History is updated with the change



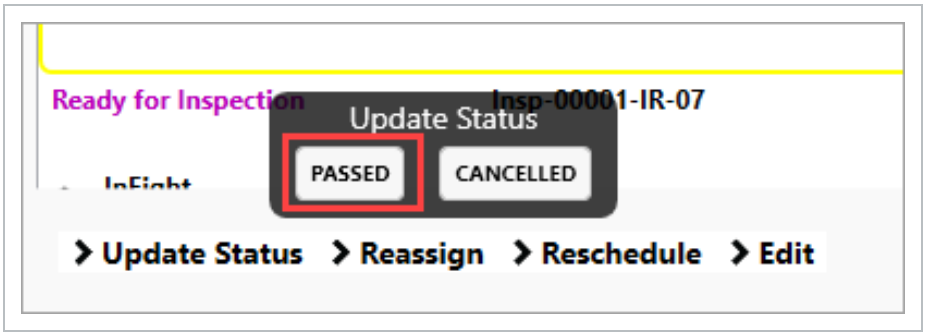
5.3 COMPLETE AN INSPECTION

5.3.1 Complete an Inspection

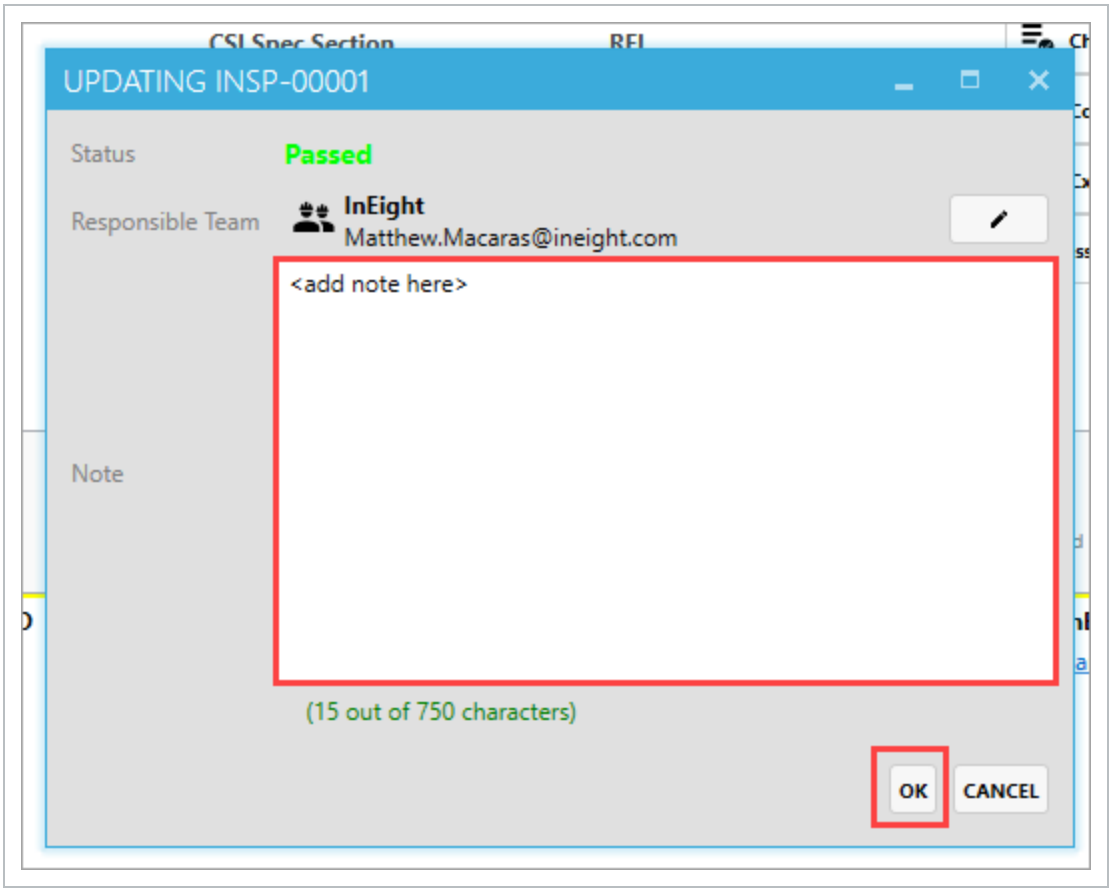
As an Inspection becomes complete, it's important to Complete the Inspection to attain an accurate and timely project.

5.3 Step by Step 1 — Complete an Inspection

1. From within a specific inspection, click on **Update Status**.
2. Click on the **Passed** icon.

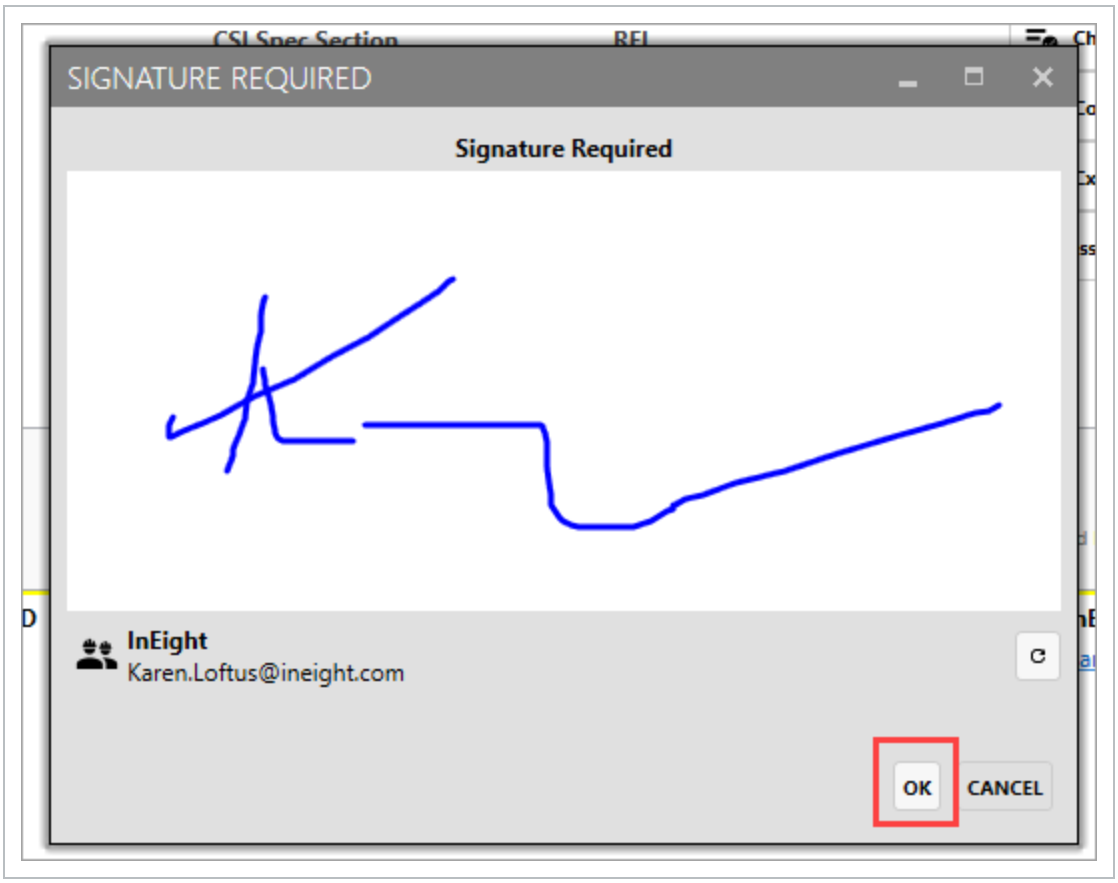


3. In the subsequent pop-up window, type in an **explanatory note**.
4. Click **OK**.

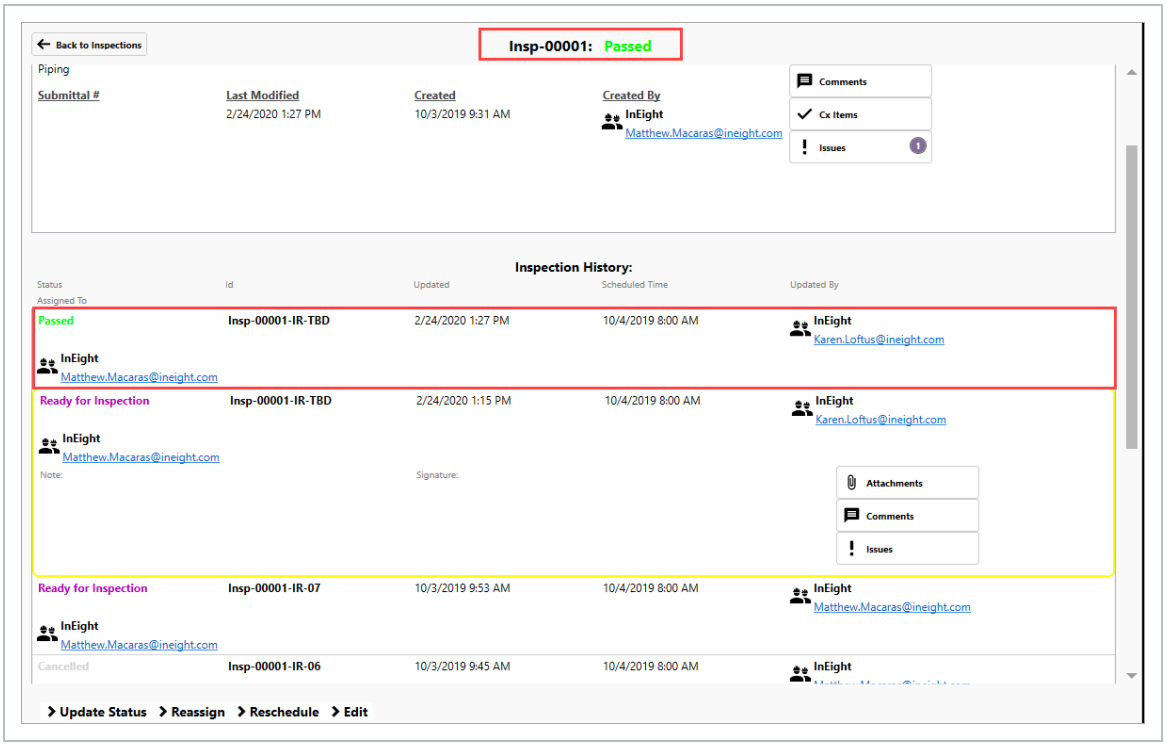


5. In the next pop-up window, **add your signature**, if required.

6. Click **OK**.

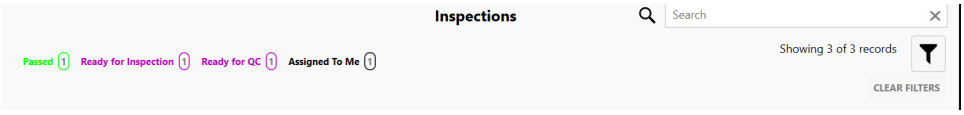

SIGNATURE REQUIRED
Signature Required
InEight
Karen.Loftus@ineight.com
OK
CANCEL

- As a result, the Inspection item is shown as Passed



Lesson 5 Review

1. The Inspections module is the only module where there is a filter function.



   a. True
   b. False

2. Which of the following are tabs at the bottom of an Inspection? (check all that apply)
   a. Edit
   b. Reassign
   c. Reports
   d. Reschedule
   e. Update Status
   f. All Of the Above

3. When editing an Inspection, the Inspection Type is a free-form, mandatory field.
   a. True
   b. False

Lesson 5 Summary

As a result of this lesson, you can:

- Create an Inspection
- Link Existing Issues to an Inspection
- Edit an Inspection
- Complete an Inspection

LESSON 6 – ELEMENTS

Lesson Duration: 20 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Work with Elements
- Navigate Element hierarchy
- Import and load data into Elements

Topics in this Lesson

6.1 Work With Elements 104
6.2 Navigate Element Hierarchy 110
6.3 Elements Import 116
6.4 Progress Roll-Up Reports 123
Lesson 6 Review 126
Lesson 6 Summary 126

6.1 WORK WITH ELEMENTS

By one definition, **Elements** can be the smallest components where work is acted upon. This can include tagged pieces of equipment such as a cable, an individual switch, or the actual installation of a switch.

Element Id	Element Type	Element Sub Type	Discipline	IWP
Subsystem-CWR-0456-02	**Sub-System**	Piping Sub-System	Piping	IWP-Piping Rack Run
Subsystem-CWS-0456-01	**Sub-System**	Piping Sub-System	Piping	IWP-Piping Rack Run
Subsystem-HVAC-0456-01	**Sub-System**			IWP-MECH EQUIP-021
Subsystem-HVAC-0456-02	**Sub-System**			IWP-MECH EQUIP-021
Subsystem-PWR-0020-01	**Sub-System**		Electrical	
System-CW-0456	**System**			
System-HVAC-0456	**System**			
Tag-AHU-0303	**Engineering Tag**	Air Handler Unit	Mechanical	IWP-MECH EQUIP-021
Tag-AHU-0304	**Engineering Tag**	Air Handler Unit	Mechanical	IWP-MECH EQUIP-021
Tag-C-CP-0101-P-0101	**Engineering Tag**	Control Cable	Electrical	IWP-ELECTRICAL-CABLE-007
Tag-CP-0101	**Engineering Tag**	Control Panel	Electrical	IWP-ELECTRICAL-CABLE-007
Tag-CT-0001	**Engineering Tag**	Cooling Tower	Mechanical	IWP-MECH EQUIP-013
Tag-CTS-0001	**Engineering Tag**	Steel Structure	Structural	
Tag-Duct-0203-01	**Engineering Tag**	Ducting	HVAC	IWP-MECH EQUIP-024

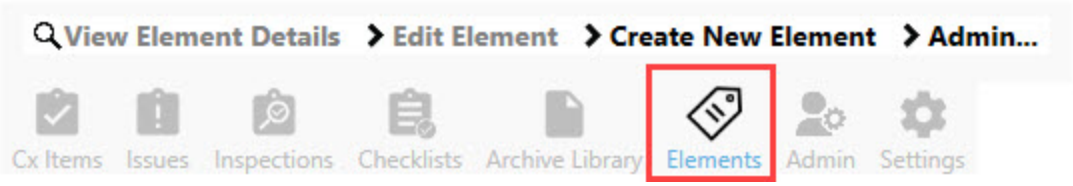
In addition, Elements can also be comprised of entire systems or units of worked performed on a job. This can include whole blocks, systems, structures, or other different element types based on the size of a facility. The below table shows some of the many different element types.

Element Types	Description
Block	Functional area within a plant.
System	Functional system of a plant that performs an operation.
Sub System	A division of a system into smaller consumable parts. Many elements exist under sub systems.
Tagged Equipment	Individual pieces of equipment or components that have construction, pre-commissioning or commissioning work acted against them.
Process Lines	Named lines for process fluids to travel in between other lines or major equipment.

Element Types	Description
Soft Tags	Signal tags used for pre-commissioning.
Loops	Collections of instruments that perform a cause and effect function.
Test Packages	Collections of elements that are grouped together and tested.
Structures	For infrastructure, large structures that have work enacted against them. Structures can have multiple smaller subsets like backfill, sub structure, super structure that can be nested under the structures.
Segments	Segments of road or rail or pipeline or transmission lines.
Intersections	For light controls.
Signs	For Buildings.

6.1.1 Element Navigation

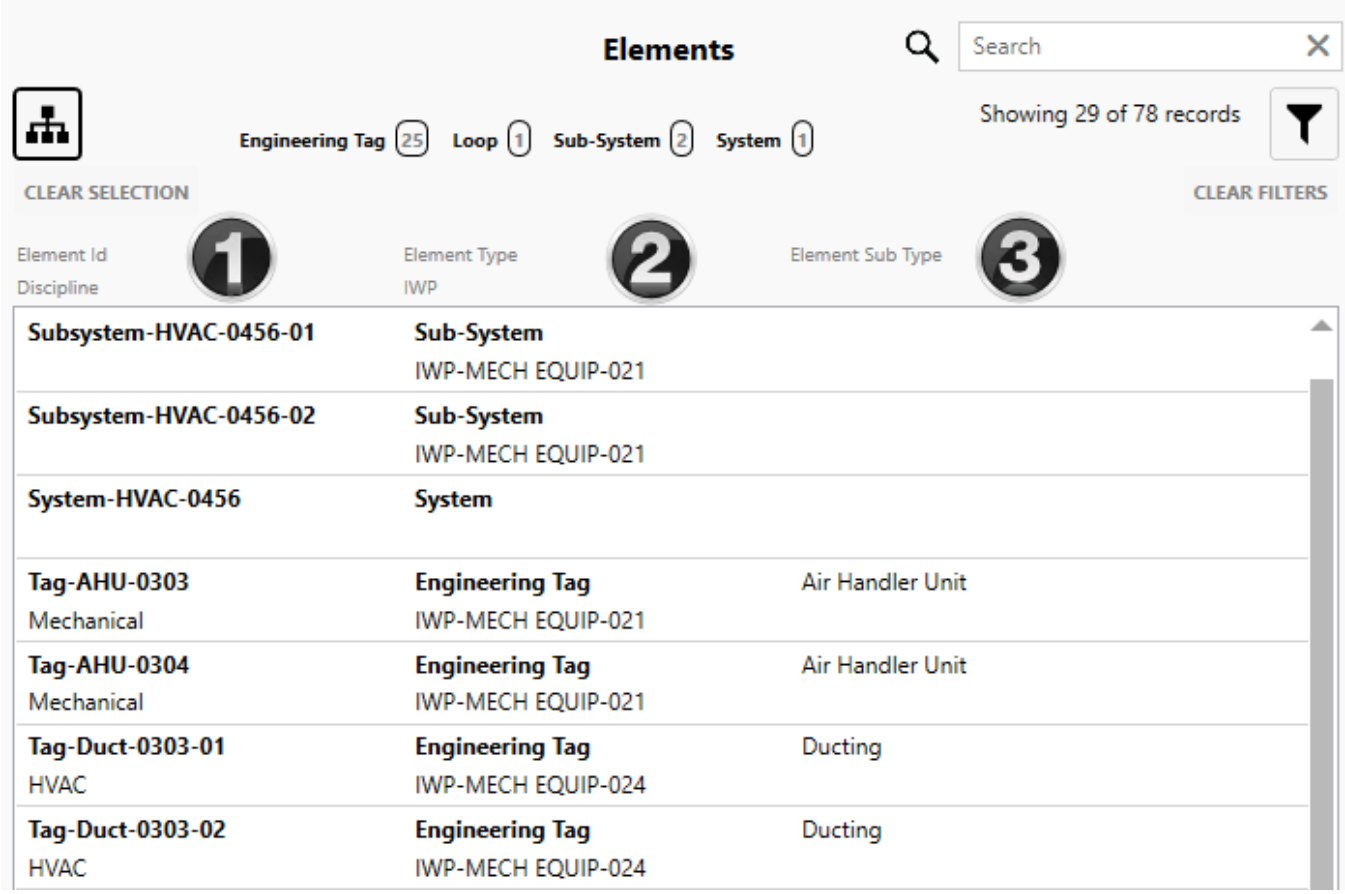
Within the Completions application, you can access the Elements screen by selecting the Elements icon at the bottom of the page.



NOTE	Tab order and its functionality may differ from what is shown above.

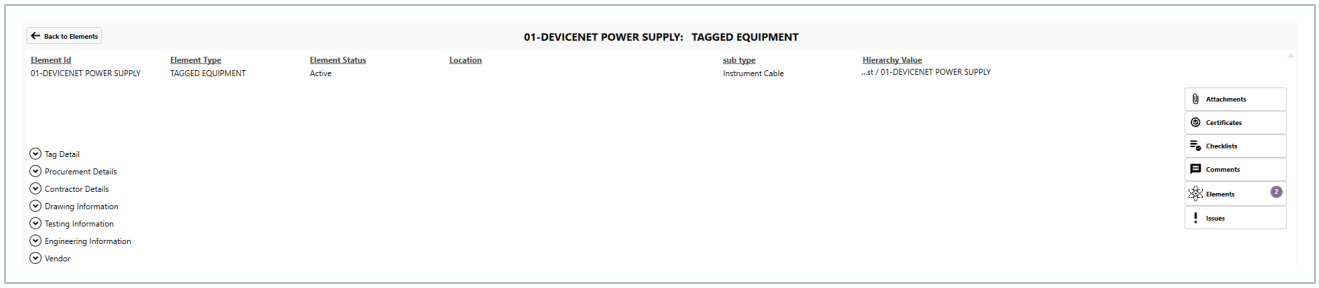
While customizable, on the Element screen some core columns include:

Item	Description
1	Identification number of an Element
2	The classification of the Element can range from System, Sub System, Engineering Tag, Test Packages, Loops, etc
3	Sub-type

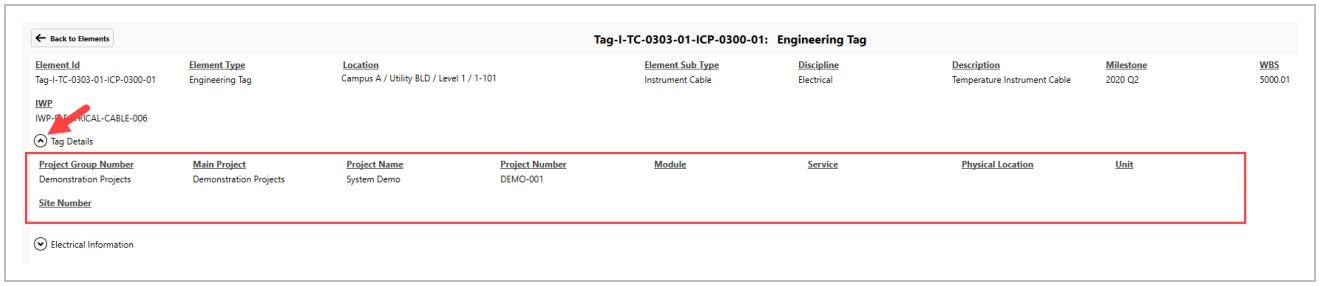


6.1.2 Element Details

Selecting an Element brings you to the Element Details screen.

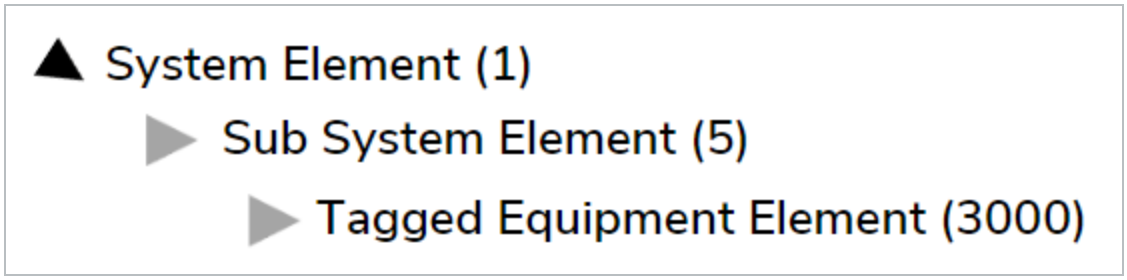


Clicking on the **down arrow** next to the Element Details description expands additional attributes for each of the element descriptions.



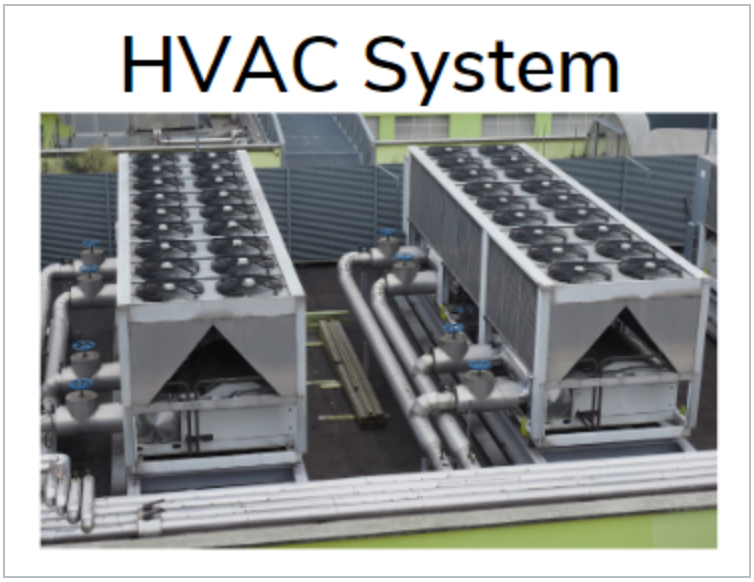
6.1.3 Nested Elements

By nesting elements together, you are creating both a level of order and a defined structure to categorize your elements. System elements can contain several Sub System Elements. For example, Sub Systems can contain many Engineering Tag Elements. In order to isolate, quickly identify and locate these various types of Elements, it's helpful to arrange Element types in a hierarchical manner.



Some jobs can contain thousands of different element types, which could be difficult to search through. If your goal is to access a specific section of a plant within a job (like an HVAC system), the ability to nest your element types is useful for both organizing and when searching for specific elements within the HVAC system.

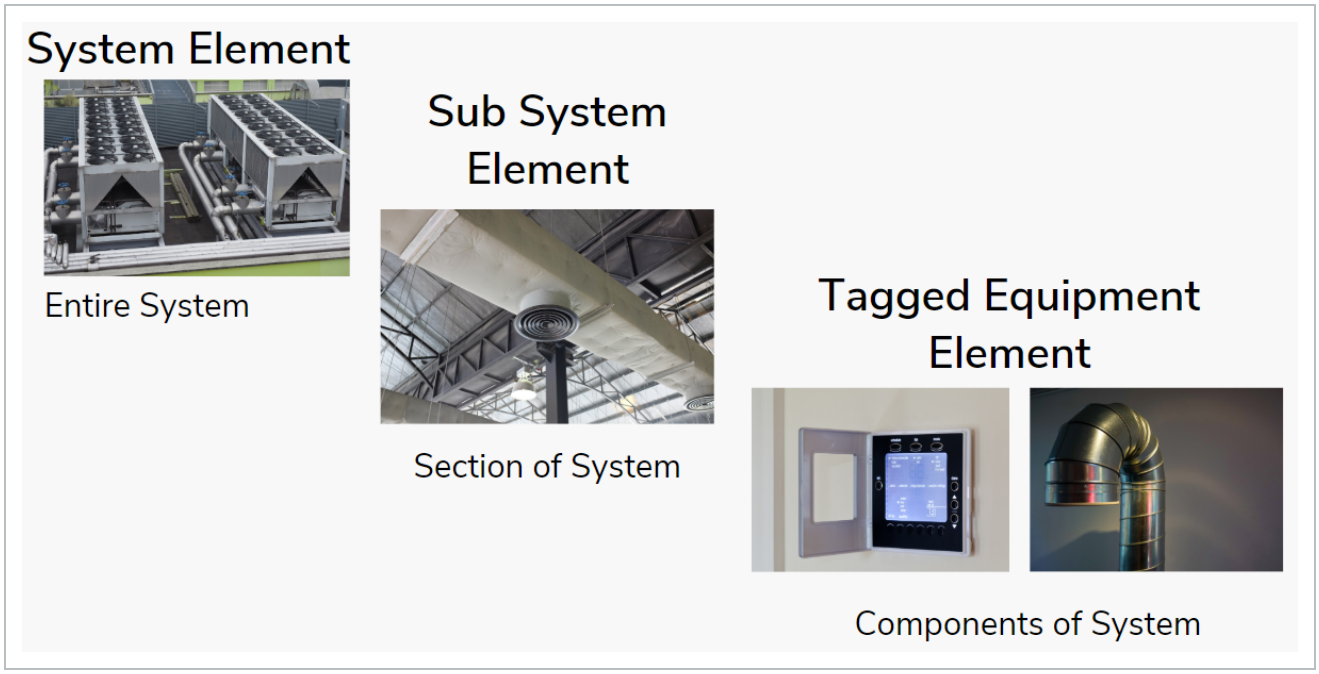
EXAMPLE: HVAC air handlers are located at the top of a building, which serves the purpose of supplying conditioned air throughout the entire building. This would be labeled as the HVAC **System Element**.



On each floor there are individual HVAC control units, which control the temperature for each one of the floors. An HVAC control unit is considered here as a **Sub System Element**.

Within each of the individual HVAC floor control units, there are various pieces of equipment used to connect the thermostats and flapper valves to these individual floor units. These parts can be labeled as **Tagged Equipment Elements**.

When these element types are nested together (Systems, Sub Systems, and Tagged Equipment), you can better organize all the element that make up your system. Below is an example of a nested hierarchy. Your hierarchy could be configured differently depending on how your project is set up.



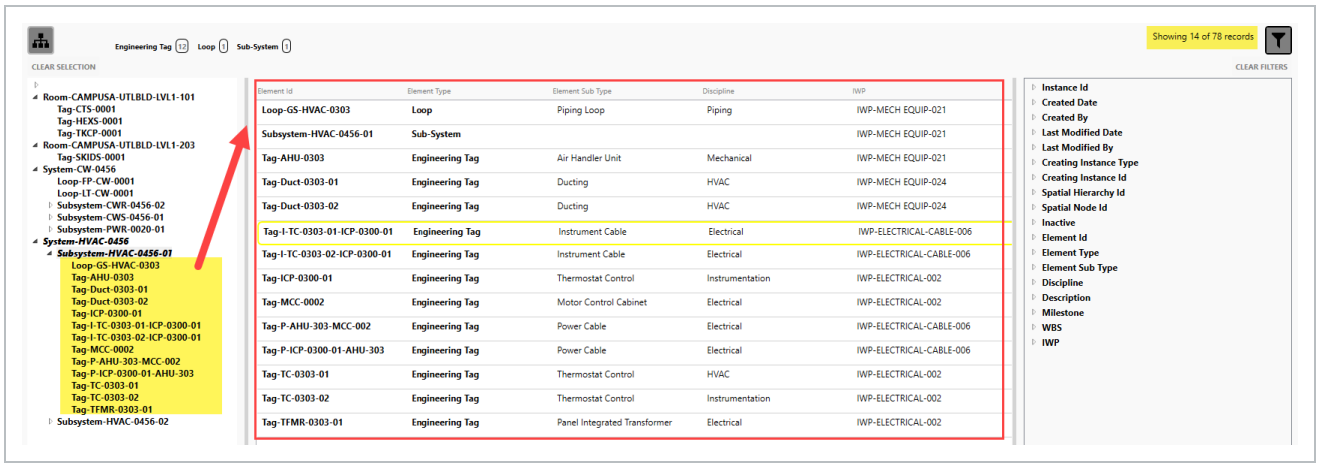
6.2 NAVIGATE ELEMENT HIERARCHY

6.2.1 Navigate Element Hierarchy

Within the Elements tab, Element Id's are listed. To view the hierarchy behind those elements, click on the **Hierarchy** button.

> **TIP** Toggling the Hierarchy button turns the hierarchy display on and off.

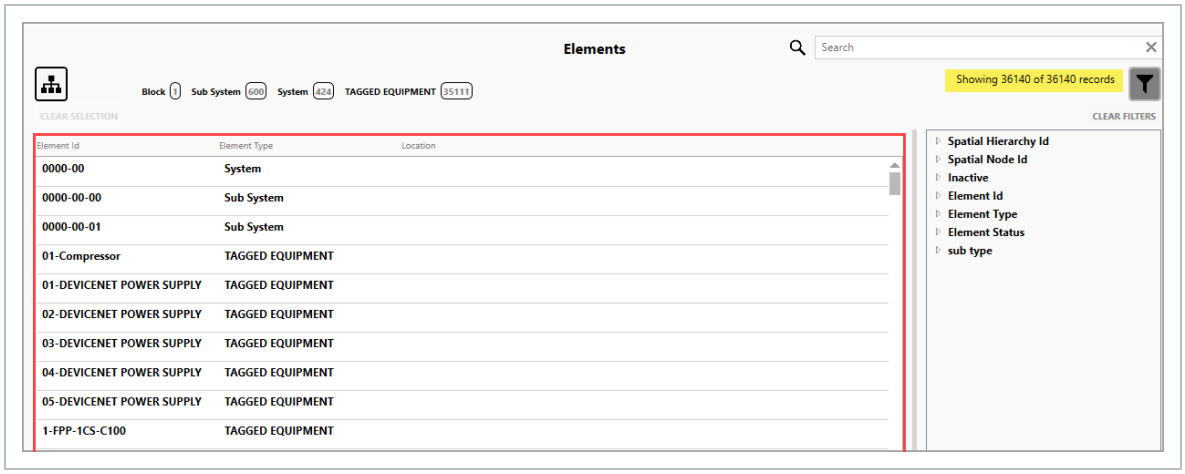
Looking at the hierarchy, 1E-LV-3-1 is the direct parent to those shown in yellow below. Element 1E-LV-3 is the direct parent to 1E-LV-3-1.



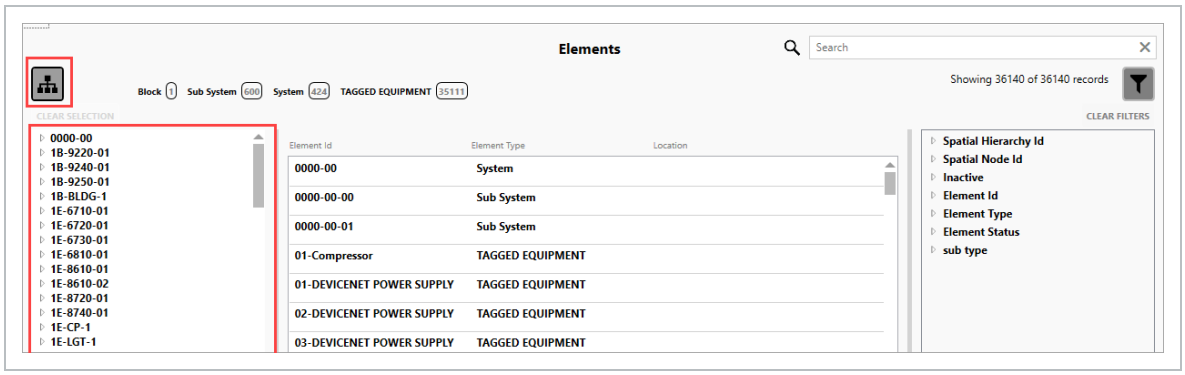
6.2.1.1 Hierarchies

Using an HVAC System as an example, when you turn on the HVAC sub system for one of the floors, it's possible to isolate individual components required to make the HVAC Systems and Sub Systems function. You can view the status and detail information for each of the individual components, which may include associated checklists, issues and defects.

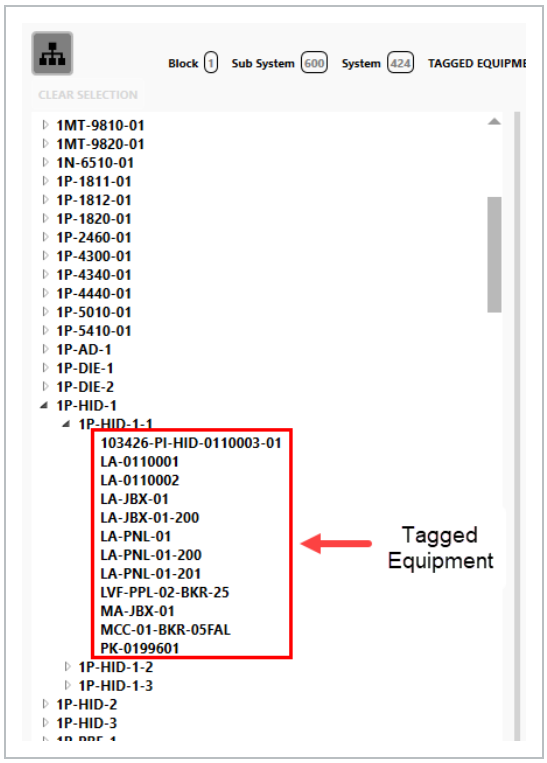
In the example shown below, you can see on the top right there are 36140 elements.



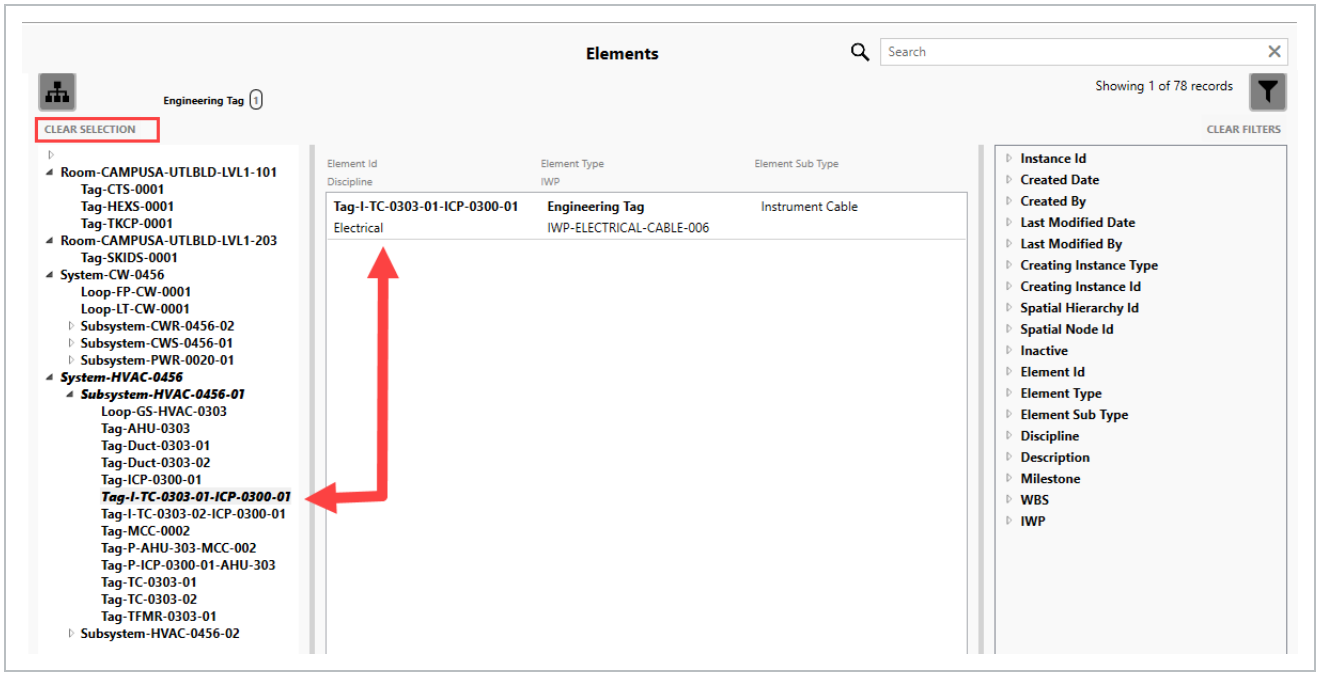
Selecting the hierarchy button allows you to better isolate the various elements in a more structured manner. You are also able to view the relationships and details of each of the Elements.



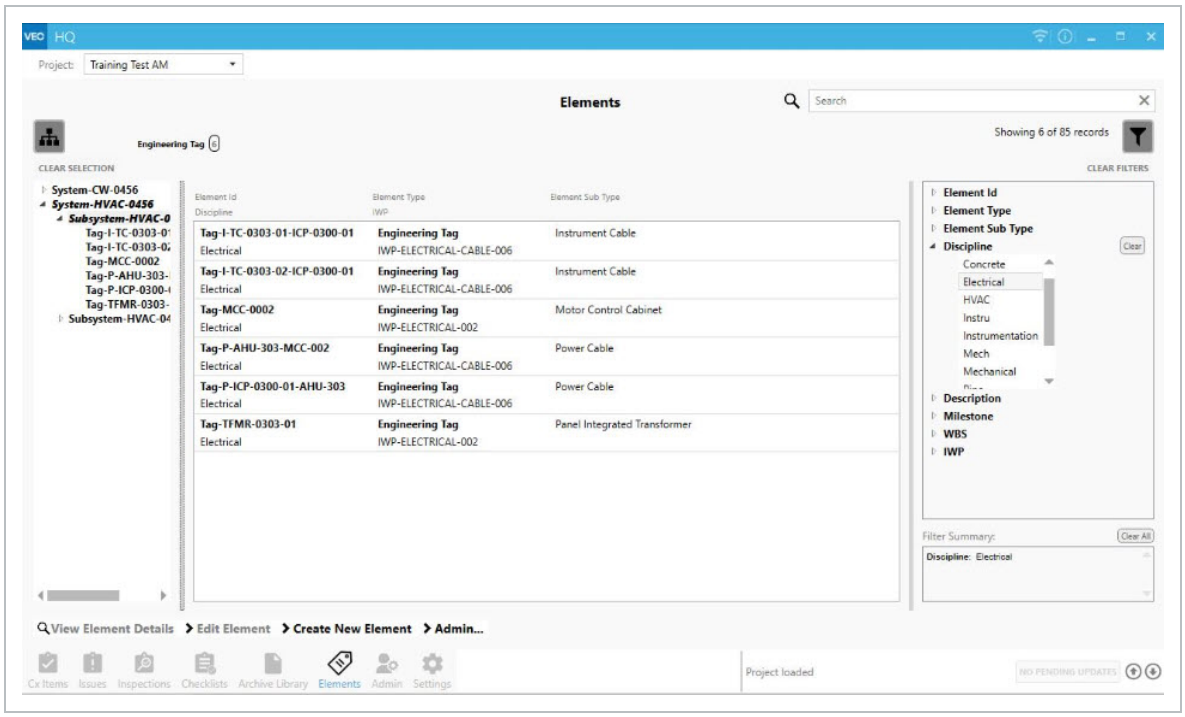
You can view your nested hierarchy for each of your systems and its associated elements.



When you are in an element within a specific hierarchy, a simple means to return to the listing of all elements is to click the **Clear Selection** button.

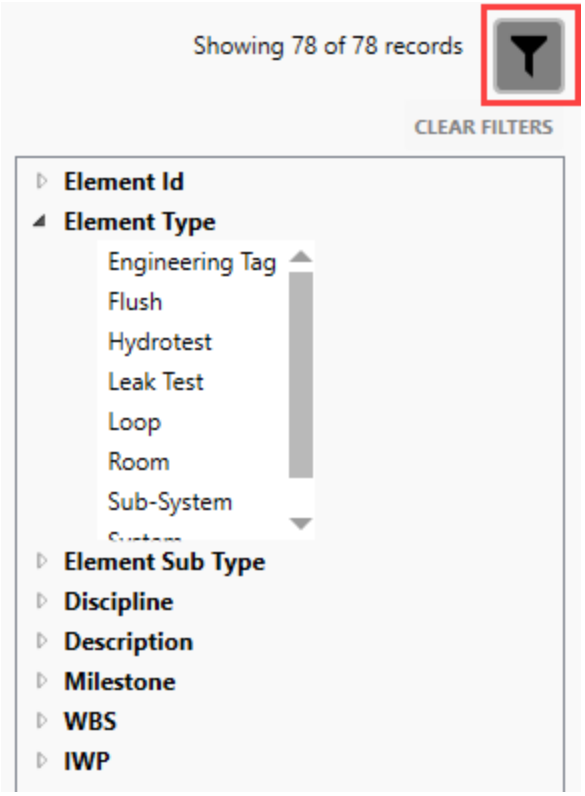


Alternatively, if you have first filtered the element, [using an "Element Status" of Commissioned as an example] and then pared down the list by searching for a specific sub-system in the hierarchy, clicking the **Clear Selection** button will move you up the hierarchy to system-level Commissioned elements. Similarly, if the filter was first selected, and you had a specific system selected, when you click the **Clear Selection** button, you will return to all Commissioned elements.



6.2.1.2 Filters

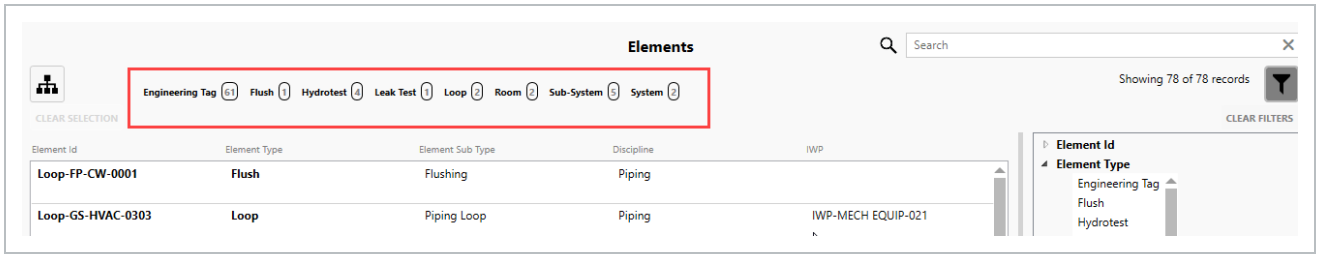
Using the filter icon allows you to jump to a desired element by selecting from the detail filter list. Filters can be used in conjunction with the hierarchy filter.



While searching for an element using the **Search** function may quickly lead you to your desired element, filters can be also used in conjunction with the hierarchy filter. Starting with a hierarchy filter quickly narrows the listing of all elements while the Filter option refines the search parameters.

6.2.1.3 Quick Filters

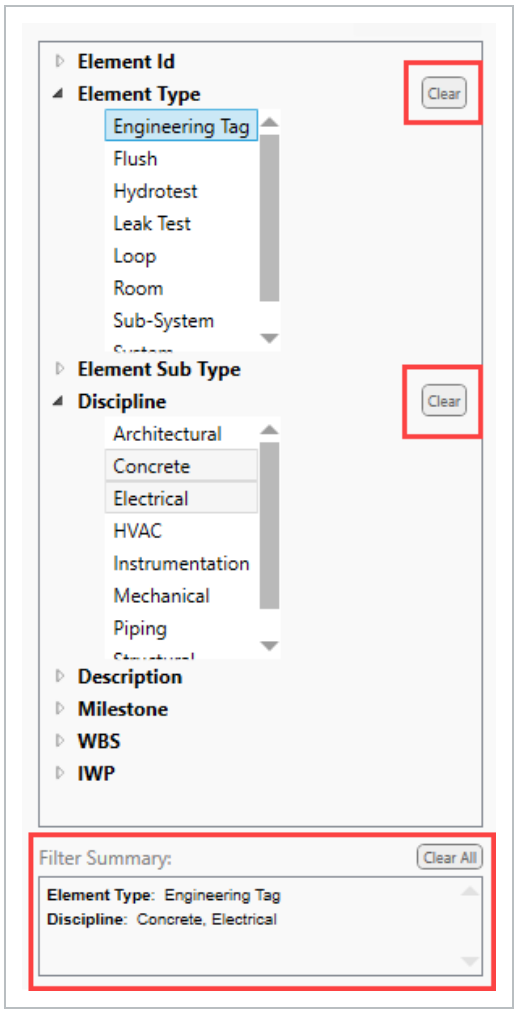
Quick filters are way to quickly view Tagged Elements. By selecting one of the Quick Filters such as Sub System, you can view all of the Elements that are tagged as Sub Systems.



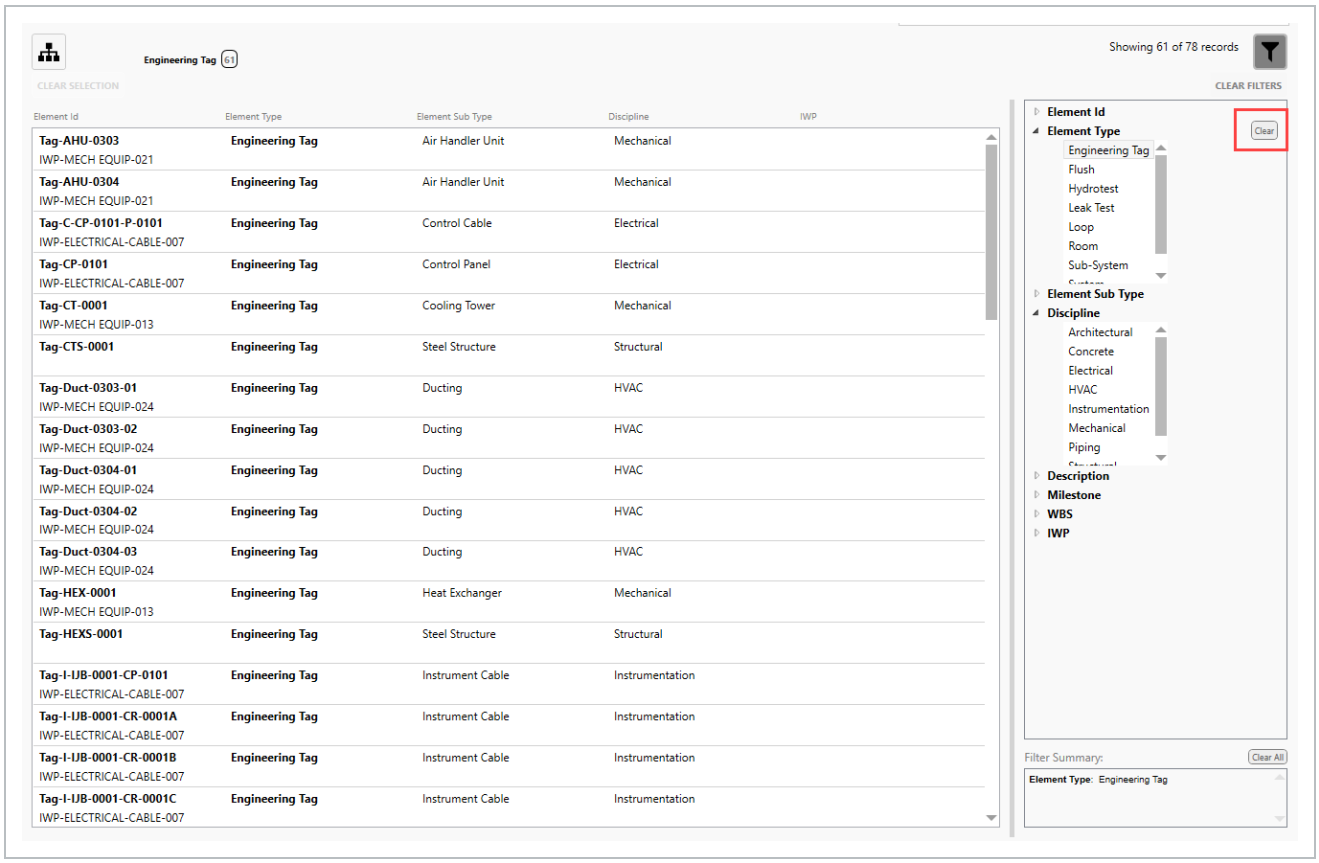
NOTE Elements and their associated hierarchy should be created and structured accordingly as it pertains to your project, by your responsible team.

To move away from a drilled-down search, you could approach it in two ways:

1. First, you could click the **Clear All** button to remove all quick filters from the list of records. As shown below, if you had filtered on all "Tagged Equipment" that was "Active" and "Commissioned", clicking the Clear All button returns you to the listing of all records.
2. Alternatively, you can also remove Advanced Filters individually.



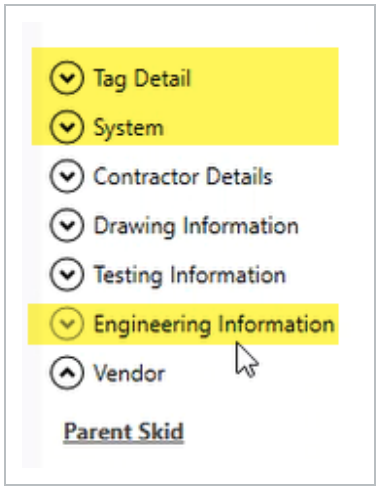
Clicking the **Clear** button on "Element Type" returns you to the list of all records.



6.3 ELEMENTS IMPORT

A typical job could have anywhere from 75,000 to 1 million tagged objects in the system. To avoid manually loading or manipulating the data individually – especially when those fields come from different sources – requires an alternate technique. That's where importing an Excel file with the data into VEO streamlines the process.

For example, these three highlighted areas can all come from your Engineer Record on a project, but even from there, the data may be compiled from many different sources and get consolidated on the upload sheets.



Similarly, the Contractor Details come from the contractor doing the construction work and the Testing Information is usually dictated from the commissioning group. Vendor Information typically comes from your procurement system and Drawing Information typically comes from your document control.

Importing elements begins with an Excel import sheet. This Excel file is created and then imported into Completions.

Upload Sheets have 3 functions:

1. Importing base information into Elements
2. Importing Other Tables and Fields of Information into Excel
3. Importing Element and Hierarchy Positions

6.3.1 Import Base Information into Elements

Creating an accurate Excel file for import is critical. Your InEight representative will provide the import templates for your projects.

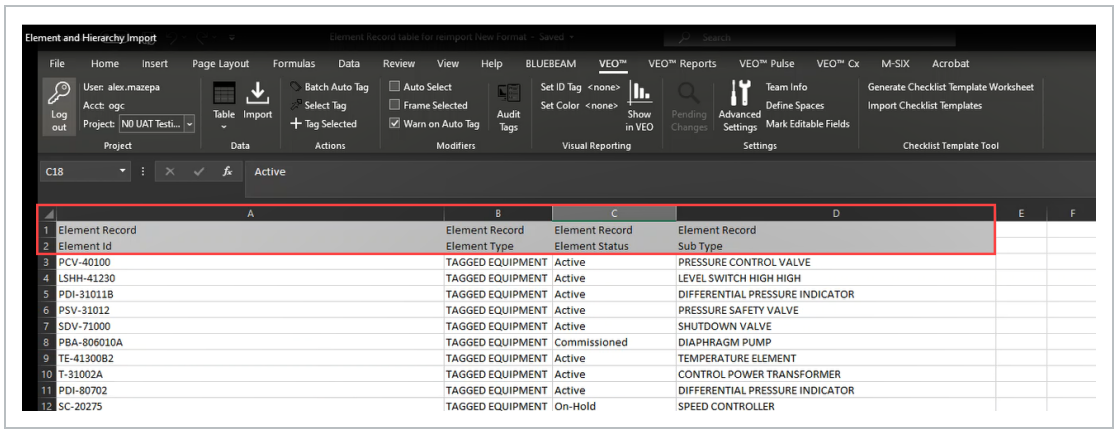
The steps below show how to set-up and begin your Excel file.

6.3 Step by Step 1 — Import Base Information into Elements

1. InEight will provide the names of the tables and Import templates at project set-up. The first two rows are critical for data import:

   • **Row 1**: Identifies which table you're writing information to, showing Element Record (a core table) as seen below

- **Row 2**: Identifies, at minimum, the Element Id, Element Type, Element Status and Sub Type



	A	B	C	D
1	Element Record	Element Record	Element Record	Element Record
2	Element Id	Element Type	Element Status	Sub Type
3	PCV-40100	TAGGED EQUIPMENT	Active	PRESSURE CONTROL VALVE
4	LSHH-41230	TAGGED EQUIPMENT	Active	LEVEL SWITCH HIGH HIGH
5	PDI-31011B	TAGGED EQUIPMENT	Active	DIFFERENTIAL PRESSURE INDICATOR
6	PSV-31012	TAGGED EQUIPMENT	Active	PRESSURE SAFETY VALVE
7	SDV-71000	TAGGED EQUIPMENT	Active	SHUTDOWN VALVE
8	PBA-806010A	TAGGED EQUIPMENT	Commissioned	DIAPHRAGM PUMP
9	TE-41300B2	TAGGED EQUIPMENT	Active	TEMPERATURE ELEMENT
10	T-31002A	TAGGED EQUIPMENT	Active	CONTROL POWER TRANSFORMER
11	PDI-80702	TAGGED EQUIPMENT	Active	DIFFERENTIAL PRESSURE INDICATOR
12	SC-20275	TAGGED EQUIPMENT	On-Hold	SPEED CONTROLLER

> **NOTE** Field Names must match exactly what's written in the database for both the table and the column.

2. Enter, import or copy data into the remaining rows of the spreadsheet for import to the system.
   - Using the example above, in Row 3 Element PCV-40100 is an Active piece of Tagged Equipment pertaining to a Pressure Control Valve

> **NOTE** If the field being uploaded to is a defined picklist, the user needs to ensure that the values in the Excel match the values defined. If the picklist is a Hierarchy Picklist it has to follow the convention of "Value 1", " / ", "Value 2", " / ", "Value 3". This may require concatenation of multiple columns from the data source.

3. Save the Excel file with your desired file name as an .XLSX extension.
4. Close the .XLSX file.

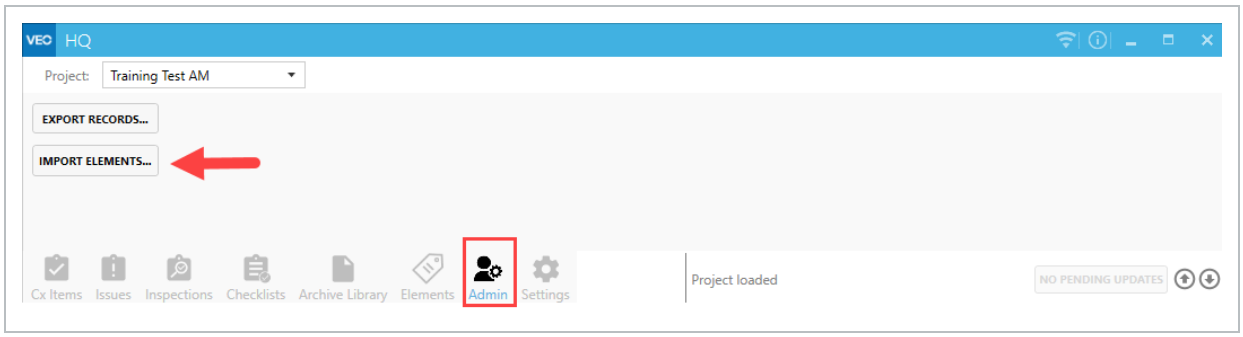
6.3.2 Load Base Information into the System

With an Excel Import file created, you can now import that file into your project.

6.3 Step by Step 2 — Load Base Information into the System

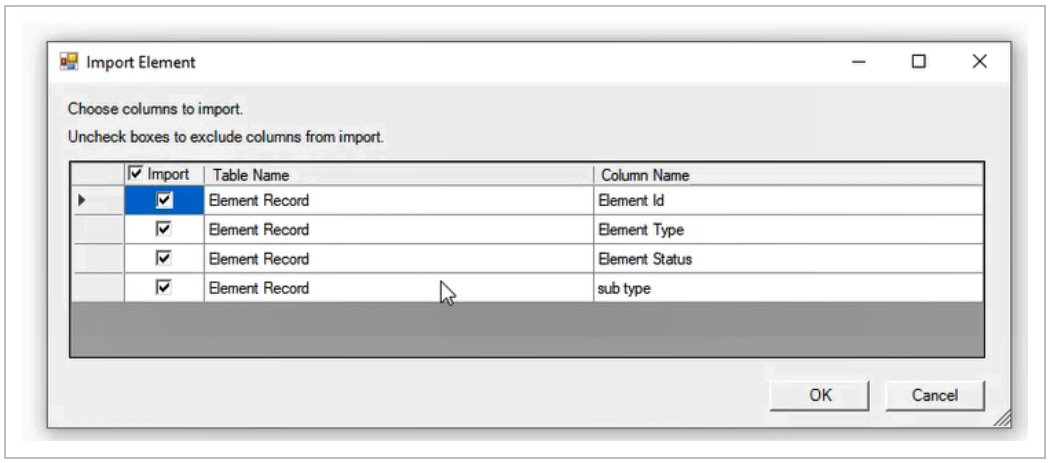
1. Click on the **Admin** button.

2. Click on the **Import Elements** button.



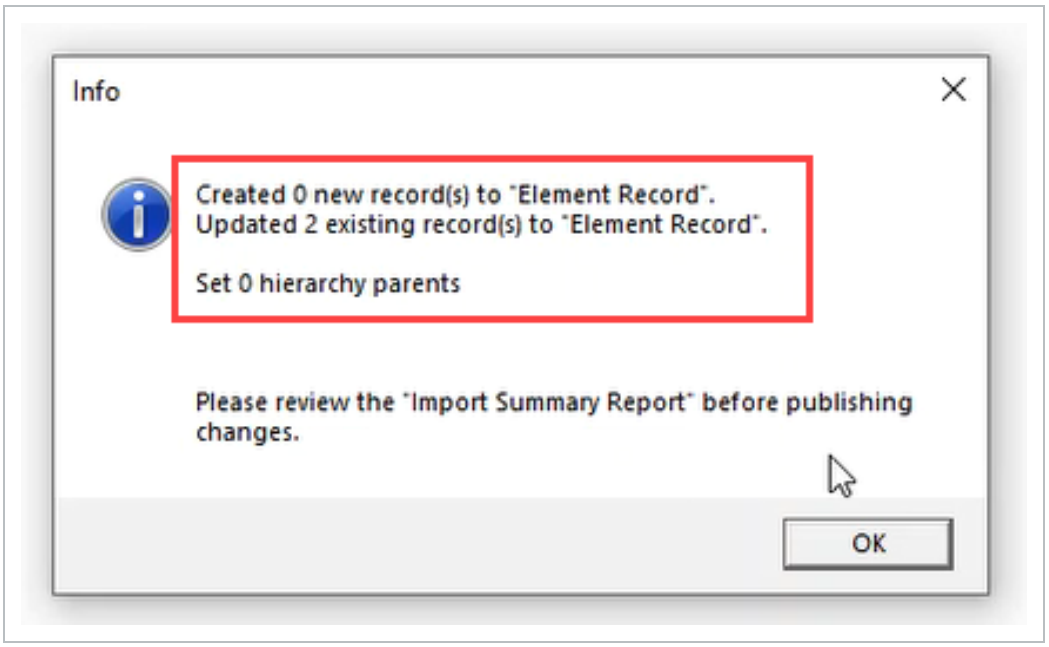
3. Navigate to and open the newly created Excel .XLSX file.
   - The system will analyze the top 2 rows of the .XLSX file for upload

> **NOTE** There is an option to de-select (or not import) certain columns into the system by un-checking the appropriate Import column box



4. Click **OK**.
   - All the records from the sheet will be analyzed against the current database. If any values are different, those values will be added in. If data is updated based on the Element ID, those new values will be populated

- A pop-up will indicate what was created and modified

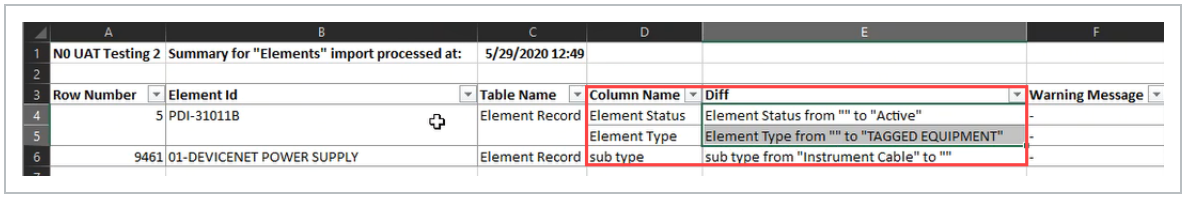


5. Click **OK**.

> **NOTE** The import will replace all values for each record that is imported. If a field is uploaded as blank from the import it will overwrite any values in the system.

6.3.2.1 View Imported Changes

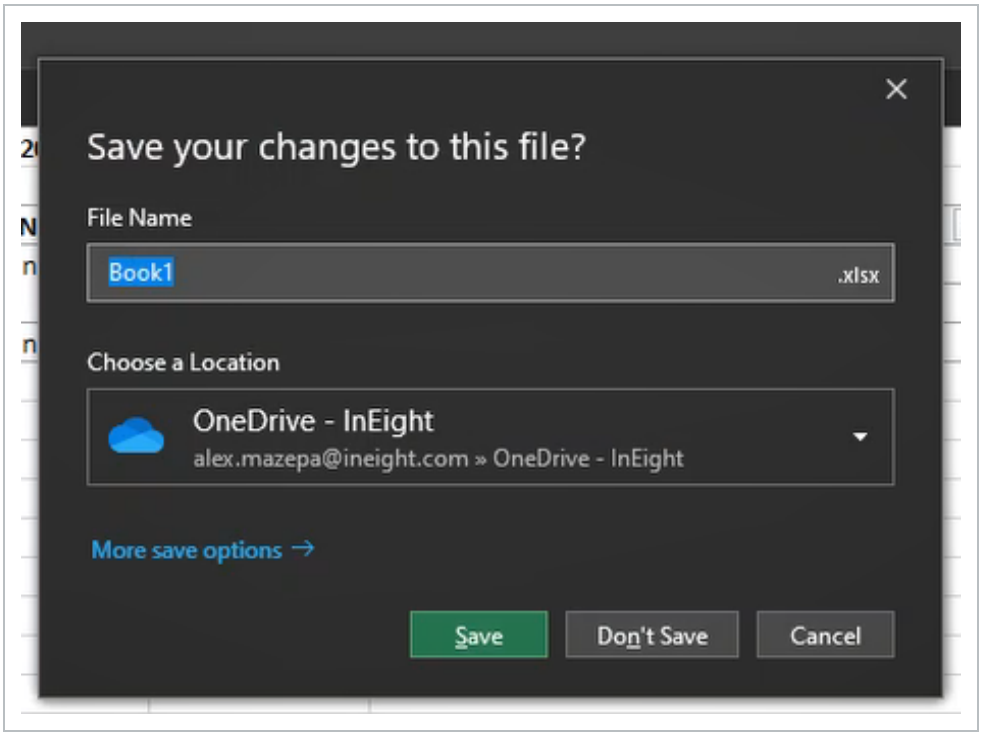
To see what the imported changes are, a new spreadsheet pops up as an Import Summary Report which identifies the changes made.



	A	B	C	D	E	F
1	N0 UAT Testing 2	Summary for "Elements" import processed at:	5/29/2020 12:49			
2						
3	Row Number	Element Id	Table Name	Column Name	Diff	Warning Message
4	5	PDI-31011B	Element Record	Element Status	Element Status from "" to "Active"	-
5				Element Type	Element Type from "" to "TAGGED EQUIPMENT"	-
6	9461	01-DEVICENET POWER SUPPLY	Element Record	sub type	sub type from "Instrument Cable" to ""	-

- On Tag PDI-21011B, the Element Status went from blank to Active
- On Tag PDI-21011B, the Element Type went from blank to Tagged Equipment
- On Tag 01-DEVICENET POWER SUPPLY, the Sub-type went from Instrument Cable to blank

This report is recommended to be saved by clicking **Save** in Excel.



TIP InEight recommends that the project admin retains 1) the reports and 2) the imports for traceability.

Alternatively, the same data is presented in a different manner under the Import Summary Report Data tab.

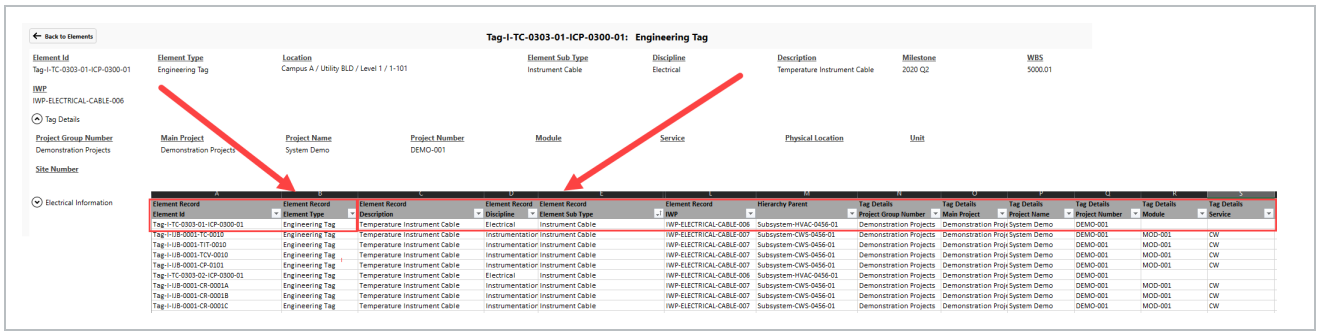
Close the report by clicking the **Don't Save** button.

Click on the **Pending Updates** button in the lower right corner of the screen.

Either click **Publish** or **Discard** and click **OK**.

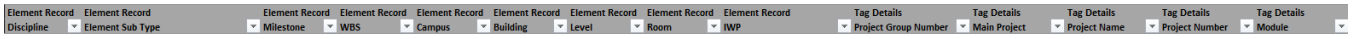
6.3.3 Import Other Tables and Fields of Information into Excel

Other tables and fields of information are also populated using the Import function.



NOTE As a precautionary measure to ensure extra uploading security, the term “Tag Details” is shown on the HQ user interface and the name of the table as recognized by the server is “Element Tag Details."

Scrolling across the top of the spreadsheet are different tables identified that align with the tables within VEO.



Uploading data follows the same process as shown above.

6.3.4 Change Element Engineered Tags Using Import

If an engineered tag for an existing element needs to change, but you don’t want to lose corresponding data on any other table, a mechanism using an Instance Id will make that happen.

In all other situations, everything keys off of the Element Id unless there’s a column in the Import called Instance Id.

NOTE This function is only available to ADMIN users.

When there is a value in that cell, the Import will look up the Instance Id value in Column A, and not the Element Id in Column B.

6.3 Step by Step 3 — Add an Instance Id

1. Insert a new Column A.
2. Name A1 **Elements** and A2 **Instance Id**.
3. Locate and edit the tag to edit in Column B.

4. Add the updated Element Record information to the corresponding cell in Column A.

Element Record Instance Id	Element Record Element Id	Element Record Element Type	Element Record Element Status	Element Record sub type
9112870f-0219-463a-8d27-d6a19ee59ede	!TEST-FPP-1CS-C100	TAGGED EQUIPMENT	In Design	
6874c295-2406-4246-8361-ca8c4a18aa86	0000-00	System	Active	
db3719df-8c4b-45b3-918a-c12a5e530a4e	0000-00-00	Sub System	Active	
e1efe8f1-3ff2-45d3-8e22-268a969a9c56	0000-00-01	Sub System	Active	
a1eca3fa-77f5-4db6-a4f5-a8630daa3d08	01-Compressor	TAGGED EQUIPMENT	Open	RECYCLE COMPRESSOR
3a69dae9-70dd-4681-8371-a52cc0a13f7b	01-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT	Active	Instrument Cable
54a2730a-d0b7-4954-8a31-0d0ab1368028	02-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT	On-Hold	DISTRIBUTION BOARD
1fd21ff6-2a93-4c6c-aca0-ecf7323e72bb	03-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT	Active	DISTRIBUTION BOARD
9345732e-fded-4eae-b886-600444c509de	04-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT	On-Hold	DISTRIBUTION BOARD
72a8009e-4bcc-41f5-a1c5-5f332429a45d	05-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT	Active	DISTRIBUTION BOARD
f535ca18-d099-423b-8a27-78a00d460100	1-FPP-1CS-C100	TAGGED EQUIPMENT	In Design	
45ef33f4-1e42-46a4-ba12-828ef3012da9	1-FPP-1CS-E137	TAGGED EQUIPMENT	In Design	
065573d8-8919-45e8-b2e2-cab135a68a3d	1-FPP-1CS-E200	TAGGED EQUIPMENT	In Design	
caec9e1e-c68c-46f5-acbf-c18b64fb8b72	1-FPP-1CS-E201A	TAGGED EQUIPMENT	In Design	

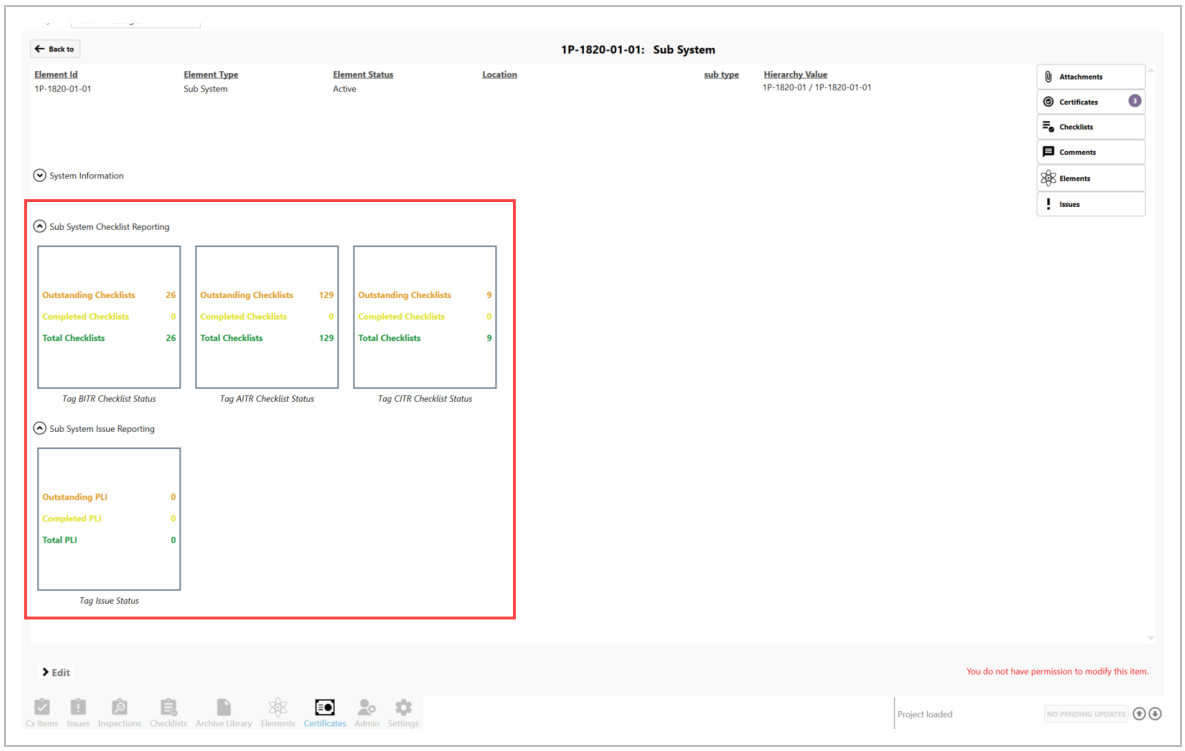
5. Save the Upload file.
6. Import the file to VEO.

6.4 PROGRESS ROLL-UP REPORTS

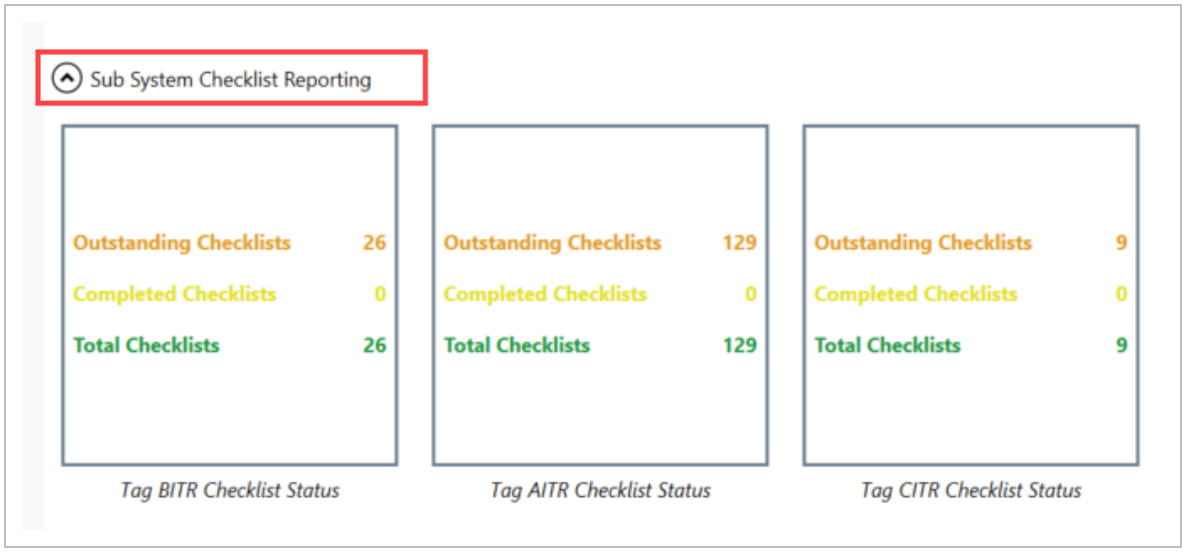
6.4.1 Value of Progress Roll-up Reports

Progress roll-up reports provide a visual means to look into elements and the items linked to them in meaningful ways from a system or sub-system level.

In this example, and from within a sub system, two drop-downs provide a visual representation of both Checklist and Issue status.

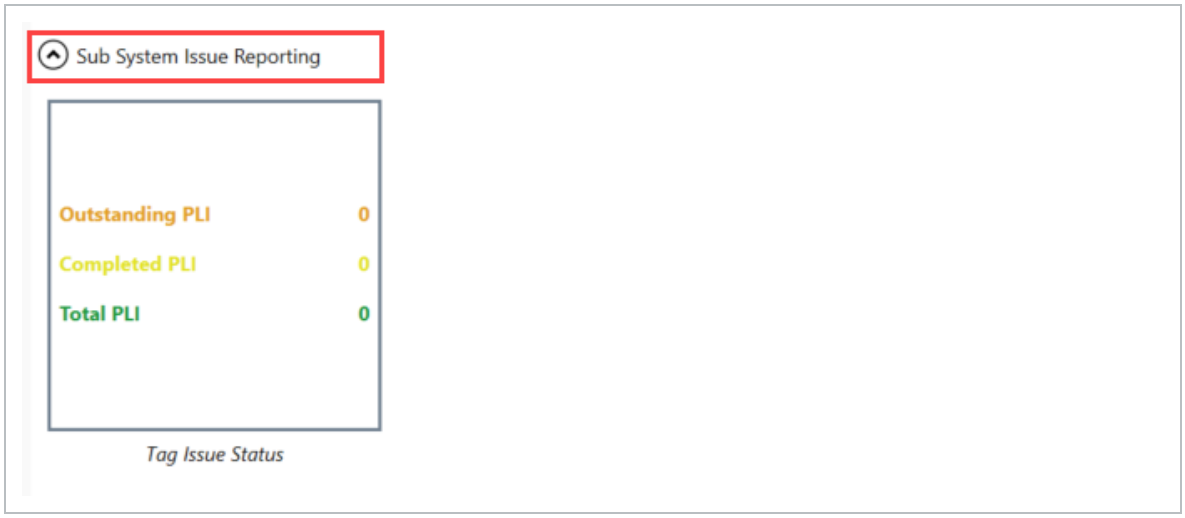


After clicking on the **Sub System Checklist Reporting** drop-down you see three blocks showing Outstanding, Completed and Total Checklist statuses for each of the checklist types:



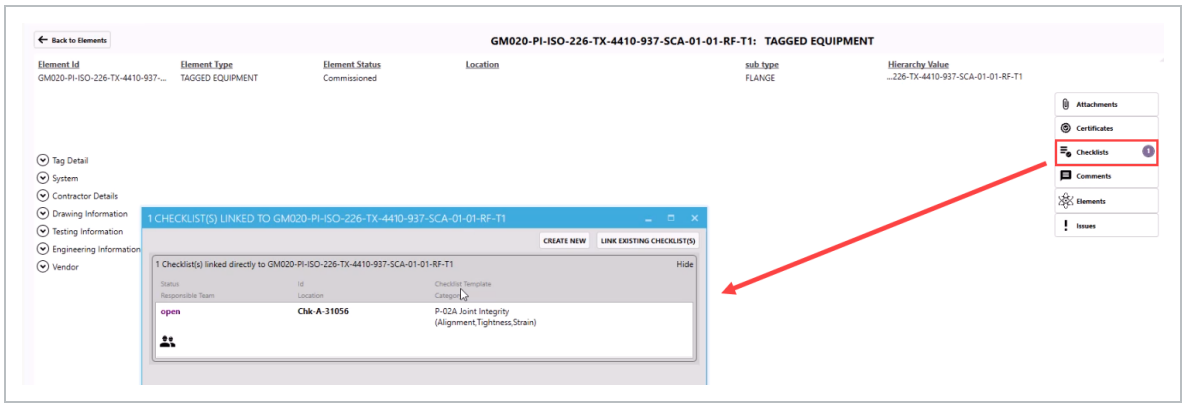
TIP	Type A (AITR) qualify against the Construction Complete (CC) Checklist Type B (BITR) looks at the Ready for Commissioning (RFC) Checklist Type C (CITR) looks at the Ready For Startup (RFSU) Checklist

Similarly, clicking on the **Sub System Issue Reporting** drop-down shows the Tag Issue Status Report which summarizes the Issues against the children in the sub-system.



With thousands and thousands of elements in a project, having a simple means to "see" multiple levels down in the system in meaningful ways is both beneficial and a time-saver.

All sorts of custom roll-up reports can be configured. In this example, for a Tagged Equipment element, checklists would appear counting it against the overall total, as shown in the blocks above.



In the Certificates lesson, you will also visually see the value for Progress Roll-up Reports when it comes to Completeness Reports and Loop Readiness Reports as a means to ensure all checklists have been completed.

Lesson 6 Review

1. Elements are only comprised of entire systems, sub-systems, or blocks types.
   a. True
   b. False

---

2. The value in nesting elements together is to provide a level of order and a defined structure to categorize your elements.
   a. True
   b. False

---

3. Selecting the hierarchy buttons allows you to: (select all that apply)
   a. View the relationships and details of each of the Elements
   b. Search the elements for keywords to refine the selection
   c. Filter on the elements for pieces of metadata
   d. All of the above

---

4. Upload Sheets serve the following functions: (Select all that apply)
   a. Importing Element and Hierarchy Positions
   b. Importing base information into Elements
   c. Importing Other Tables and Fields of Information into Excel

---

5. Progress Roll-up Reports can visually represent Sub system Checklist reporting and Sub system Issue reporting comparing outstanding, completed and total statuses.
   a. True
   b. False

Lesson 6 Summary

As a result of this lesson, you can:

- Work with Elements
- Navigate Element hierarchy

- Import and load data into Elements

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LESSON 7 – ATTACHMENTS

Lesson Duration: 20 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Upload an attachment
- View and link a Completions attachment

Topics in this Lesson

7.1 Attachment Management 130
7.2 Attachment Upload 134
7.3 Access Attachments 137
7.4 HQ Attachments 141
Lesson 7 Review 146
Lesson 7 Summary 146

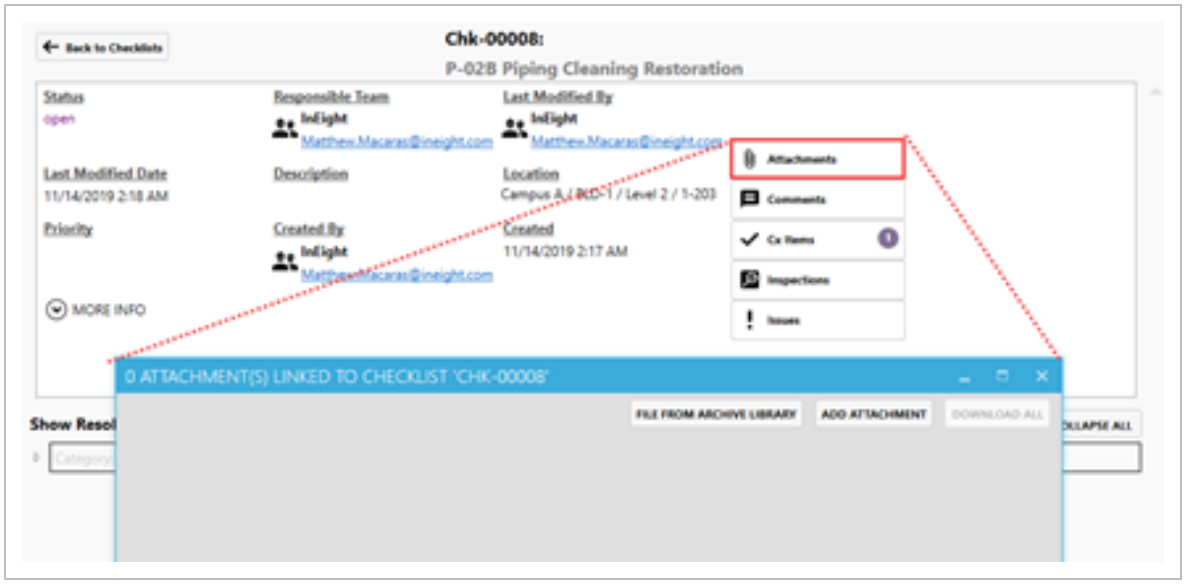
7.1 ATTACHMENT MANAGEMENT

> **NOTE** The InEight Completions product is highly customizable per your specific project requirements. Tab order and its functionality may differ than what is shown.

7.1.1 Upload Attachments

Aside from signing phases, answering checklists, and creating/updating issues, users working in the Completions application can also add and link attachments.

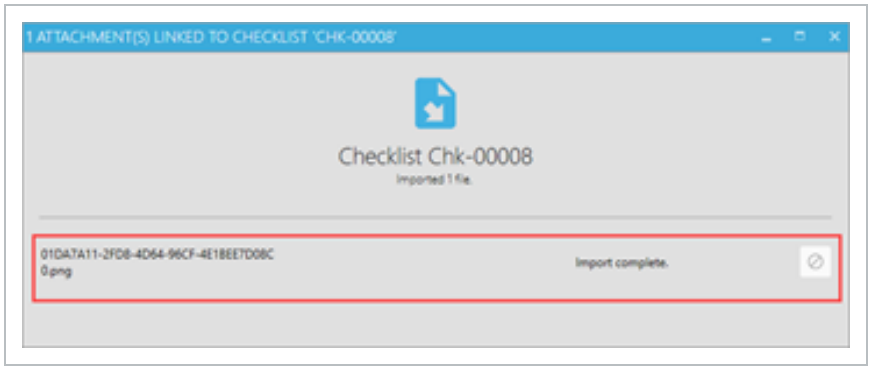
Attachments can be added to any module based on your permission level, using a Cx Item as an example below. They can be added in the same manner to a Phase, an Issue, Inspection and a Checklist.



7.1 Step by Step 1 — Add an Attachment

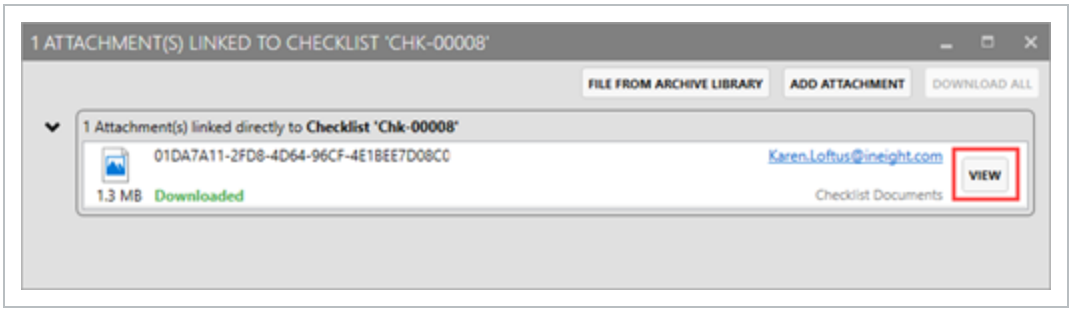
1. Starting from the desired Cx Item, Phase, Issues, Inspection or Checklist, click the **Attachments** button.
2. Click the **Add Attachment** button.
3. Select the image from the desired folder or location.

4. Click **Open**.
   - A new pop-up window reflects the import

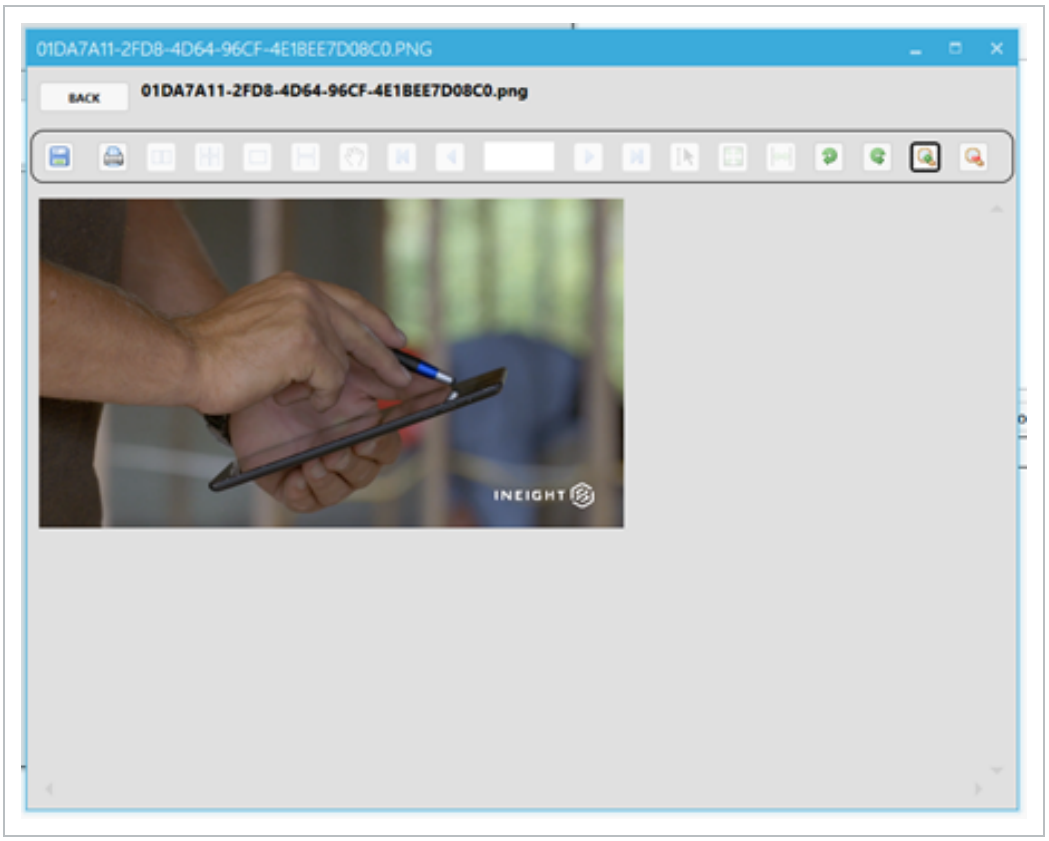


.

5. Click **OK**.
   - The attachment now appears in the Attachment pop-up, along with additional data about the attachment and the email of the individual that uploaded the attachment

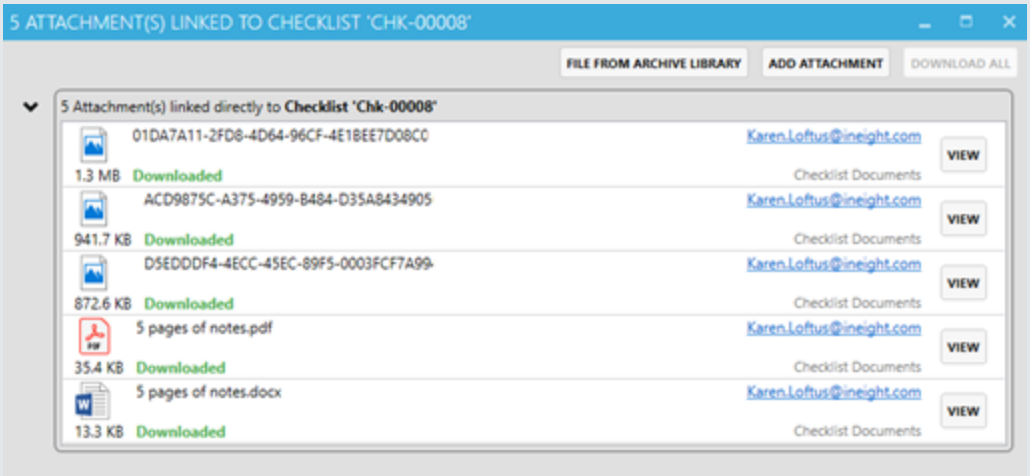


- Additionally, you can now view the attachment by clicking the **View** button



NOTE

You can also select multiple images to bring in at once, resulting in multiple attachments being linked.



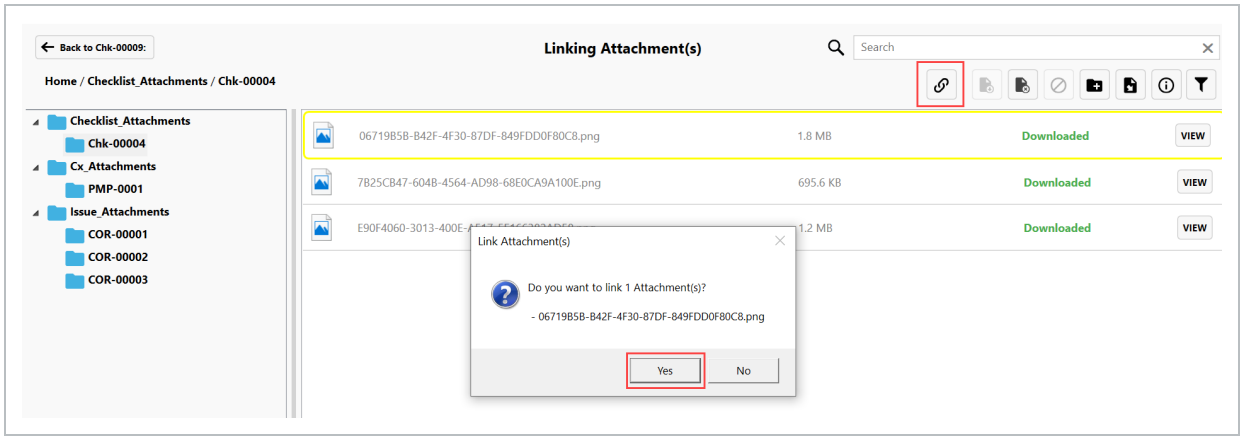
TIP

To remove an image, right-click on the attachment record within the Attachment(s) Linked to Checklist pop-up window.

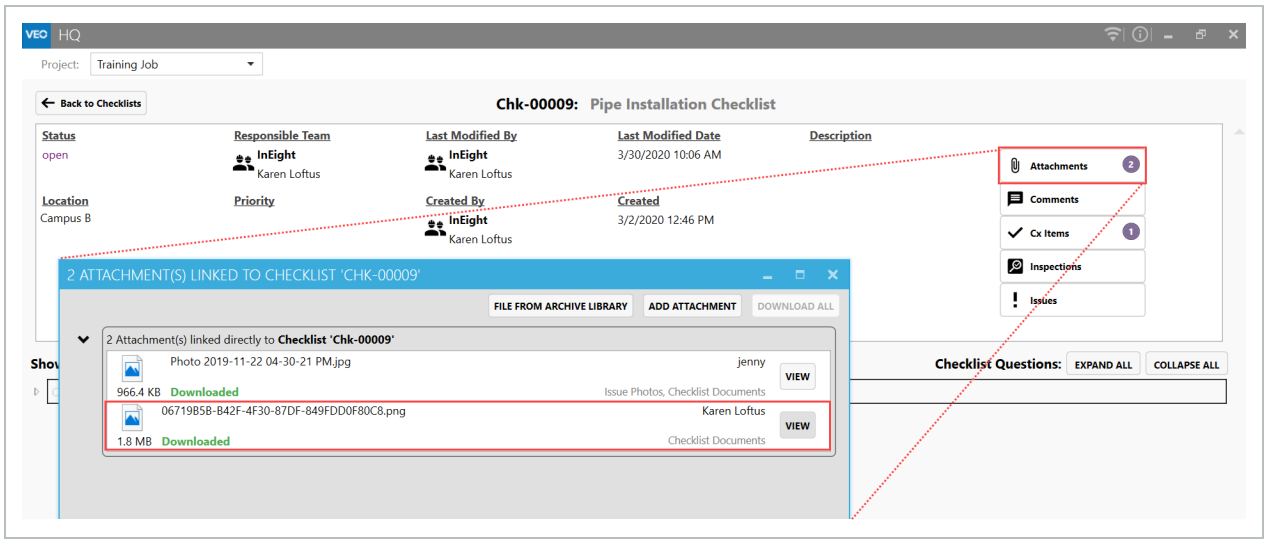
The following Step-By-Step outlines the process for adding a file from the archive library.

7.1 Step by Step 2 — Add a File from the Archive Library

1. Starting from the desired Cx Item, Phase, Issues, Inspection or Checklist, click the **Attachments** button.
2. Select the **File From Archive Library** button.
3. Navigate to your preferred folder, either using the folder structure on the left or by clicking through each folder on the right.
4. Select an image(s).
5. Click on the **Link Select Item(s)** icon.
6. Click on the **Yes** button to confirm linkage of the attachment(s).



As a result, the linked image is now shown as an attachment.



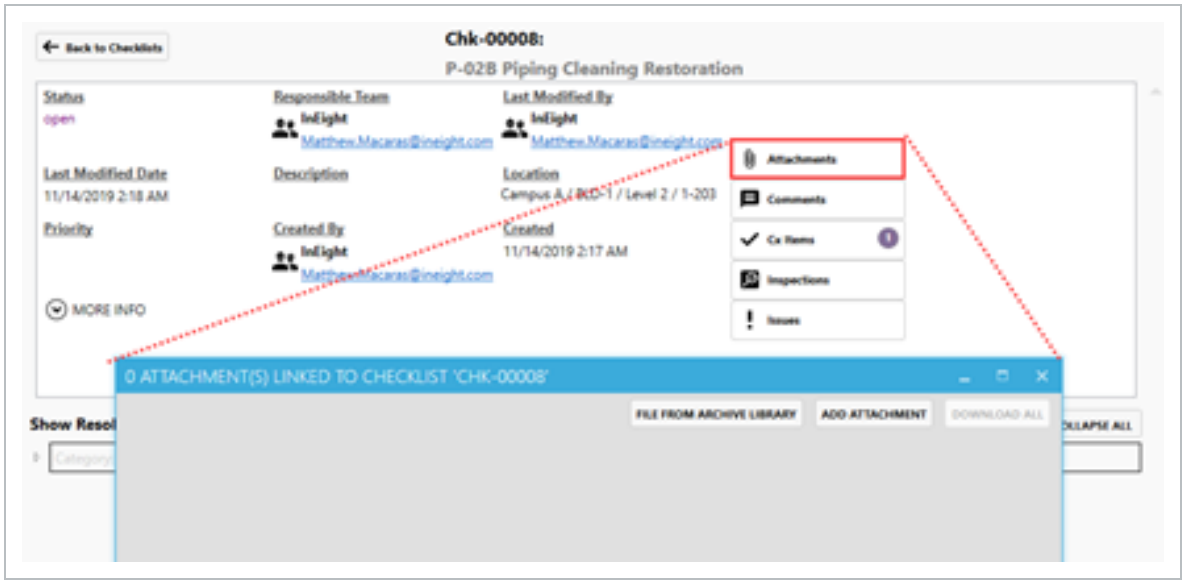
7.2 ATTACHMENT UPLOAD

NOTE The InEight Completions product is highly customizable per your specific project requirements. Tab order and its functionality may differ than what is shown.

7.2.1 Upload Attachments

Aside from signing phases, answering checklists, and creating/updating issues, users working in the Completions application can also add and link attachments.

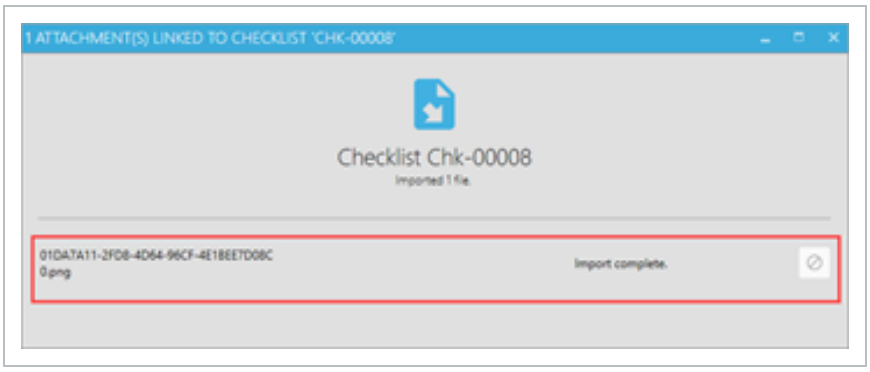
Attachments can be added to a specific Cx Item as shown below. They can be added in the same manner to a Phase, an Issue, Inspection and a Checklist.



7.2 Step by Step 1 — Add an Attachment

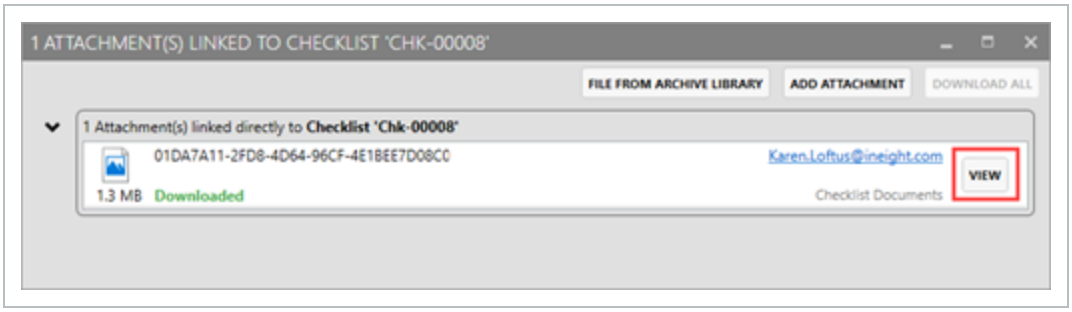
1. Starting from the desired, Cx Item, Phase, Issues, Inspection or Checklist, click the **Attachments** button.
2. Click the **Add Attachment** button.
3. Select the image from the desired folder or location.

4. Click **Open**.
    - A new pop-up window reflects the import

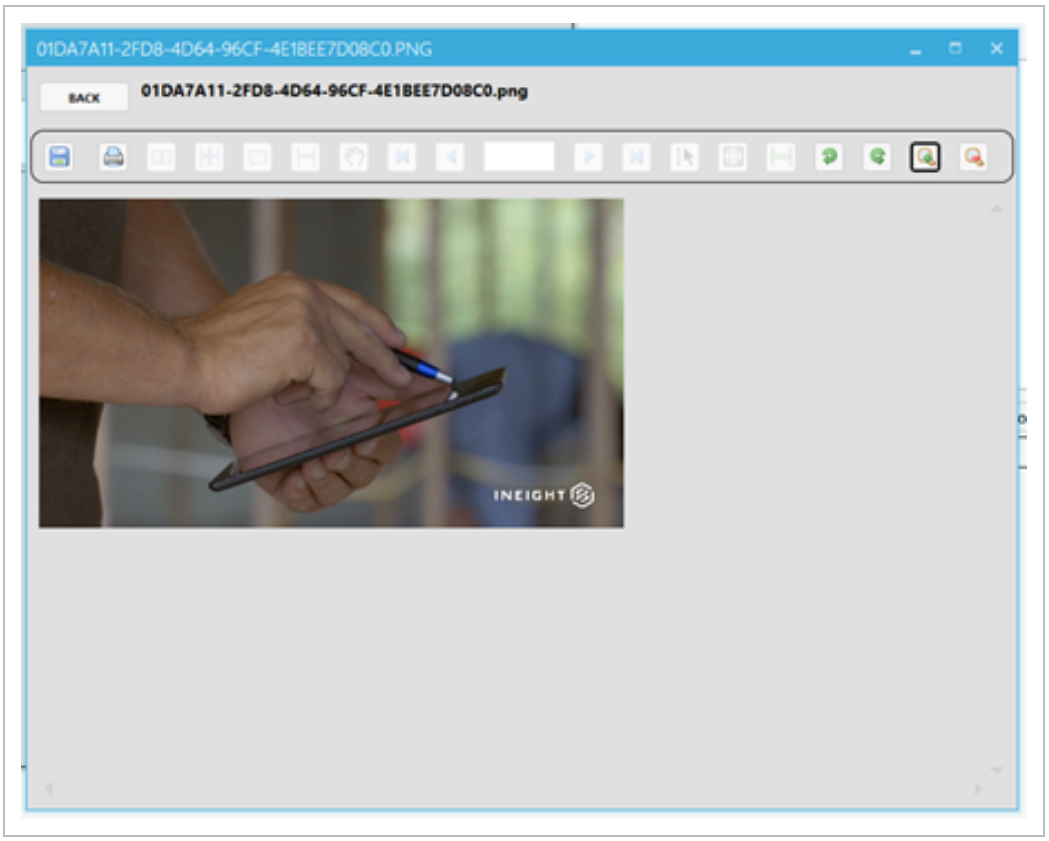


.

5. Click **OK**.
    - The attachment now appears in the Attachment pop-up, along with additional data about the attachment and the email of the individual that uploaded the attachment

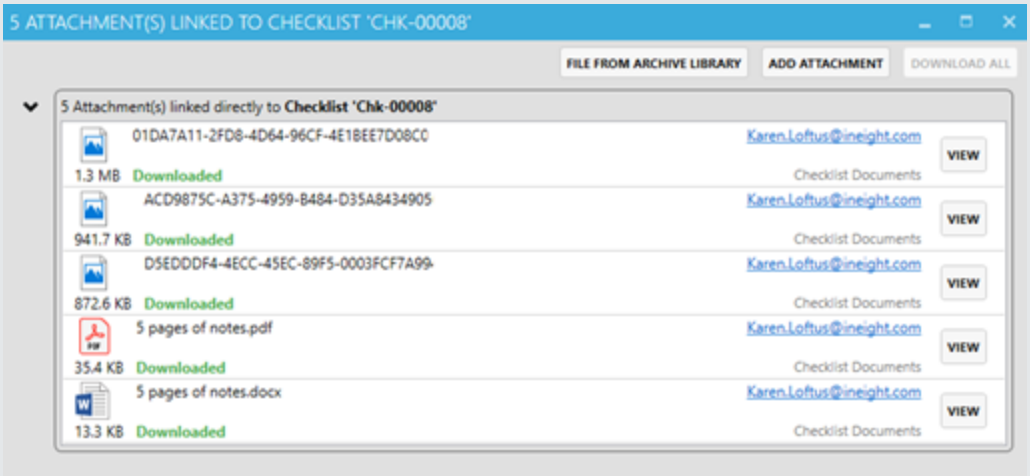


- Additionally, you can now view the attachment by clicking the **View** button



NOTE

You can also select multiple images to bring in at once, resulting in multiple attachments being linked.



TIP

To remove an image, right-click on the attachment record within the Attachment(s) Linked to Checklist pop-up window.

7.3 ACCESS ATTACHMENTS

7.3.1 View an Attachment in a Desktop Application

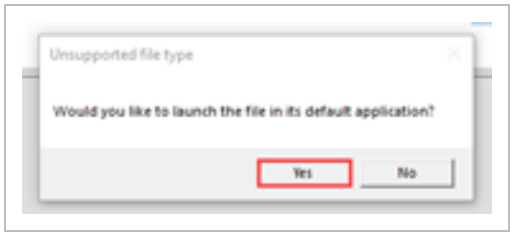
When an Image file is attached, viewing functionality is limited to:

1. Save and Print
2. Rotate clockwise and counter-clockwise
3. Zoom In and Zoom Out

When attaching a PDF document, all functionalities exist, including:

	Description
1	Save and Print
2	Facing 2-up and 4-up
3	Single page, Single Continuous and Pan
4	First / Last Page and Previous / Next Page
5	Select
6	Fit Page and Fit Width
7	Rotate Clockwise and Counter-Clockwise
8	Zoom In and Zoom Out

When opening a Word or Excel document, a pop-up asks if you would like to launch the file in its default application. Click **Yes** to proceed.

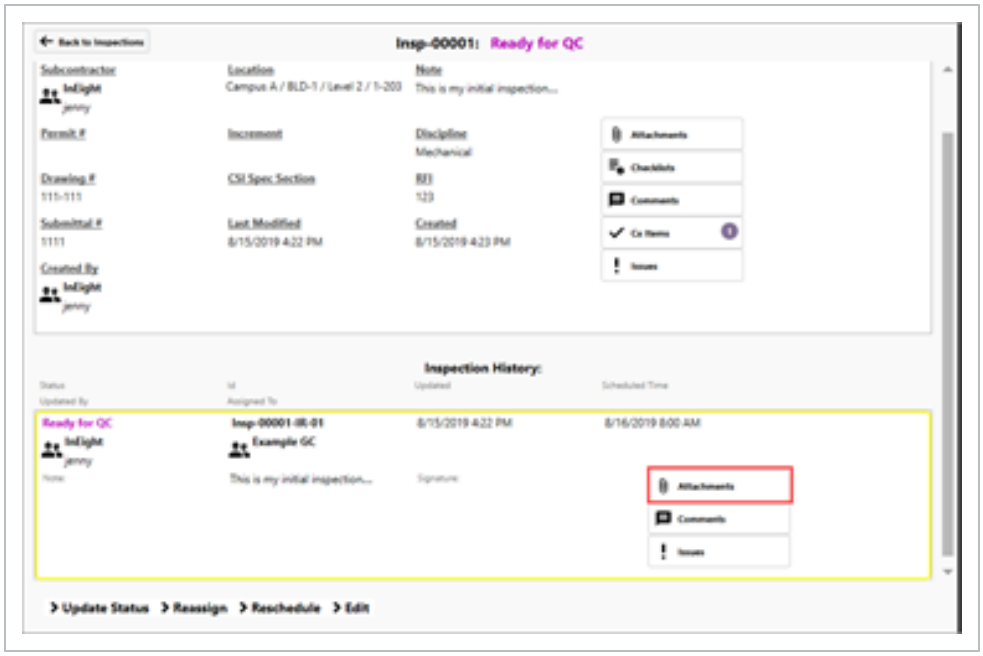


TIP	We do not recommend uploading external applications such as Word or Excel, due to conversion issues when printing.

7.3.2 Link Attachments

Linking an attachment is useful when a desired attachment exists in one area, and also when tying it to another aspect of the project.

Click on an **Attachments** button, from Inspection History in our example.



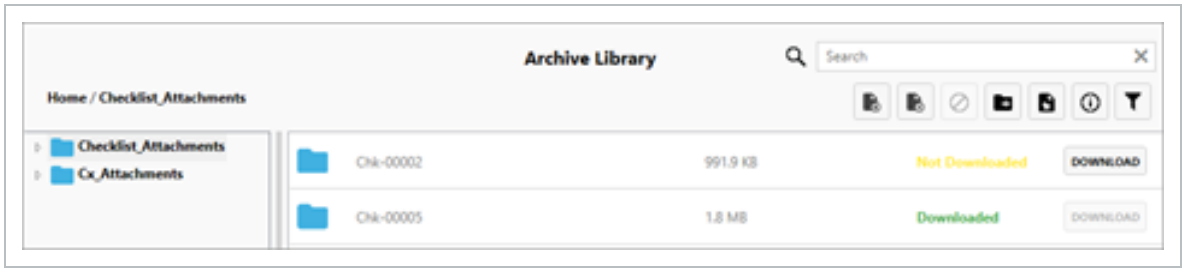
With no current attachments tied to this inspection, click on **File From Archive Library**.

The **File From Archive Library** button directs you to the Archive Library where all project documentation is stored.

7.3.3 Store Document in the Archive Library

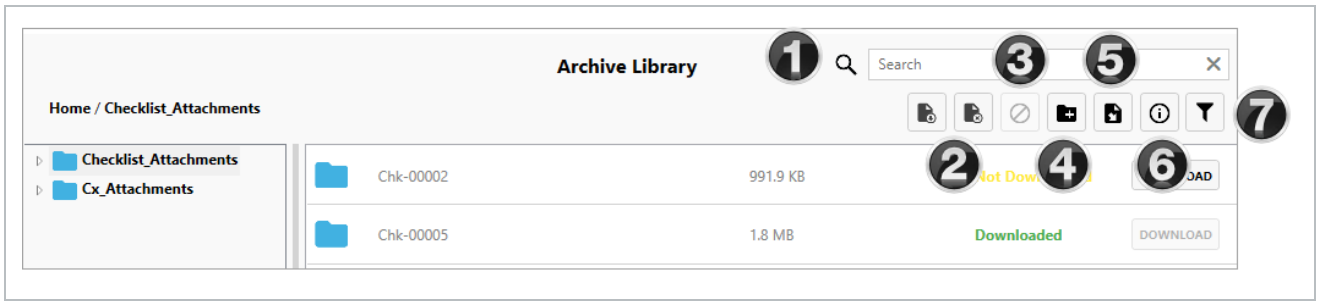
The Archive Library is used to store and distribute versioned project documents.

InEight Completions also automatically stores files and photos making them accessible within all Completions applications.



The following actions in the Archive Library can be accessed:

	Description
1	Search
2	Download All & Remove Local Activity
3	Stop Download
4	New Folder
5	Import Files
6	More Info
7	Label Filter



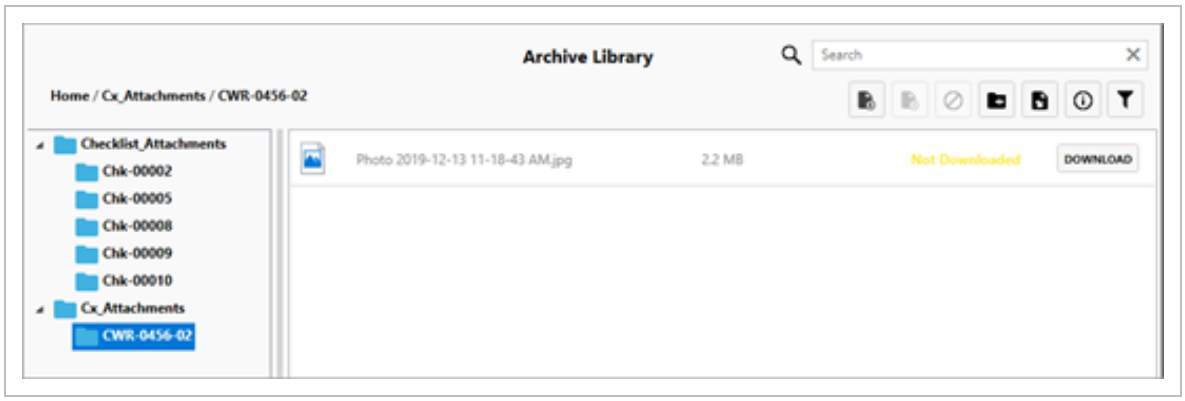
The following Step-By-Step outlines how to view attachments within a selected archive folder.

7.3 Step by Step 1 — View Attachment List Within an Archive Folder

1. Click on the **Archive Library** button.

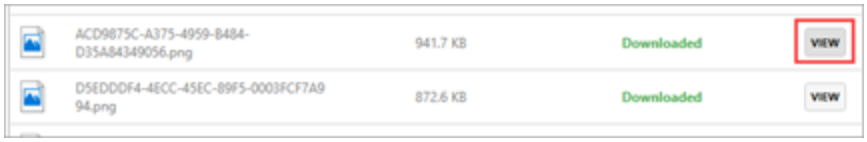
2. Open any folder by clicking on the **folder tile** or the **Carrot** to the left of the file folder.

3. Click on the desired folder, being aware additional sub-folders may exist.



- If the file has not yet been downloaded, the phrase *Not Downloaded* will appear in yellow, and the **Download** button is available
- If the file has already been downloaded, the term *Downloaded* will appear in Green, and the **View** button is available

4. Click on the respective **Download** or **View** button.



7.4 HQ ATTACHMENTS

7.4.1 View an Attachment

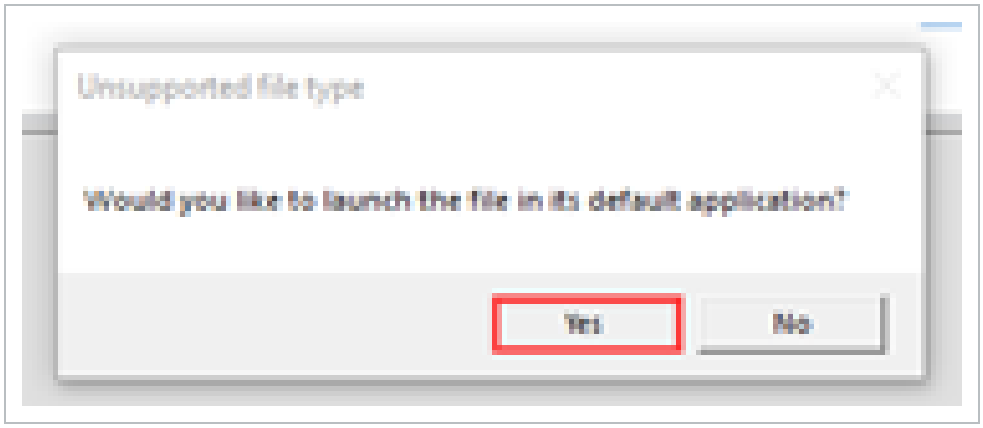
When an Image file is attached, viewing functionality is limited to:

1. Save and Print
2. Rotate clockwise and counter-clockwise
3. Zoom In and Zoom Out

When attaching a PDF document, all functionalities exist, including:

	Description
1	Save and Print
2	Facing 2-up and 4-up
3	Single page, Single Continuous and Pan
4	First / Last Page and Previous / Next Page
5	Select
6	Fit Page and Fit Width
7	Rotate Clockwise and Counter-Clockwise
8	Zoom In and Zoom Out

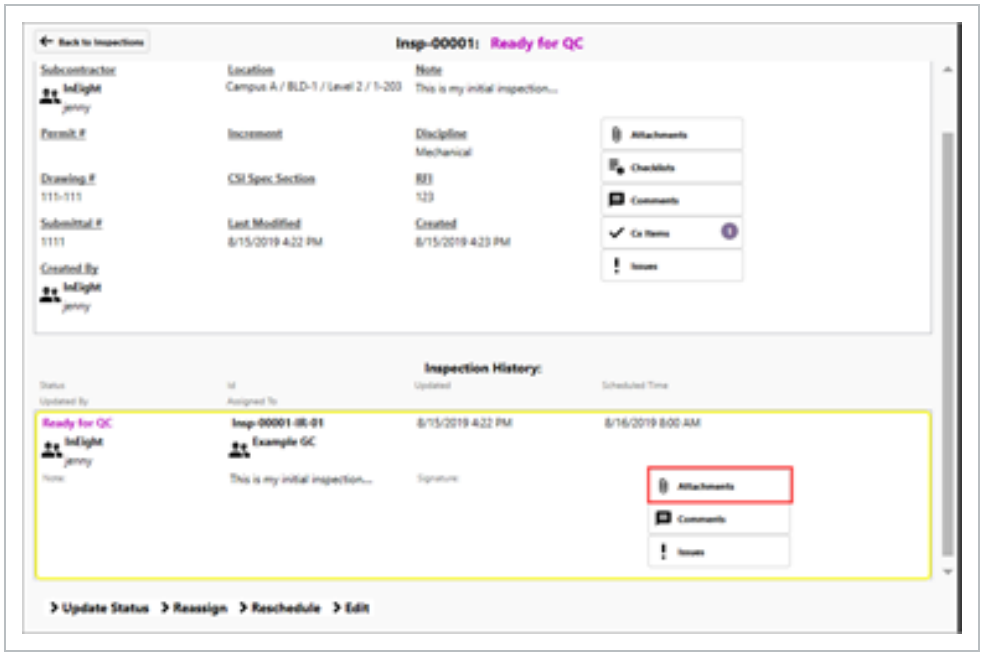
When opening a Word or Excel document, a pop-up asks if you would like to launch the file in its default application. Click **Yes** to proceed.



7.4.2 Link Attachments

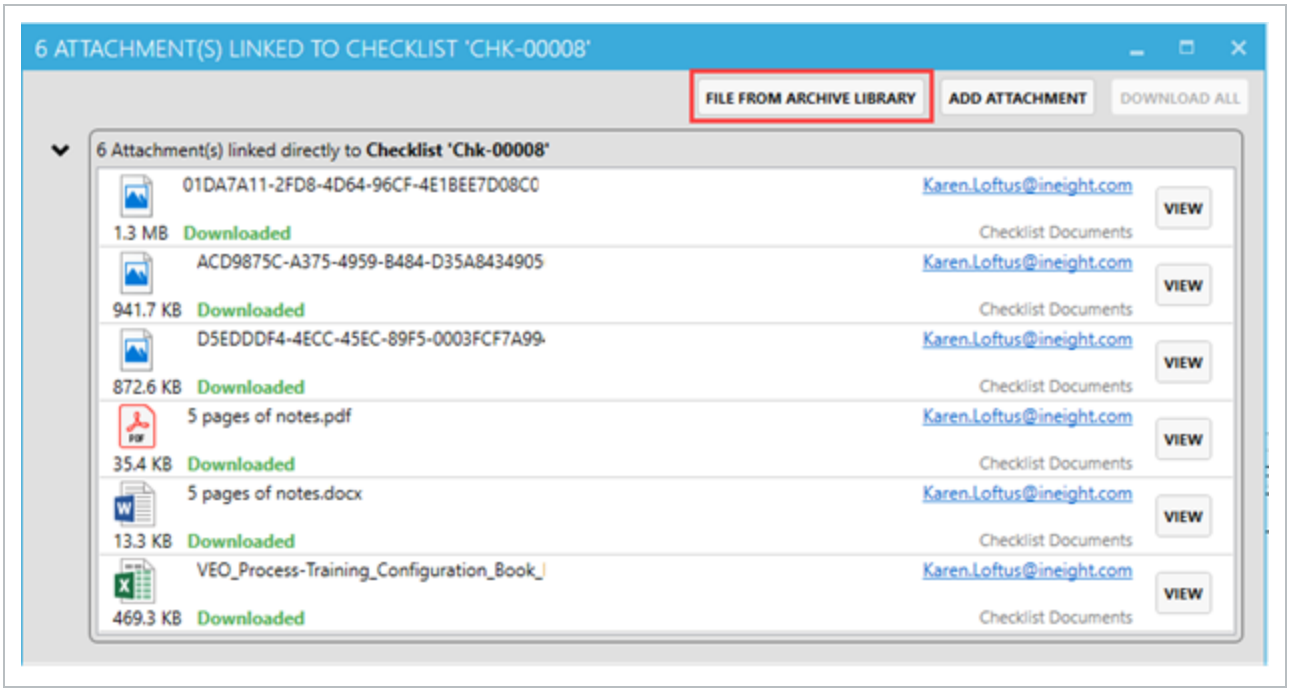
Linking an attachment is useful when a desired attachment exists in one area, and also when tying it to another aspect of the project.

Click on an **Attachments** button, from Inspection History in our example.

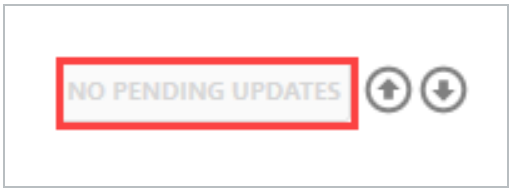


With no current attachments tied to this inspection, click on **File From Archive Library**.

The **File From Archive Library** button directs you to the area where all attachments are housed in one area for all Checklist and Cx Item attachments.



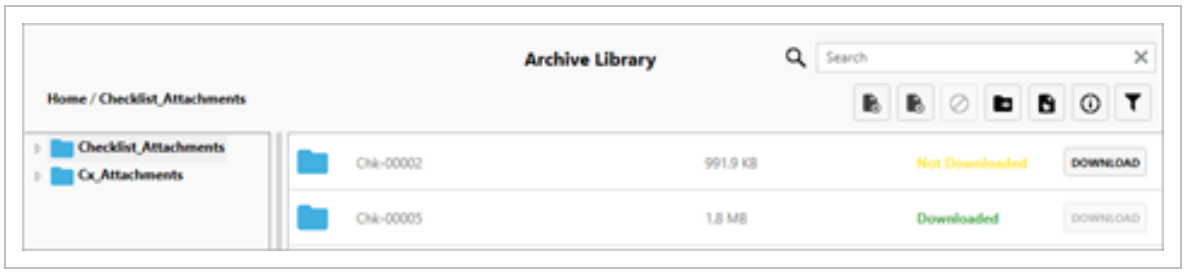
Ensure the **No Pending Updates** button is greyed out at the bottom of the page, meaning all attachments will show in the Archive Library.



7.4.3 The Archive Library

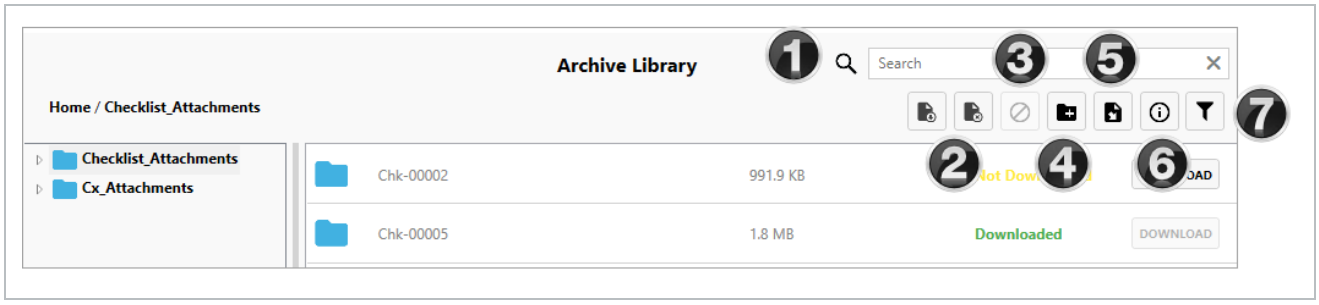
The Archive Library is used to store and distribute versioned project documents.

InEight Completions also automatically stores files and photos making them accessible within all Completions and Model applications.



The following actions in the Archive Library can be accessed:

	Description
1	Search
2	Download All & Remove Local Activity
3	Stop Download
4	New Folder
5	Import Files
6	More Info
7	Label Filter

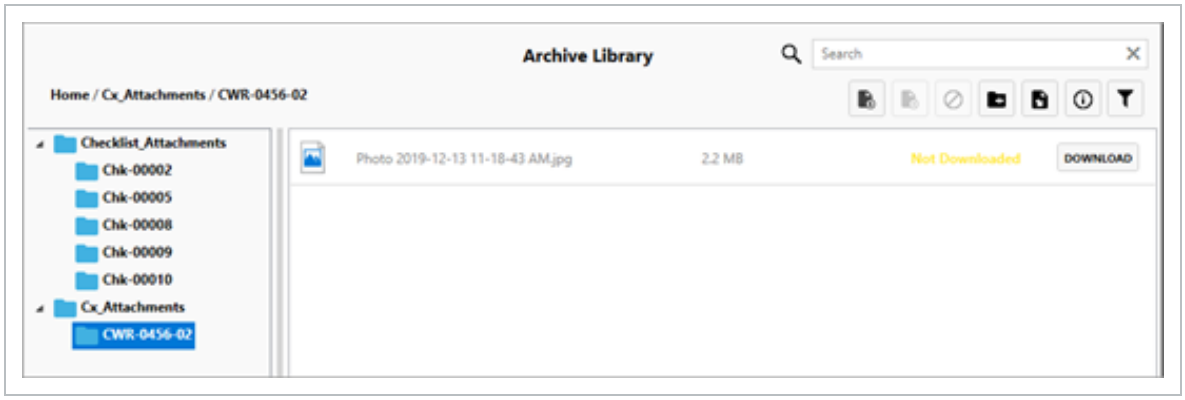


7.4 Step by Step 1 — View Attachment List Within an Archive Folder

1. Click on the **Archive Library** button.

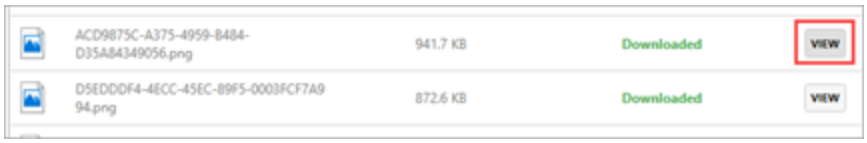
2. Open any folder by clicking on the **folder tile** or the **Carrot** to the left of the file folder.

3. Click on the desired folder, being aware additional sub-folders may exist.



- If the file has not yet been downloaded, the phrase *Not Downloaded* will appear in yellow, and the **Download** button is available
- If the file has already been downloaded, the term *Downloaded* will appear in Green, and the **View** button is available

4. Click on the respective **Download** or **View** button.



Lesson 7 Review

1. When adding an attachment, you can click on the “Add an attachment” or “File from Archive” button.
   a. True
   b. False

---

2. You access attachments from:
   a. Settings
   b. Admin
   c. Archive Library

---

3. When selecting an image, you can: (select all that apply):
   a. Double click on the attachment tile
   b. Click the run button
   c. Click the export button
   d. Click the view button
   e. Right-click on the attachment tile & click view

Lesson 7 Summary

As a result of this lesson, you can:

- Upload an attachment
- View and link a Completions attachment

LESSON 8 – RUN REPORTS

Lesson Duration: 20 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- Access Reports
- Generate Excel and PDF reports
- Review Reports

Topics in this Lesson

8.1 Access and Review Report Output 148
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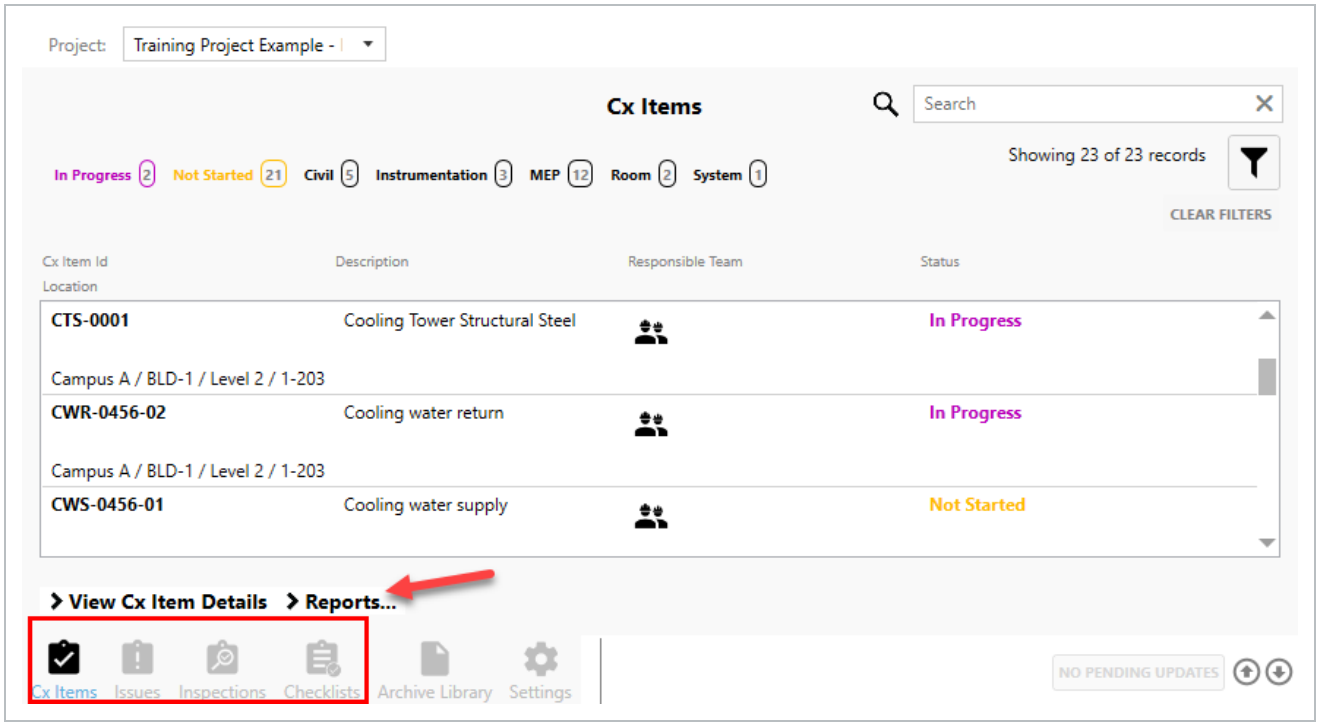
Lesson 8 Summary 166

8.1 ACCESS AND REVIEW REPORT OUTPUT

8.1.1 Access Report

You can access Reports within InEight Completions. Depending on how your project administrator configured your system, you can find Reports by navigating to a tab, and selecting the **Reports** option. You can generate reports within tabs Cx items, Issues, Inspections, and Checklists modules.



After running an InEight Completions report, you can view the report output in Excel and/or PDF format.

Overview – InEight Completions Report List

Report Name	Cx Items	Issues	Inspections	Checklists	Description
Excel Cx Item	X				This report is consumed by project admins or management. This report is

Overview – InEight Completions Report List (continued)

Report Name	Cx Items	Issues	Inspections	Checklists	Description
Overview					mostly used to view a full list of Cx item details and their phases, and to quickly track current status and accountability.
Excel Item Pivot Table	X				This is one of the more popular reports used by admins, management, owners users, etc. This is a quick way to visualize items progress, in a tabular color-coded view conditioned by status/date. This report includes basic Cx item information and an issue count summary.
Excel Item Executive Summary	X				This report is mostly used by management. Records are grouped by Cx item type and phases to compare counts between the estimate, forecast and actuals. This report is useful for measures like delta, percent complete, and look-ahead.
Excel Item Executive System Summary	X				This report is mostly used by management. Records are grouped by disciplines, Cx item types and phases to compare between the estimate, forecast, and actuals. This report is useful for measures like delta, percent complete, and look-ahead.
Excel Plan vs Actual Type	X				This report is mostly used by management and owners. This reports the gap between planning and execution, per week. The accumulative lines are helpful visuals for evaluating performance.
Excel Issues per	X				This report is mostly used by management and owners, and is used

Overview – InEight Completions Report List (continued)

Report Name	Cx Items	Issues	Inspections	Checklists	Description
Phase					to measure the rate of issue creation vs. selected completion.
Excel Issue Overview		X			This Issues report displays a listing of Issues along with columns such as Status, Summary and Description.
Excel Inspection Overview			X		This Inspection report displays a listing of Issues along with columns such as Phase, Status, Summary and Description.
Generate PDF Report	X	X	X	X	This PDF report is used for final hand-overs. There are two ways to export this report: 1. a multiple detailed report only showing visible items, and 2. a summary showing items all within one report. This report can be customized per project needs. The PDF reports harvest all the data, links, and attachments and provide a final document. They also include QR scan codes that can be utilized in the field.

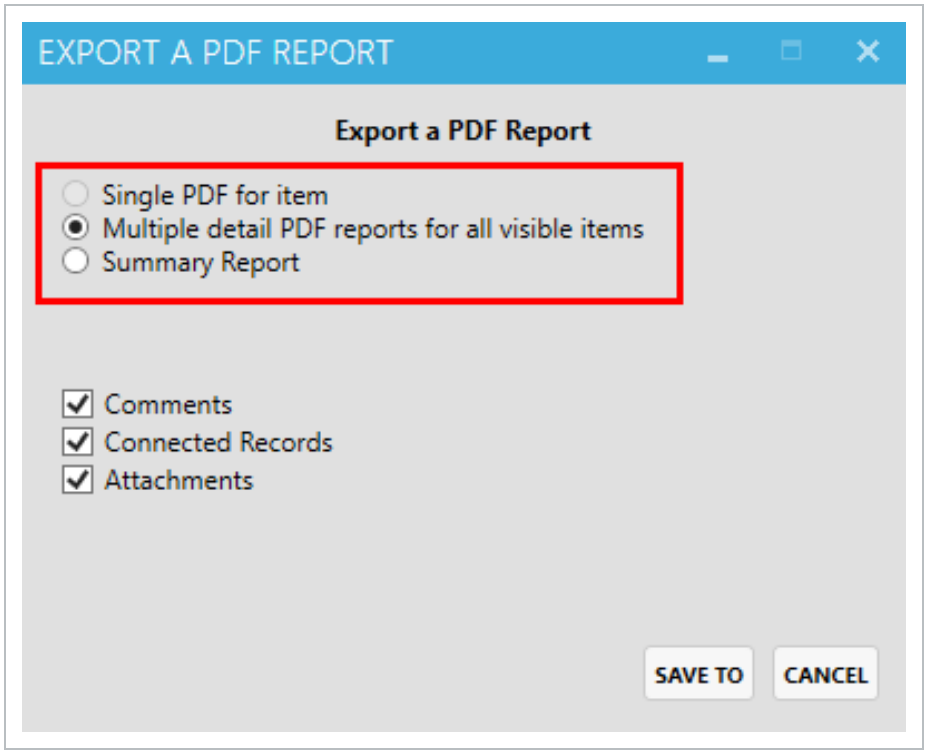
NOTE The InEight Completions Reports are configurable, therefore the structure may vary from project to project.

8.1.1.1 Export a PDF Report

PDF reports are based on option selections, and can be customized per your project needs. The PDF reports gather all the data, links, and attachments and provide a final document. They also include QR scan codes that can be utilized in the field.

When running any of the PDF reports at the header level, you have two options that allow you to:

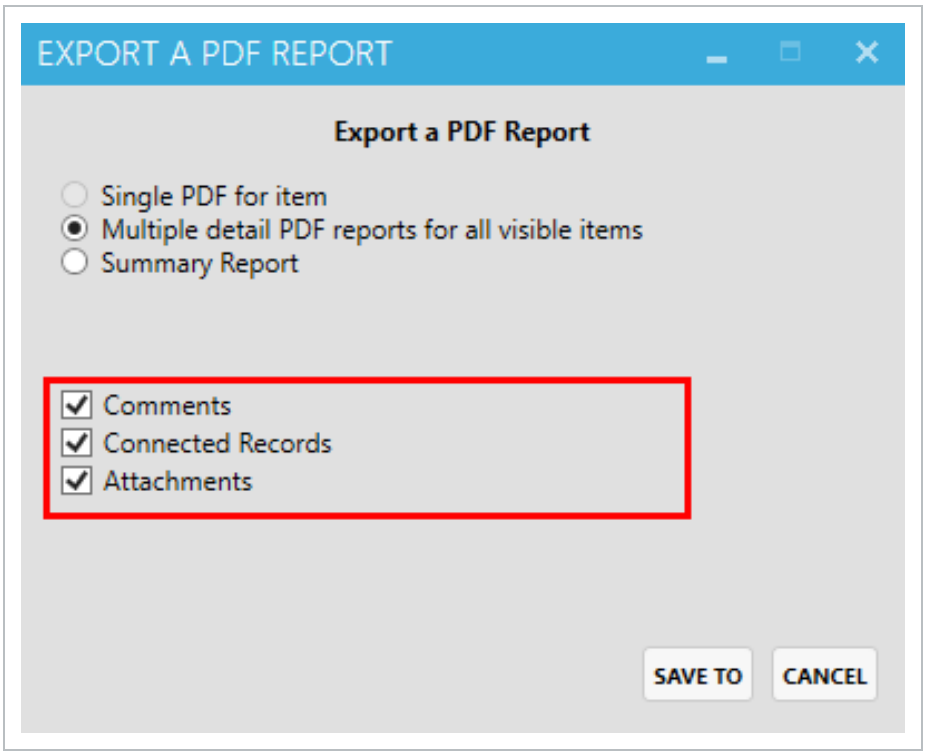
- Output the report so that multiple PDF reports show all visible items
- Output a summary report



When running any of the PDF reports at the detail level, you have three options that allow you to show:

- Comments
- Connected records

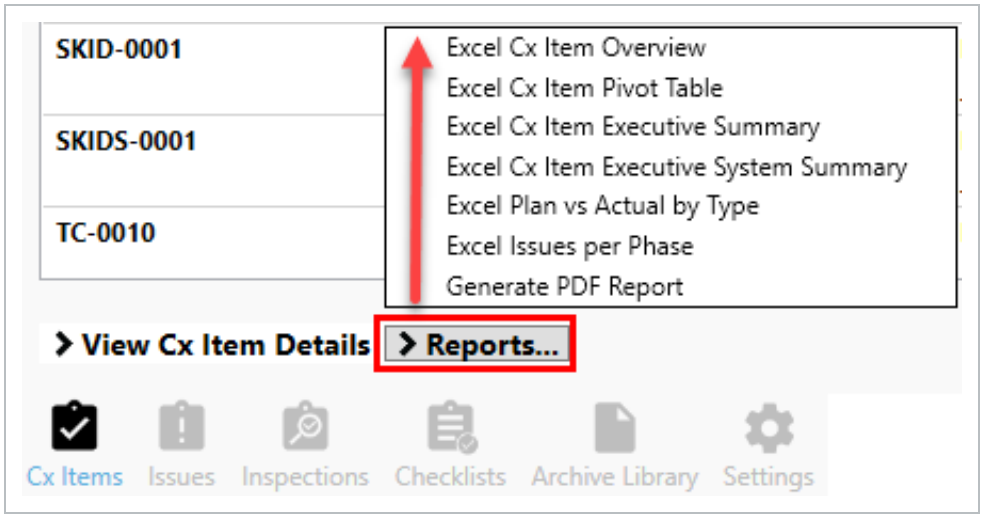
- Attachments



8.1.2 Review Report Output

8.1.2.2 Cx Items module reports

The Cx Item module reports can be found by navigating to **Cx Items > Reports**.



Excel Cx Item Overview

This report is mostly used to view a full list Cx item details and their phases, and to quickly track current status and accountability.

Template Name	Discipline	Cx Item Type	Cx Item Equipment Type	Cx Item Id	Cx Item Description	Status	Phase Name	Finish Date Estimate	Finish Date Forecast	Finish Date Actual	Campus	Building
Room	Architectural	Room	Room	CAMPUS_A-UTLBLD	Utility Area	Not Started		7/21/2019	7/24/2019		Campus A	Utility BLD
Room	Architectural	Room	Room	CAMPUS_A-UTLBLD	Utility Area	Not Started	Design Verification	7/12/2019	7/2/2019		Campus A	Utility BLD
Room	Architectural	Room	Room	CAMPUS_A-UTLBLD	Utility Area	Not Started	Quality	7/12/2019	7/2/2019		Campus A	Utility BLD
Room	Architectural	Room	Room	CAMPUS_A-UTLBLD	Utility Area	Not Started	Construction Complete	7/21/2019	7/24/2019		Campus A	Utility BLD
Room	Architectural	Room	Room	CAMPUS_A-UTLBLD	Utility Room	Not Started		7/21/2019	7/24/2019		Campus A	BLD-1

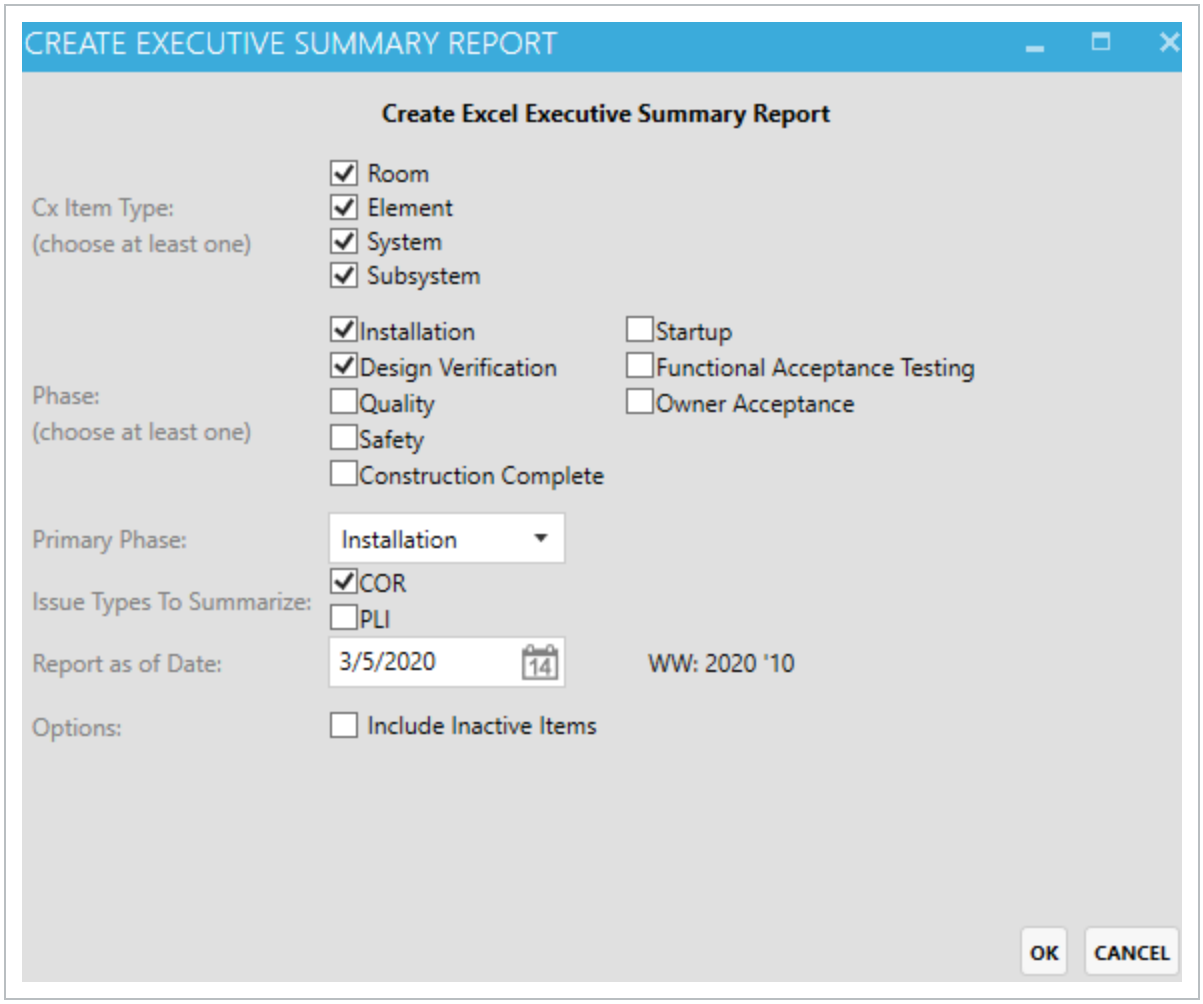
Excel Cx Item Pivot Table

This is a quick way to visualize items progress, in a tabular color-coded view conditioned by status/date. This report includes basic Cx item information and an issue count summary.

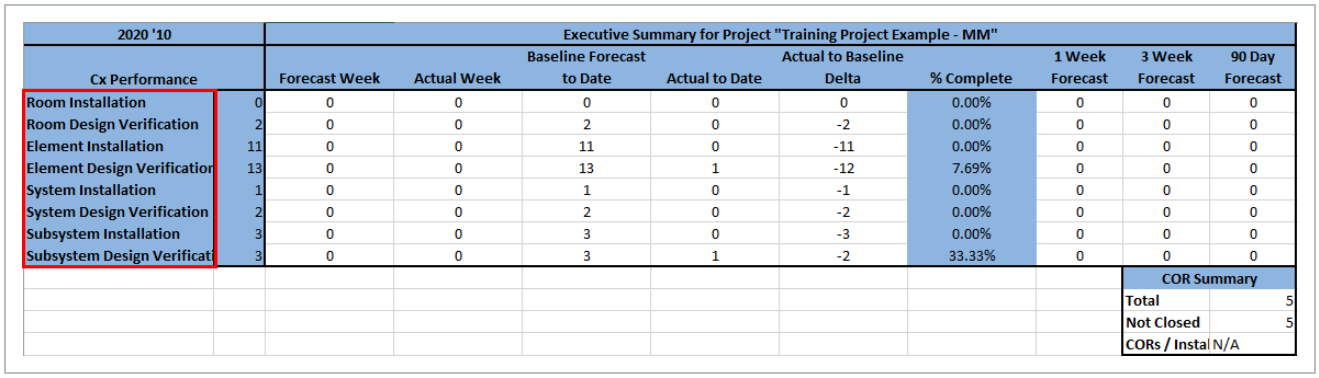
										Issues		
WBS	Main Equipment	Installation	Design Verification	Quality	Safety	Construction Complete	Startup	Functional Acceptance Testing	Owner Acceptance	Sum of Open COR	Sum of Total COR	Sum of Open PLI
1000.01	CAMPUS_A-UTLBLD-	(blank)	7/2/2019	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	(
7000.01	PMP-0001	7/2/2019	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	2	2	(
2000.01	CT-0001	(blank)	2/24/2020	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	3	3	(
3000.01	CWR-0456-02	7/2/2019	2/27/2020	2/27/2020	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	2	2	(
3000.01	CWS-0456-01	7/2/2019	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	0	0	(
3000.01	Fuel Gas System-000	7/2/2019	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	0	0	(
2000.01	HEX-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	0	(
7000.01	IJB-00001	7/2/2019	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	0	0	(
7000.01	PMP-0001	7/2/2019	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	0	0	(
3000.01	NG-0891-01	7/2/2019	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	0	0	(
1000.01	PMP-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	0	(
5000.02	SKID-0001	7/2/2019	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	0	0	(
2000.01	SKID-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	0	(
4000.01	TK-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	(
4000.01	PMP-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	(
4000.01	SKID-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	(
1000.01	TK-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	1	1	1
3000.01	Cooling System-000	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	0	0	(

Excel Cx Item Executive Summary

Records are grouped by Cx item type and phases to compare counts between the estimate, forecast and actuals. When this report is first selected, a **Create Executive Summary Report**pop-up window appears. This is where you can make selections based upon what you want to see in your report.



Based upon the Installation and Design Verifications Phase selections made in the above pop-up window, only those you can see in the Installation and Design Verification phase types are shown in the report below.

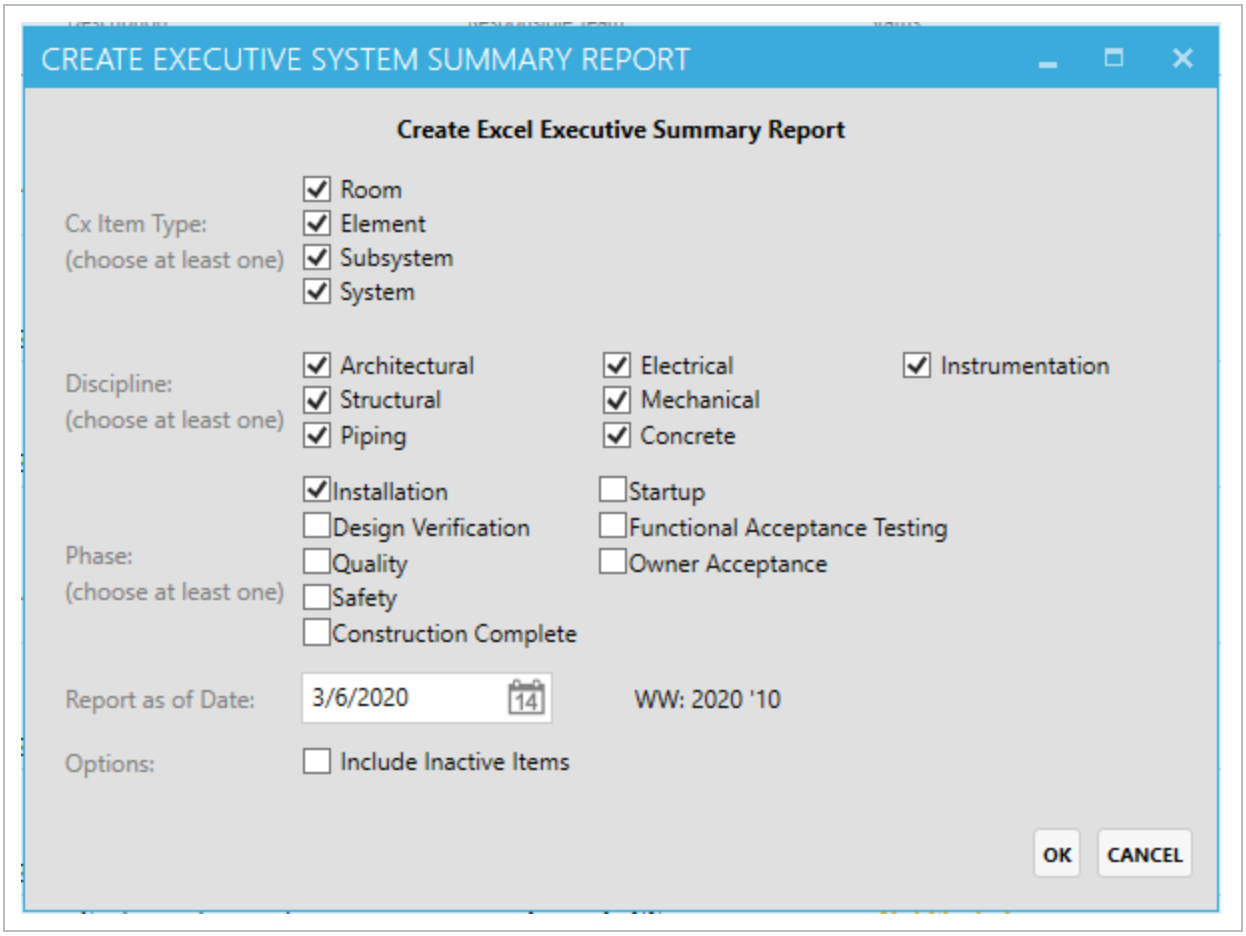


2020 '10		Executive Summary for Project "Training Project Example - MM"								
Cx Performance		Forecast Week	Actual Week	Baseline Forecast to Date	Actual to Date	Actual to Baseline Delta	% Complete	1 Week Forecast	3 Week Forecast	90 Day Forecast
Room Installation	0	0	0	0	0	0	0.00%	0	0	0
Room Design Verification	2	0	0	2	0	-2	0.00%	0	0	0
Element Installation	11	0	0	11	0	-11	0.00%	0	0	0
Element Design Verificatior	13	0	0	13	1	-12	7.69%	0	0	0
System Installation	1	0	0	1	0	-1	0.00%	0	0	0
System Design Verification	2	0	0	2	0	-2	0.00%	0	0	0
Subsystem Installation	3	0	0	3	0	-3	0.00%	0	0	0
Subsystem Design Verificati	3	0	0	3	1	-2	33.33%	0	0	0

COR Summary	
Total	5
Not Closed	5
CORs / Instal	N/A

Excel Cx Item Executive System Summary

This report is mostly used by management. Records are grouped by disciplines, Cx item types and phases to compare between the estimate, forecast and actuals. When this report is first selected, a **Create Executive System Summary Report** pop-up window appears. This is where you can make selections based upon what you want to see in your report.

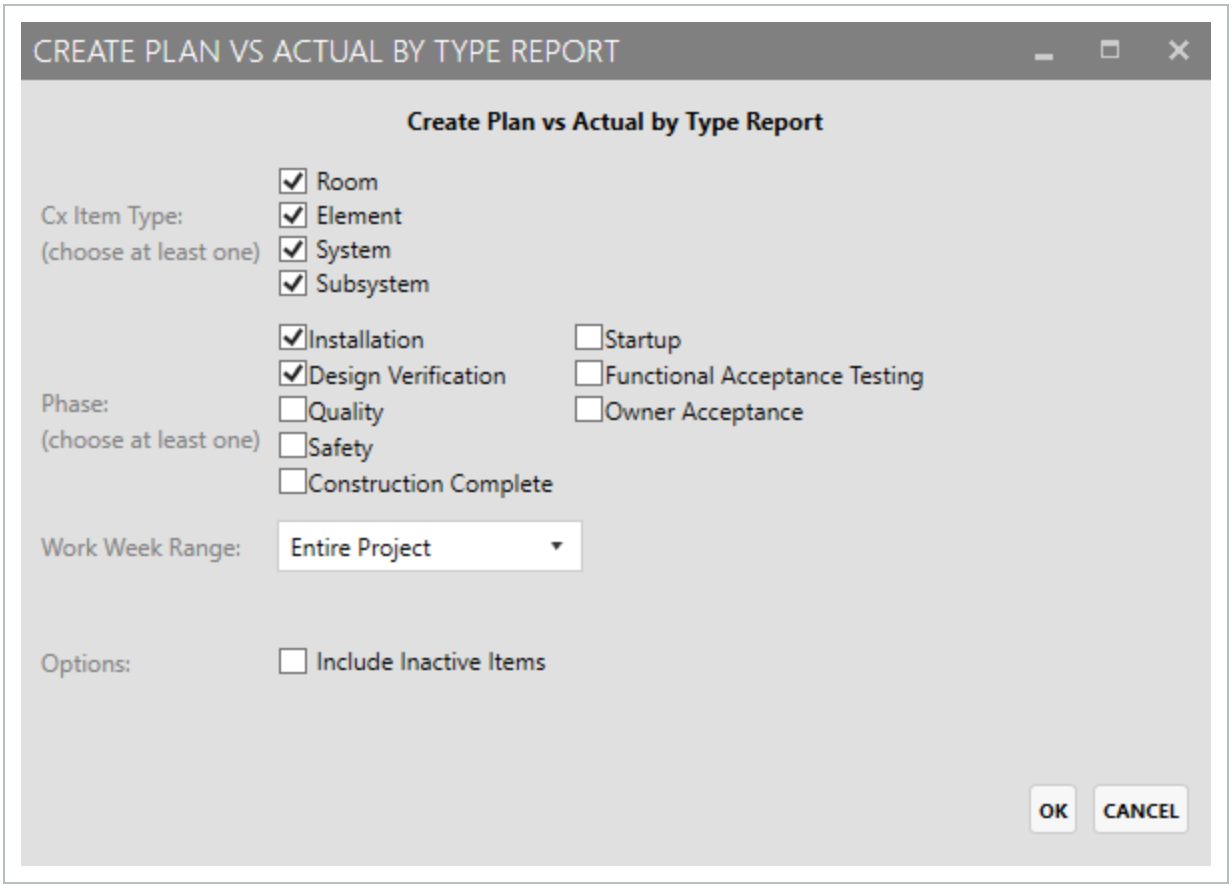


Based upon the Installation Phase selections made above, in the example below, you can see the data represented by Discipline in the report.

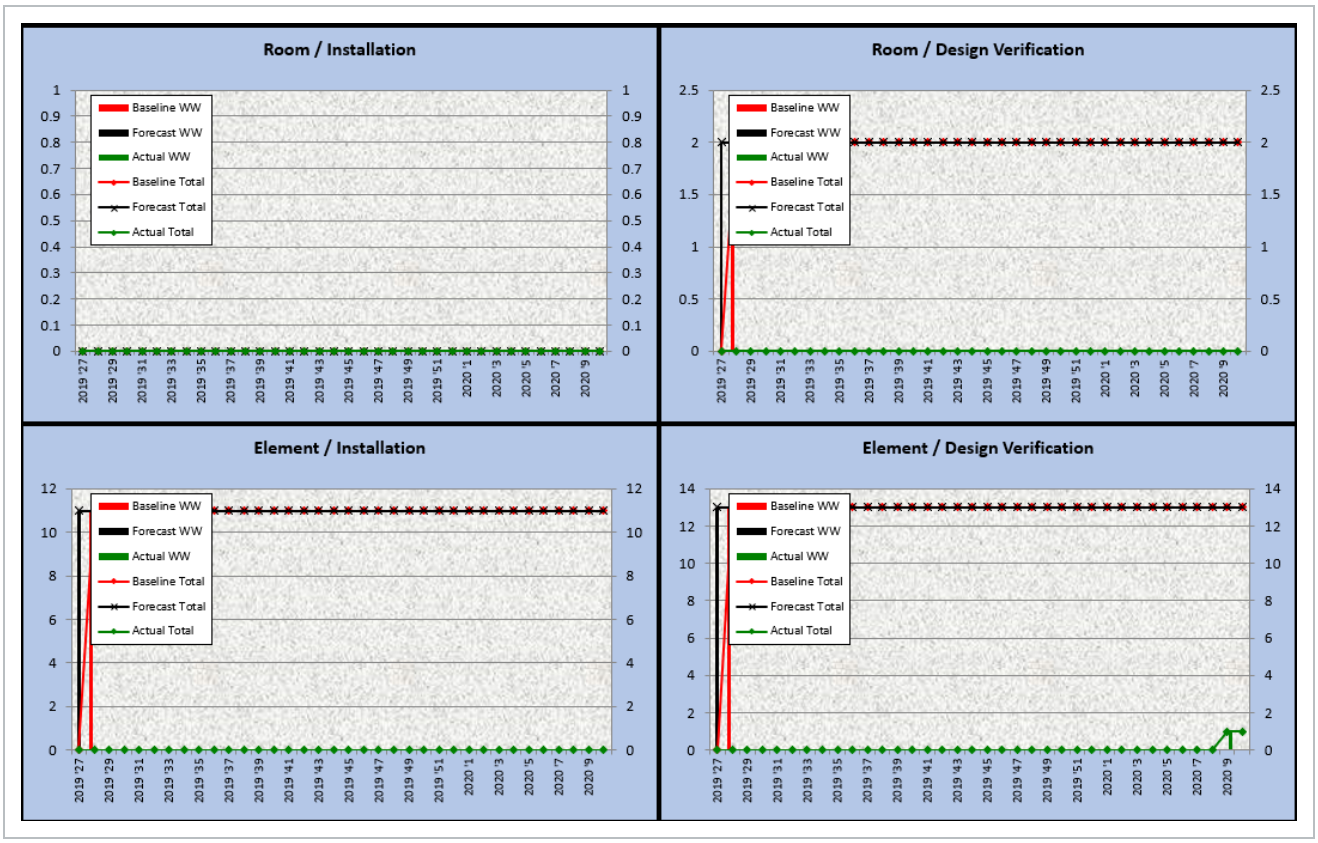
2020 '10	Executive System Summary for Project "Training Job"																			
	Element Installation					Room Installation					Subsystem Installation					System Installation				
Discipline	Total	Forecast to Date	Actual to Date	% Comp	Next 3 Weeks	Total	Forecast to Date	Actual to Date	% Comp	Next 3 Weeks	Total	Forecast to Date	Actual to Date	% Comp	Next 3 Weeks	Total	Forecast to Date	Actual to Date	% Comp	Next 3 Weeks
Architectural	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0
Concrete	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0
Electrical	3	3	0	0%	0	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0
Instrumentation	3	3	0	0%	0	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0
Mechanical	5	5	1	20%	0	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0
Piping	0	0	0	0%	0	0	0	0	0%	0	2	2	0	0%	0	0	0	0	0%	0
Structural	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0	0	0	0	0%	0
TOTALS:	11	11	1	9%	0	0	0	0	0	0	2	2	0	0%	0	0	0	0	0	0

Excel Plan vs Actual by Type

This report addresses the gap between planning and execution, per work week. The accumulative lines are helpful visuals for evaluating performance. When this report is first selected, a **Create Plan vs Actual by Type Report** pop-up window appears. This is where you can make selections based upon what you want to see in your report.

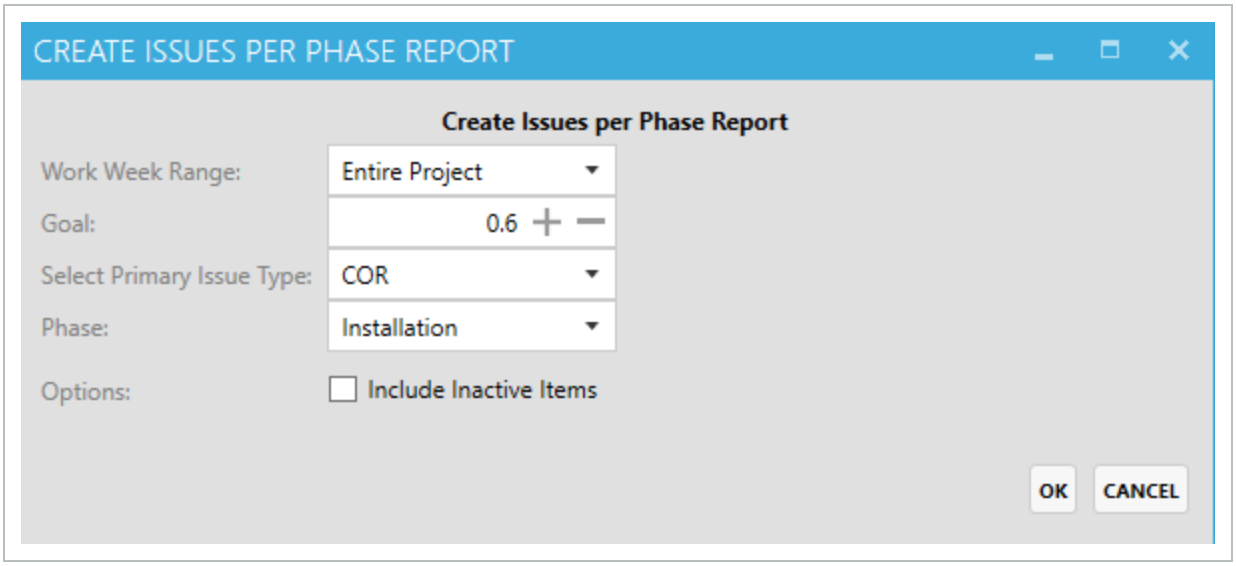


Based upon the selections made in the above pop-up window above, you can see the chosen results in the below report.

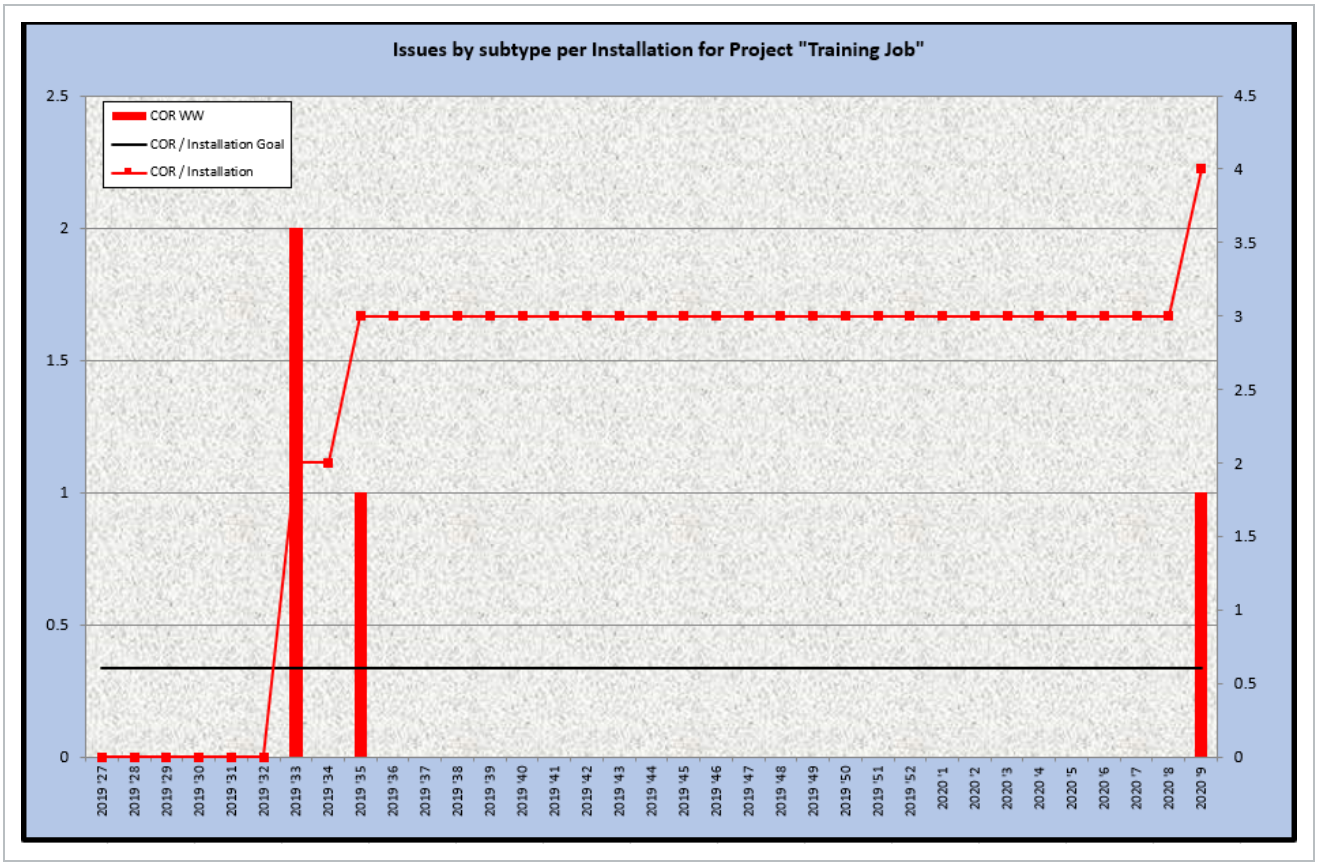


Excel Issues per Phase

This report is used to measure the rate of issue creation vs. selected completion. When this report is first selected, a **Create Issues per Phase Report** pop-up window appears. This is where you can make selections based upon what you want to see in your report.

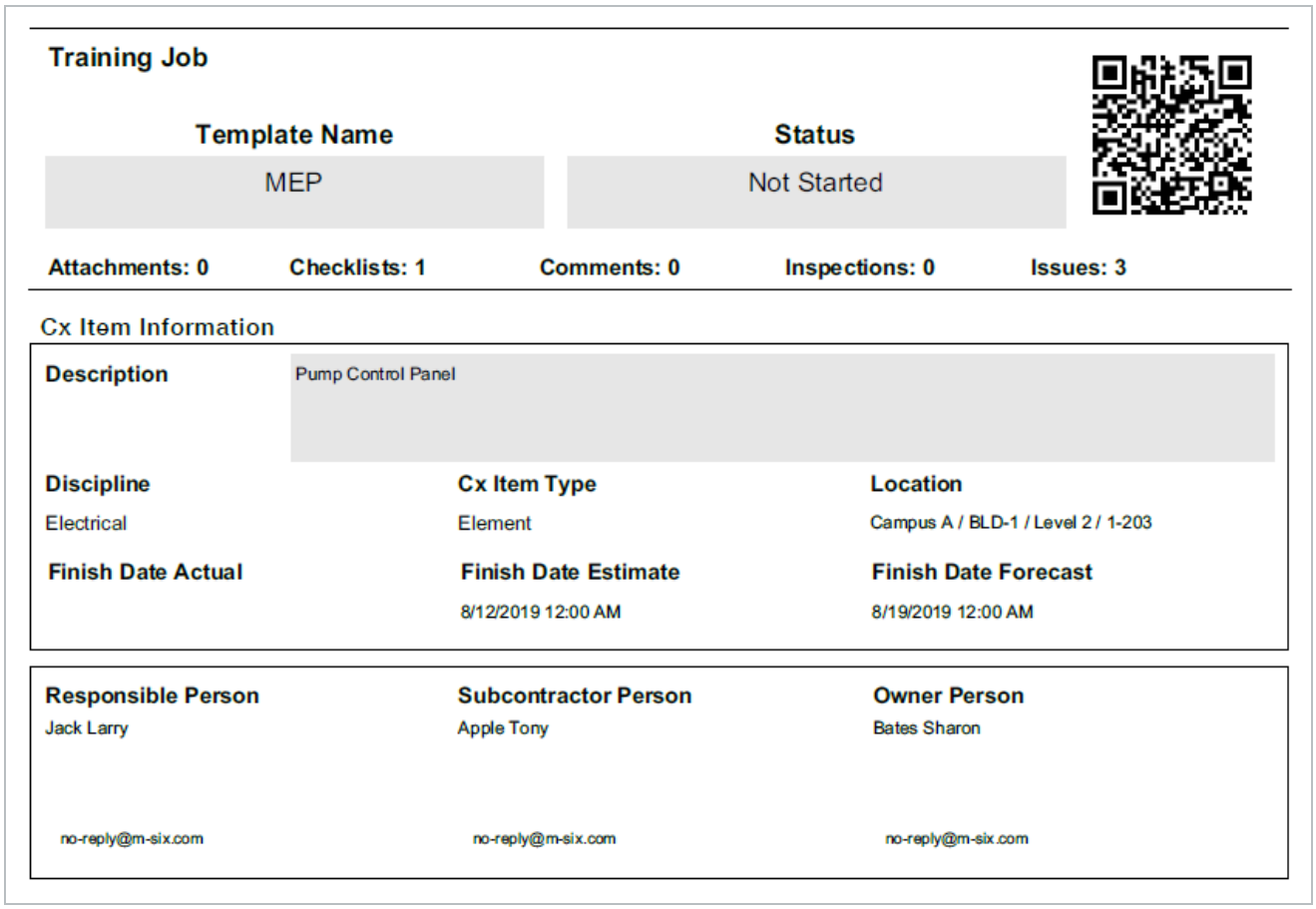


Report results are shown below.



Generate PDF Report

The (Cx) Generate PDF report is summary of a Cx item that displays information such as the number of Attachments, Checklists, Comments, Inspections, and Issues. A QR scan code is also included, to be utilized in the field. While the example below is for Cx Items, the same sort of PDF Report is available in the Issues, Inspections, and Checklists modules.



Training Job

Template Name	Status
MEP	Not Started

Attachments: 0 Checklists: 1 Comments: 0 Inspections: 0 Issues: 3

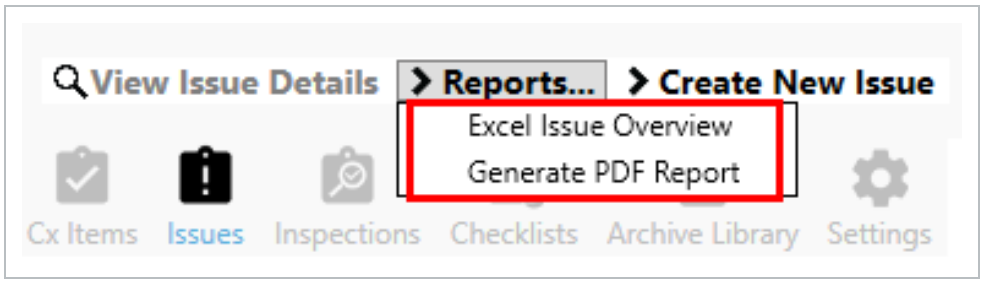
Cx Item Information

Description	Pump Control Panel	
Discipline	**Cx Item Type**	**Location**
Electrical	Element	Campus A / BLD-1 / Level 2 / 1-203
Finish Date Actual	**Finish Date Estimate**	**Finish Date Forecast**
	8/12/2019 12:00 AM	8/19/2019 12:00 AM

Responsible Person	Subcontractor Person	Owner Person
Jack Larry	Apple Tony	Bates Sharon
no-reply@m-six.com	no-reply@m-six.com	no-reply@m-six.com

8.1.2.3 Issues Module reports

The Issues report module can be found by navigating to **Issues > Reports**



Excel Issue Overview

This Issues Overview report displays a listing of Issues along with columns such as Phase, Status, Category, Summary and Description.

Template Name	Cx Item Id	Cx Item Description	Discipline	Phase	Subtype	Id	Status	Open Status	Category	Summary
					COR	COR-00002	New	Open	Instrumentation	03 - Missing/Incorrect Core Marker
MEP	CWR-0456-02	Cooling water return	Piping	Installation	COR	COR-00003	New	Open	Mech	11 - Verify Bolt Torque
MEP	CWR-0456-02	Cooling water return	Piping	Installation	COR	COR-00004	New	Open	LSS	03 - Sample Ports
Civil	CTS-0001	Cooling Tower Structural Steel	Structural	Quality	COR	COR-00005	New	Open	Electrical	06 - Conductor Labeling
					COR	COR-00006	New	Open	CSA	01 - Support issues
Civil	TKCP-0001	Tank Concrete Pad	Concrete	Design Verification	COR	COR-00007	New	Open	CSA	04 - Tagging issues
Civil	CTS-0001	Cooling Tower Structural Steel	Structural	Quality	COR	COR-00008	New	Open	Electrical	03 - Conduit 360 Degree Rule
MEP	CP-0001	Pump Control Panel	Electrical		COR	COR-00009	New	Open	Electrical	10 - Circuit Breaker AIC
Civil	TKCP-0001	Tank Concrete Pad	Concrete		PLI	PLI-00001	New	Open	CSA	11 - Other

Generate PDF Report

The (Issues) Generate PDF Report is a summary of an Issue that displays information such as Attachments, Checklists, Comments, Cx Items, Issues, and Issue Description. A QR scan code is also included, to be utilized in the field. While the example below is for Issues, the same sort of PDF Report is available in the Cx Items, Inspections, and Checklists modules.

Training Project Example

Subtype	Status
COR	New

Attachments: 0 **Checklists: 1** **Comments: 0** **Cx Items: 1** **Inspections: 0**

Issue Information

Description
Failed checklist question: 'Box is clean and free of construciton debris'

Category
Electrical

Due Date
11/30/2019 2:00 PM

Summary
07 - Wire Management

Locations
Campus A / BLD-1 / Level 2 / 1-203

Resolution Note

Subcontractor

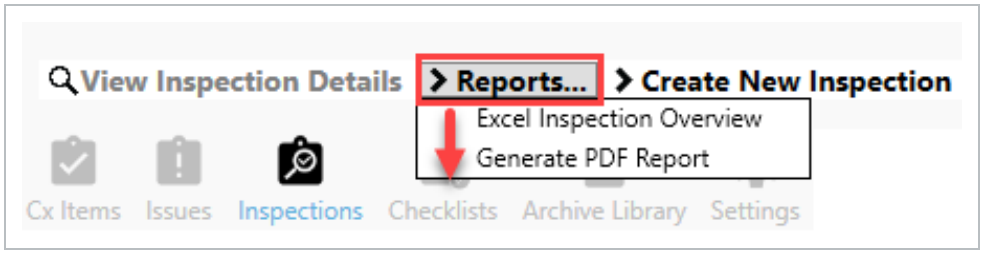
Responsible Team
InEight

Created By
Nicole.Tudor@ineight.com
11/27/2019 2:24 PM

Last Modified By
Nicole.Tudor@ineight.com
11/27/2019 2:24 PM

8.1.2.4 Inspections reports

The Inspections module reports can be found by navigating to **Inspections > Reports**.



Excel Inspection Overview

The Excel Inspection Overview report displays Inspection ID's along with columns such as: Status, Description, Created By and the various Inspection locations.

Instance Id	Id	Inspection Type	Status	Description	Created By	Created	Campus	Building	Level	Room	Responsible Tear
21da91d0-c518-42a1-a18a-468bb54a0481	Insp-00001	Initial Inspection	Ready for QC	This is my initial inspection....	jenny	8/15/2019	Campus A	BLD-1	Level 2	1-203	Example GC
5b57ef0b-70d2-47f8-96ca-0611c1da70d8	Insp-00002	Initial Inspection	Ready for Inspection	please inspect this and that	jenny	8/28/2019	Campus A	Office Complex			Example GC
60d91b91-f6a9-4c5e-b3c7-0870ddfc01c8	Insp-00003	Initial Inspection	Ready for QC		Karen Loftus	3/2/2020	Campus A	Office Complex	Level 1		Example GC

Generate PDF Report

The (Inspection) Generate PDF report is a summary of an inspection that displays information such as: Attachments, Checklists, Comments, Cx Items, Issues, and Inspection Description. A QR scan code is also included, to be utilized in the field. While the example below is for Inspections, the same sort of PDF Report is available in the Cx Items, Issues and Checklists modules.

Training Job

Inspection Type	Status
Initial Inspection	Ready for QC

Attachments: 0 **Checklists: 0** **Comments: 0** **Cx Items: 1** **Issues: 0**

Inspection Information

Description: This is my initial inspection....

Permit #

Discipline Mechanical

Scheduled Time
8/16/2019 8:00 AM

Location
Campus A / BLD-1 / Level 2 / 1-203

Drawing #
111-111

CSI Spec Section

RFI
123

Change Order
1111

Subcontractor
InEight

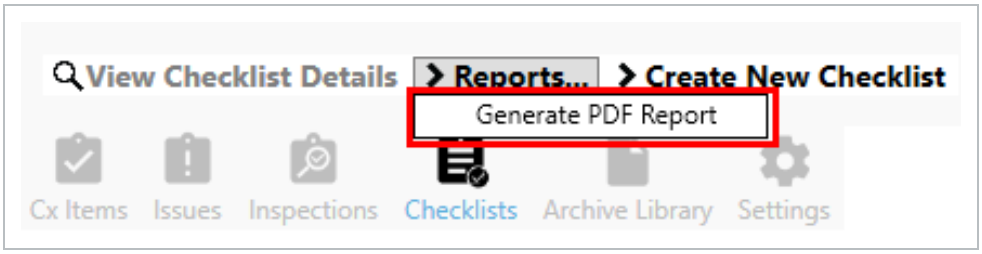
Responsible Team
Example GC

Created By
jenny
8/15/2019 4:23 PM

Last Modified By
jenny
8/15/2019 4:22 PM

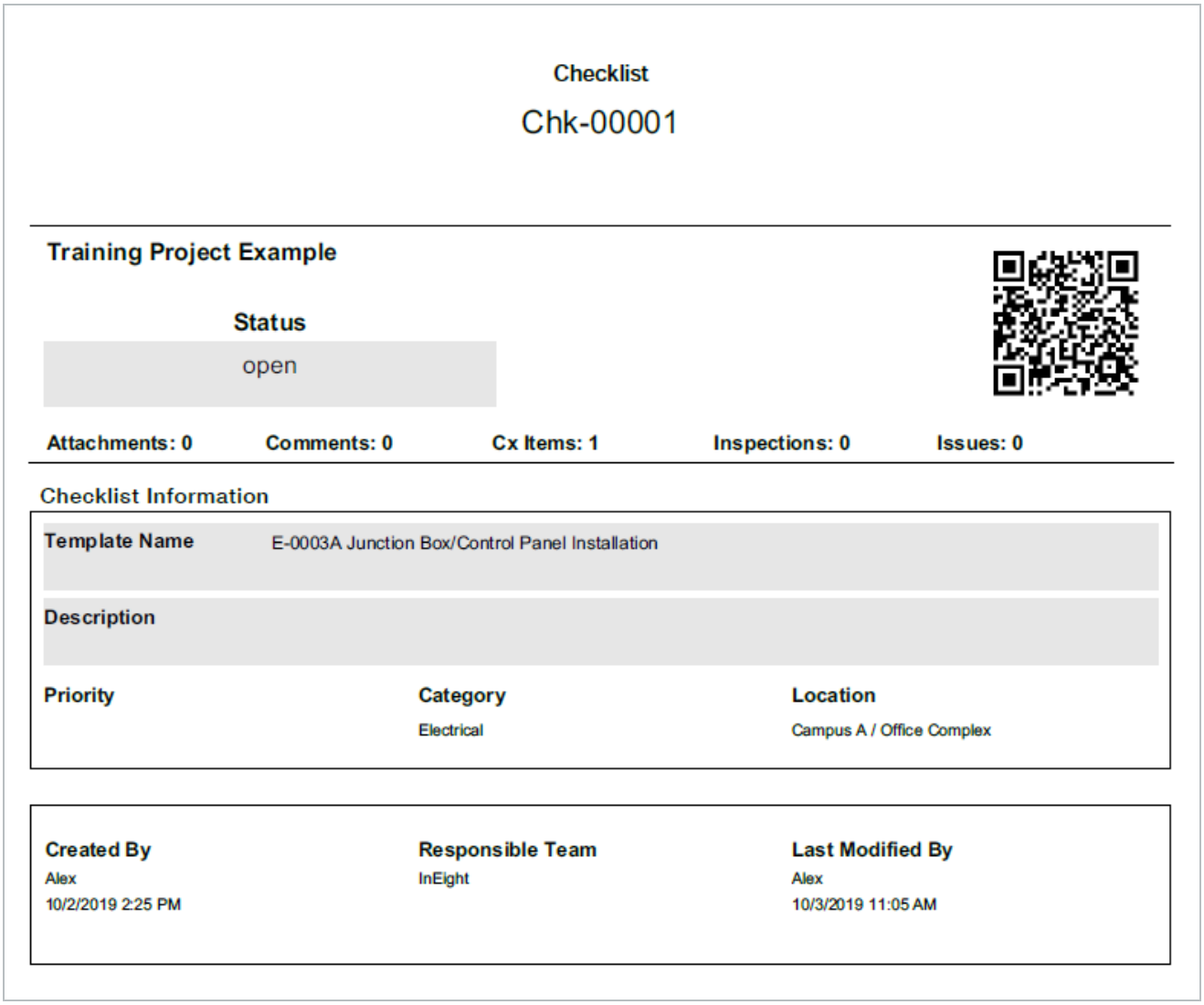
8.1.2.5 Checklists reports

The Checklists module reports can be found by navigating to **Checklists > Reports**.



Generate PDF Report

The (Checklists) Generate PDF report is a summary of an inspection that displays information such as Attachments, Checklists, Comments, Cx Items, Issues, and Checklist Description. A QR scan code is also included, to be utilized in the field. While the example below is for Checklists, the same sort of PDF Report is available in the Cx Items, Issues and Inspections modules.



Checklist

Chk-00001

Training Project Example

Status

open

Attachments: 0 **Comments: 0** **Cx Items: 1** **Inspections: 0** **Issues: 0**

Checklist Information

Template Name	E-0003A Junction Box/Control Panel Installation
Description	

Priority	**Category**	**Location**
	Electrical	Campus A / Office Complex

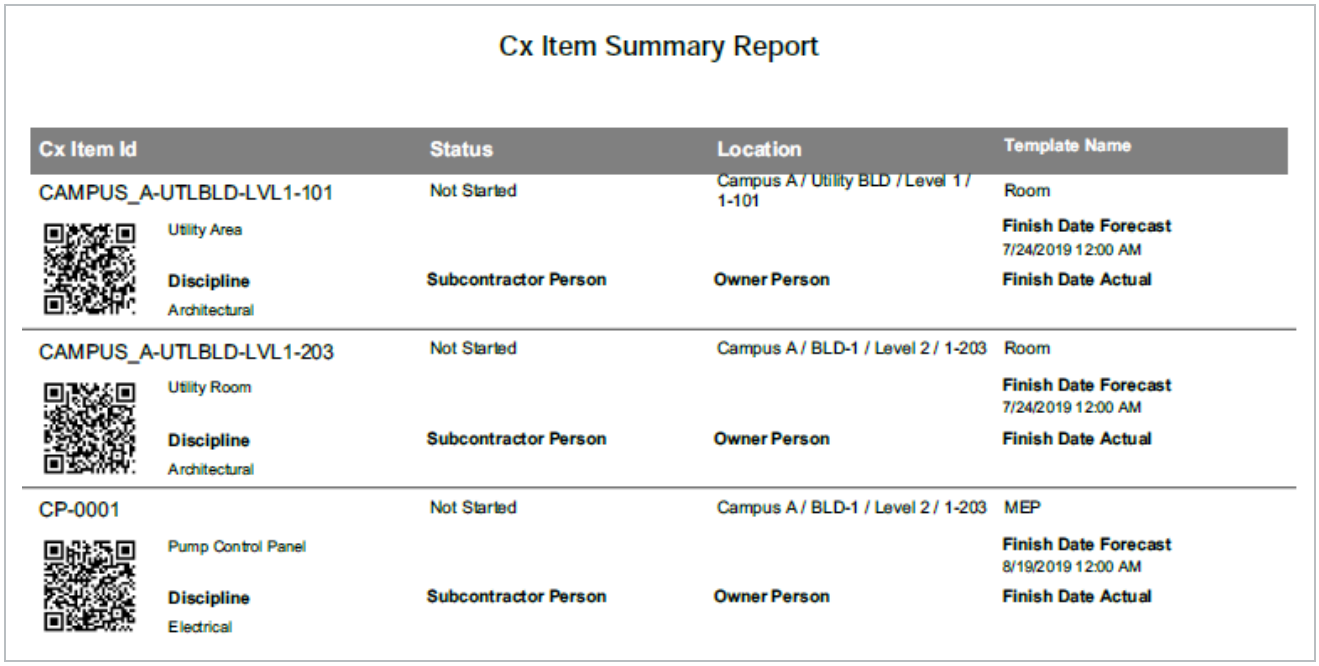
Created By	**Responsible Team**	**Last Modified By**
Alex 10/2/2019 2:25 PM	InEight	Alex 10/3/2019 11:05 AM

The following Step by Step walks you through how to execute a PDF Summary Report within a tab menu path.

8.1 Step by Step 1 — Run a PDF Summary Report

Using the Cx Items module as an example, follow the Step by Step instructions below to run the Generate PDF Report.

1. Navigate to Cx Items > Reports and select **Generate PDF report**.
    - The Export a PDF Report pop-up window appears
2. Check the **Summary Report** radio button.
    - The selection options for Comments, Connected Records, and Attachments no longer appear
3. Click on **Save To**.
4. Save the Summary Report list PDF file to your **local drive**.
5. Open the **Summary Report list PDF** file.
    - Navigate through the report to become more familiar with the layout



Cx Item Summary Report

Cx Item Id	Status	Location	Template Name
CAMPUS_A-UTLBLD-LVL1-101	Not Started	Campus A / Utility BLD / Level 1 / 1-101	Room
Utility Area			**Finish Date Forecast** 7/24/2019 12:00 AM
Discipline Architectural	**Subcontractor Person**	**Owner Person**	**Finish Date Actual**
CAMPUS_A-UTLBLD-LVL1-203	Not Started	Campus A / BLD-1 / Level 2 / 1-203	Room
Utility Room			**Finish Date Forecast** 7/24/2019 12:00 AM
Discipline Architectural	**Subcontractor Person**	**Owner Person**	**Finish Date Actual**
CP-0001	Not Started	Campus A / BLD-1 / Level 2 / 1-203	MEP
Pump Control Panel			**Finish Date Forecast** 8/19/2019 12:00 AM
Discipline Electrical	**Subcontractor Person**	**Owner Person**	**Finish Date Actual**

Lesson 8 Review

1. The _____ report is available for all or most of the tabs:
   a. Excel Inspection Overview
   b. Excel Issues per Phase
   c. Generate PDF
   d. Excel Issue Overview

---

2. Which report shows items progress in a tabular color-coded view, conditioned by status/date?
   a. Excel Cx Item Overview
   b. Excel Inspection Overview
   c. Excel Item Pivot table
   d. None of the above

---

3. When using the Generate PDF Report, the selection options for Comments, Connected Records, and Attachments must always be checked?
   a. True
   b. False

Lesson 8 Summary

As a result of this lesson, you can:

- Access Reports
- Generate Excel and PDF reports
- Review Reports