COMPLETIONS USER GUIDE

SAFETY, QUALITY & COMMISSIONING

INEIGHT

Release 22.2
Last Updated: 28 March 2022

CONTENTS

STEP-BY-STEP PROCEDURES

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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

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.

NOTE	Your Completions Project Administrator is responsible for creating user accounts and also providing you with the proper credentials **before** downloading and installing the InEight Completions application. The Completions Project Administrators are also the first to contact for any login or account access issues.

1.1.1 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

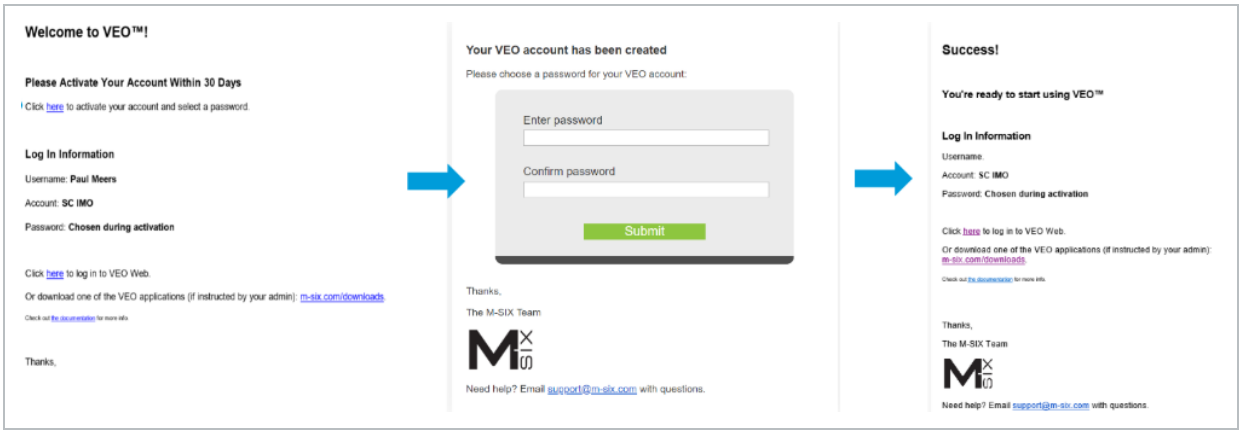
Solid State Drive is recommended.

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

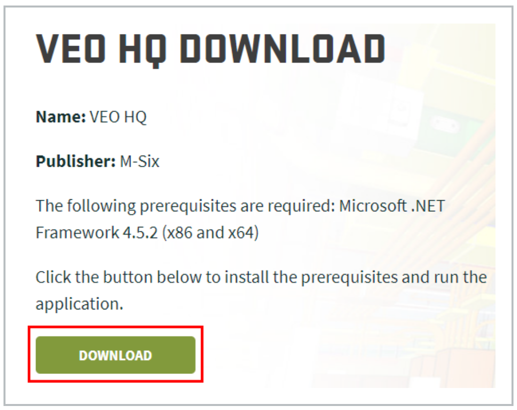
InEight Completions should only be installed if instructed by your Project Administrator.

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.

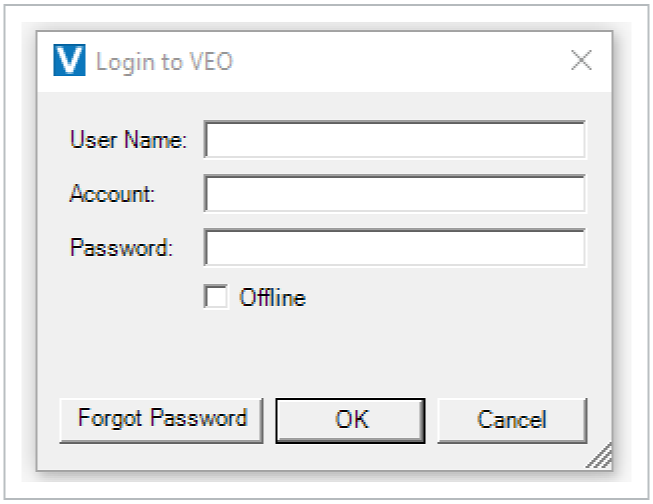


2. Download the **VEO HQ** installer from the Downloads page located on [https://ineight.com/veo-hq-installer/.](https://ineight.com/veo-hq-installer/)

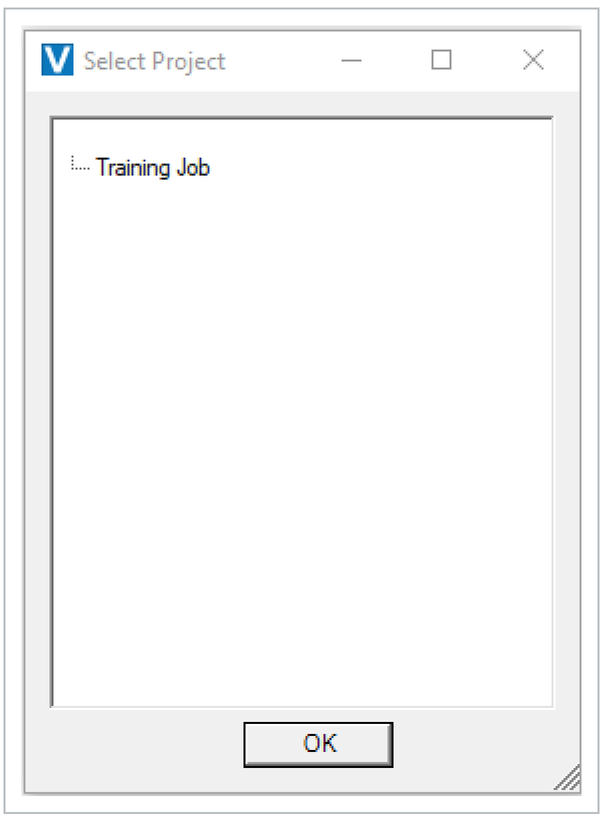


- During installation, A VEO HQ icon gets created on your desktop for you to access. Once installed, the Login to VEO automatically appears on the screen

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

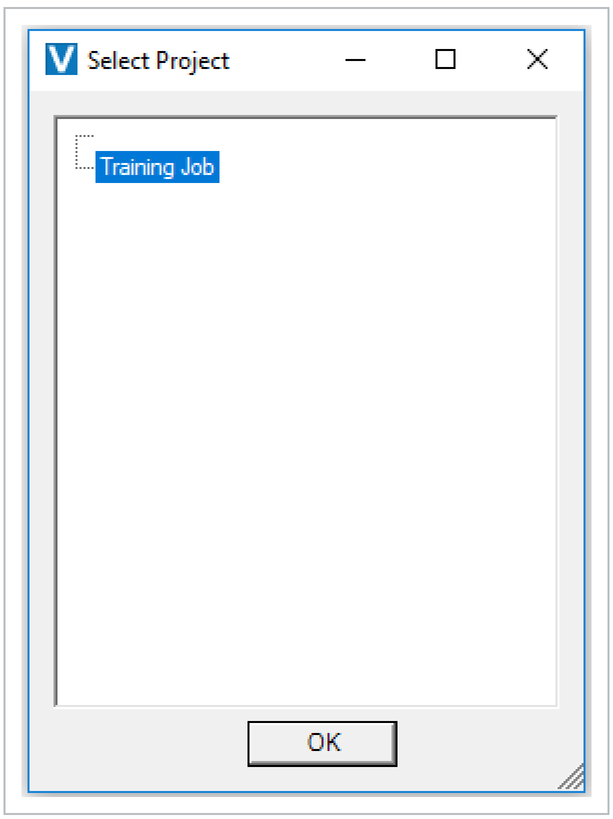
After downloading and installing InEight Completions, and entering in your credentials in the Login to Completions pop-up window, you are ready to:

- Select a project to load
- Enter in project information

1.2.1 Select a Project

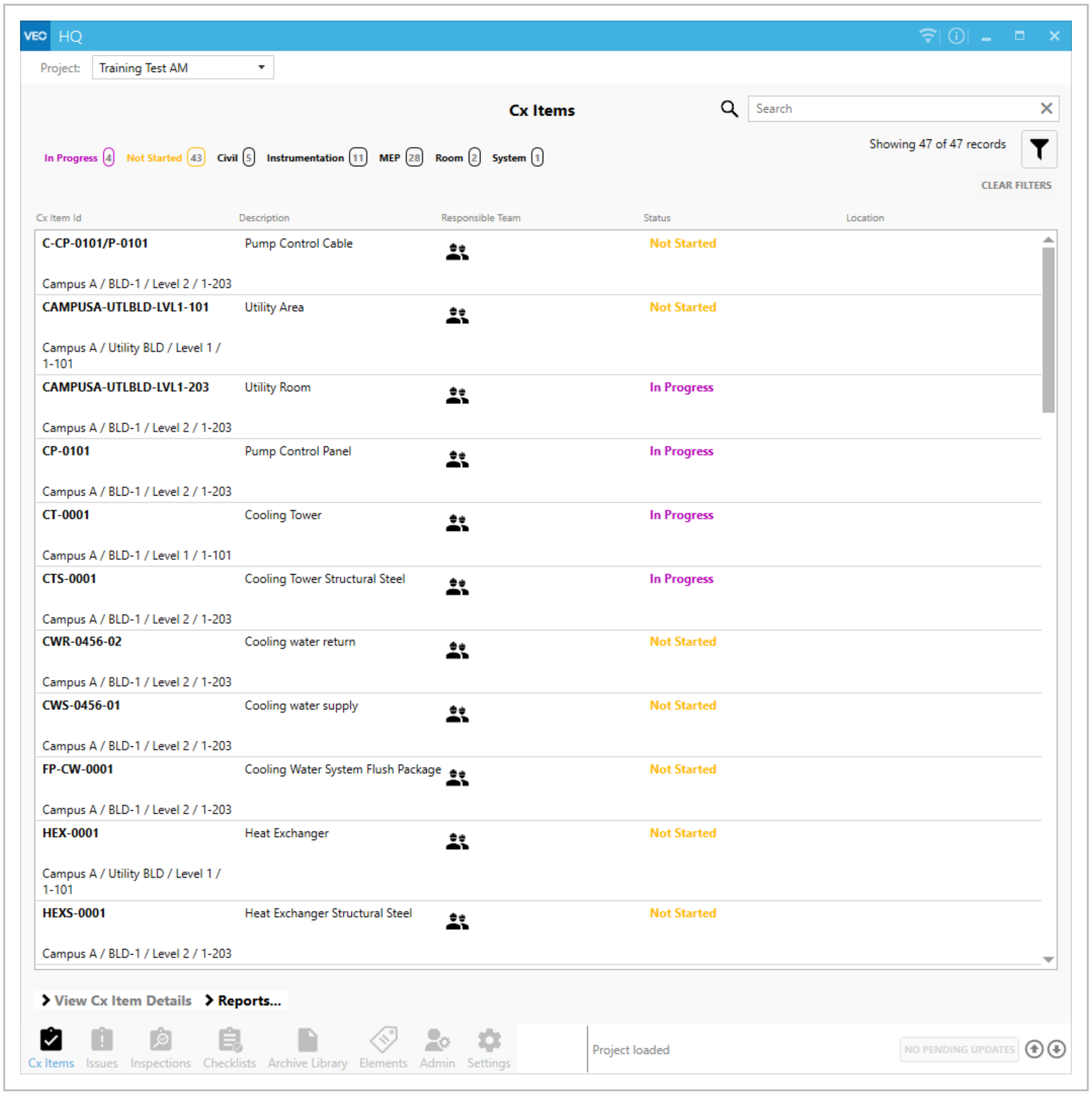
1.2 Step by Step 1 — Select a Project and Enter Information

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

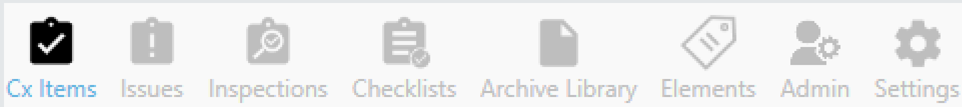


2. Either **double-click** on the project, or select **OK** to load the project.

- 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 in use.



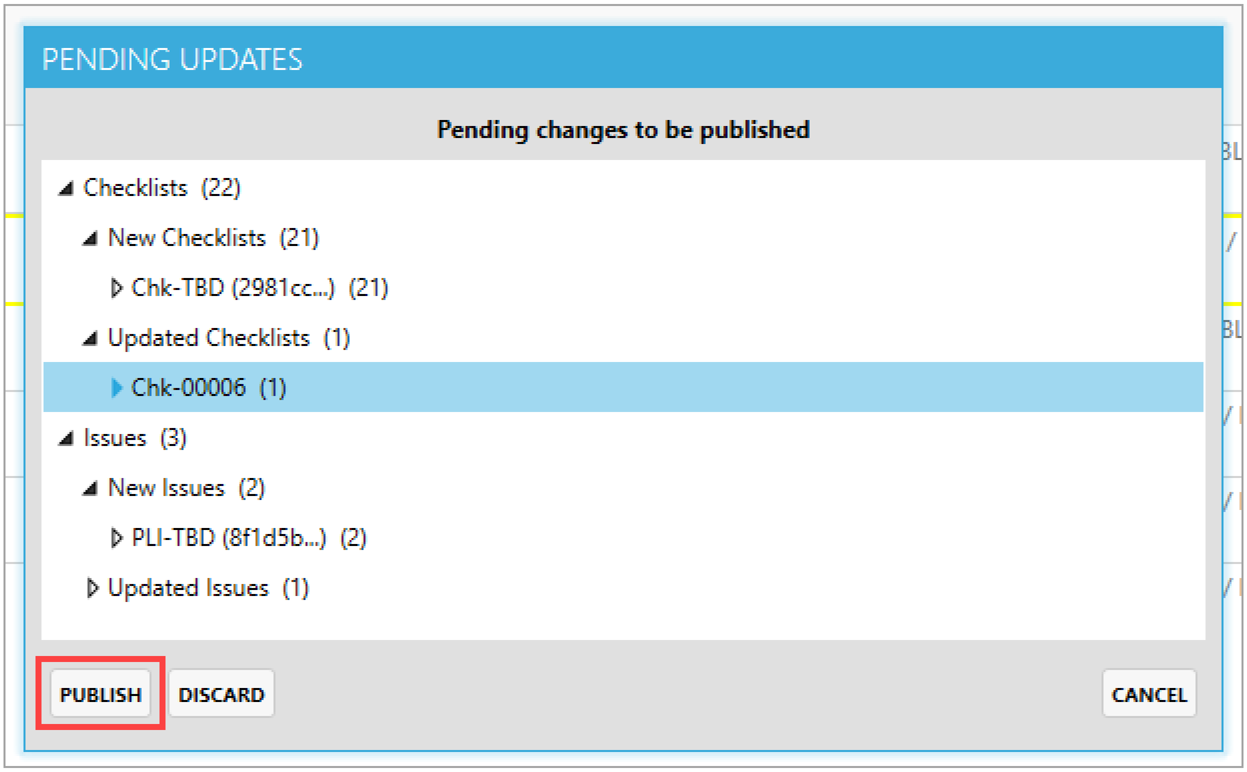
1.2.2 Update Project Status

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

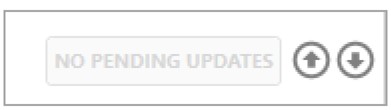
1.2 Step by Step 2 — Update Changes

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



1.3 CLEAR CACHE

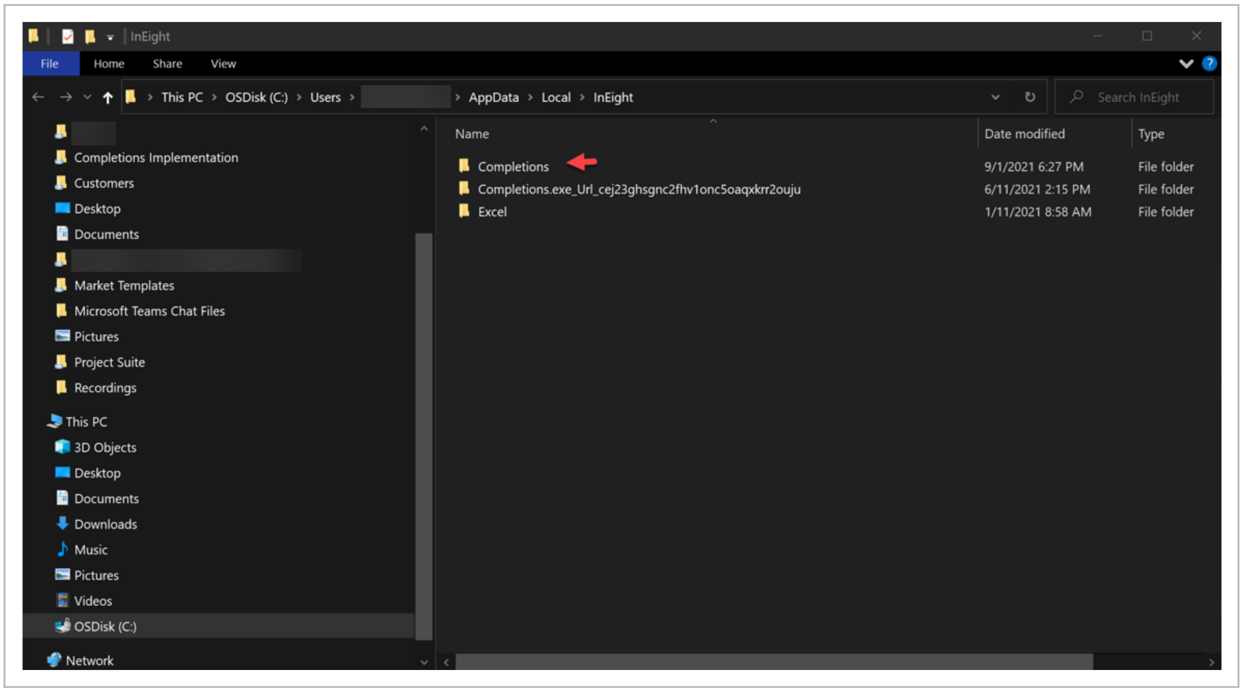
Clearing cache from HQ Completions and Mobile Completions lets you load the software from a clean slate. For example, if there are configuration changes that did not go through the application correctly or old login data files, you need to clear your cache to free up space and correct any data issues you may experience.

1.3.1 Clear HQ Completions Cache

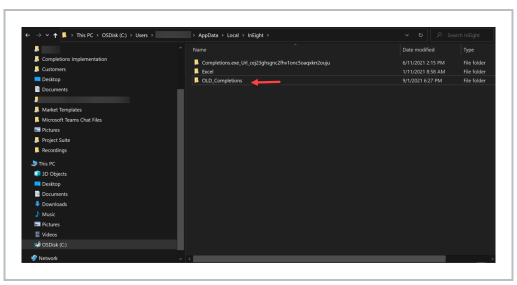
Follow this step-by-step to clear your HQ Completions Cache.

1.3 Step by Step 1 — Clear your Completions Cache

1. Close HQ Completions.
2. In File Explorer, go to *C:\Users\<user_name>\AppData\Local\InEight*.



3. Rename the **Completions** folder to **OLD_Completions**.



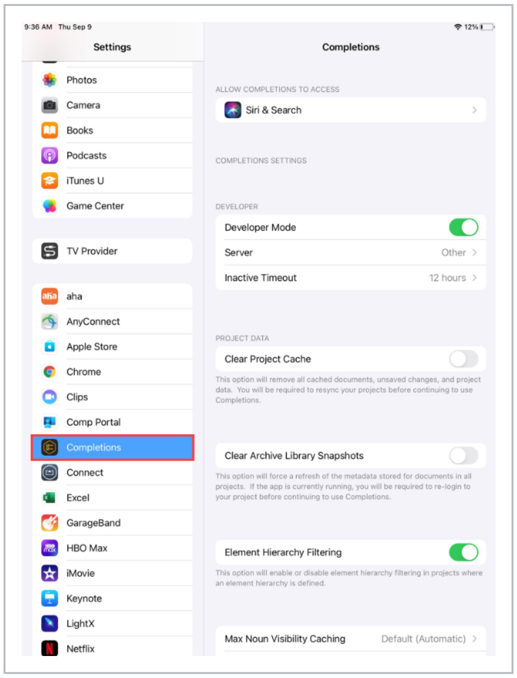
4. Log into HQ and verify that you can still access your projects(s) (running the application will recreate the HQ folder with freshly synced data from the server).
5. Delete the **OLD_Completions** folder.

1.3.2 Clear Mobile Completions Cache

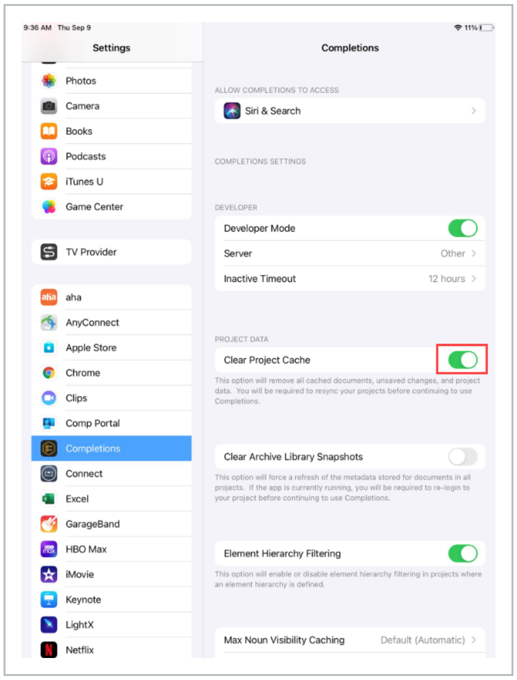
Follow this step-by-step to clear your Mobile Completions Cache.

1.3 Step by Step 2 — Clear Mobile Completions Cache

1. Go to your iPad Settings app icon and open **Settings**.
2. In the Settings column, scroll to select **Completions**.



3. Slide the **Clear Project Cache** toggle to green.



4. Close settings and open the Completions app.
5. Select **Yes** in the pop-up window.

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

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

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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

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

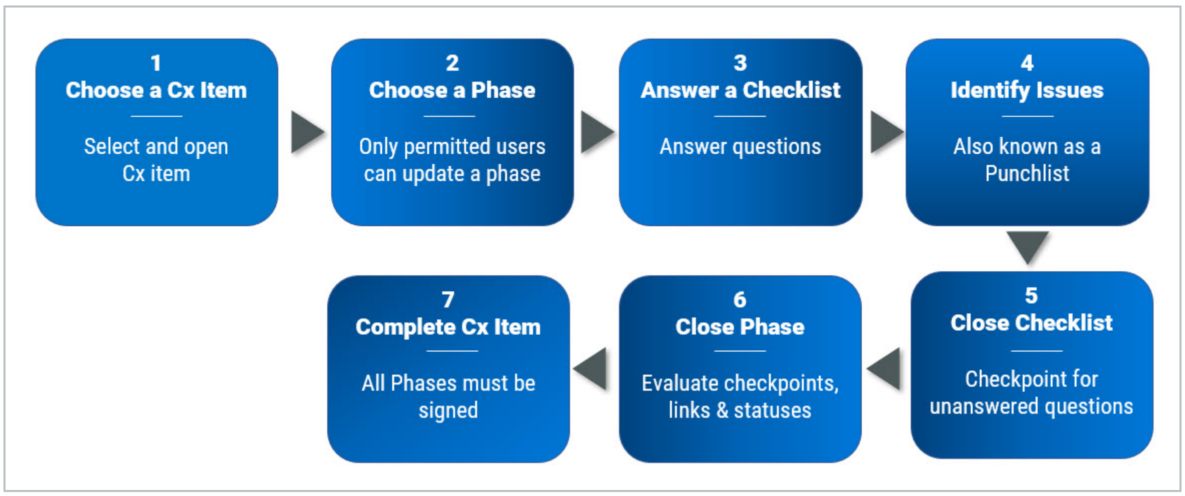
Topics in this Lesson

2.1 WORK WITH CX ITEMS

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.

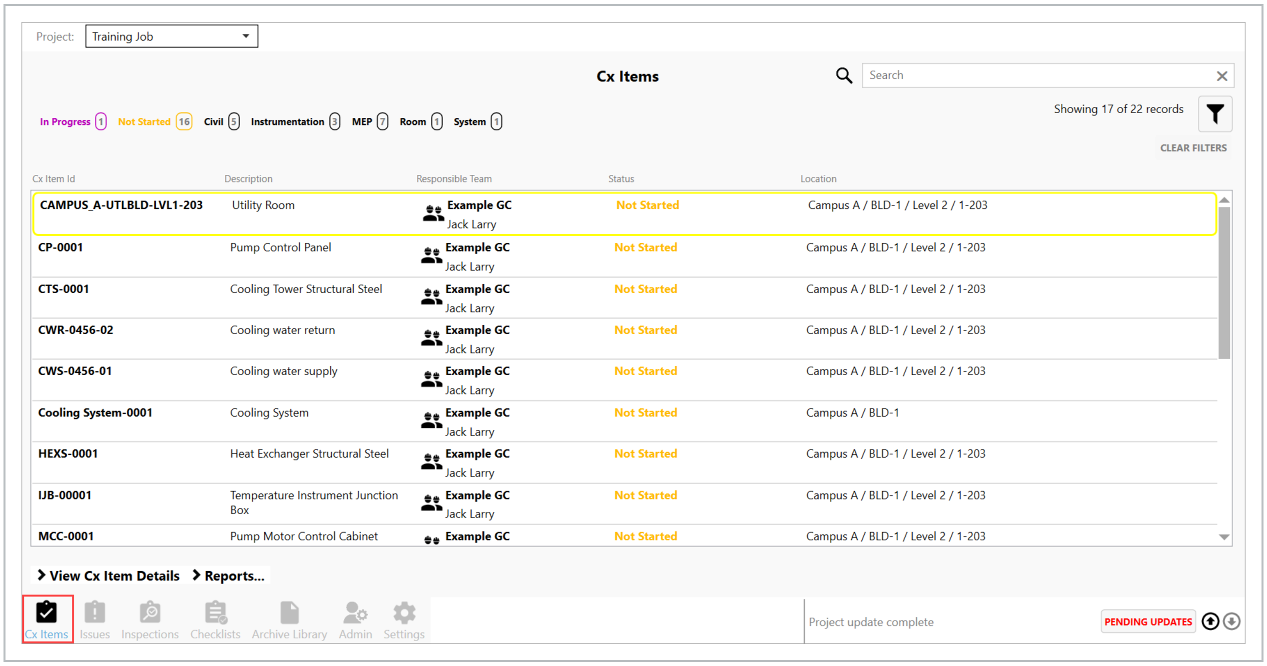
Along with the overall design of the project, your Project Administrator will assign roles to give to different Teams or individual Users which may limit your functionality based on the examples shown in these lessons.



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.

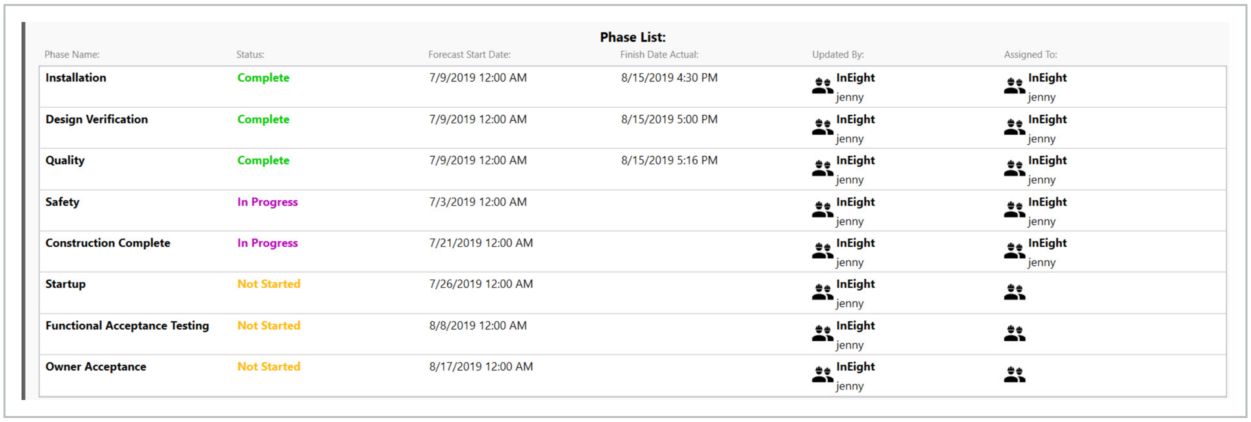
From within the selected Cx Item Id, the screen is divided in two halves.

- 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.

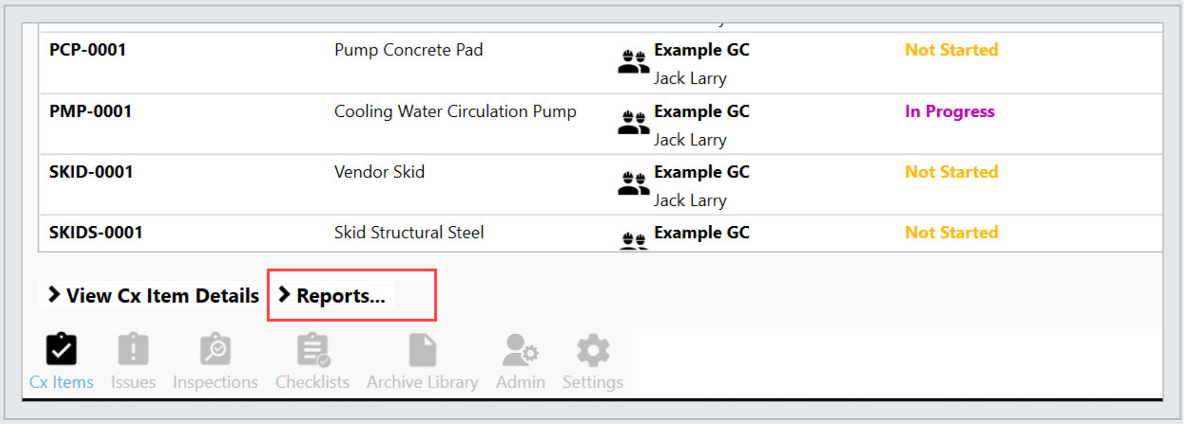
Working through each phase and completing the required components are crucial to overall owner acceptance. As shown in the sample below, within an single Cx Item, the Phases, and their respective Status is shown.



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.

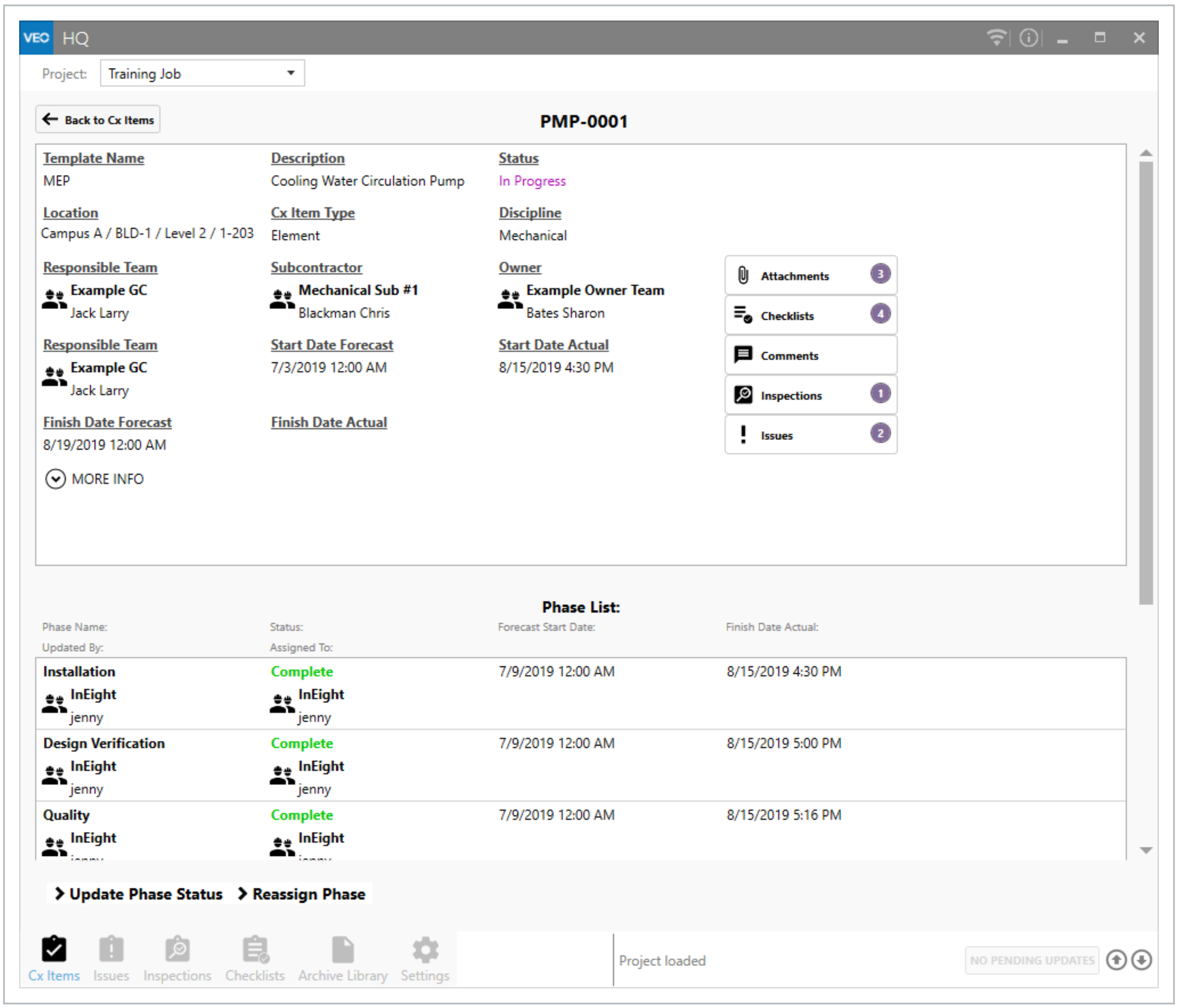
Within any phase the option may exist to add Attachments, Checklists, Comments or Issues.

- 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:

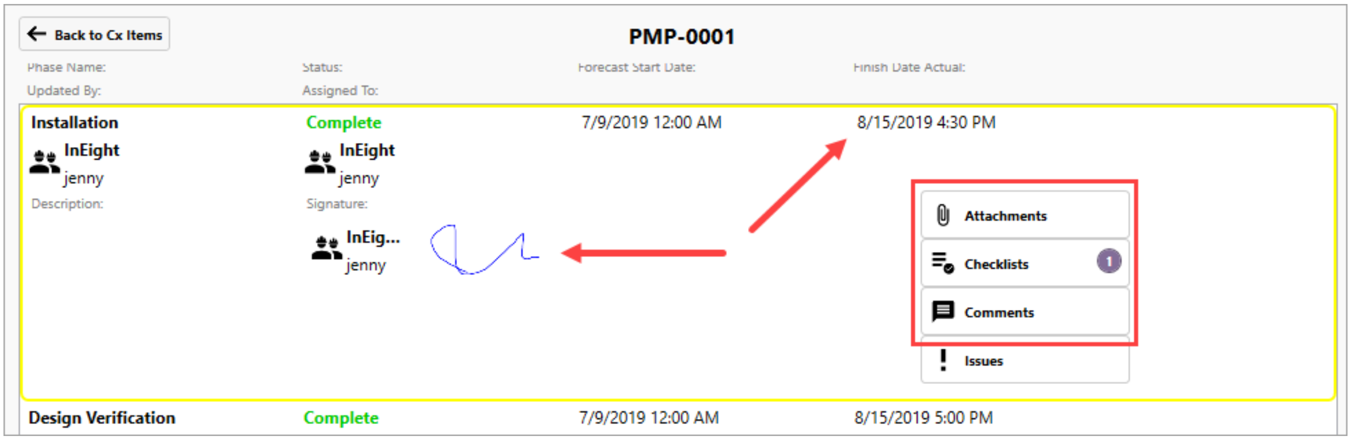
- Phase Name and who updated it last
- Status & to whom it's been assigned
- Forecast Start Date
- Finish Date Actual



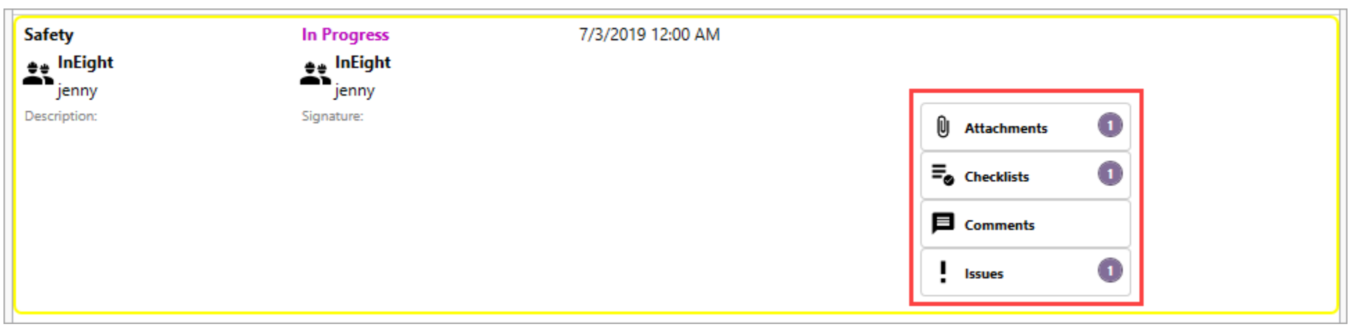
You can review data from Complete, In Progress or No Started phases.

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

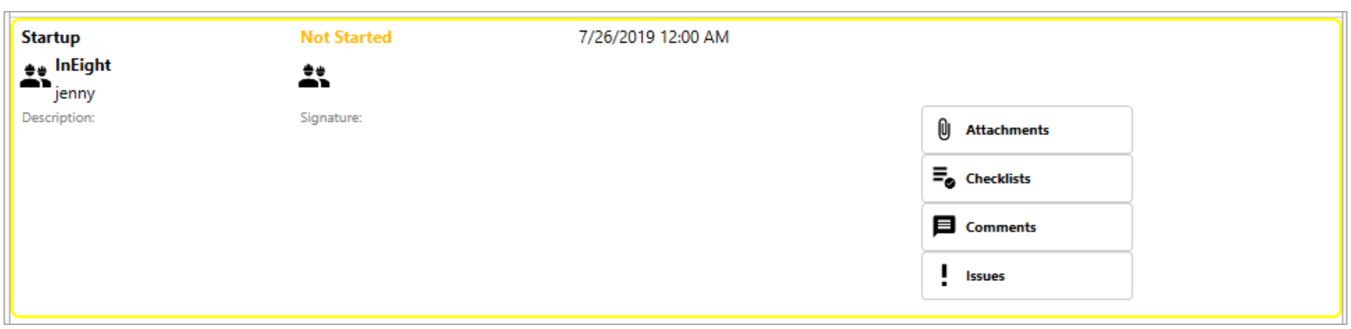
- An electronic signature
- A Finish Date Actual
- Attachments, Checklists and Comments may also be present



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

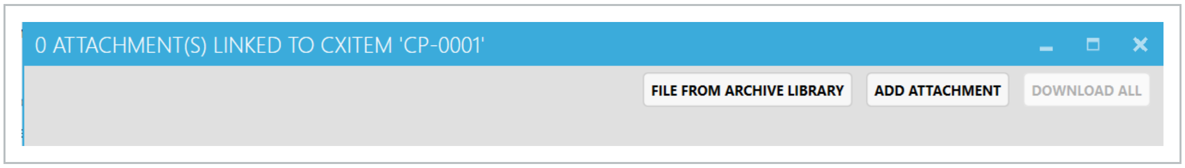


Phases that have Not Started may include Attachments, Checklists, Comments, or Issues.



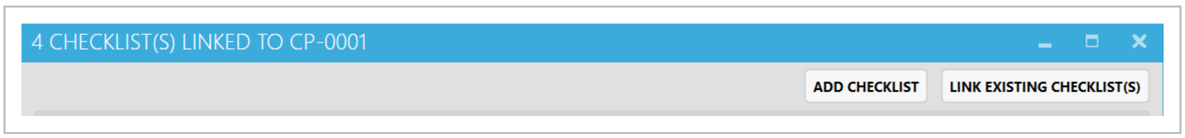
2.1.2.1 Add an Attachment

To learn more about attachments, see the Attachments lesson.



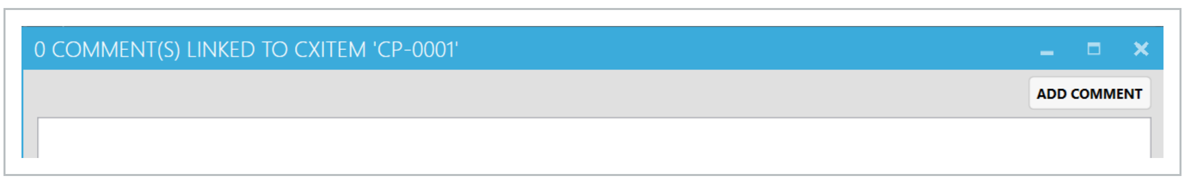
2.1.2.2 Add or Link a Checklist

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."

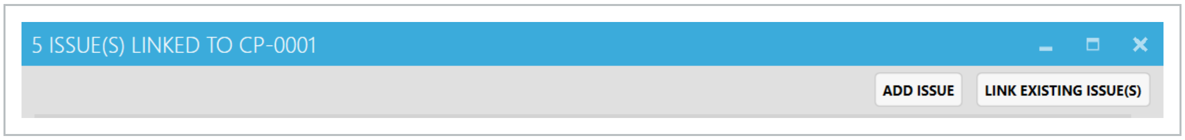


2.1.2.4 Add or Link an Inspection

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.

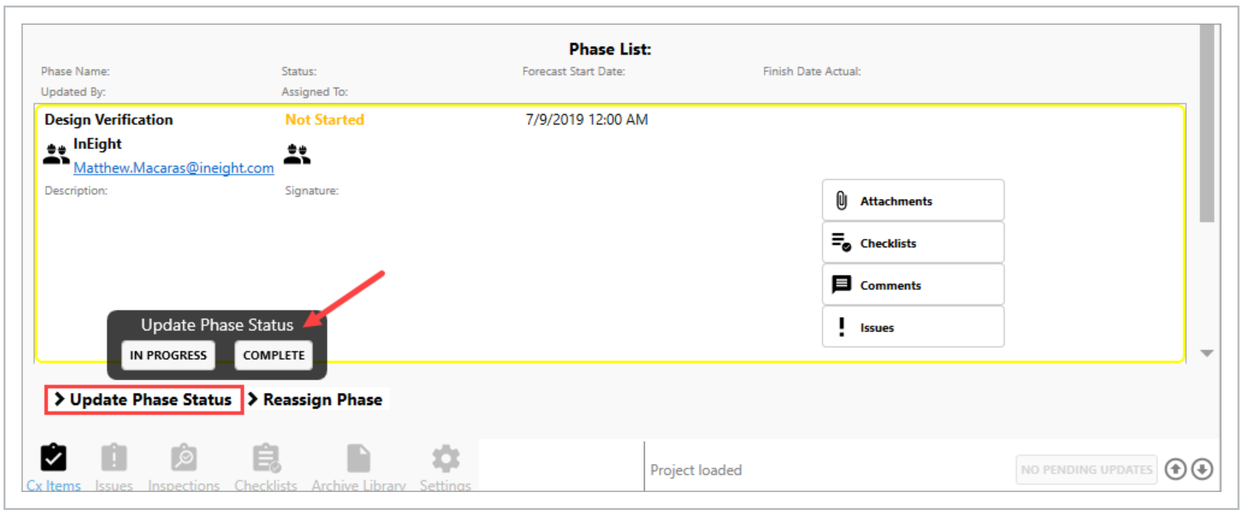


2.1.2.6 Updating Phase Status

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

Three options are available:

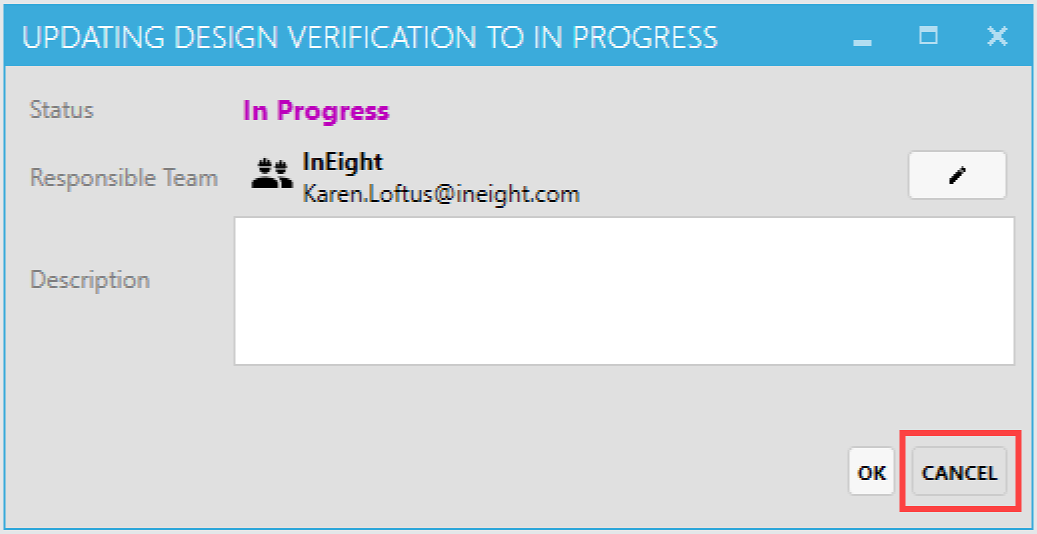
- Permission Denied
- In Progress
- Complete



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.



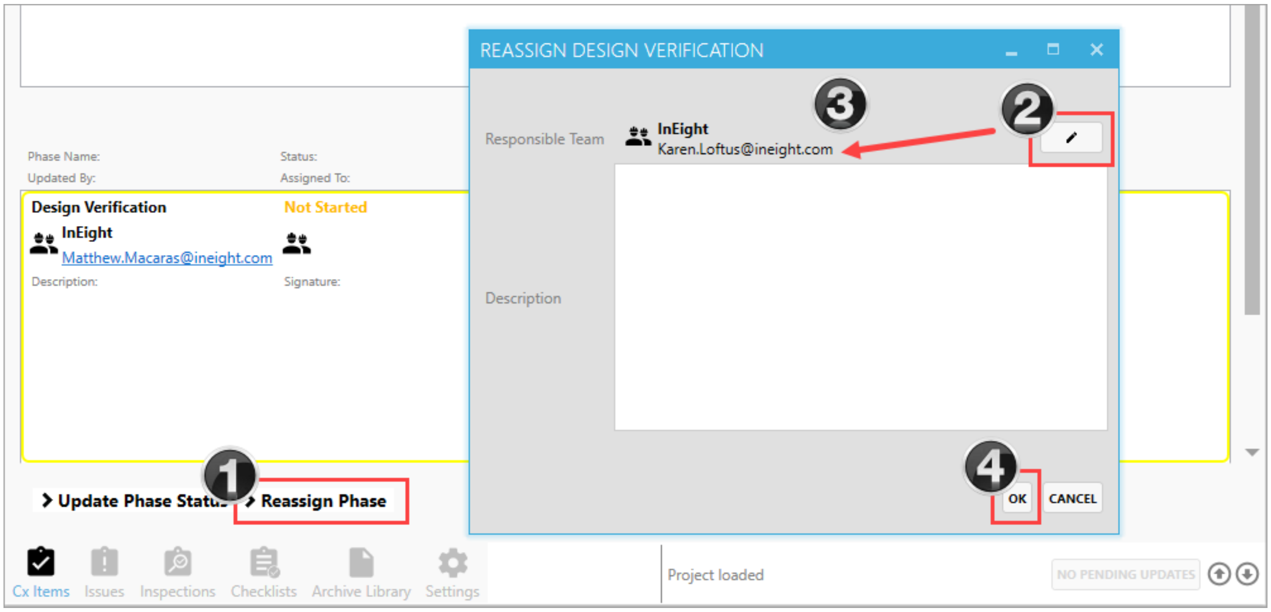
2.1.2.7 Reassign a Phase

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**.

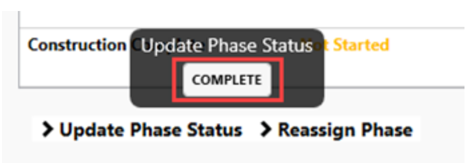


2.1.2.8 Complete a Phase

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**.

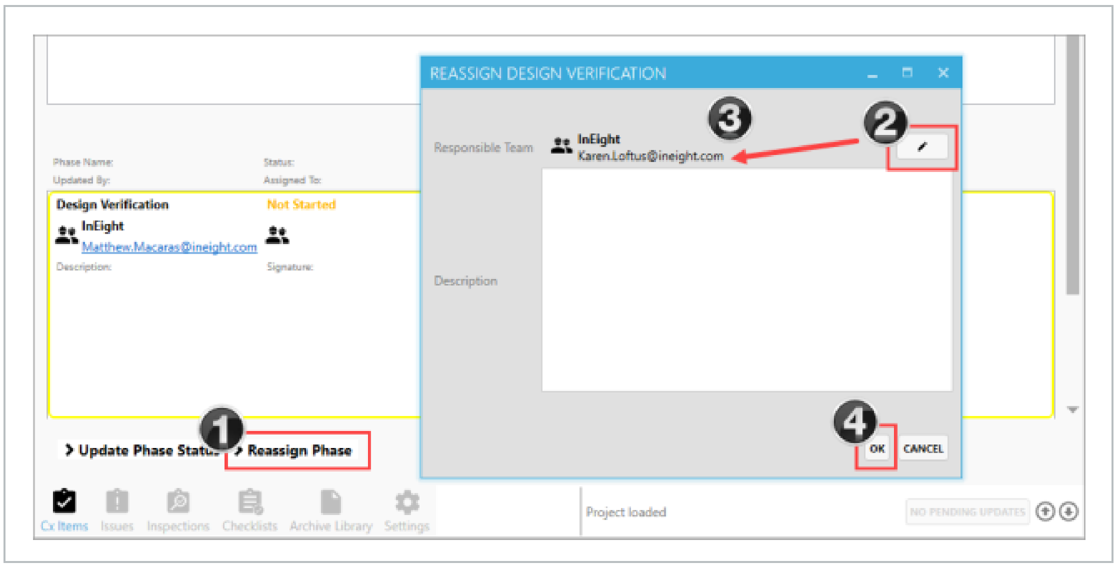
TIP	If you've made an error, and didn't want to update the status, click **In Progress**, then **Cancel** in the subsequent pop-up window.

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

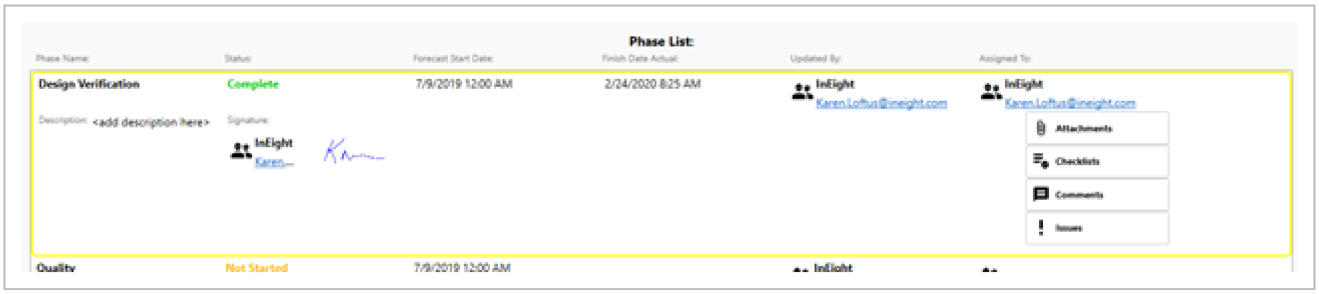
If you are ready to close out a phase, and all checklists are complete:

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

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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

InEight COMPLETIONS

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

Checklists in 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.

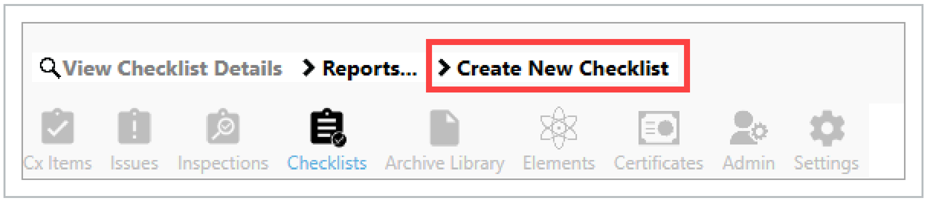
3.1.1 Create a Checklist

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

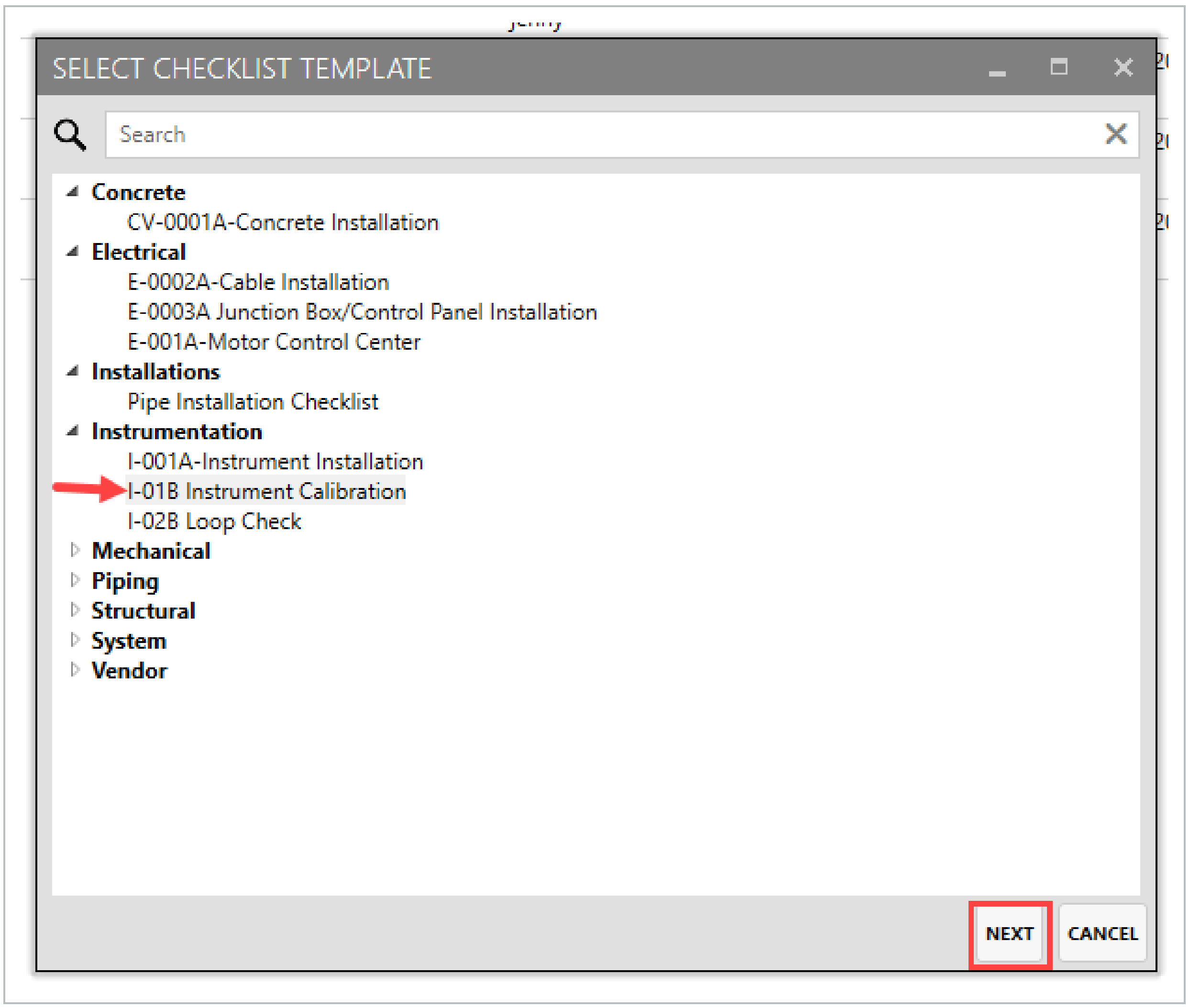
3.1 Step by Step 1 — Create a Standalone Checklist

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

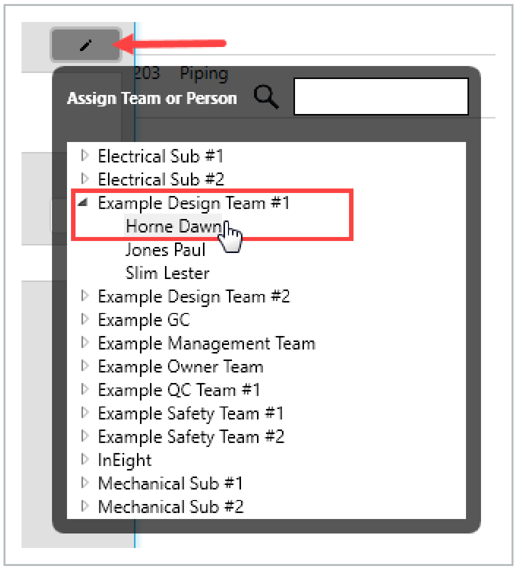
3. Click **Create New Checklists**.



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**.

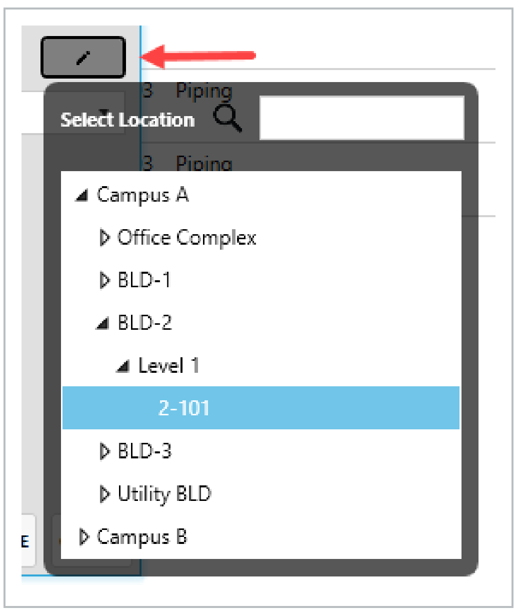


5. Click the **Assign Team or Person** button.
6. Select a **Responsible Team/Team Member**.

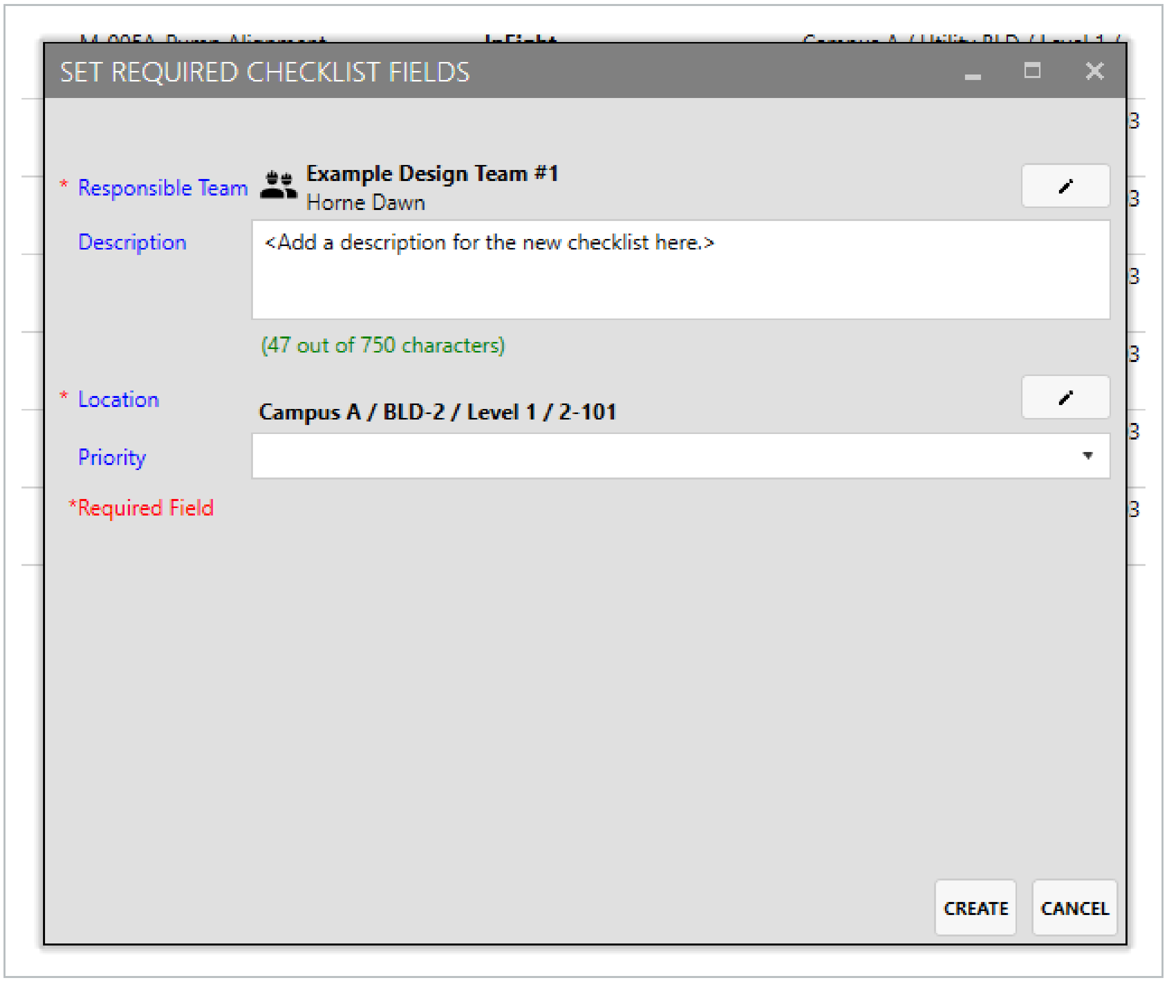


- By doing so, the Team or Person is automatically added to the dialogue box as the Responsible Team

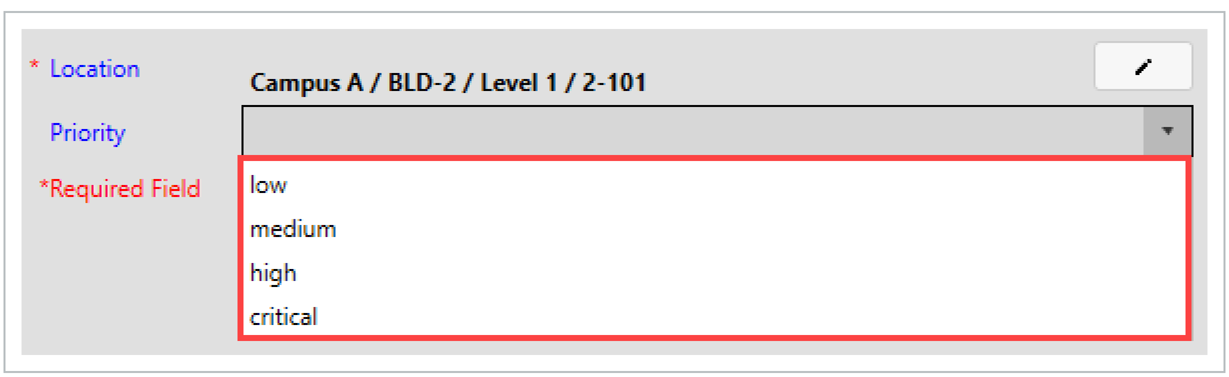
7. Click **inside the Description box** and add a description for the new checklist.
8. Click on the **Select Location** button.
9. From the drop-down, select the appropriate location, knowing you may need to drill down to actual location within a complex or building, as shown below.



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



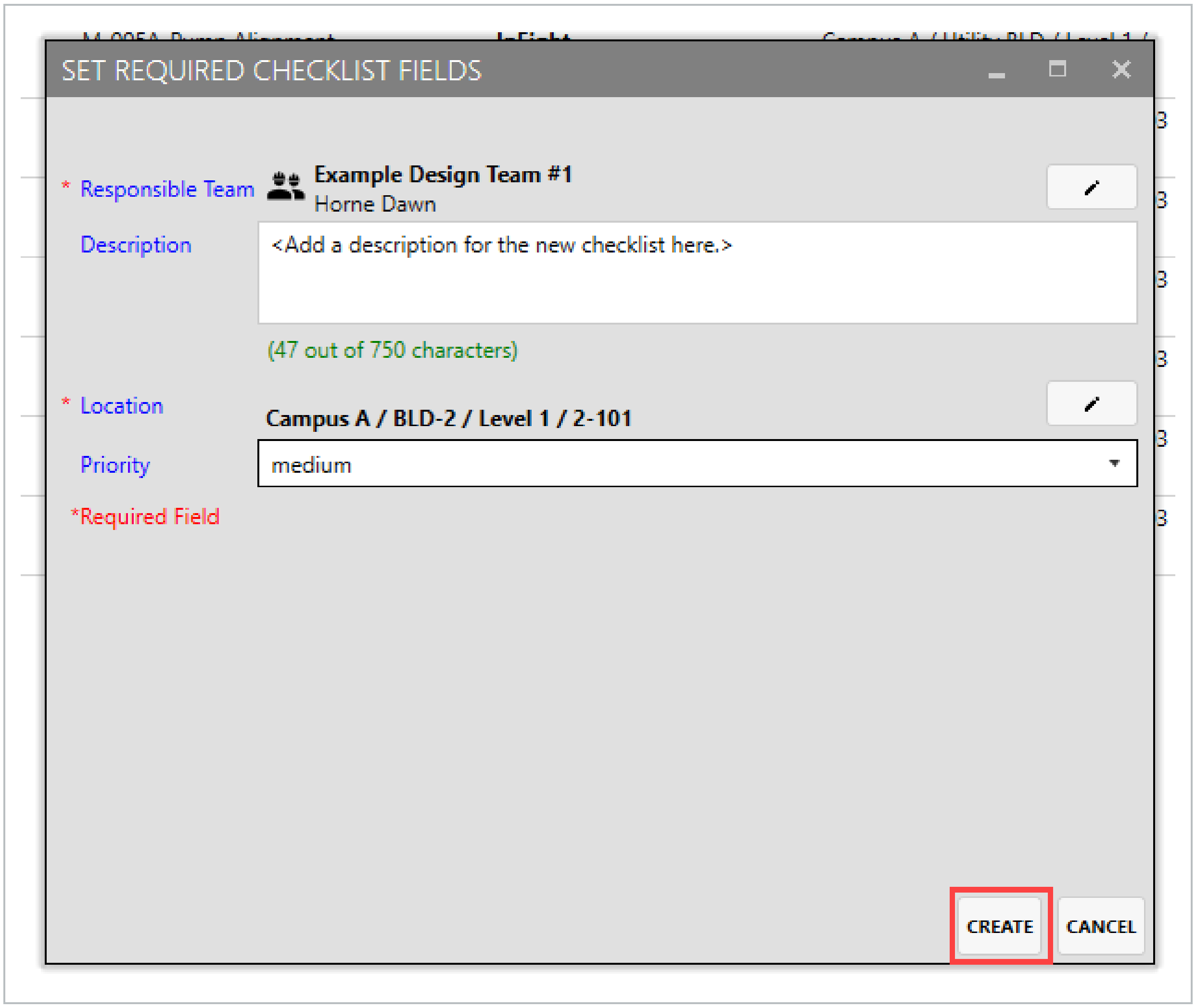
10. Click the **Priority** drop down.



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

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

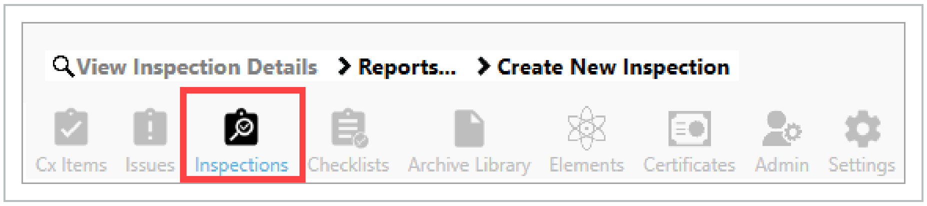
12. Click **Create**.



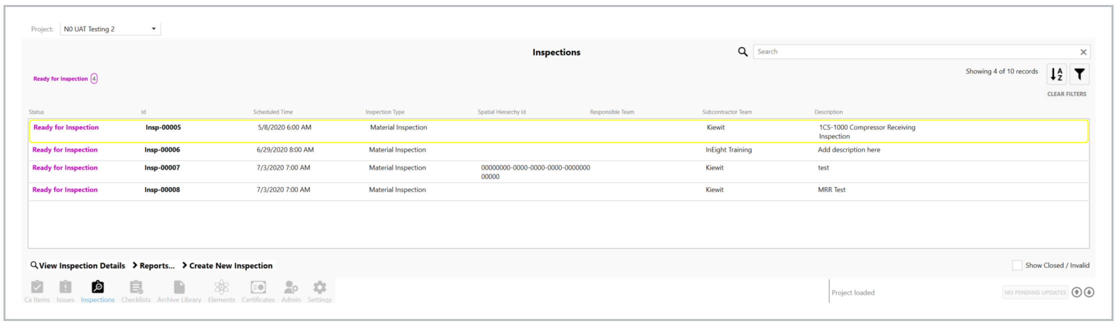
You can create a checklist from any available Completions tab.

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

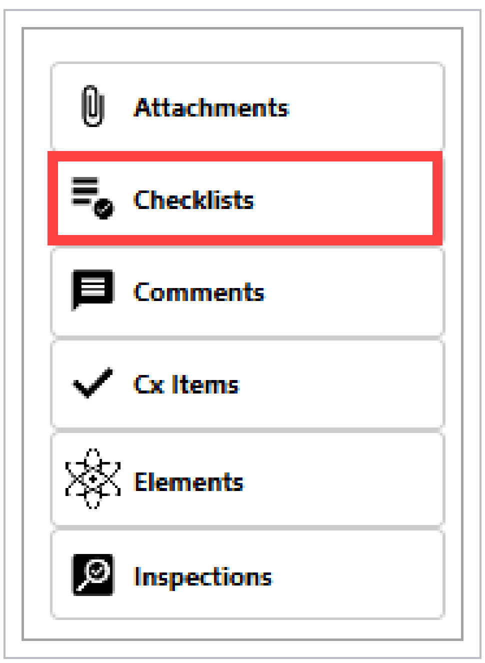
1. As an example, you can create a checklist by selecting the **Inspections** tab.



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.

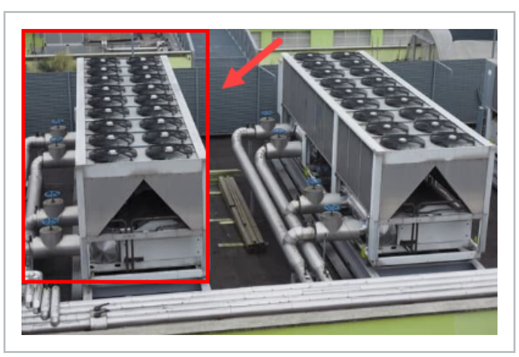
A **Checklist Placeholder** looks exactly like a Checklist Record. There is no differentiation between a Checklist and a Checklist Template, other than a placeholder checklist is not yet finalized and therefore cannot be edited. In order to use a Checklist Template it must first be executed.

For more information on Checklists, visit the "3.1 Create a Checklist" on page 42 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.

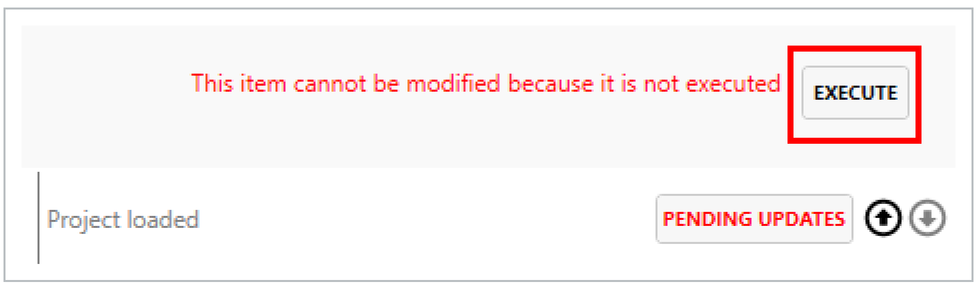


A portion of the HVAC work has already been completed and is ready for quality inspection. As the quality controller navigates to the checklist, he notices that the Answer boxes within the checklist are greyed out, and not able to be completed.

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.

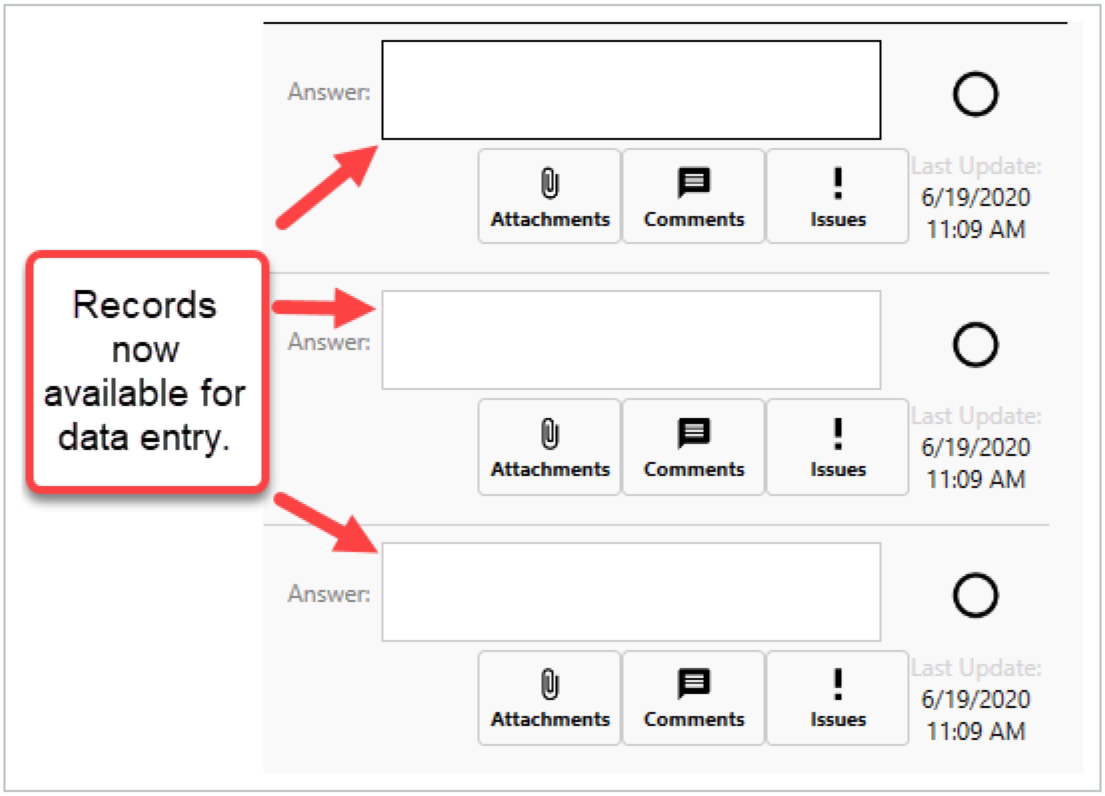
After selecting the Execute button on the bottom right of the screen, the system converts the Checklist Placeholder Records into Checklist Records.

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.

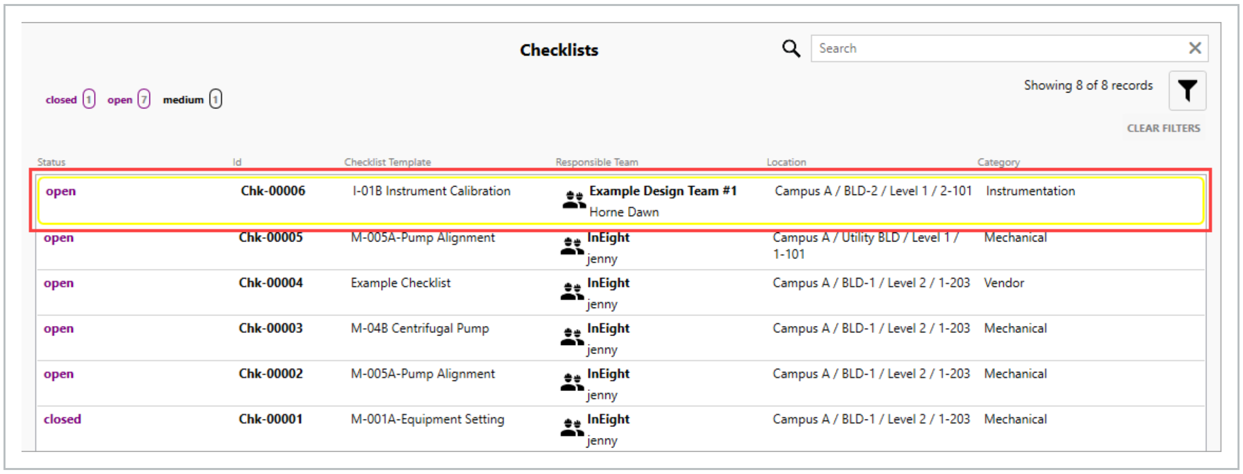


Additionally, the Attachments, Comments, and Issues buttons are also available after the Execute button is selected.

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

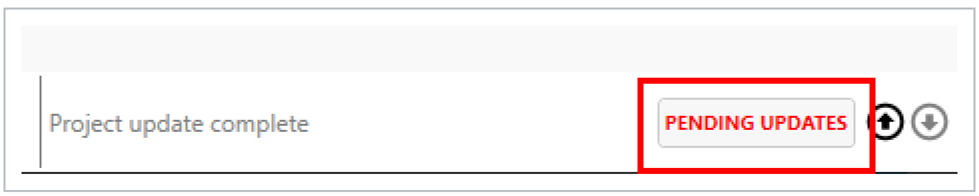
> **NOTE** Categories can include such rows as Header, General, and Acceptance, but can vary from project to project.

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

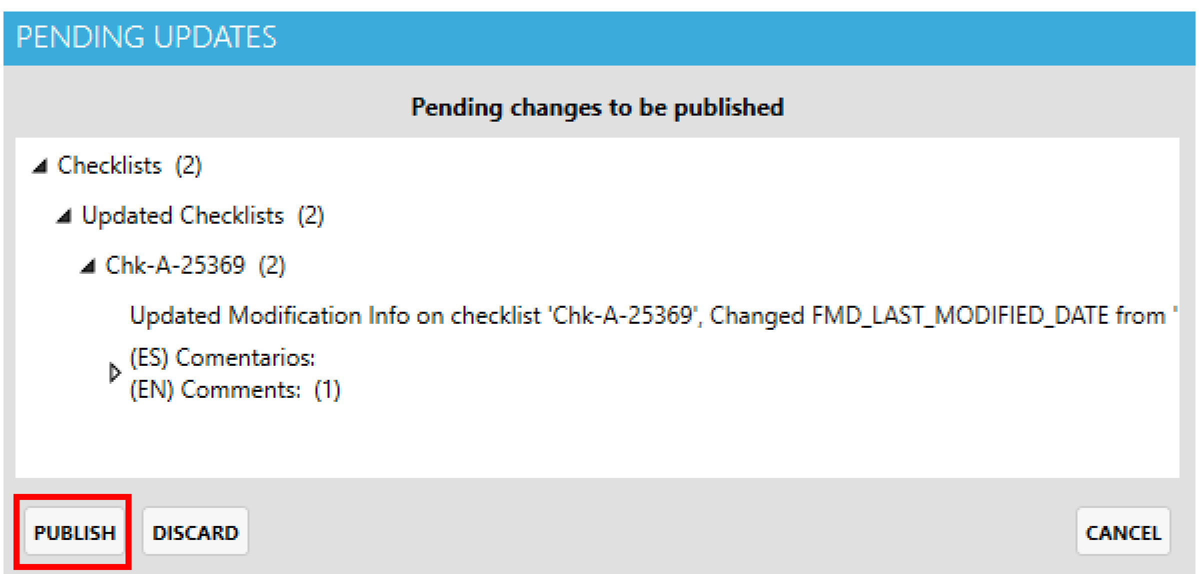
- The Execute button converts the Checklist Placeholder into a Checklist
- Once executed, notice how the Answer checkboxes are now editable

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

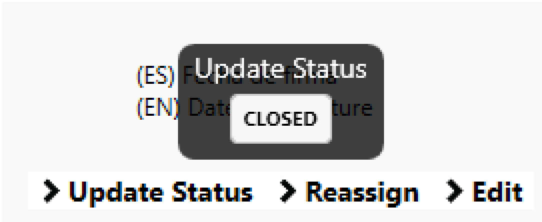
5. Select the **Pending Updates** button.



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.

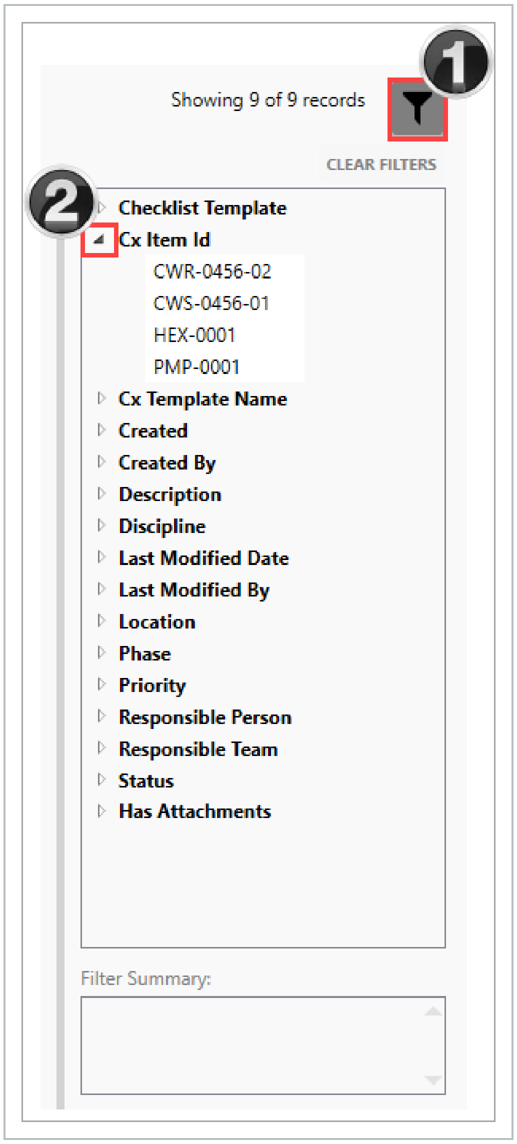
3.3.1 Locate a Checklist

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

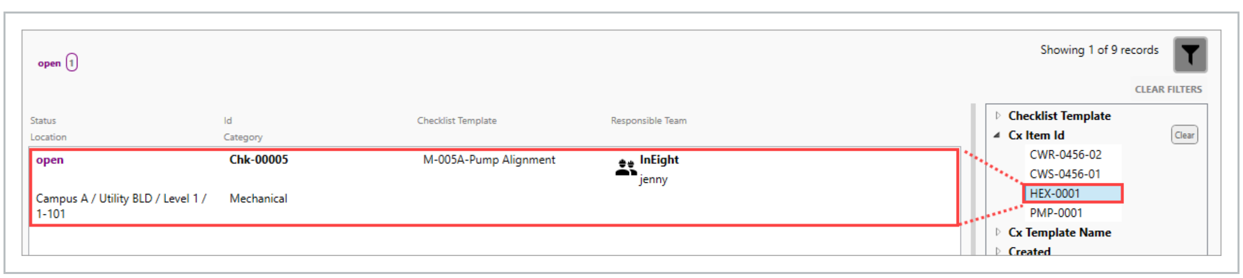
1. Using the Filter function.
2. Clicking on the Closed / Open / High / Medium buttons or as defined by your ADMIN.

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**.

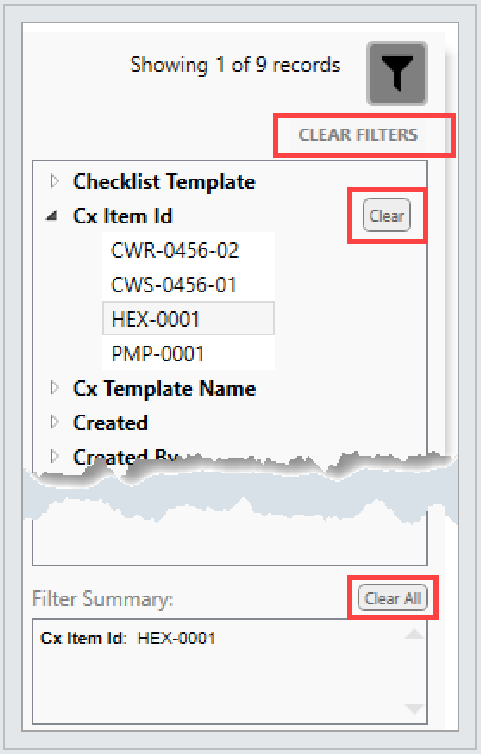


3. Click on an item from the drop down, in this case the **HEX-0001**.



4. Double-click on the checklist to open.

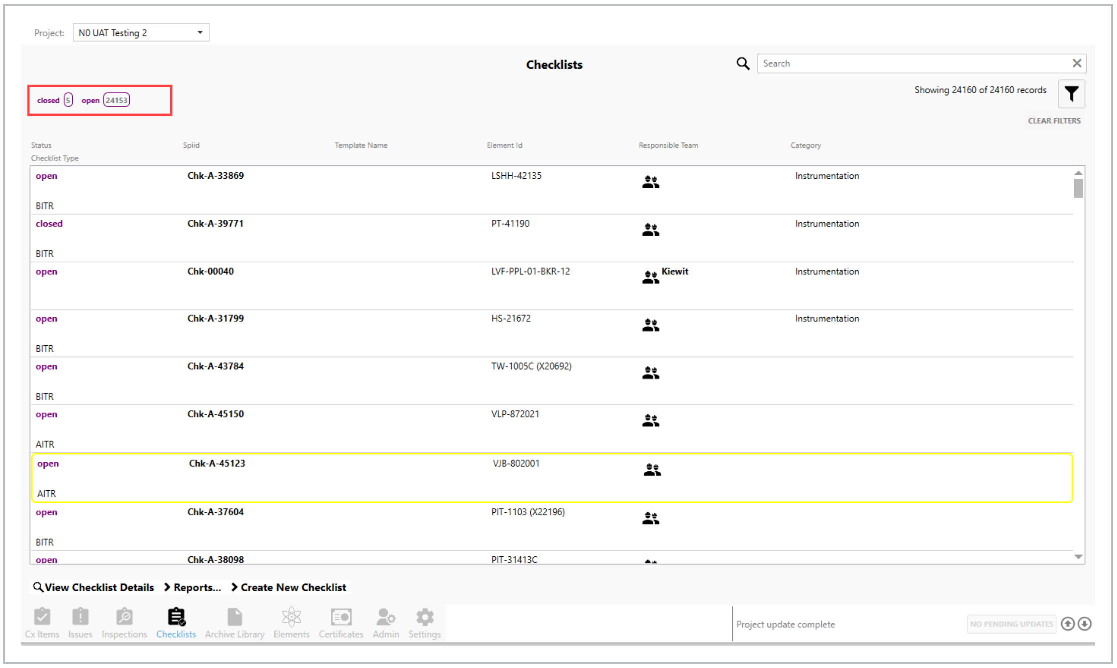
TIP Click either the **Clear Filters**, **Clear** or **Clear All** buttons to remove filtering.



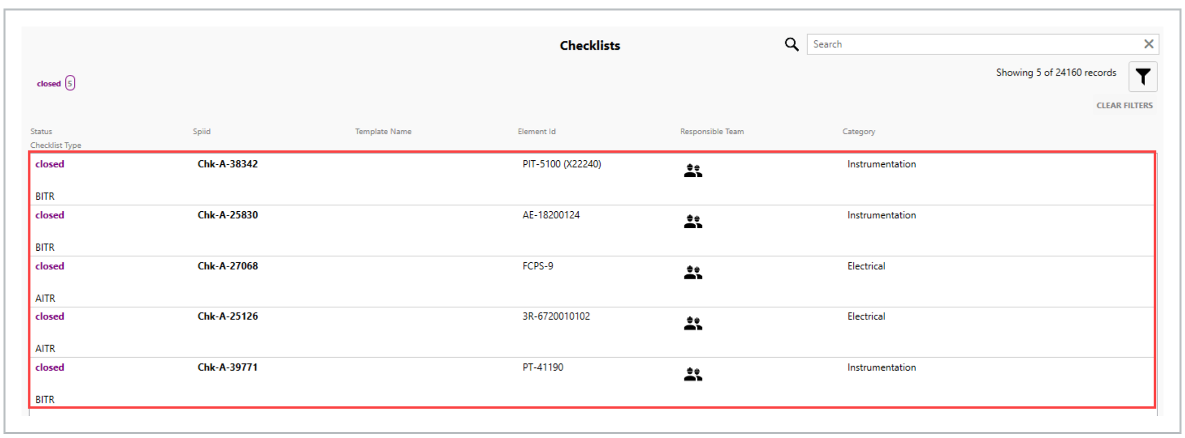
The second way to quickly jump to a checklist from within the Checklists page is to click on any of the **Closed / Open / High / Medium / Low** or otherwise defined buttons. Using this functionality might be important if you are seeking:

- 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



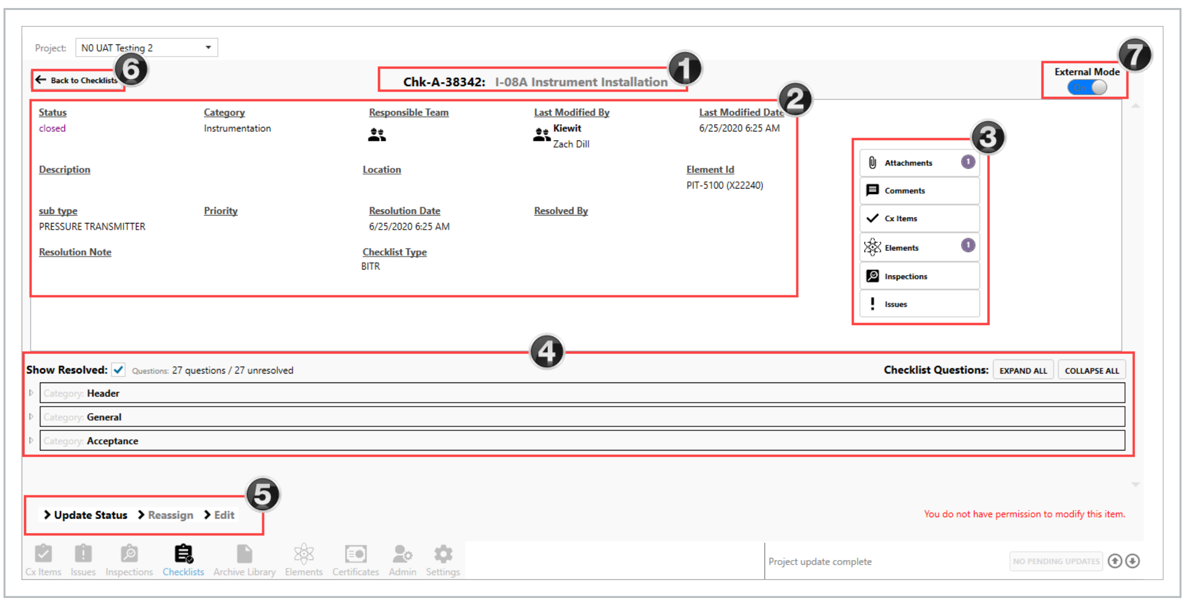
Notice once you click on any one of those buttons, the checklist records page is narrowed, in this case to five closed items.



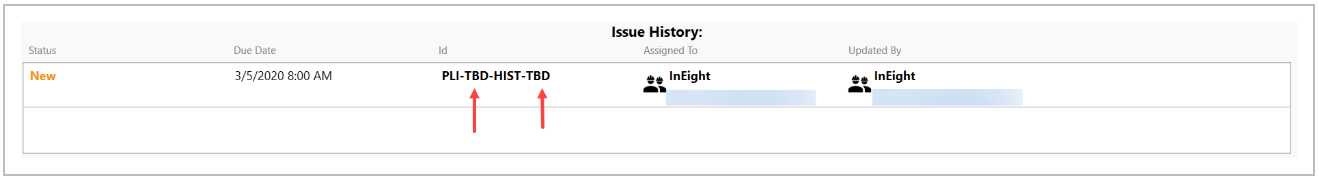
3.3.2 Navigate a Checklist

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 add new Attachments, Comments, Cx Items, Elements, 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.

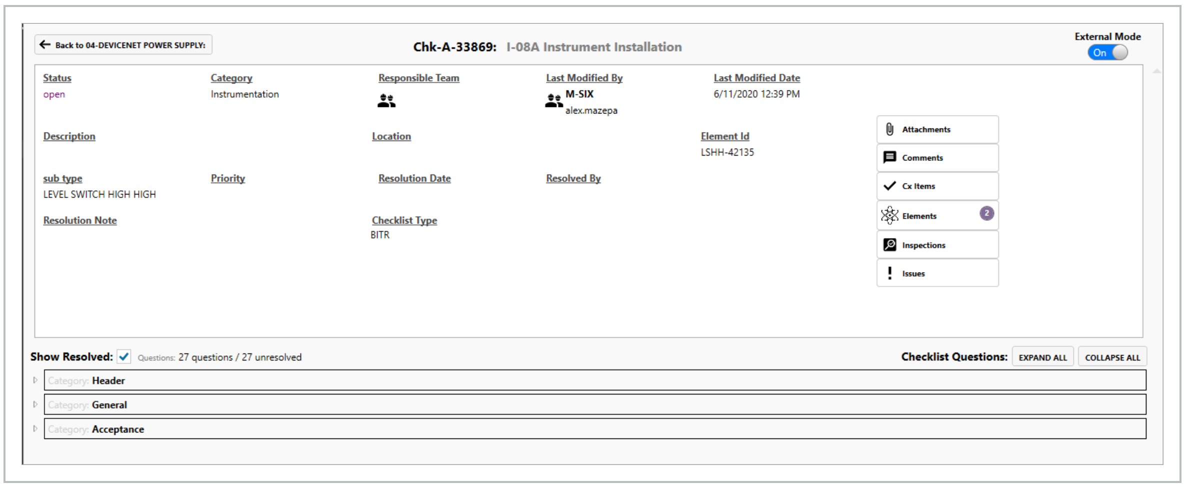


The below Checklist Issue image shows an extension of TBD under the Id field. This is because the Issue has not yet been published. Once published to the server, the TBD's will turn into a numerical reference point for the Id.



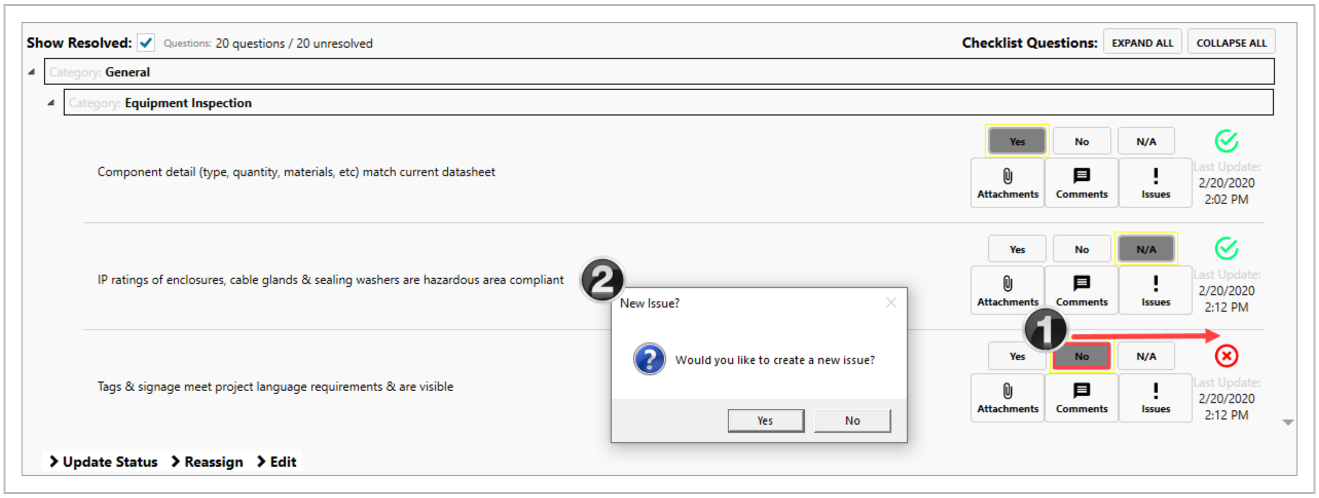
3.3.3 Link Data to a Checklist

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.

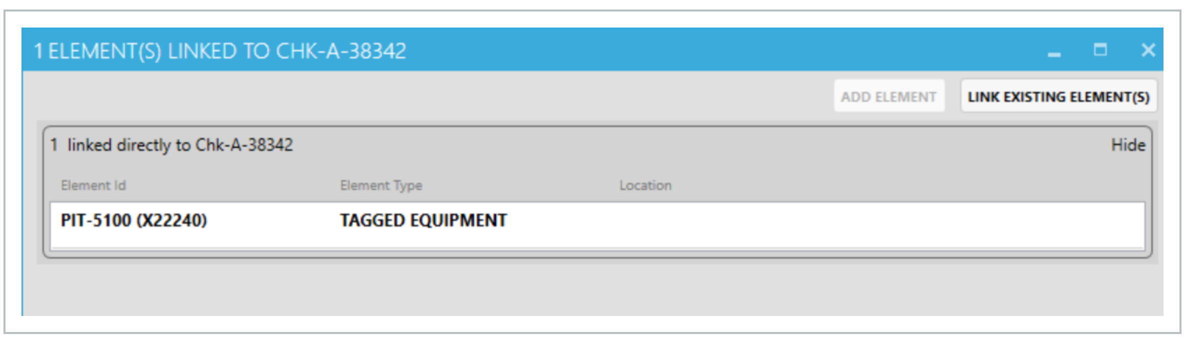
Alternatively, selecting a **NO** response turns the item into a red X, and a new pop-up appears asking if you'd like to create a new issue.



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.

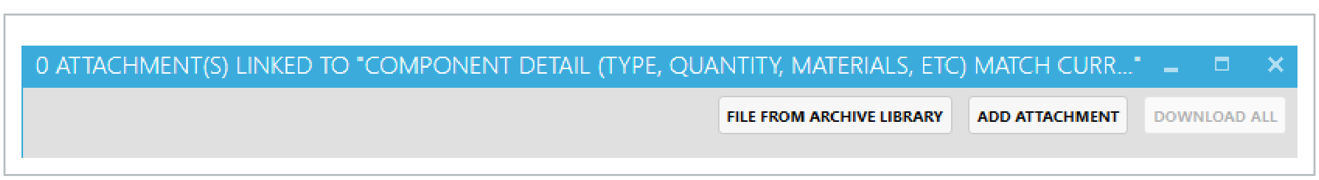
3.3.3.1 Link an Element

To learn more about elements, see the Elements lesson.



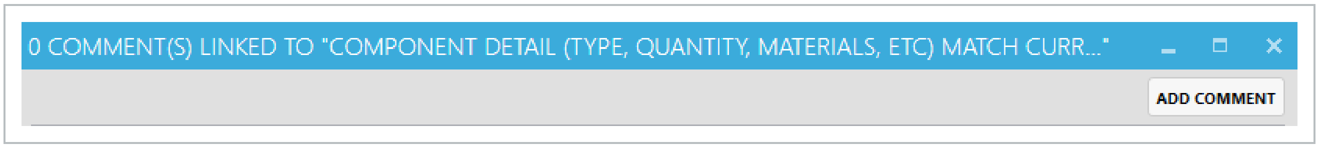
3.3.3.2 Add an Attachment

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.

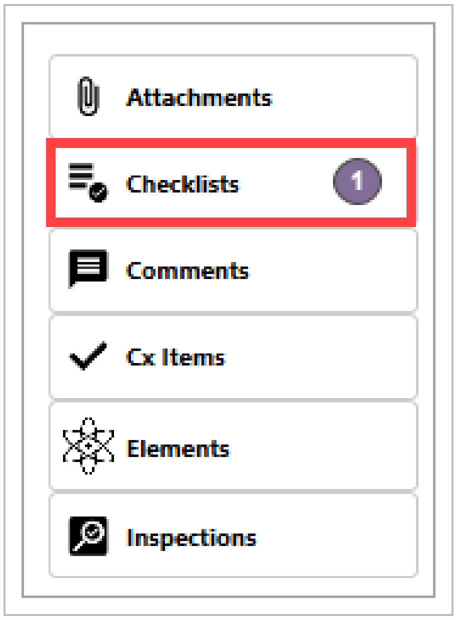
To learn more about Cx items, see the Cx Items lesson.

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

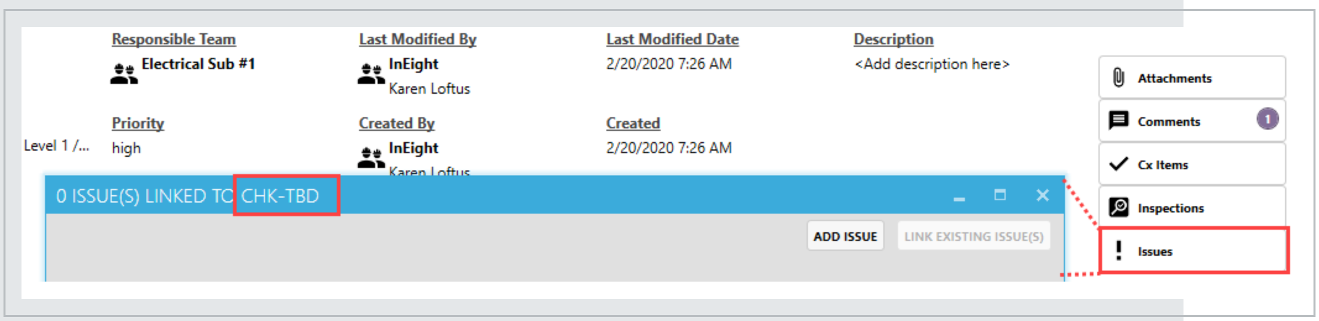
3.3 Step by Step 2 — Link a Checklist to a Completions Tab

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 63 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



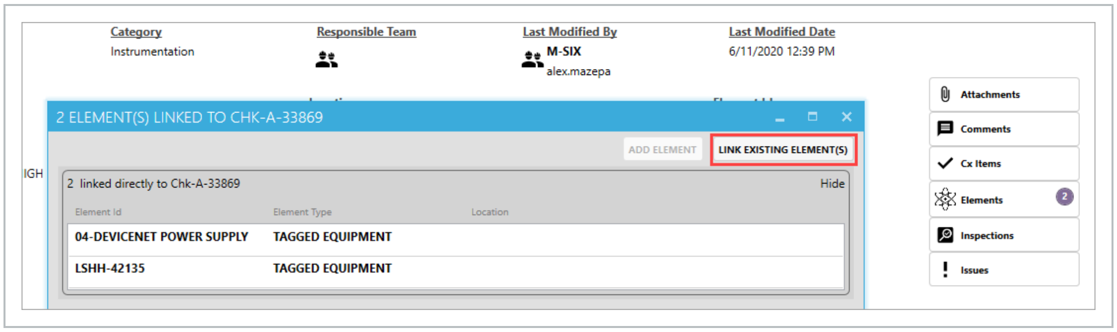
> **TIP** If you add an attachment, comment or issue at the top right side of the page, it is automatically linked to the specific record.



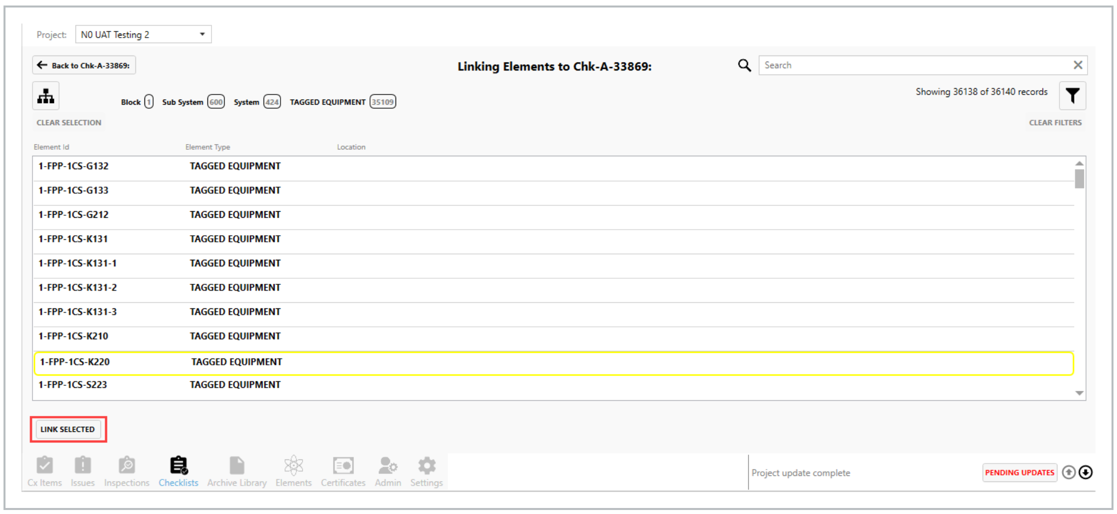
The following step by step outlines the process of linking an element to a checklist.

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.



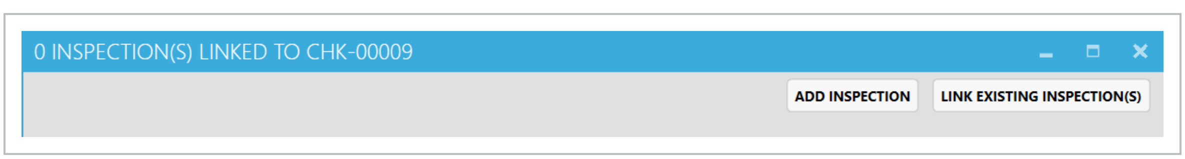
4. In the resulting pop-up, select the desired **Element Id(s)**.
5. Click the **Link Selected** button.



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.

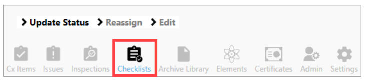


3.3.3.6 Add or Link an Issue

To learn more about issues, see the Issues lesson.

3.4 OPEN AND CLOSE A CHECKLIST

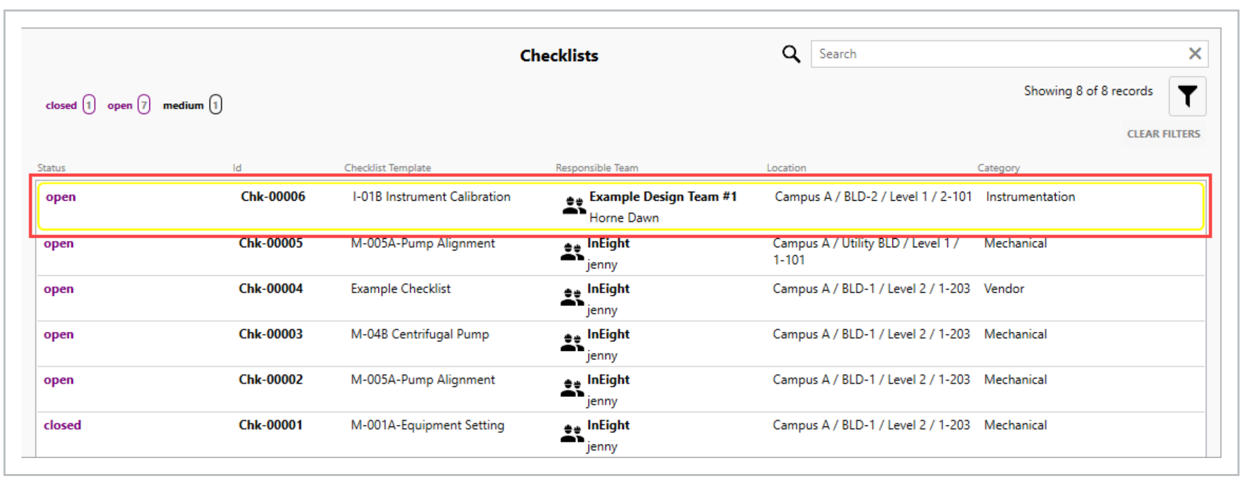
You can access Checklists by selecting the Checklists icon at the bottom of the screen.



3.4.1 Open a Checklist

3.4 Step by Step 1 — Open an Existing Checklist

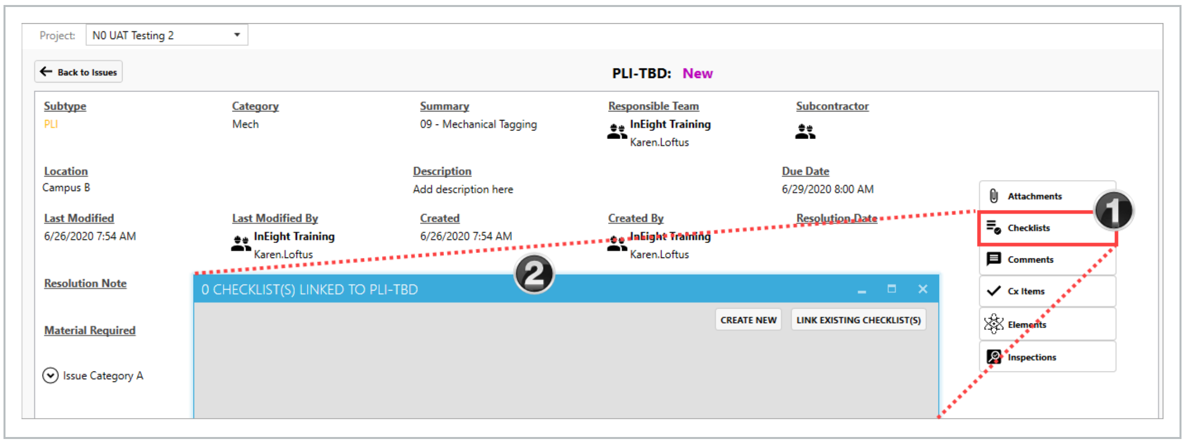
1. Click on the **Checklists** icon at the bottom of the screen.
    - The list of existing checklists appears
2. Search through the existing checklists, then double-click on the desired checklist, Instrument Calibration in our example.



- 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.

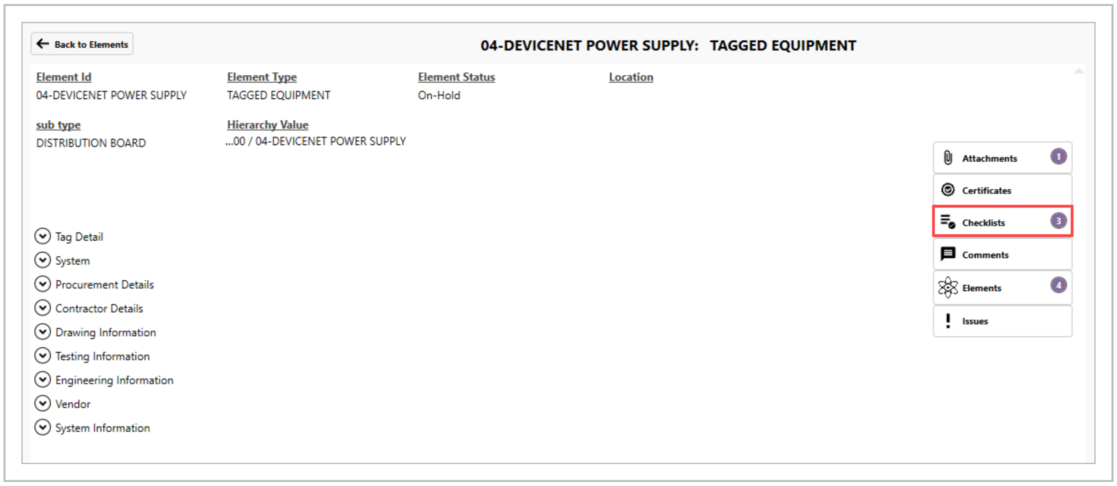
Where available, you can also open a checklist from within a specific Cx Item, Issue, Inspection or Element. Though the Checklists button is available to select, it doesn't mean that each item has an existing checklist created, as shown in this Inspection.



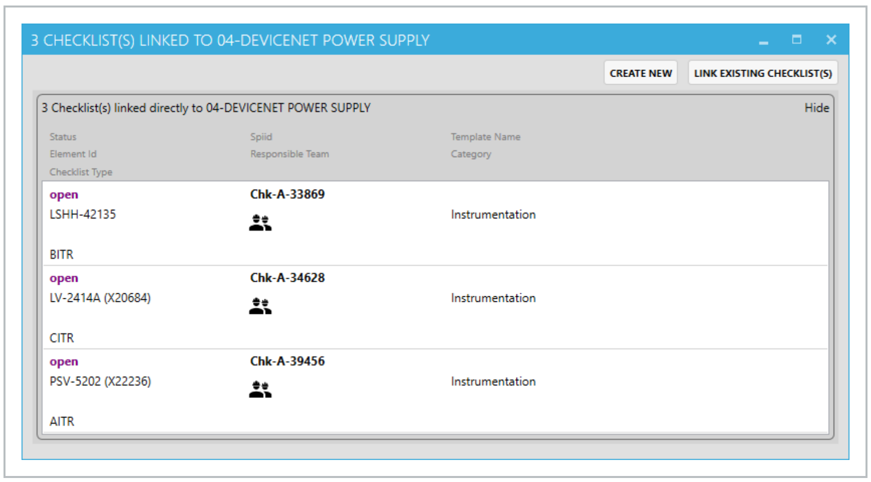
If there were a checklist to address, there would be a number to the right of the Checklists button.

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

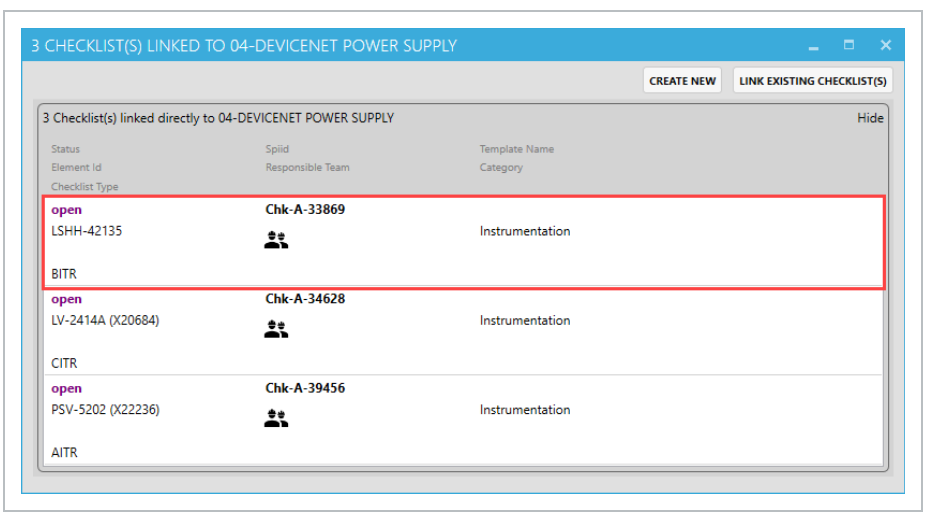
1. Open a **Cx Item**, **Issues**, **Inspections** or **Elements** tab.
2. Double-click on a specific item, in this case Element **04-DEVICENET POWER SUPPLY**.
3. Seeing there are 3 linked checklists, click on the **Checklists** button.



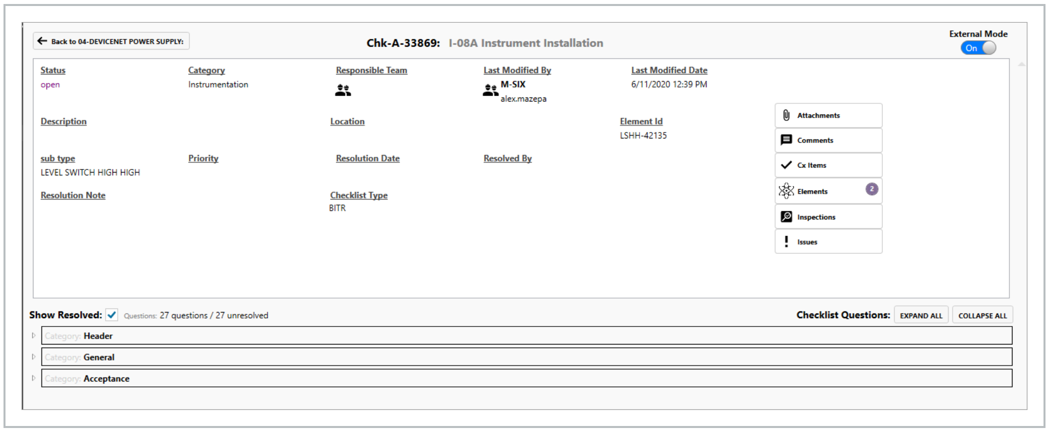
- In the pop-up box, the link of checklists appear



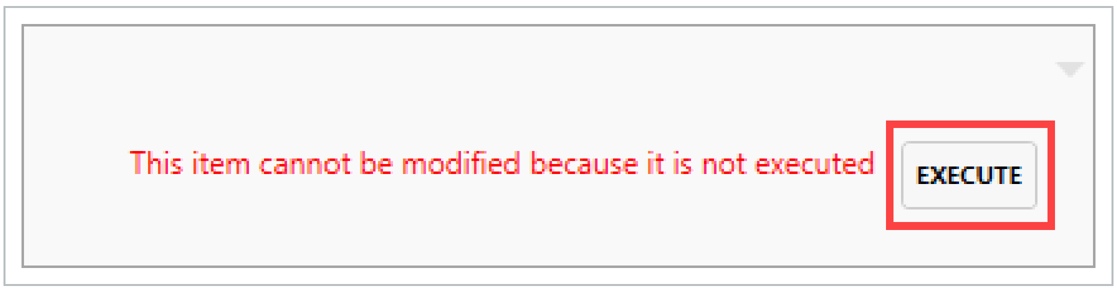
4. Double-click on a checklist, ID # **Chk-A-33869** is our example.



- 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.

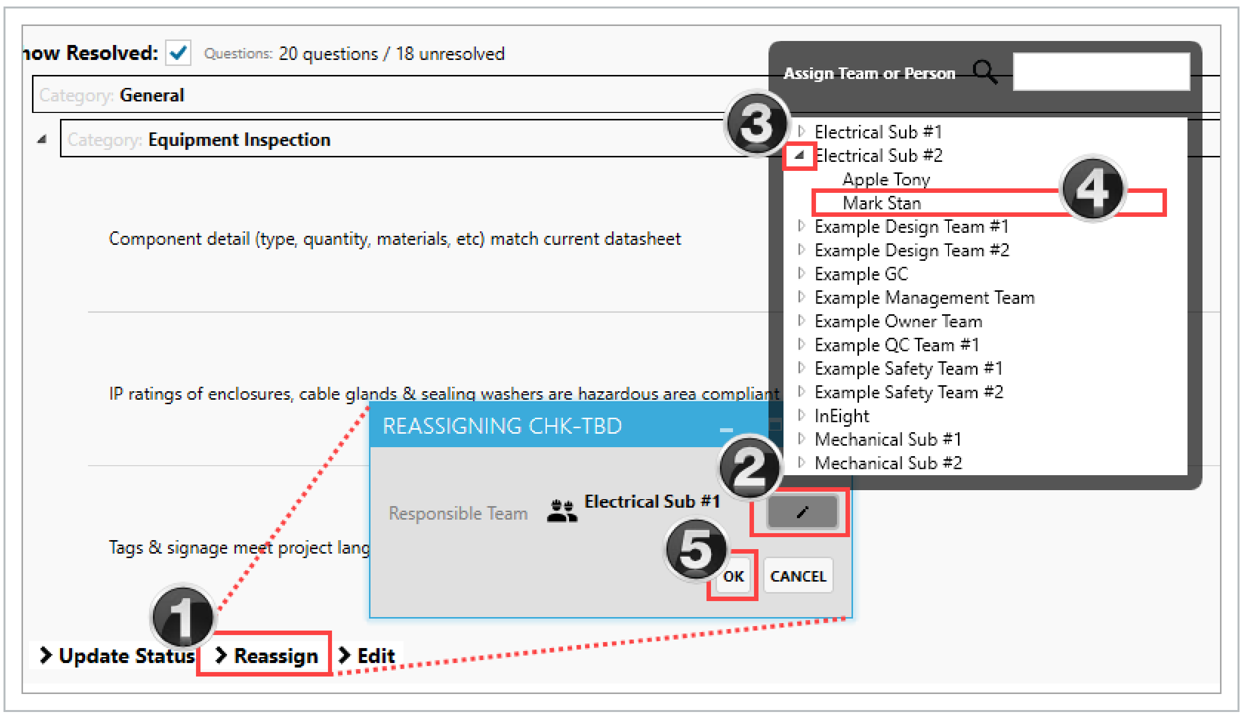
3.4.2 Reassign a Checklist

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.

3.4.4 Checklist Permissions

Depending on the type of permissions you have, you might not have the correct permissions to modify an existing checklist. If this is the case, when you open an existing checklist, a warning appears. Then, the Update Status > Reassign > Edit link is disabled, as shown below.

You can close the checklist by clicking the **Back to Checklists** button.

3.5 PAPER CHECKLISTS

3.5.1 Use of a Paper Checklist

Online completion of a checklist housed in Completions, might not be an option for you and your organization if:

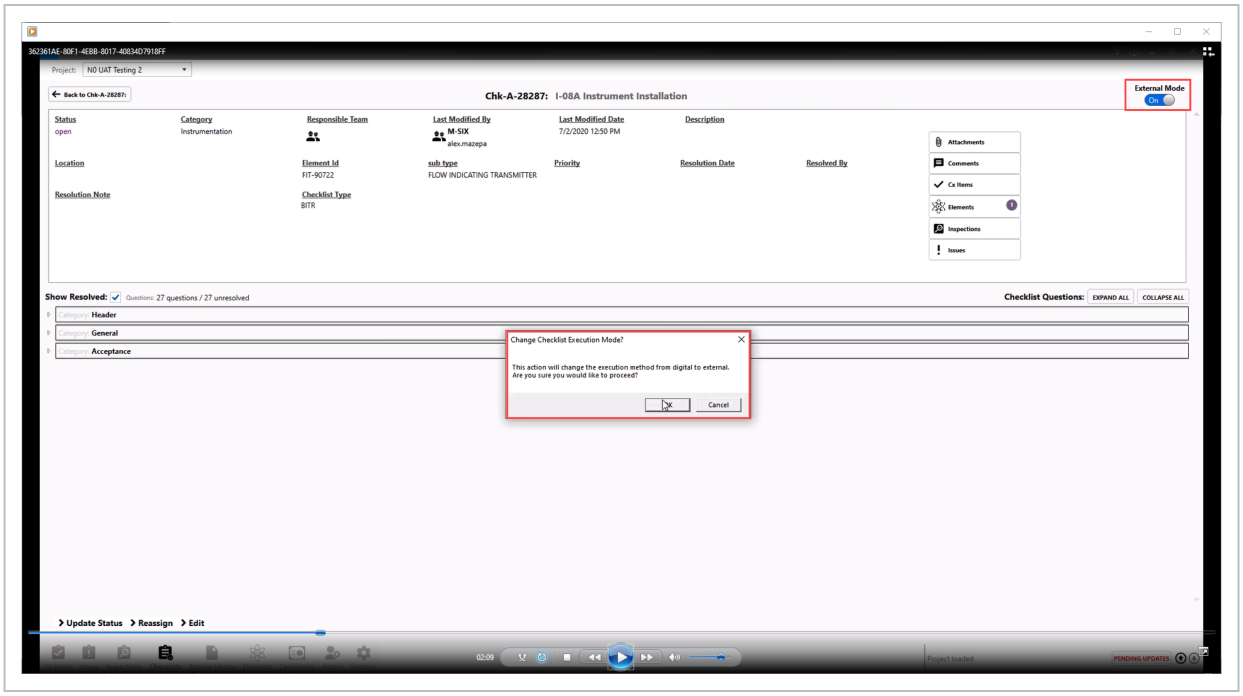
- Your organization or market do not have the ability, access or funds to deploy iPads at all locations
- It might not be physically safe (exposure risk)
- Wet signatures are still needed on some documents

If any of these is the case, a paper checklist fills the gap. The existing checklist in Completions is downloaded and saved, manually completed, and then imported back into Completions as processed and closed.

The system is designed to hand-off a stack of Checklists to the admin, who orders them, and scan in all the paper into a PDF document. After all is scanned in, the above process would be completed and many checklists would be completed.

3.5 Step by Step 1 — Enable External Mode

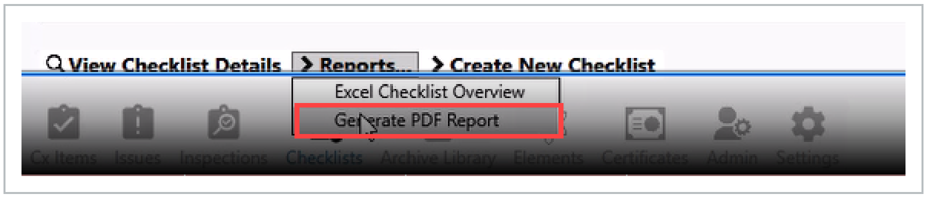
1. From an executed Checklist, turn the External Mode button to **On**.
2. Click **OK** in the dialog box to proceed.



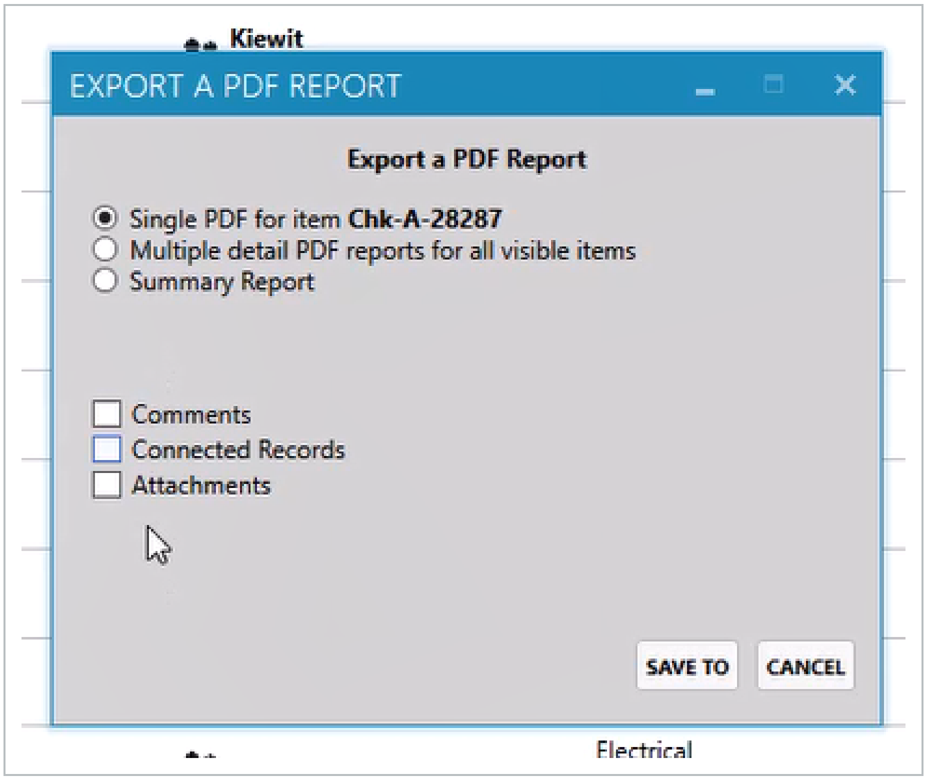
The following steps walk you through creating a PDF, or paper version, of a checklist.

3.5 Step by Step 2 — Create a Paper Checklist

1. From the Checklists tab, locate and select the desired checklist.
2. Click Reports > **Generate PDF Report**.



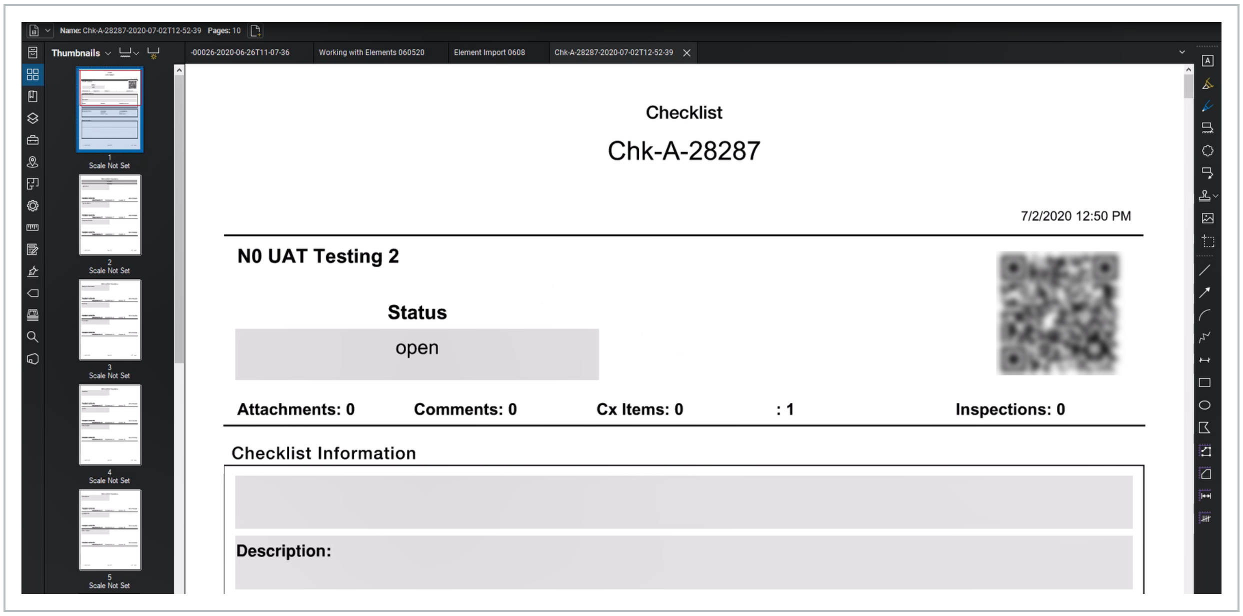
3. Select if a single PDF will be created. Multiple PDFs or a Summary Report are also options.



4. Click **Save To** to confirm the export.
5. Navigate to where you want to save your PDF, and then click **Save**.

NOTE	If the **Multiple detail PDF reports** option is selected, PDFs of all visible records arwill be generated.

The resulting PDF paper checklist shows with the bar code on the top and all checklist questions beneath it.



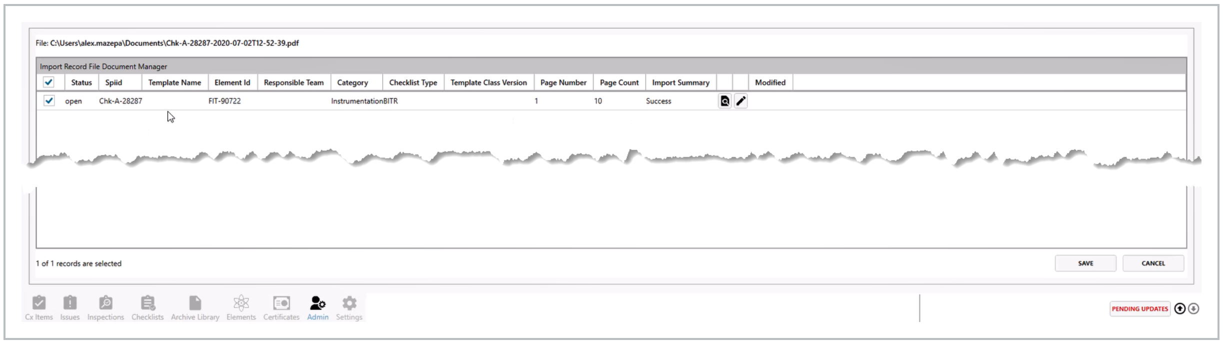
6. Manual documentation on the paper checklist can now be added.
7. When the checklist is completed, click the **Close** button on the PDF.

The following steps walk you through how to import the completed paper checklist into Completions. This requires the project admin role assignment.

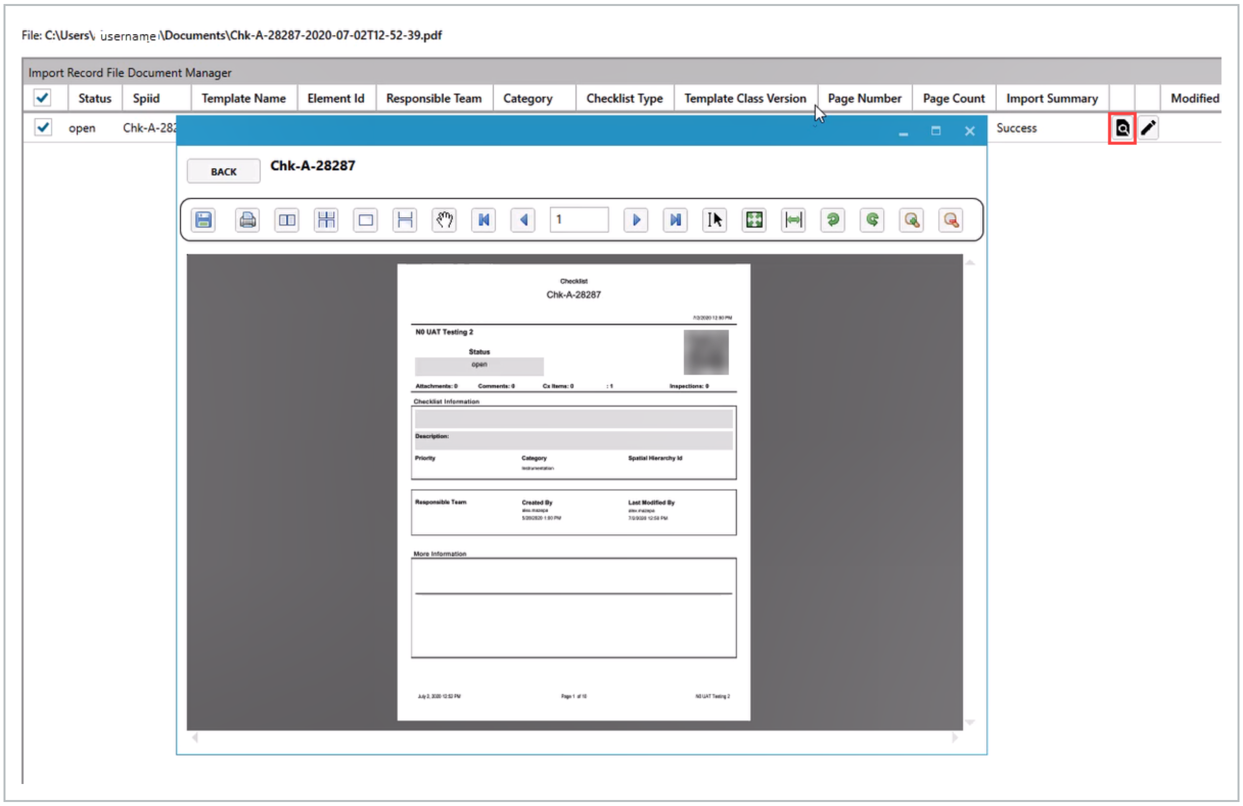
3.5 Step by Step 3 — Import Completed Paper Checklist File

1. Click **ADMIN** tab, and then select **Import Record File**.

2. Pull up the completed checklist.



3. Select the check box, and then click the **SAVE** button to process the checklist and close.
4. Preview the PDF.

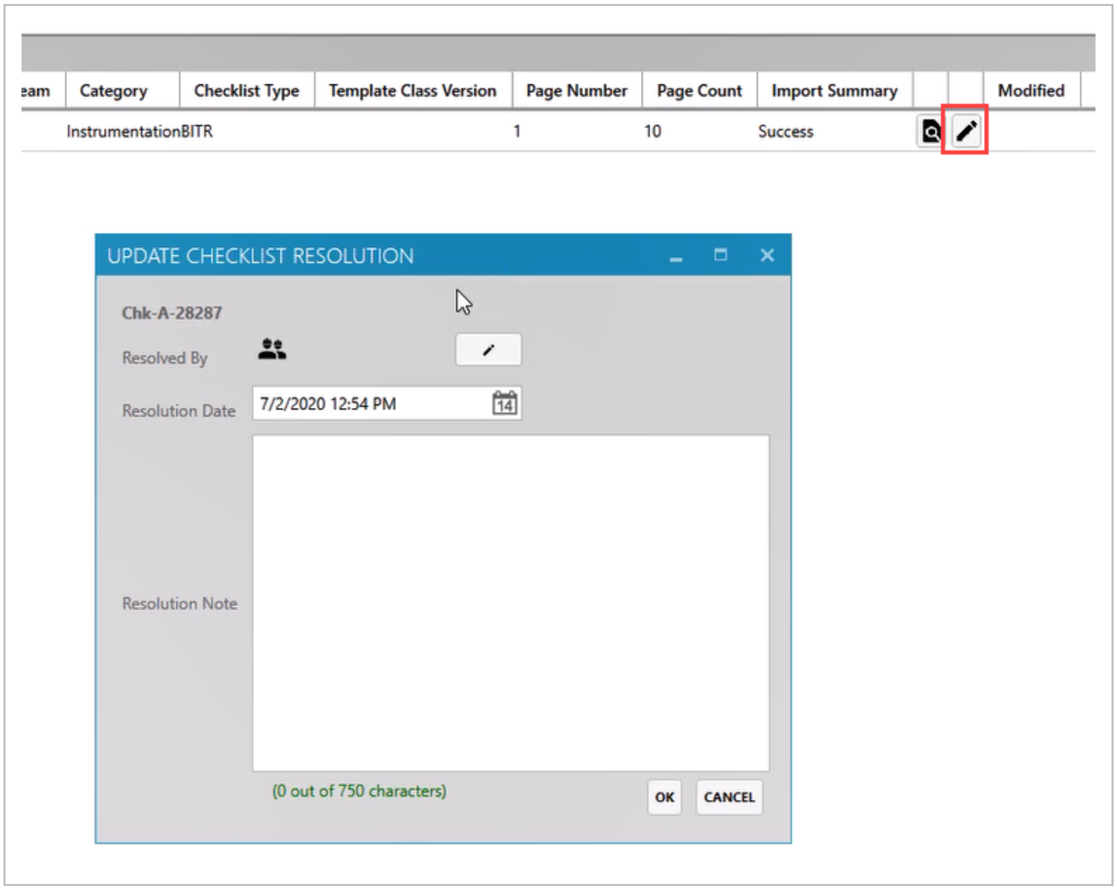


TIP	There can be more than one checklist in a PDF. The system reads the first page QR Code and scans subsequent pages looking for other QR Codes. If located, it separates the PDFs from each other.

The following steps outline how to preview and edit checklist record information before completing the record. The Admin who is completing importing the paper checklists is automatically assigned as the individual who Resolved the Checklist on the date and time that the admin imported the checklist. Since this is not accurate to the checklist contents, the admin can use the edit feature to call out the individual who did execute the checklist and change the date in the system to reflect the executed paper document.

3.5 Step by Step 4 — Edit Checklist Record Information

1. Click the **Edit** icon.



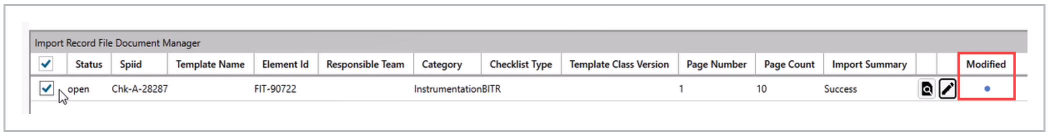
2. Update the following three items in the dialog box, if necessary:

Resolved By name

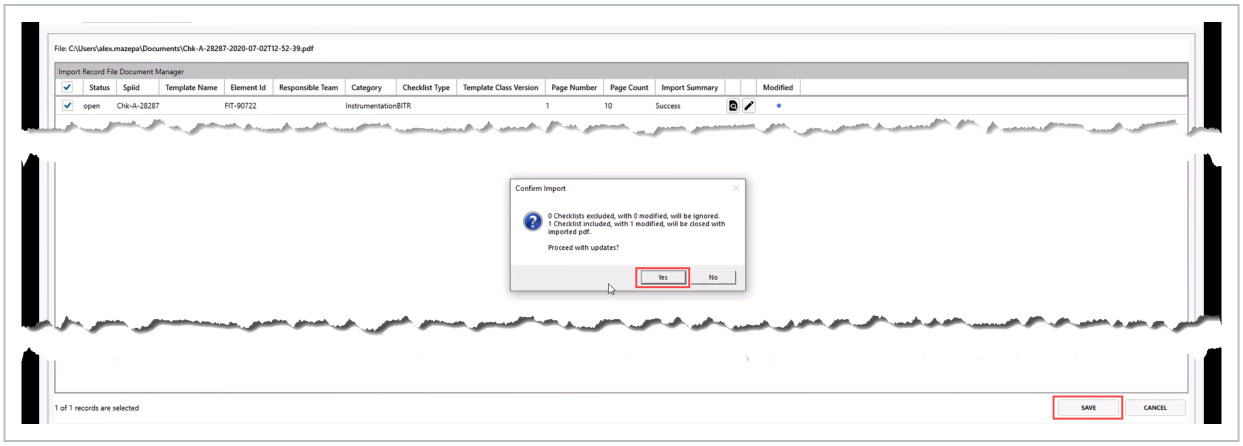
Resolution Date and time

Resolution Note (freeform)

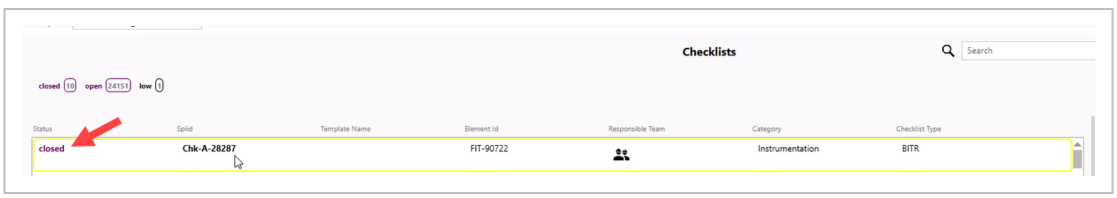
3. Click **OK** when complete.
   - This information is uploaded and the Modified column shows a dot



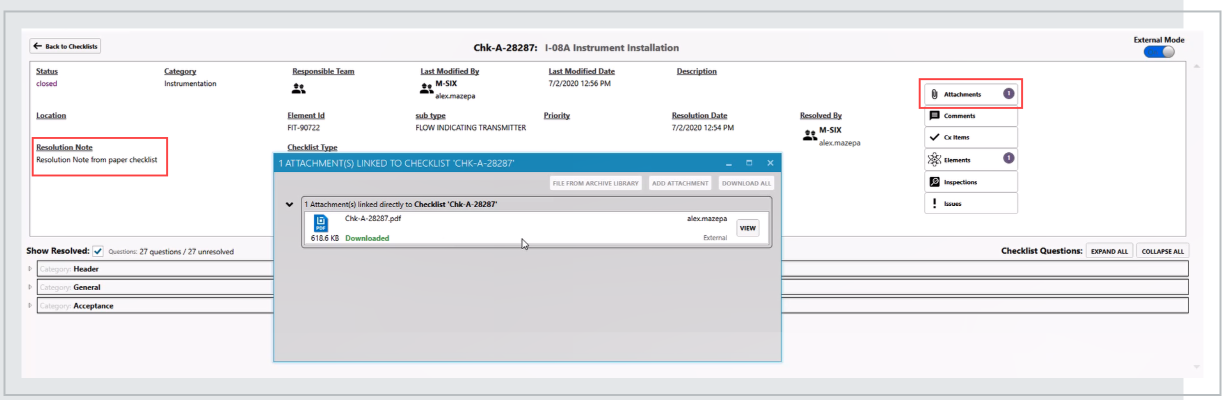
4. Click **SAVE**, and then click **Yes** to confirm the update.



5. Return to your Checklist record, and the checklist shows as Closed.



NOTE If the checklist is re-opened and Attachments is selected, the Attachment can be viewed and the Resolution Note is shown.



Now the checklist is completed.

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

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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

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

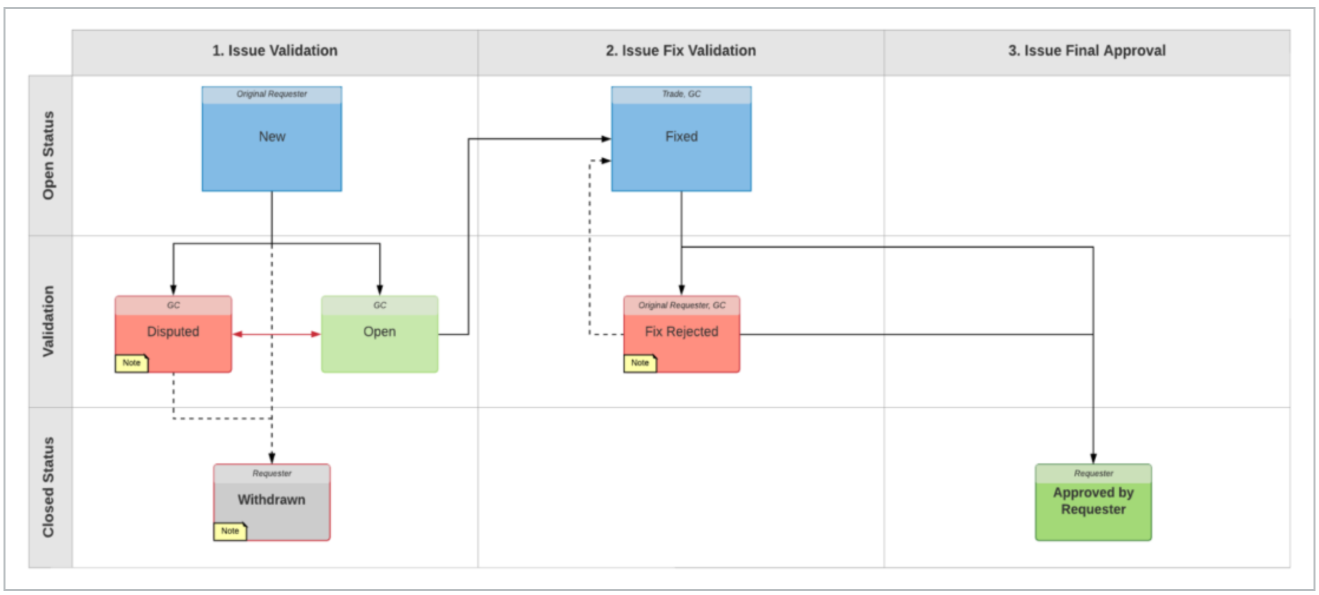
InEight Completions Issues can be defined as: a to-do list, a type of a deviation, or a type of non-conformance that eventually needs to be corrected.

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.

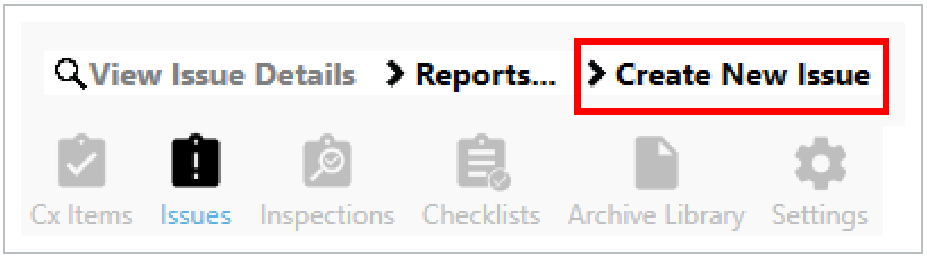
TIP	In the Description field, it is important to provide a clear description of the issue in order for the Responsible Team clearly understands the issue.

4.1.1 Create a Standalone New Issue

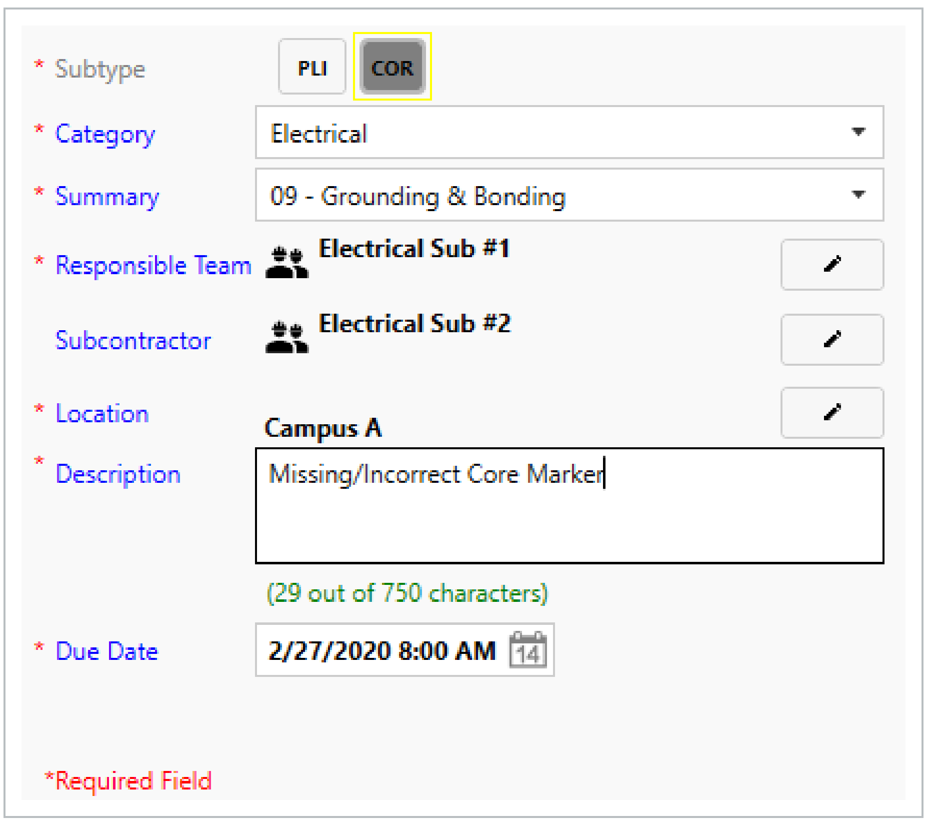
Once you determine a deviation or an action item for another party, you can start to create your Issue. In the Step by Step below, some of the selection options may not be available to choose from.

4.1 Step by Step 1 — Create a New Issue

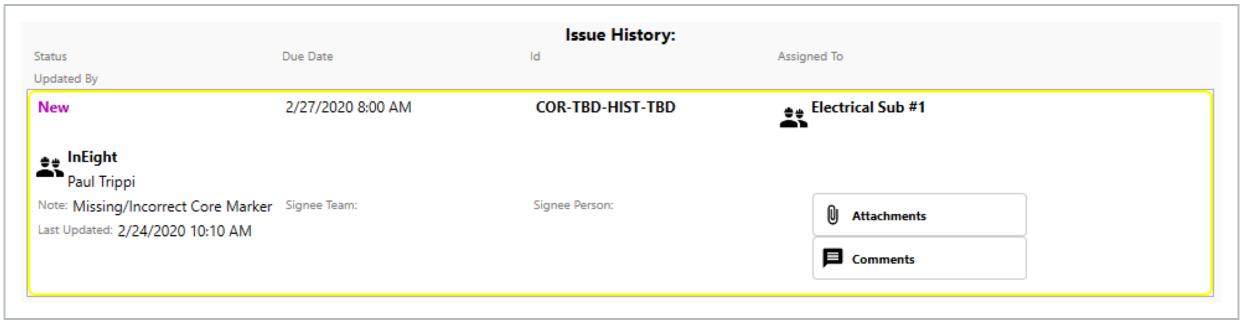
1. Select the **Issues module**.
2. Click on **Create New Issue**.



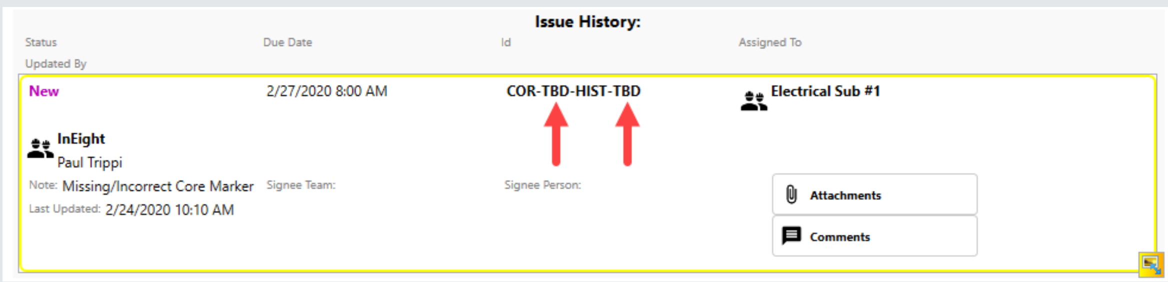
2. For Subtype, select **COR**.
3. For Category, select **Electrical**.
4. For Summary, select **09-Grounding and Bonding**.
5. For Responsible Team, select **Electrical Sub #1**.
6. For Subcontractor select **Electrical Sub #2**.
7. For Location select **Campus A**.
8. For Description type **Missing/Incorrect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



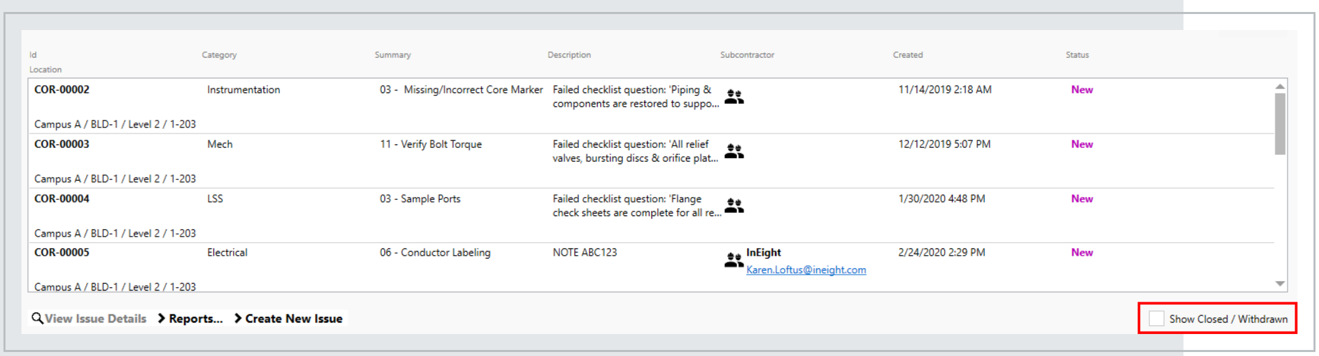
10. Select **OK**. The newly created Issue should look similar to what's shown below.



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.



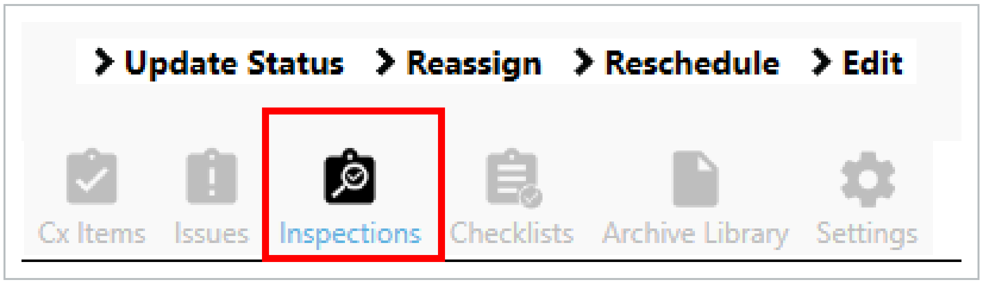
TIP The Issues screen by default displays open issues currently associated with this project. Select the Show Closed/Withdrawn checkbox to view all Issues.



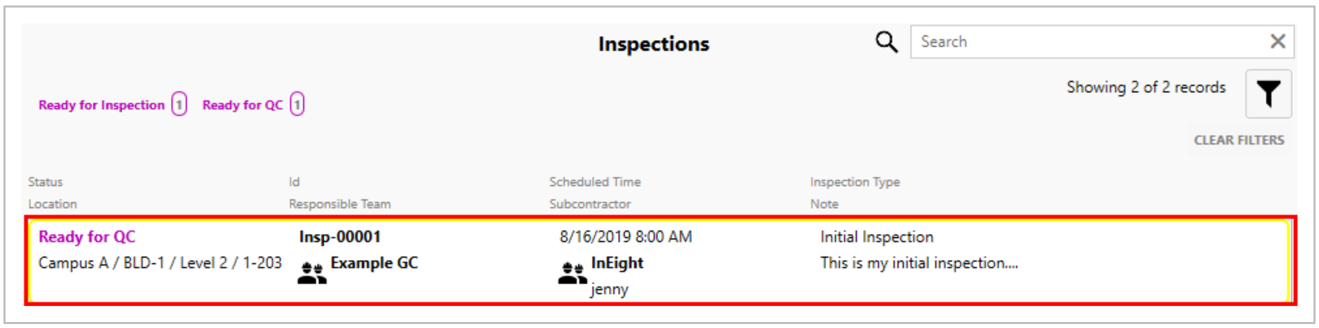
4.1.1.1 Create an Issue from any Available Completions Tabs

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

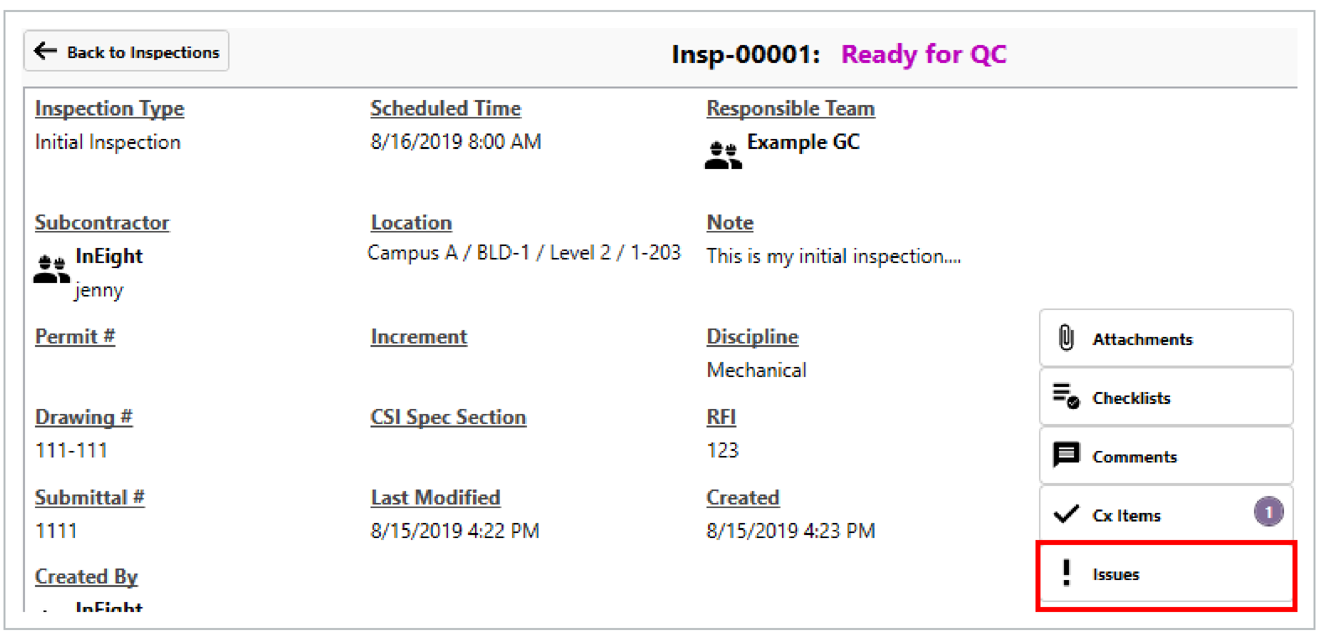
- Some tabs may not be available as they are dependent on how roles and permissions are defined



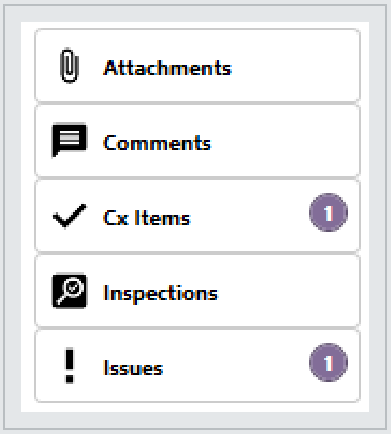
Within Inspections, double click on an open inspection.



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.



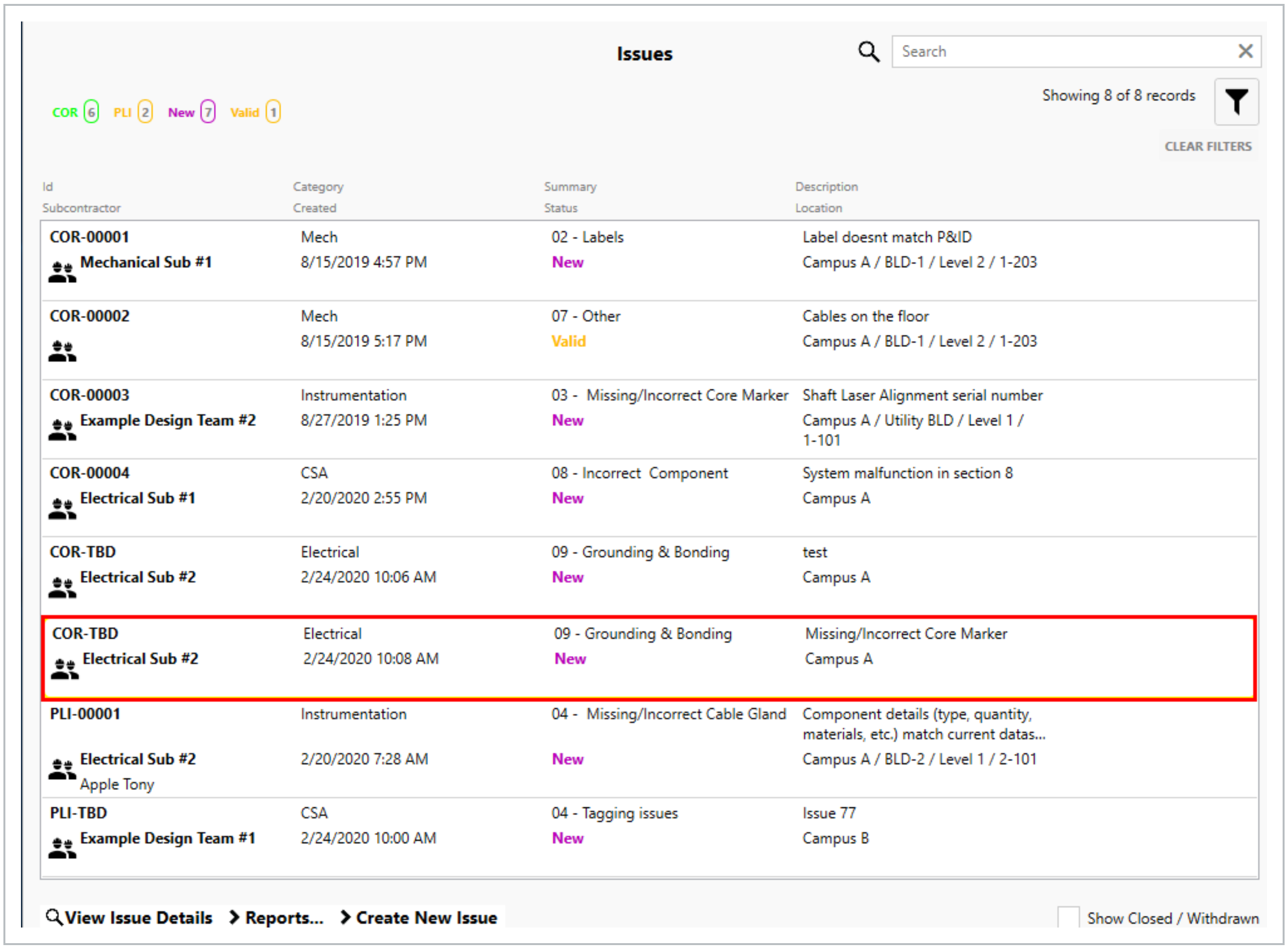
4.2 ISSUE MAINTENANCE

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

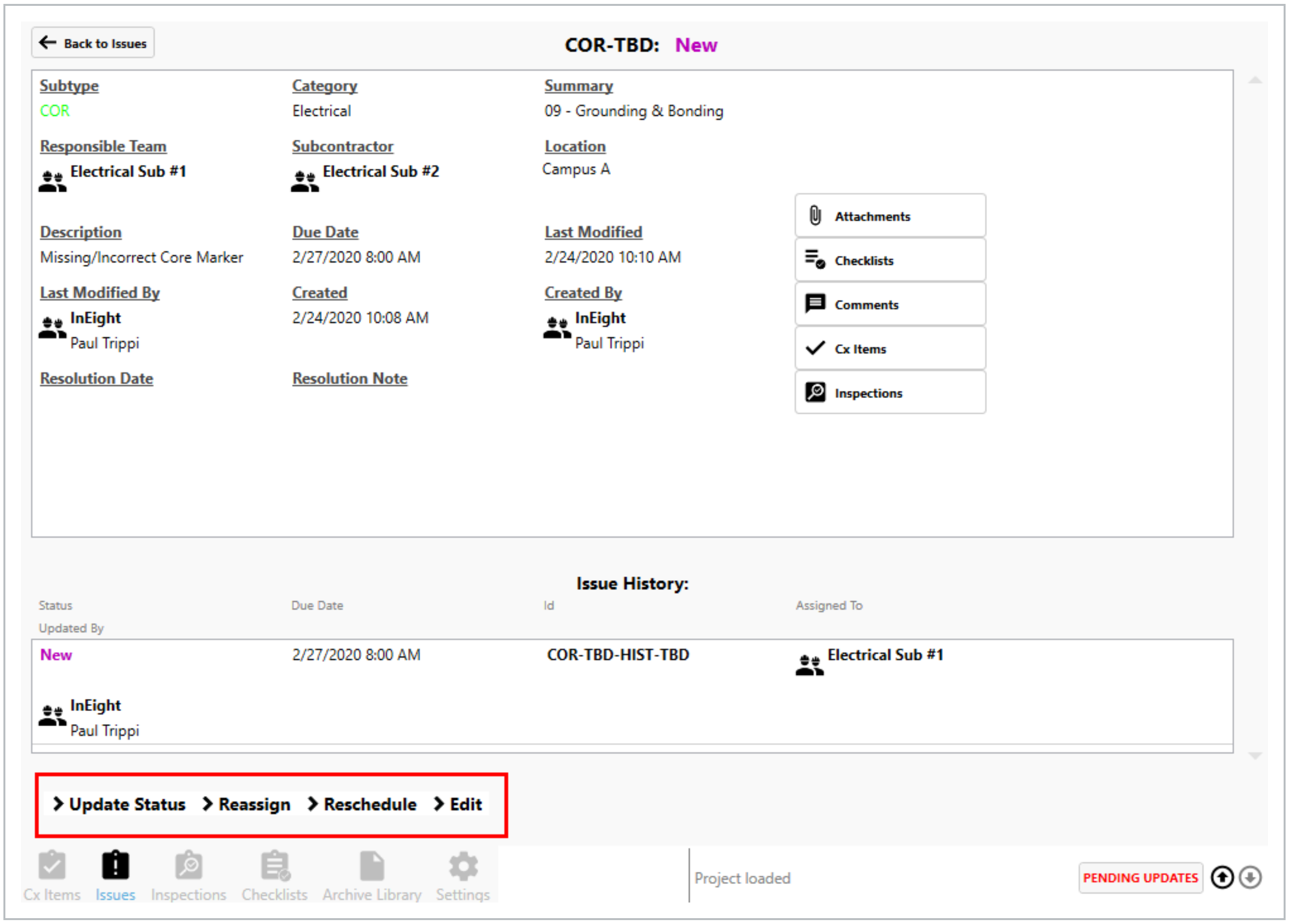
In these cases, it's possible to update the current situation of an Issue using any of the following four status updates:

- Update Status
- Reassign
- Reschedule
- Edit

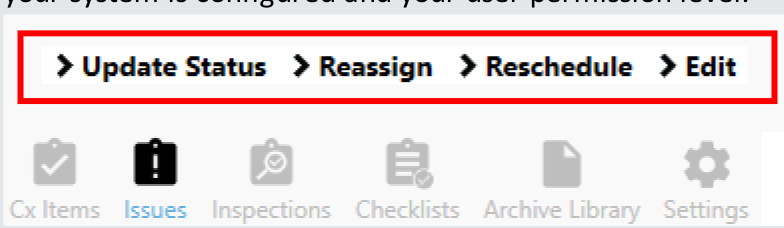
From the Issues tab, double click an issue that needs its status changed.



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



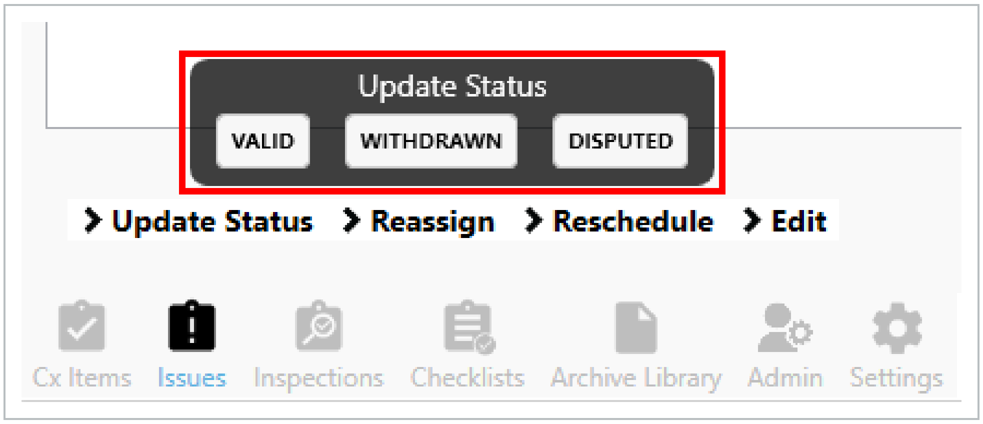
NOTE The options for Update Status, Reassign, Reschedule, and Edit options are all customizable, and depends on how your system is configured. Options depend on how your system is configured and your user permission level.



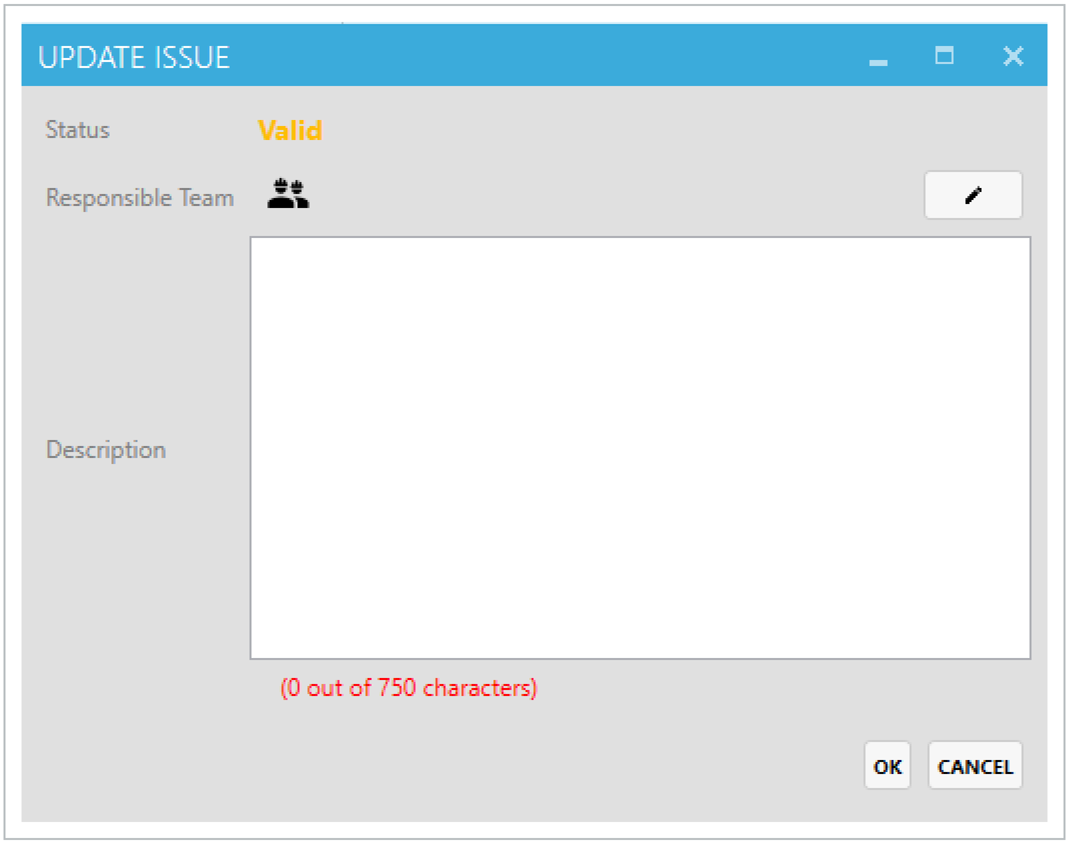
4.2.1 Update Status example

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

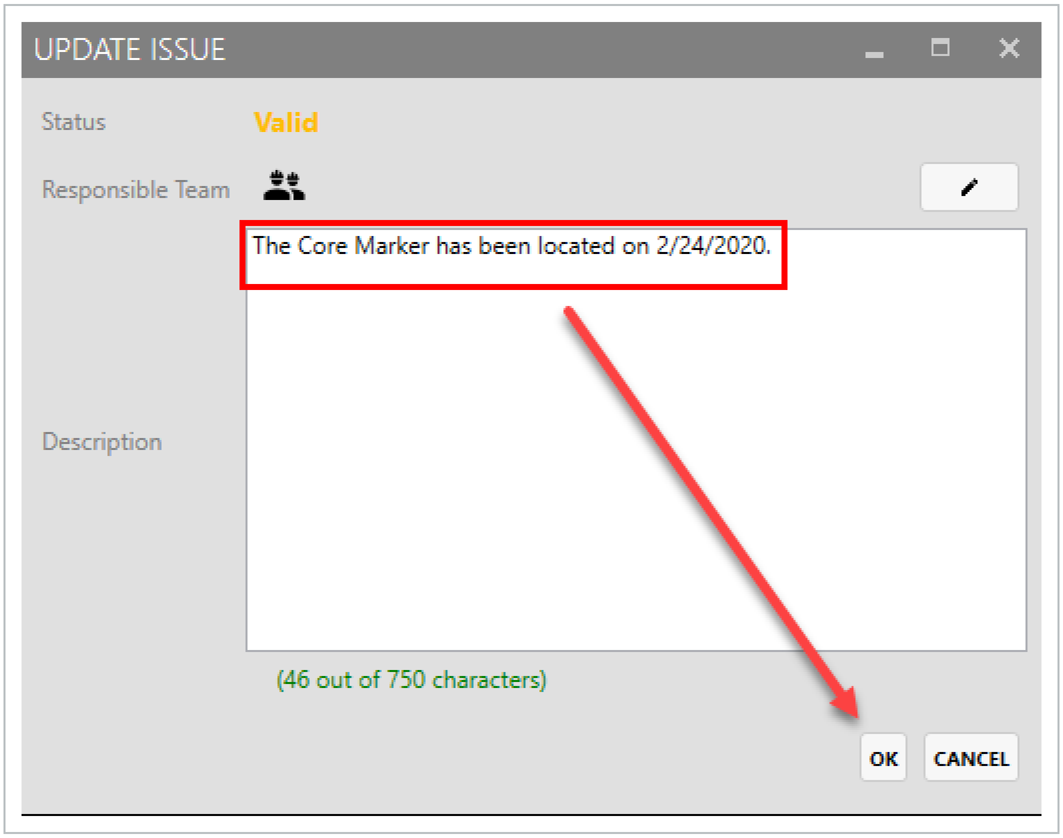
Update Status options are specific to a project. In the below example, the project administrator has created three Update Statuses: Valid, Withdrawn, and Disputed. Your company may choose a different variation of statuses. Resolving an issue is discussed in the Resolve and Issue topic.



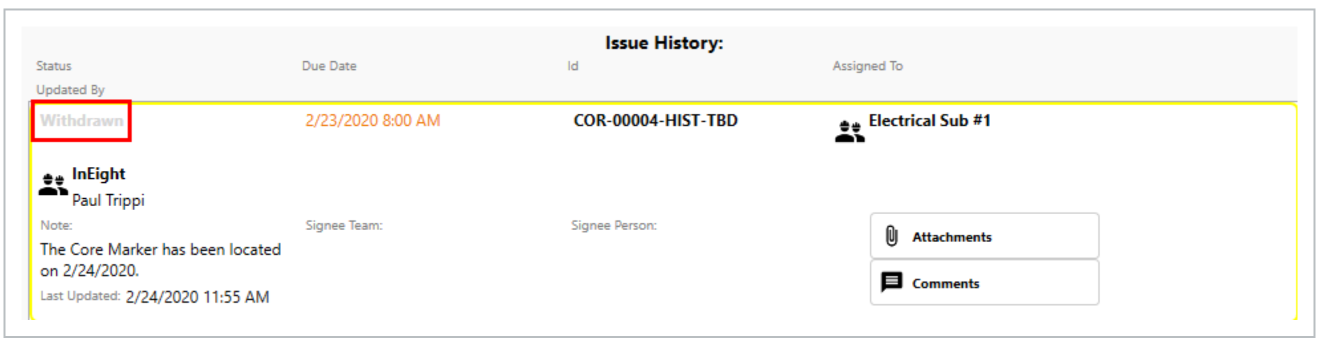
After selecting a status, the Update Issue pop-up window appears, like the one below.



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

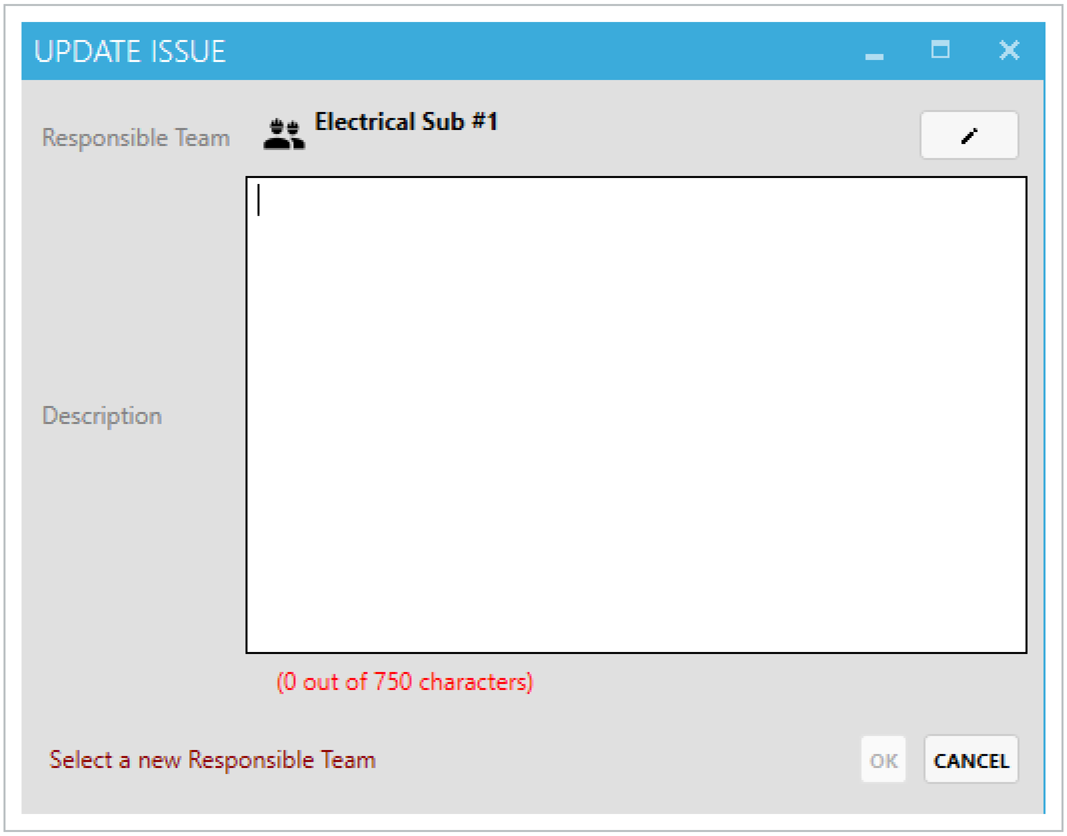


After selecting OK, you return back to the Issues Detail view, where you can see all the history events of this issue including the latest update.

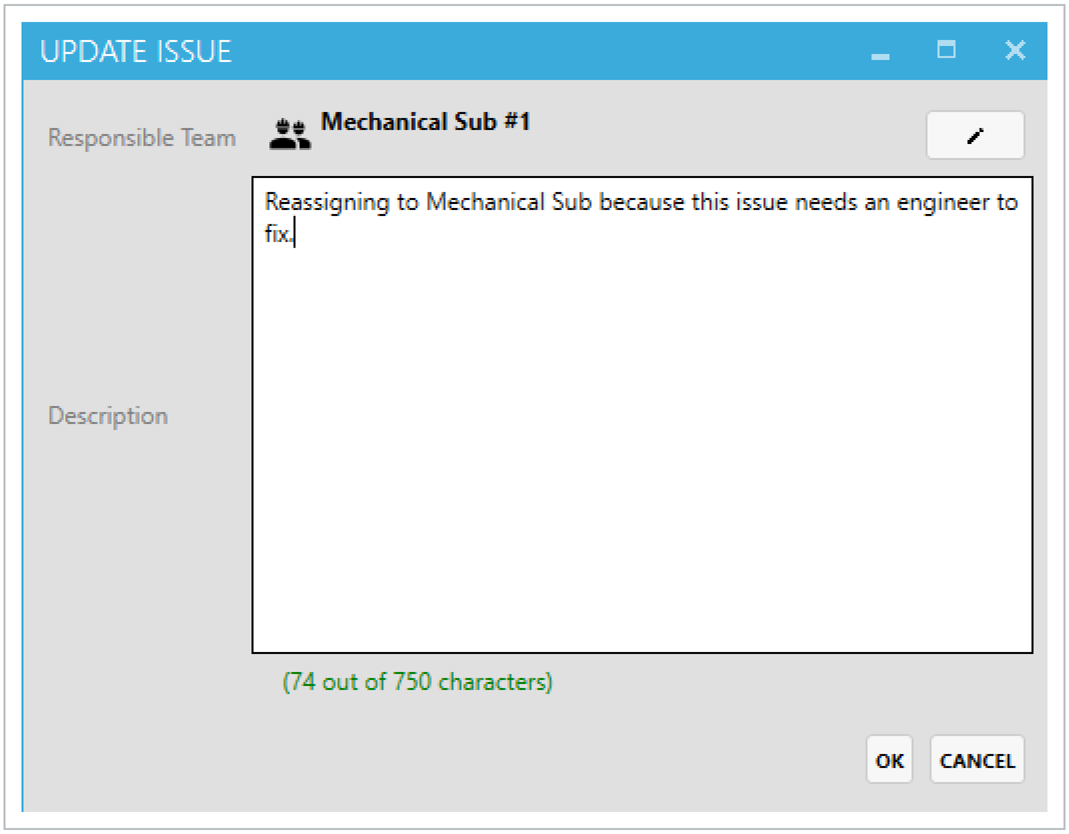


4.2.2 Reassign

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

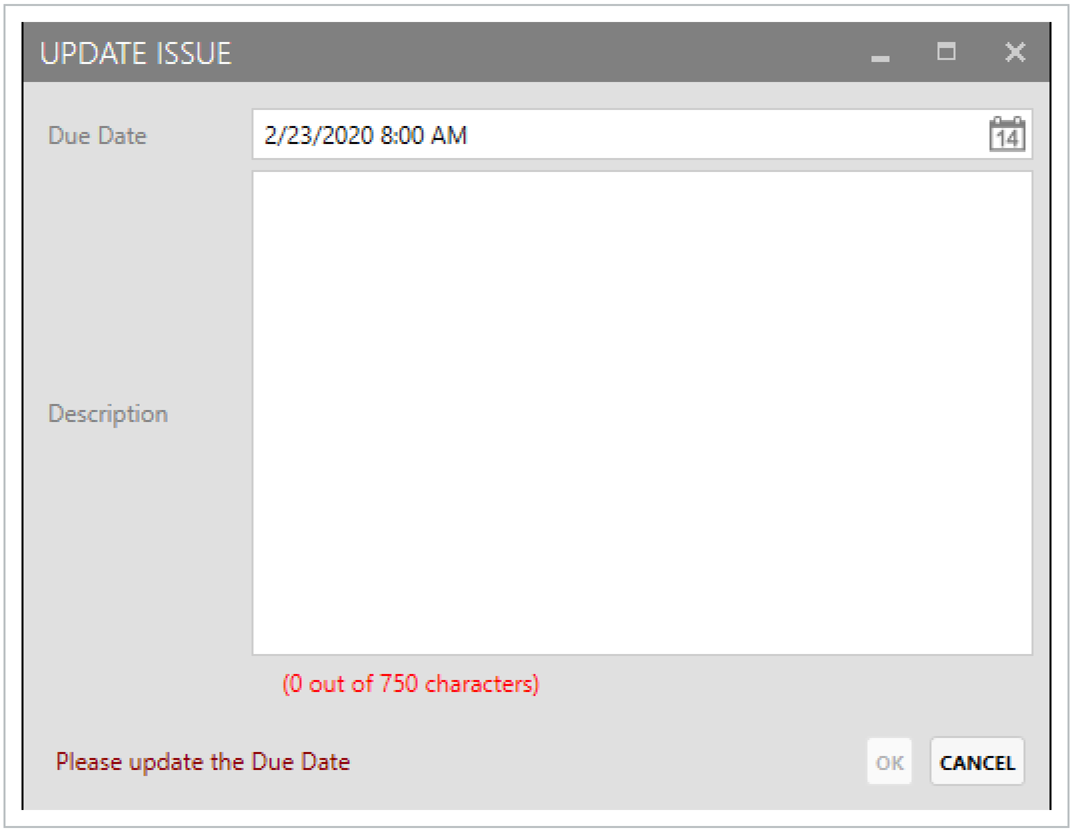


Click the **Pencil** icon to change the Responsible team, and type in a description for the reassignment change, then select **OK**.

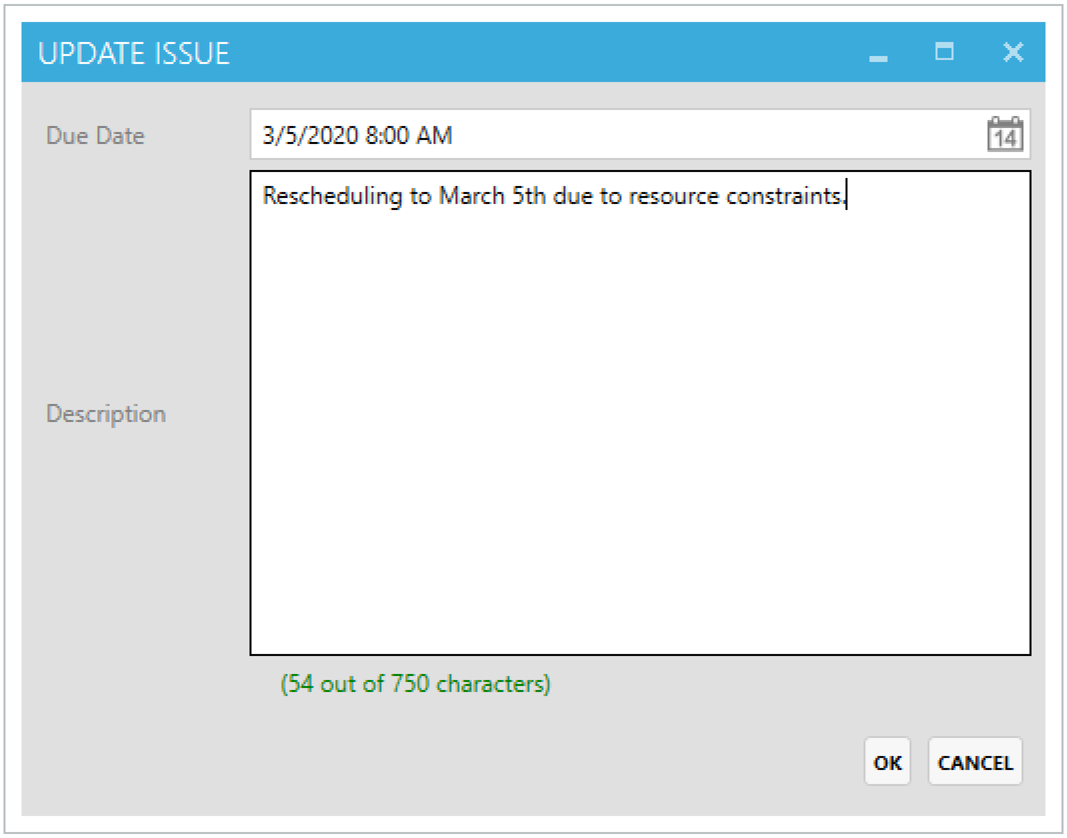


4.2.3 Reschedule

Selecting the Reschedule button allows you to reschedule the issue.

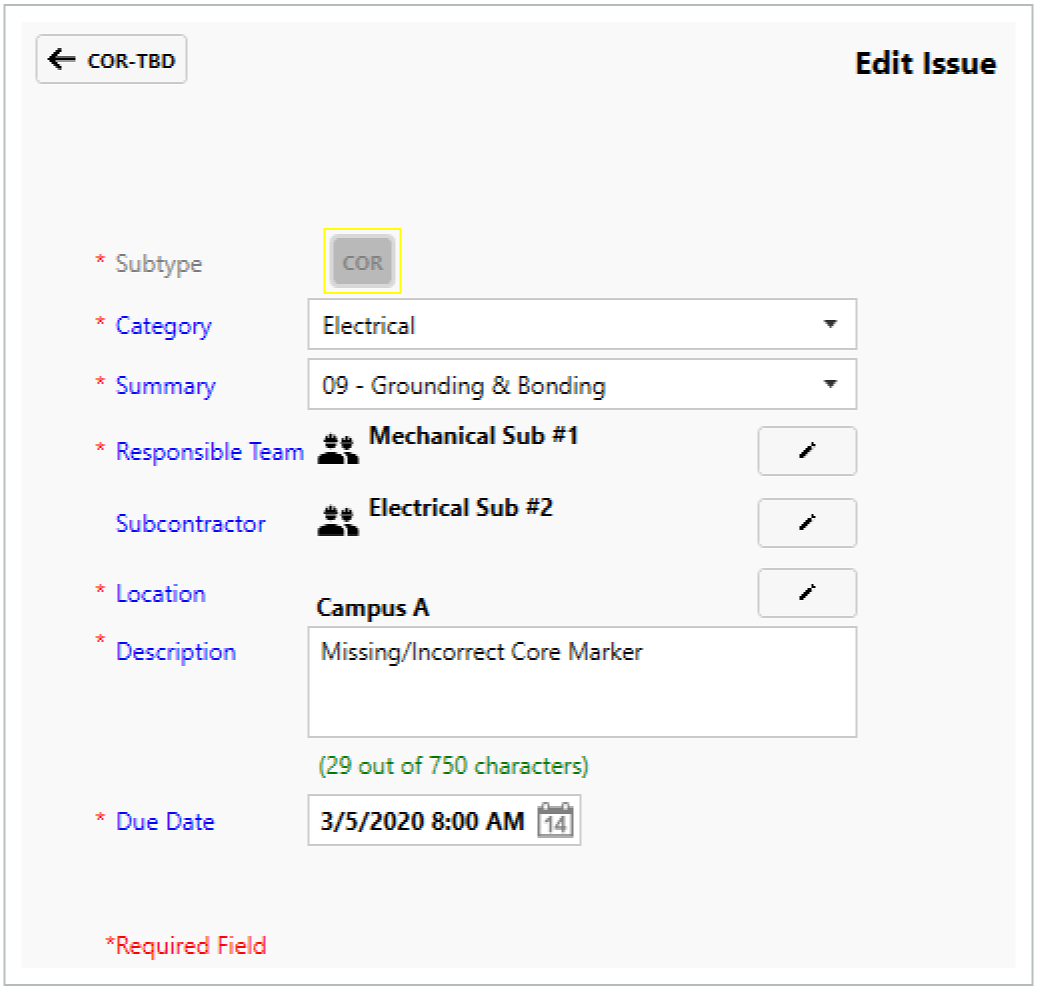


Change the Due Date to the desired date, then enter a description for the reschedule reason.



4.2.4 Edit

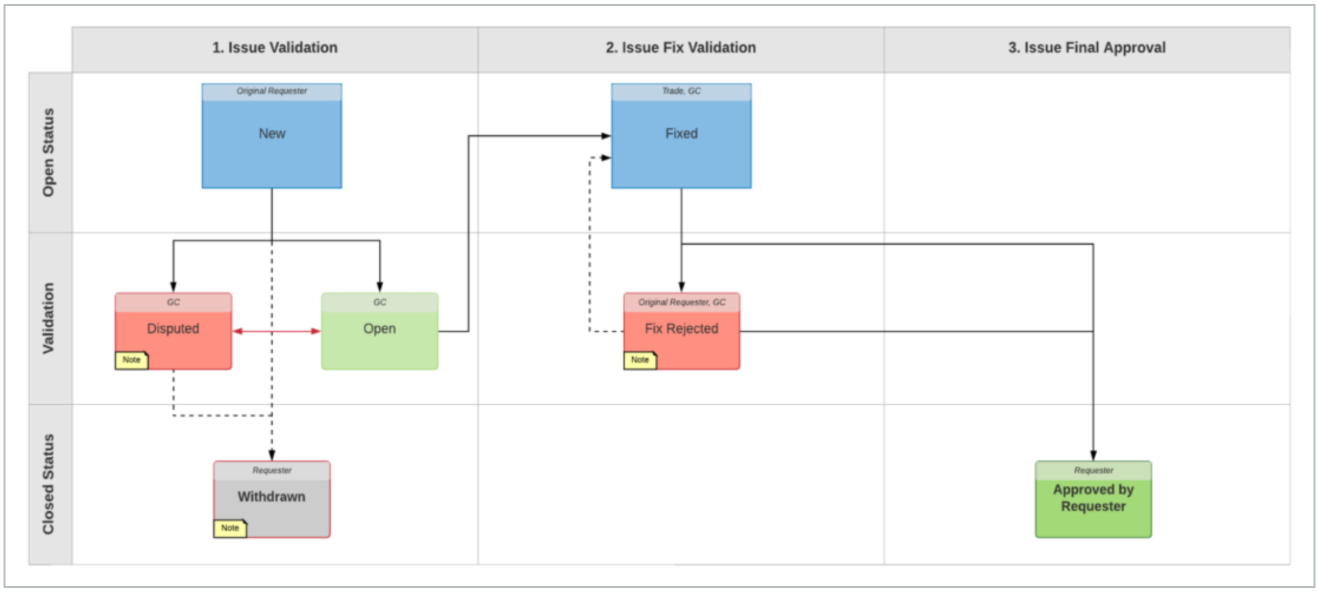
Selecting the Edit button allows you to edit an existing issue, as long as the correct roles and permissions are assigned.



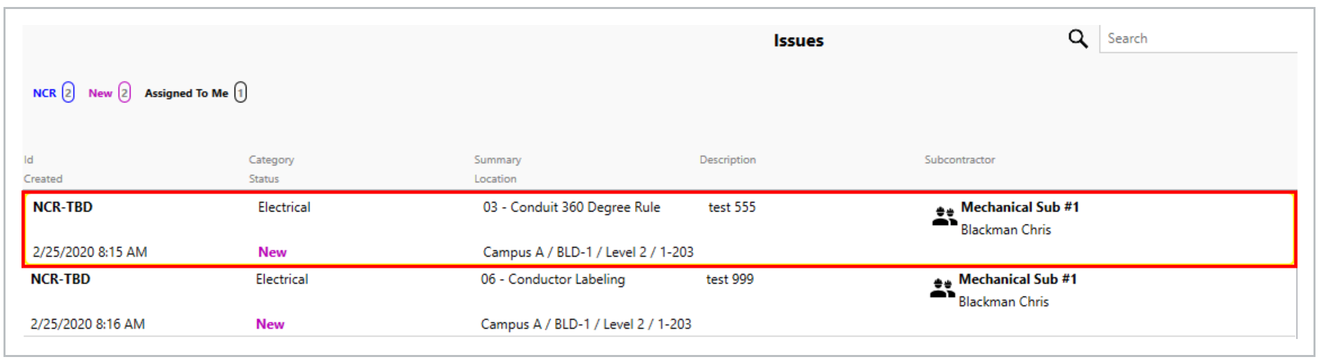
4.3 RESOLVE AN ISSUE

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.

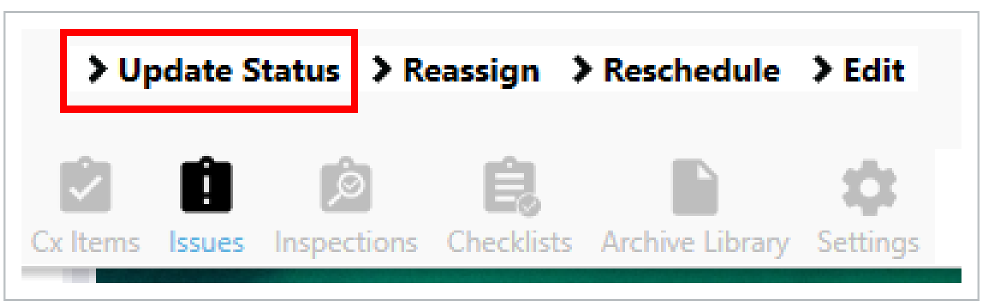
1. Issue Validation
2. Issue Fix Validation
3. Final Approval



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

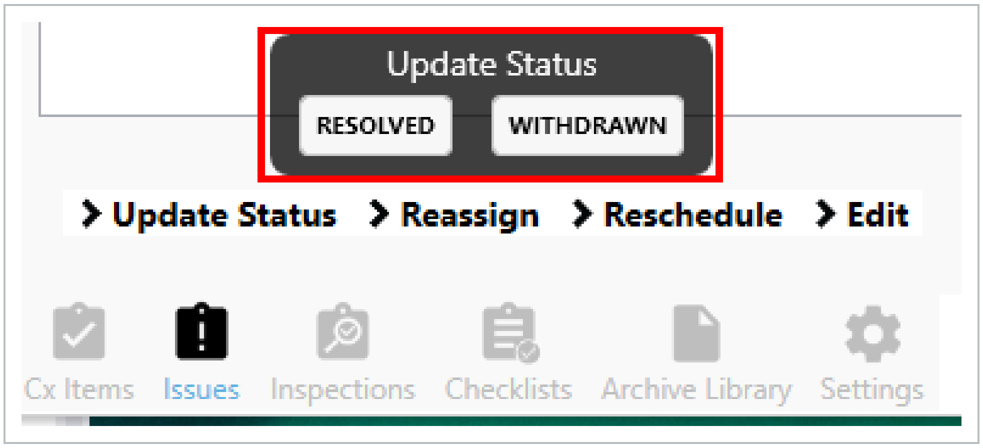


At the bottom of the screen select the **> Update Status** menu option.



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.

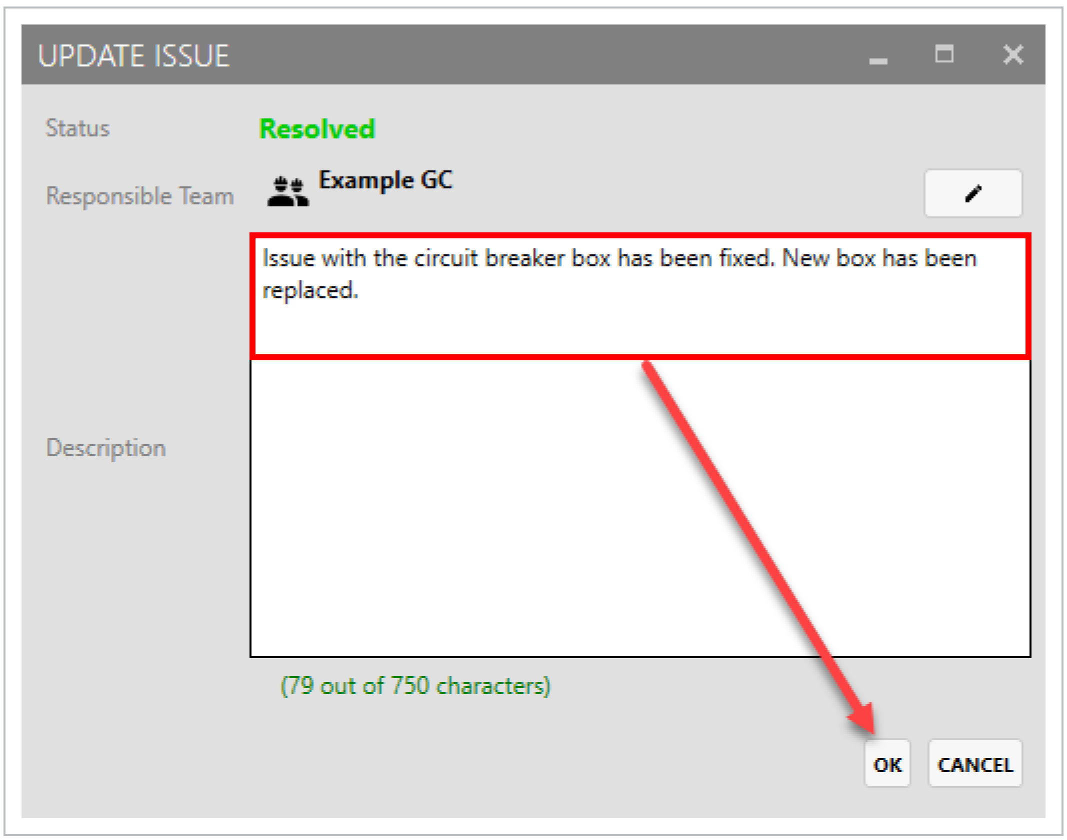
Below is showing an example of two possible Issue Update Status options.



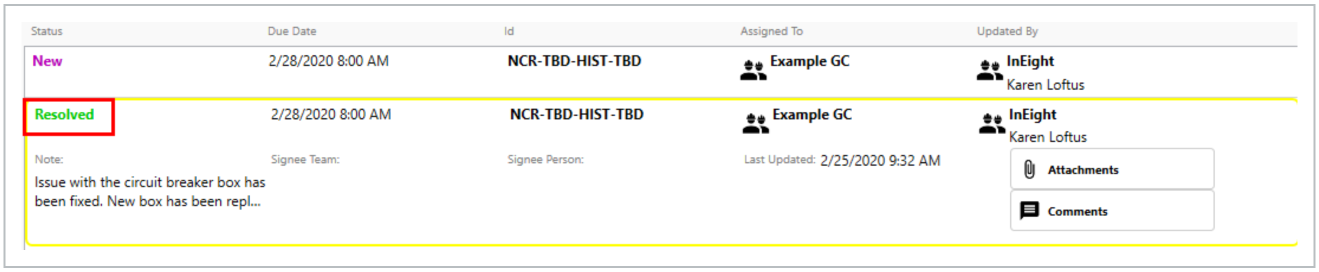
In this example, after selecting Resolved, an Update Issue pop-up box appears allowing you to:

- 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

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

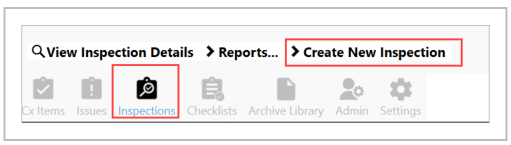
EXAMPLE: A field engineer is performing a weekly walk. He finds the relevant inspection, updates the information, assigns the responsible parties, and finally updates the inspection status.

5.1.1 Create a New Inspection

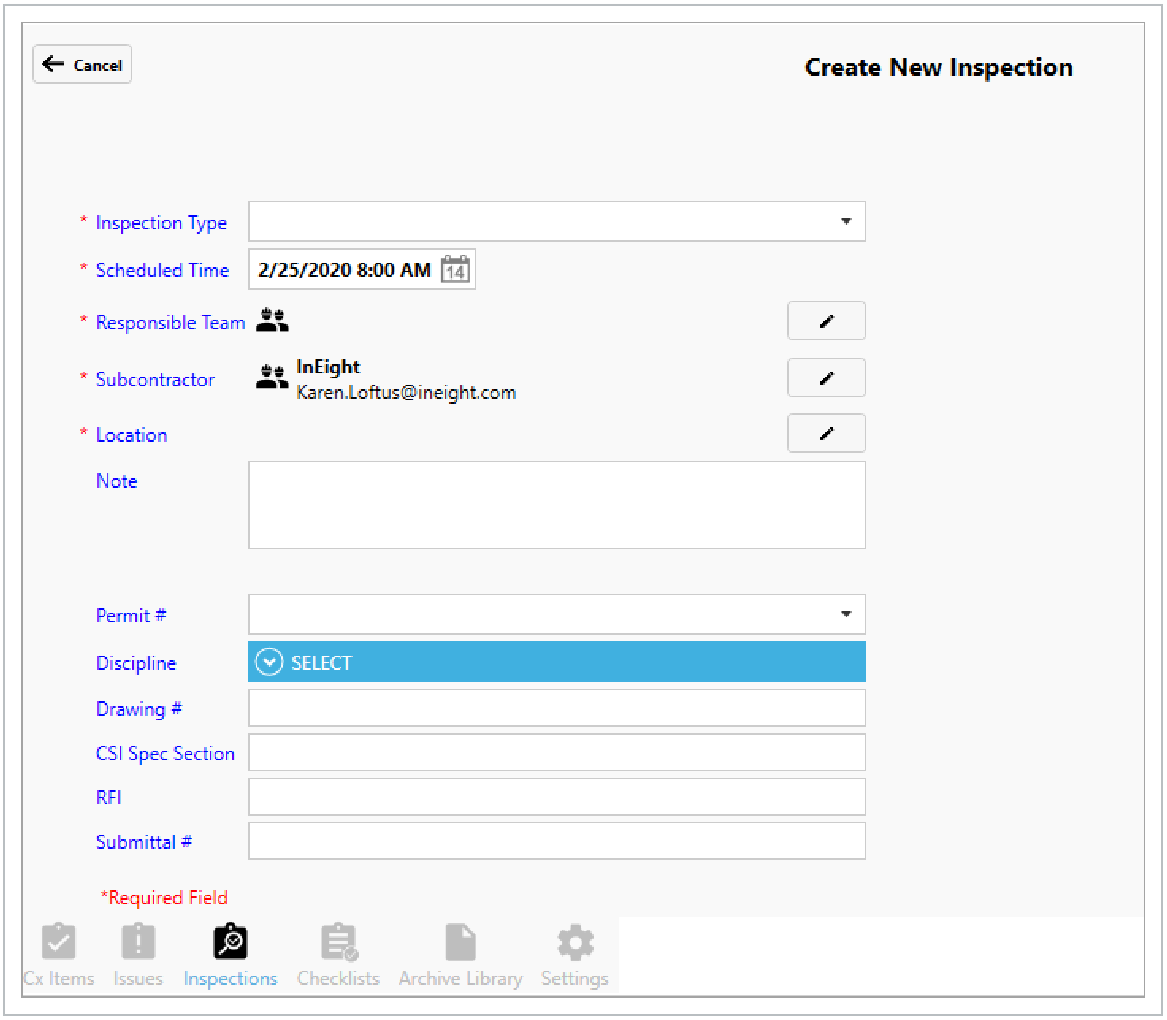
In order to create a Inspection, do the following:

5.1 Step by Step 1 — Create a New Standalone Inspection

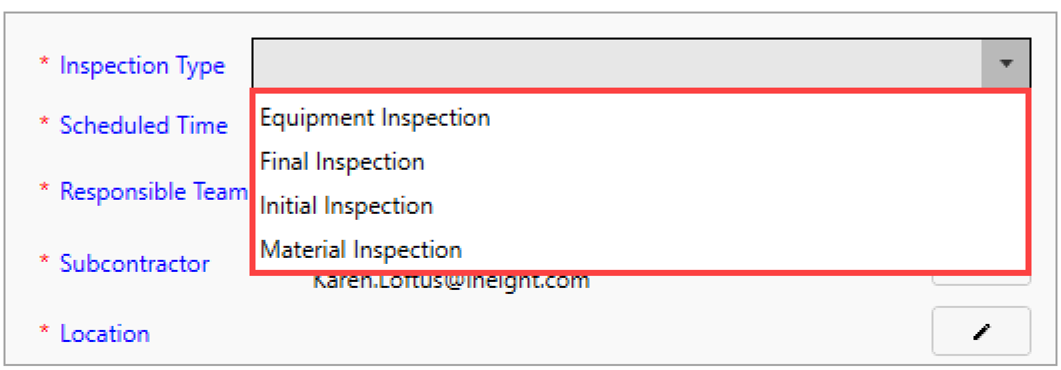
1. Click on the **Inspections** tab.
2. Click on the **Create New Inspection** button.



- The Create New Inspection window appears

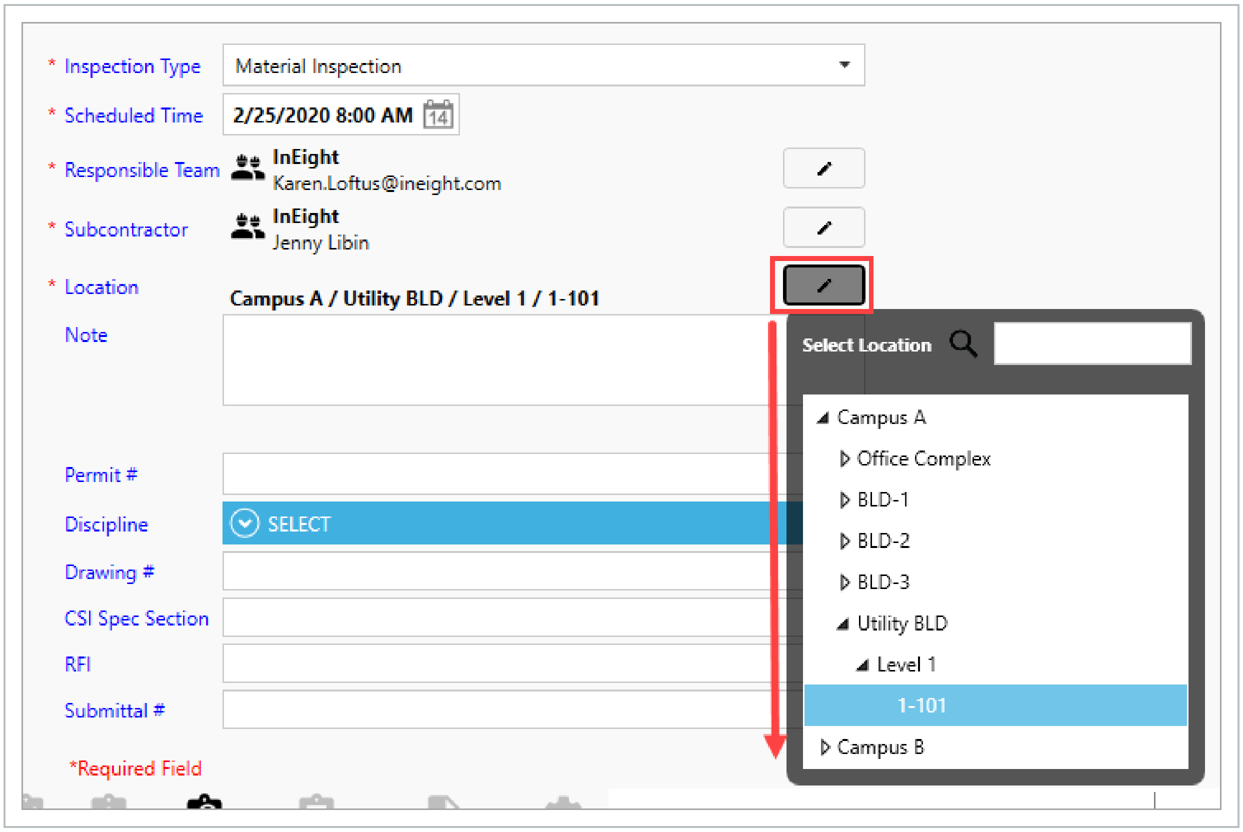


3. Select the Inspection Type from the drop-down.



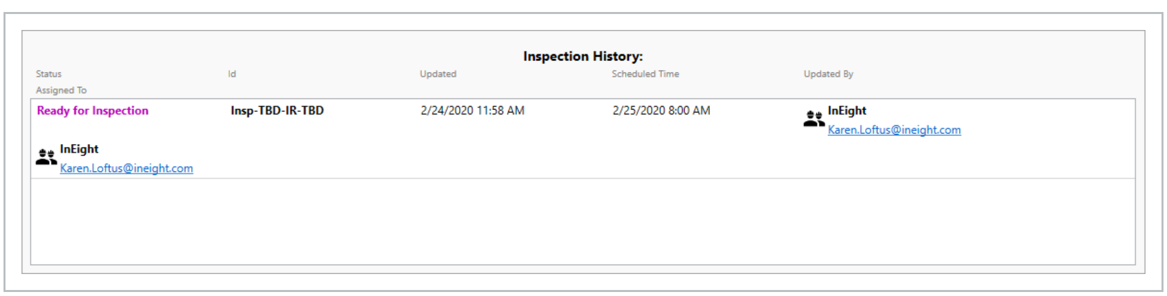
4. Update the Scheduled Time if not accurate by clicking on the **Calendar** icon.
5. Select a Responsible Team/Person by clicking on the **Pencil** icon, and drilling down as needed.
6. Select the Subcontractor by clicking on the **Pencil** icon.

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

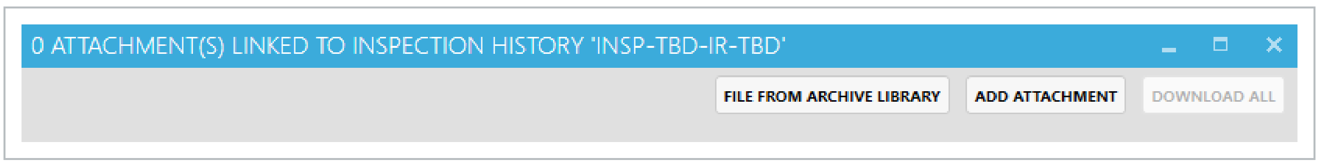
With one or more inspections already planned and assigned, you might need to pull up an existing inspection.

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.

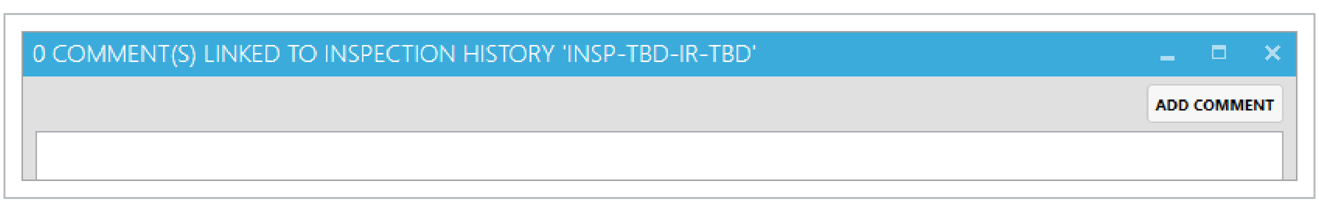


5.1.2.2 Add or Link a Checklist

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

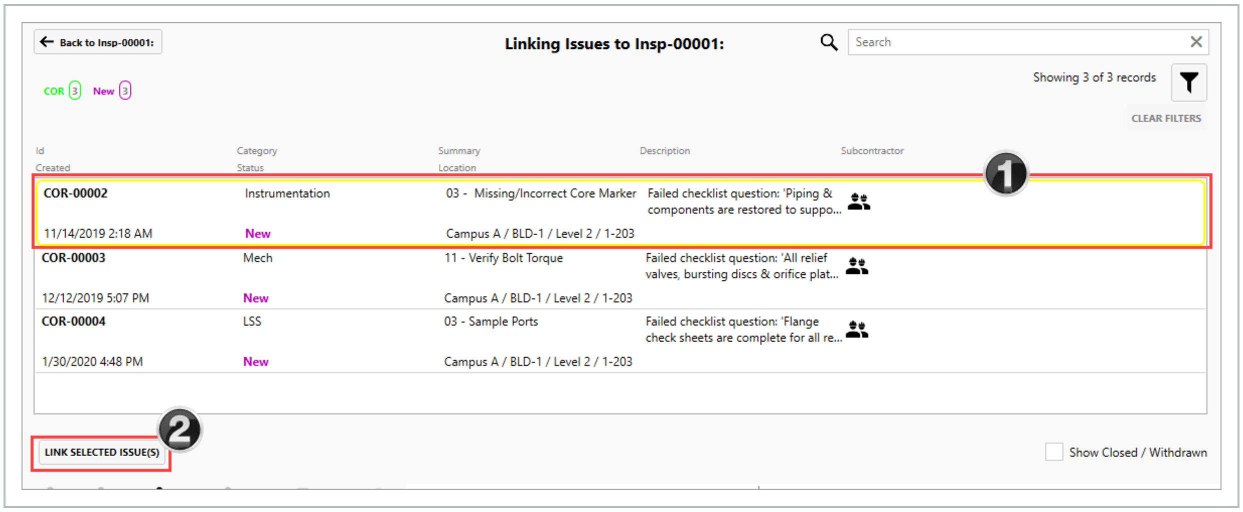
If the **Issues** button is selected, a new pop-up window appears where an Issue can be added, or links made to current, existing issues.

To learn more about issues, see the Issues lesson.

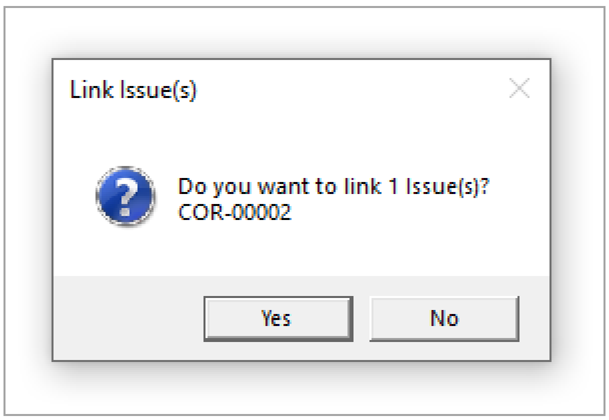
If the Link Existing Issues button is selected, a new pop-up appears identifying New Issues.

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

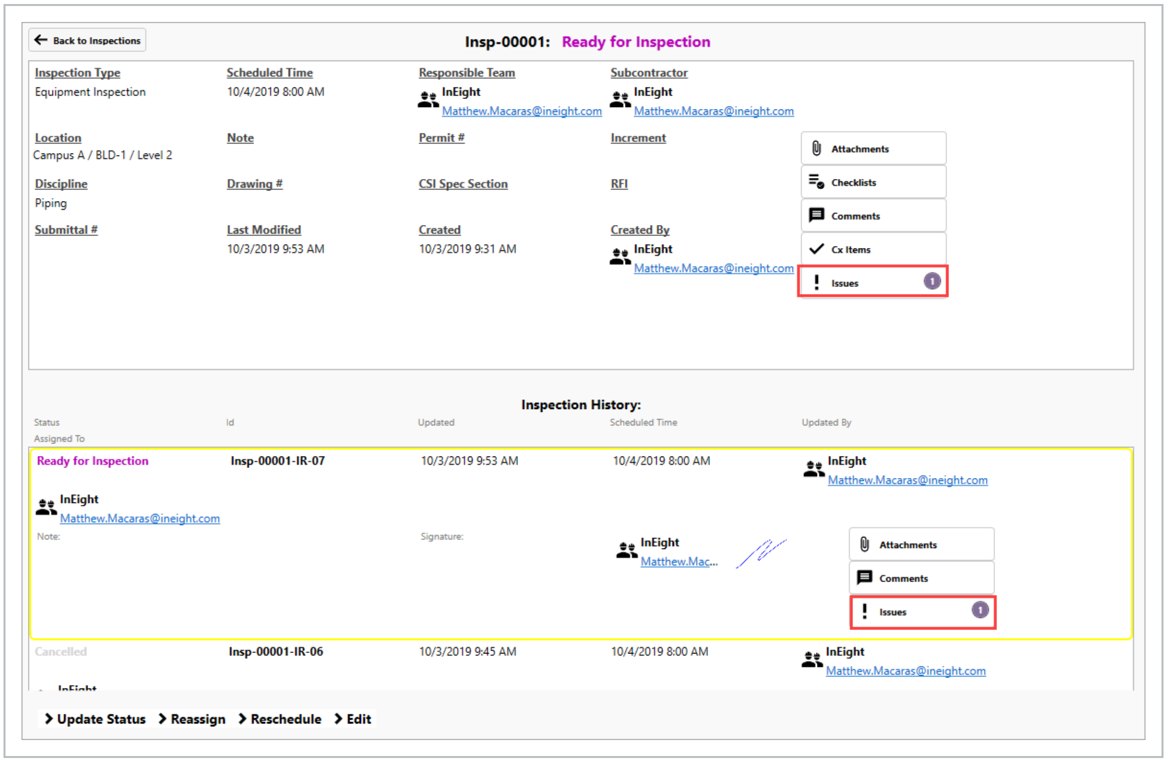
1. Click on **Inspections**.
2. Double-click on an Inspection **line item**.
3. Click on the most current **Ready for Inspection line item** in the Inspection History.
4. Click on the **Issues** button.
5. Click the **Link Existing Issue(s)** button.
6. From the resulting pop-up window, select the **New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



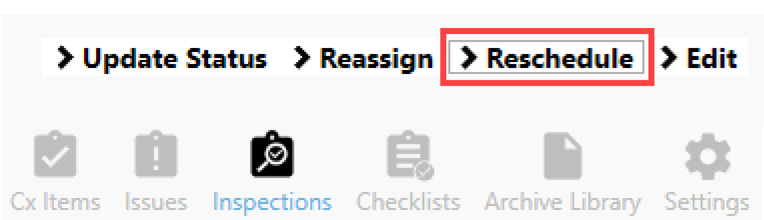
5.2 INSPECTION MAINTENANCE

5.2.1 Reschedule Inspections

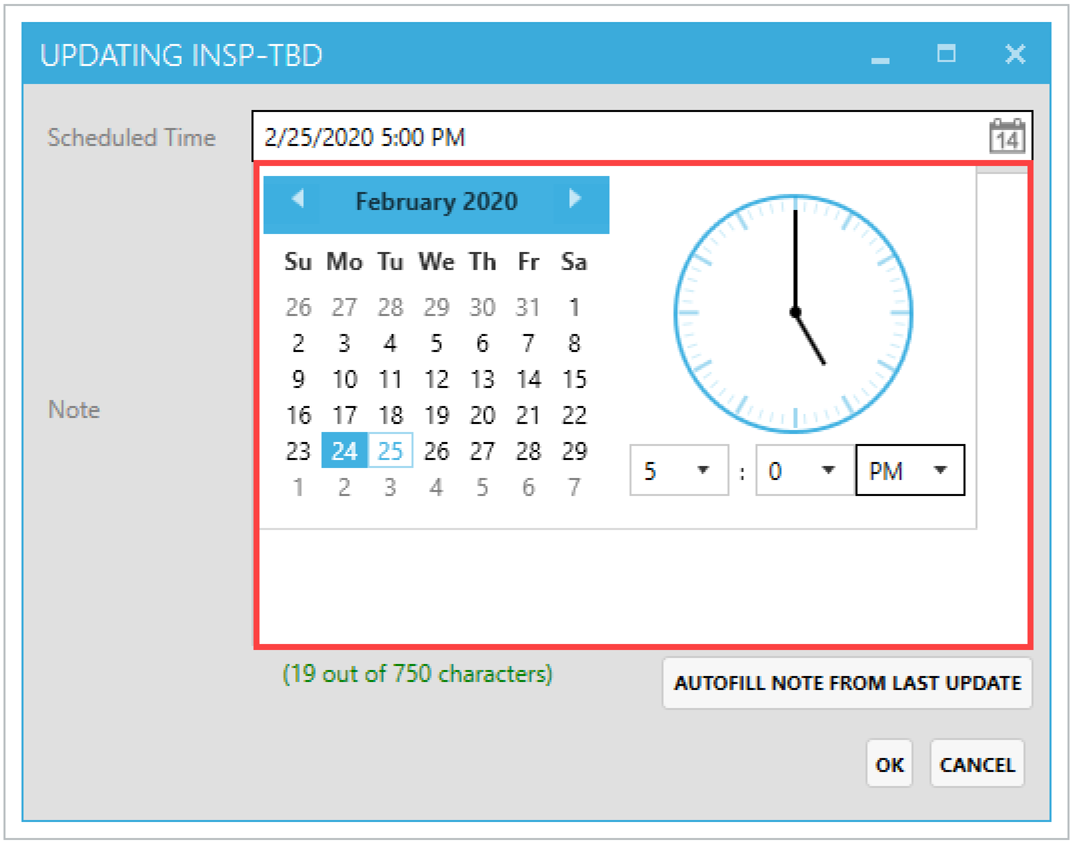
At times, rescheduling an Inspection may be necessary.

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.

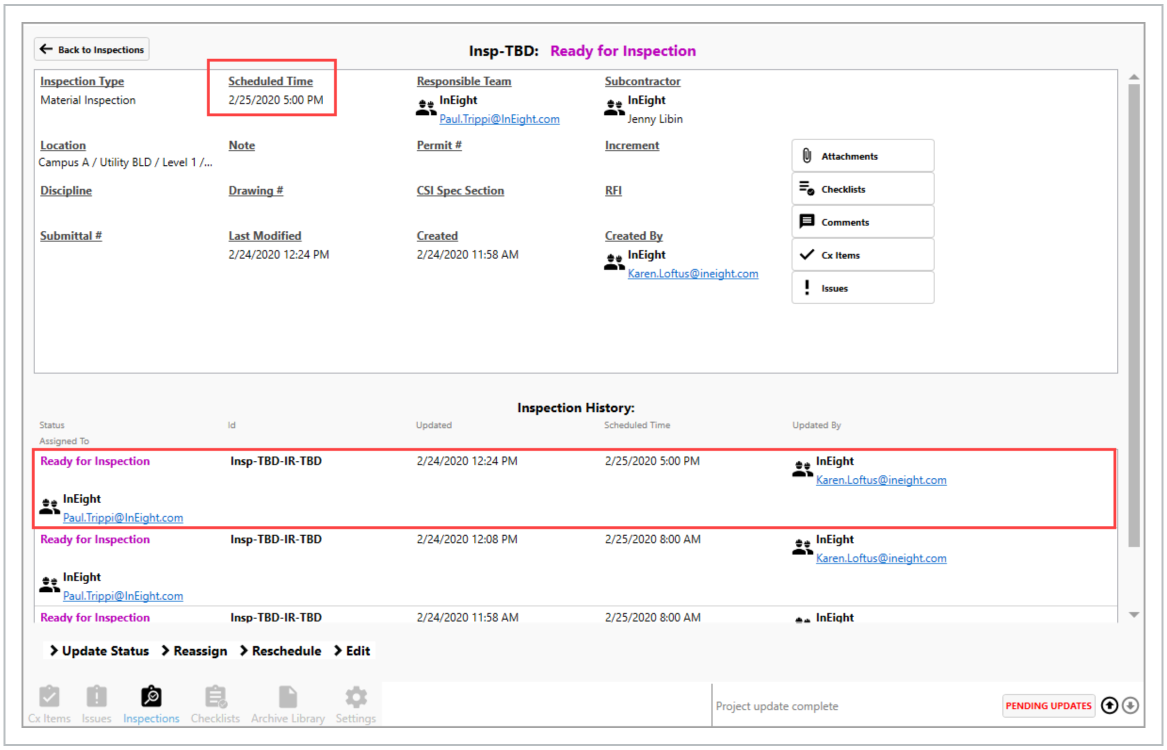


4. Click on the **Calendar** icon.
5. From within the pop-up window, select a new date and time for the inspection.



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



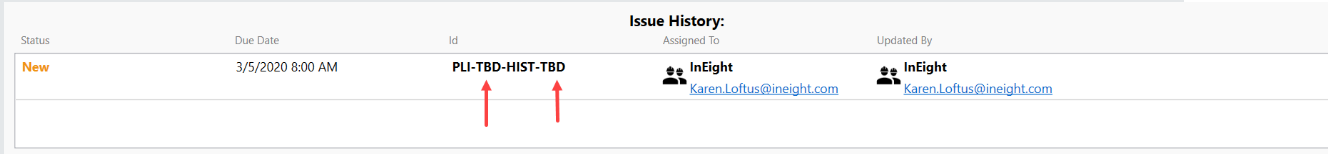
5.2.2 Edit an Inspection

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.



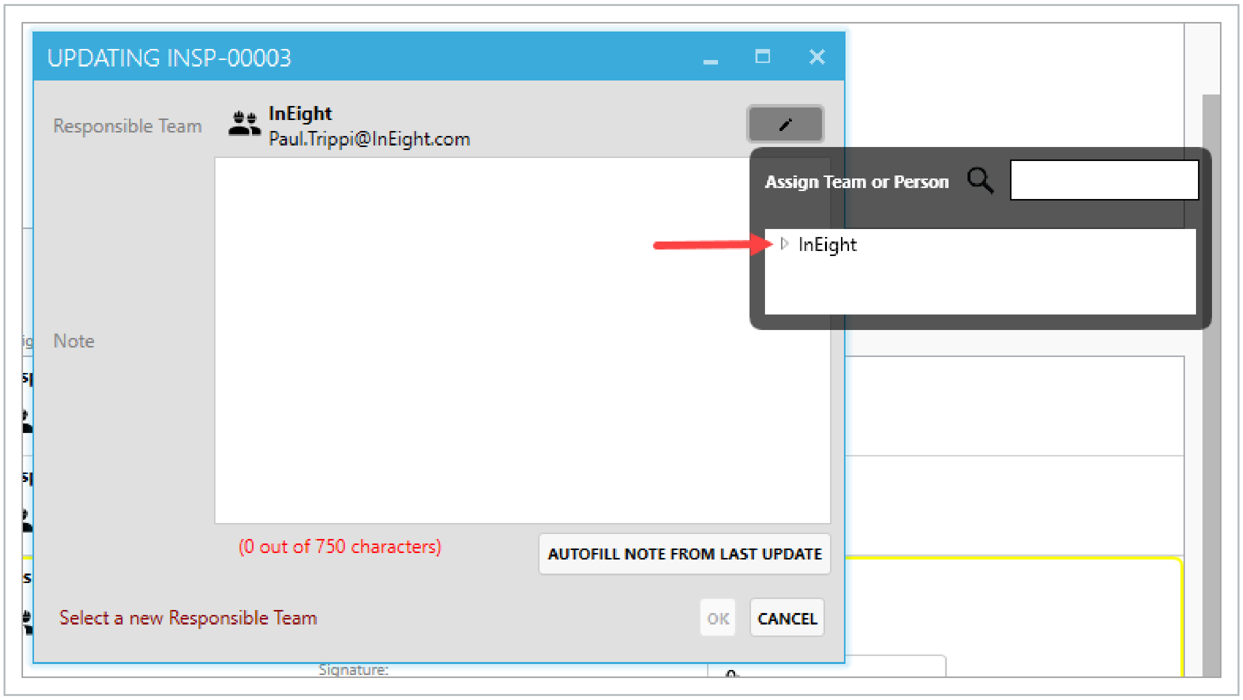
5.2.3 Reassign an Inspection

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

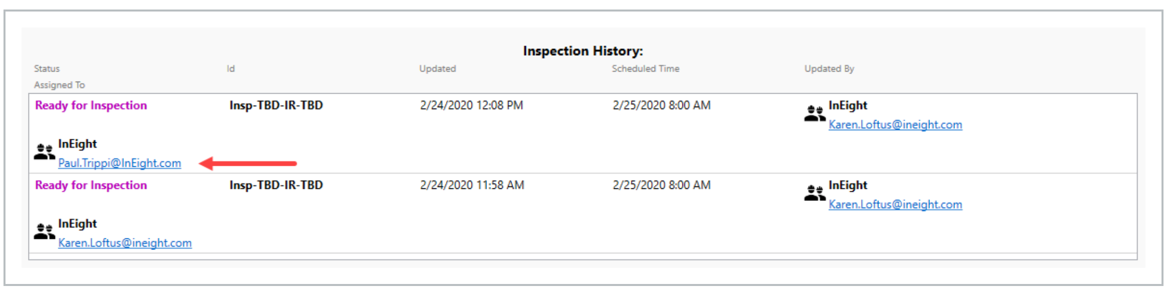
5.2 Step by Step 3 — Reassign an Inspection

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



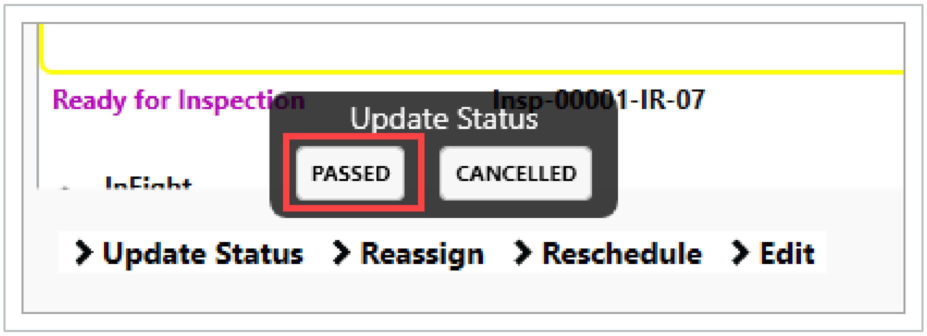
5.3 COMPLETE AN INSPECTION

5.3.1 Complete an Inspection

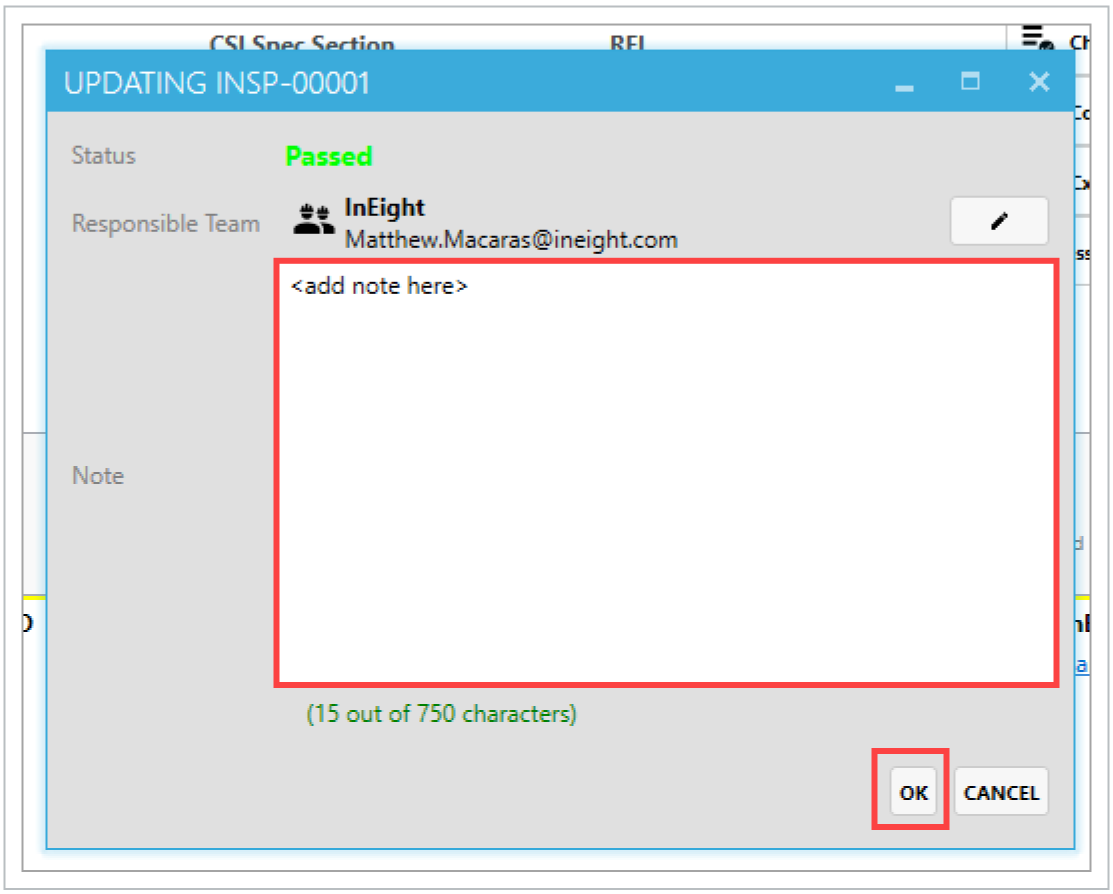
As an Inspection becomes complete, it's important to Complete the Inspection to attain an accurate and timely project.

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.

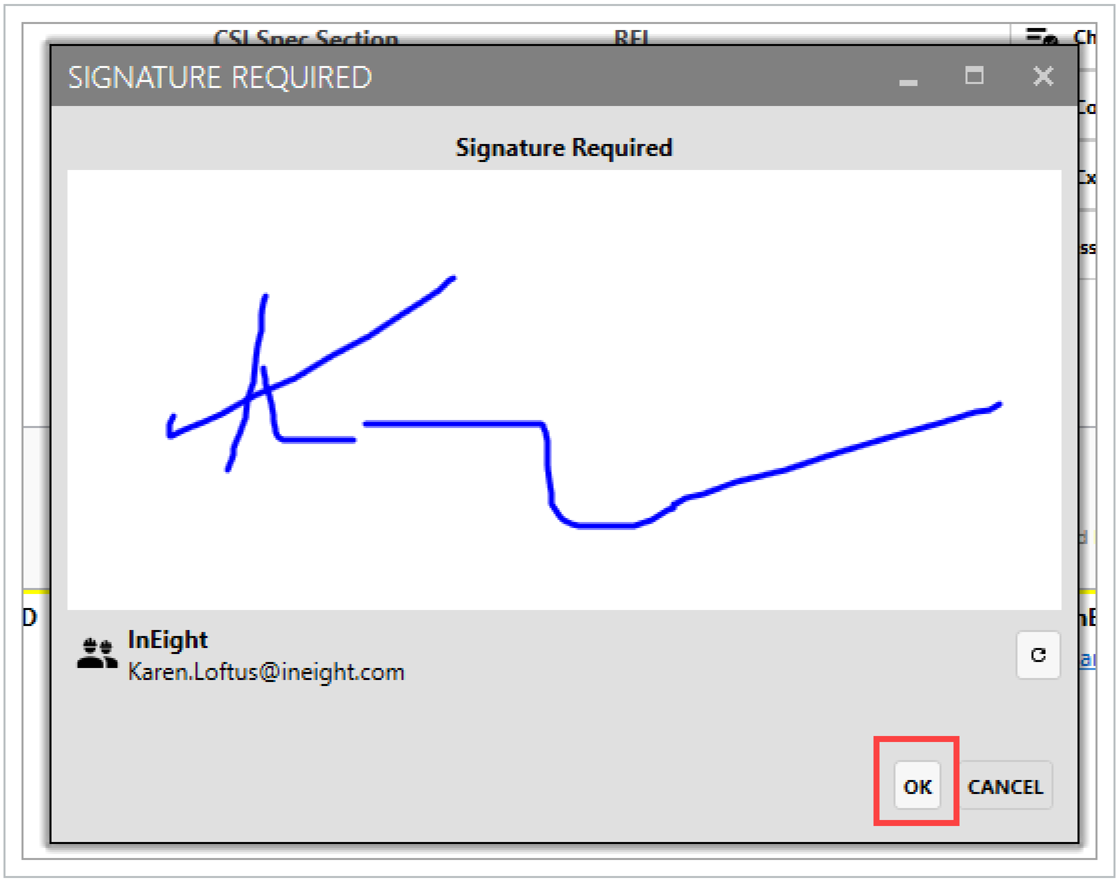


3. In the subsequent pop-up window, type in an **explanatory note**.
4. Click **OK**.

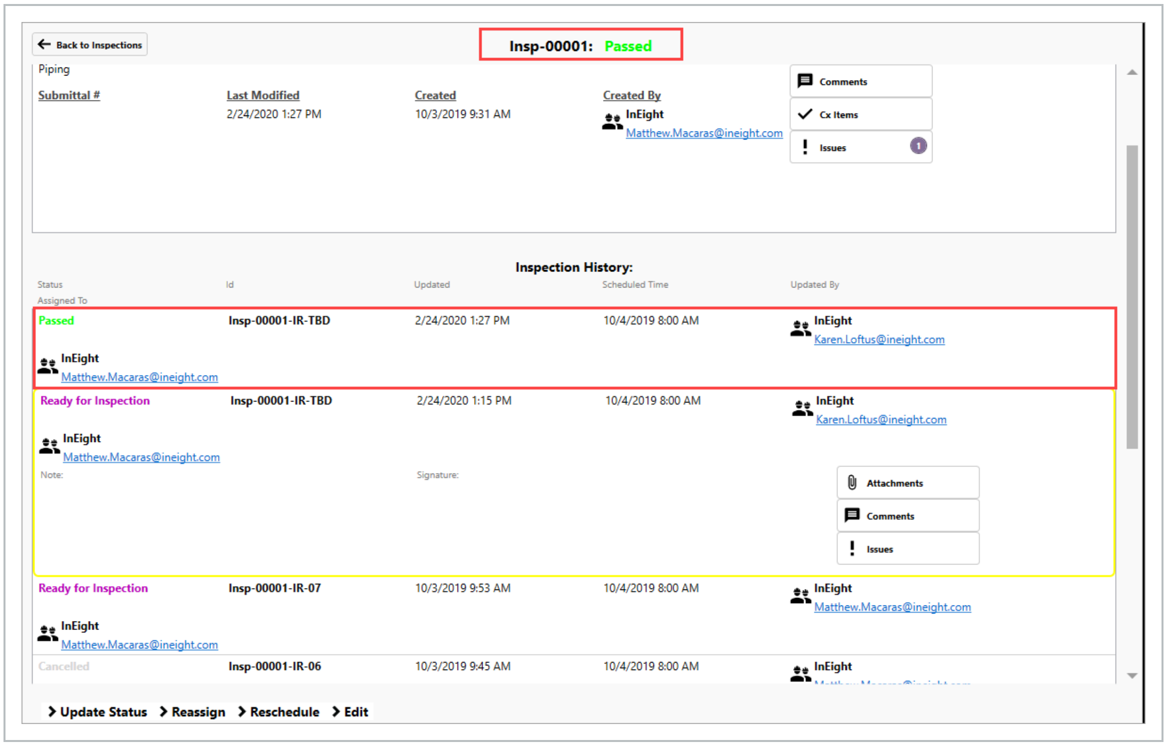


5. In the next pop-up window, **add your signature**, if required.

6. Click **OK**.

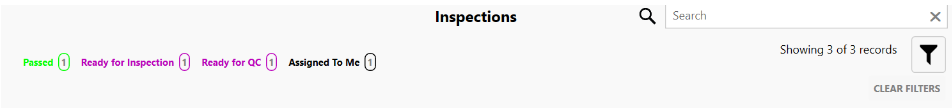

CSI Spec Section
REF
SIGNATURE REQUIRED
Signature Required
InEight
Karen.Loftus@ineight.com
OK
CANCEL

- 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

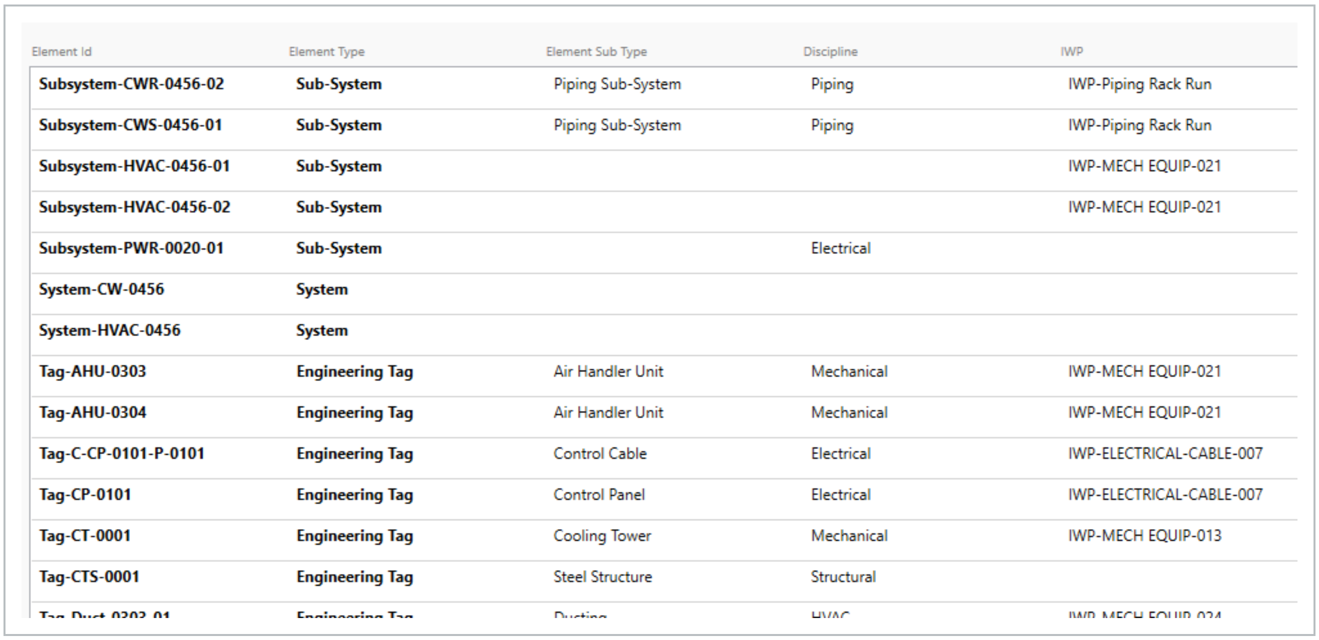
After completing this lesson, you will be able to:

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

Topics in this Lesson

6.1 WORK WITH ELEMENTS

Elements can be considered the smallest components that work is acted upon. Elements provide structure to a project, are classified by type, and have unique features depending on type. Elements are essentially items that hold specific meta-data about a component or a grouping of components. They do not contain any status. Items like checksheets, issues, and inspections, which do contain status, reference elements for the information they contain.



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	

The below table shows some of the different element types.

Element Types	Description
Block	Functional area in a plant that can contain many systems or sub-systems.
System	Sub-systems are parent elements that break larger systems into smaller, more manageable scopes for commissioning and start-up.
Sub-System	A module type element is for projects using a module fabrication and installation philosophy for the project execution.
Construction Tag	A construction tag is a tag that can be created ad-hoc by construction to represent work that needs to be captured in the field.
Engineering	An engineering tag is a tag that has been planned for and created from engineering

Element Types	Description
Tag	sources or construction takeoffs.
ISO	ISOs are most often used to organize spools, valves, bolt ups, and welds typically shown on isometric drawings.
Spool	Spool element types are typically associated under parent element types like ISOs to indicate what piping spools make up the content of a Piping Isometric.
Loop	A loop is for instrument or control system loop checks that are a part of commissioning and start up testing.
Test Package	Test packages are used to capture piping hydro, pneumatic, or flushing events.
Circuit	Circuits are used for energization or testing of power circuits during commissioning.

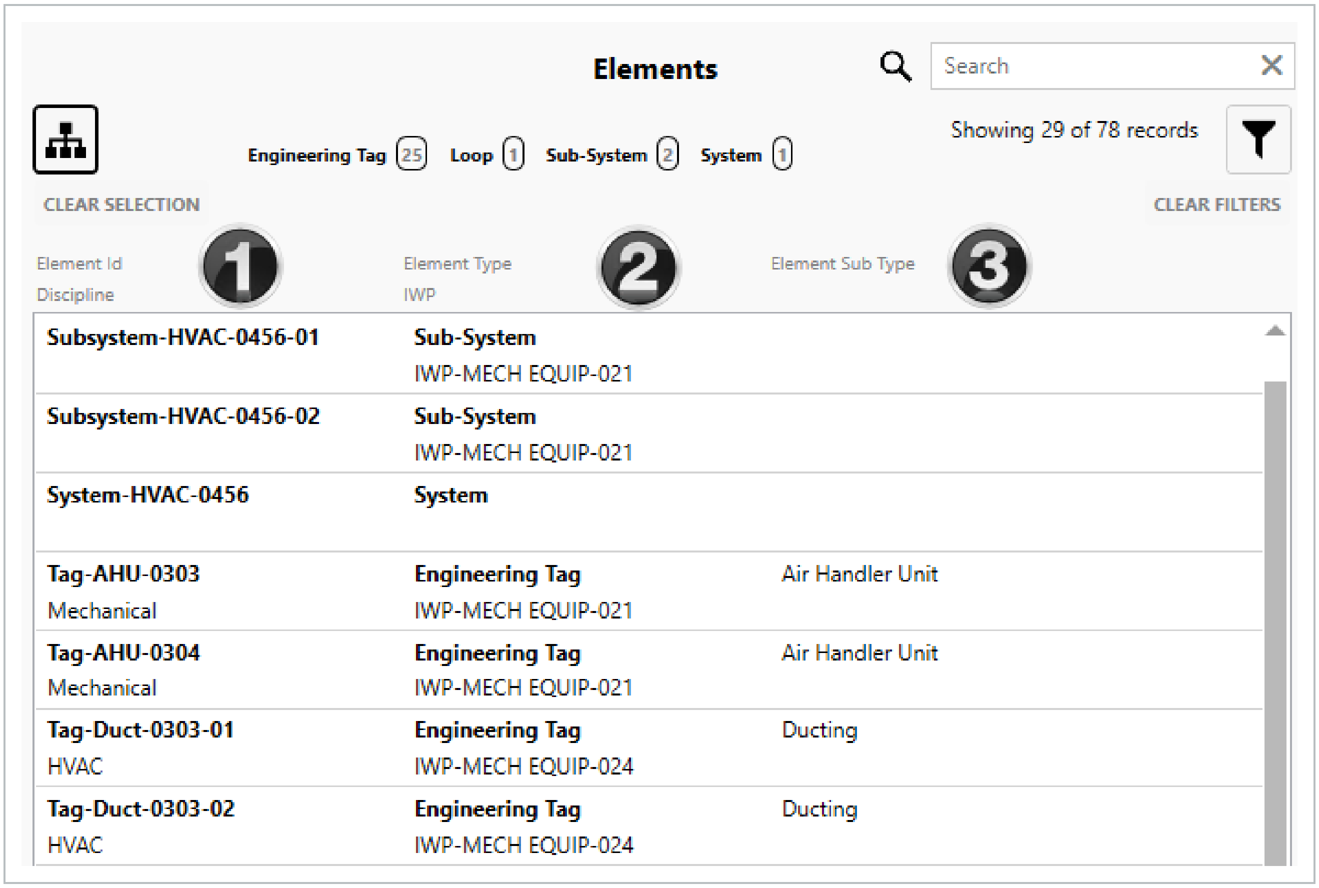
6.1.1 Element Navigation

In the Completions HQ application, to open the Elements page, click the **Elements** icon at the bottom of the page.

NOTE	Module order and its functionality might differ from what is shown above.

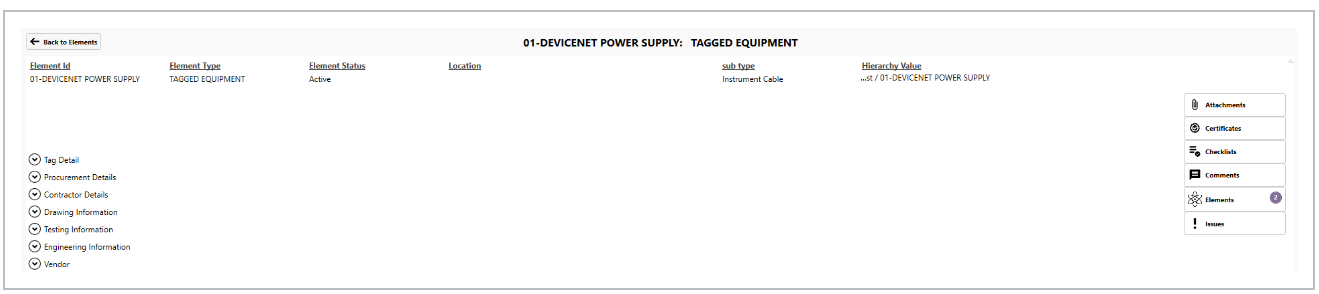
While customizable, on the Element screen some core columns include:

Item	Description
1	Identification number of an element
2	Element types, as detailed in the table above
3	Element sub types

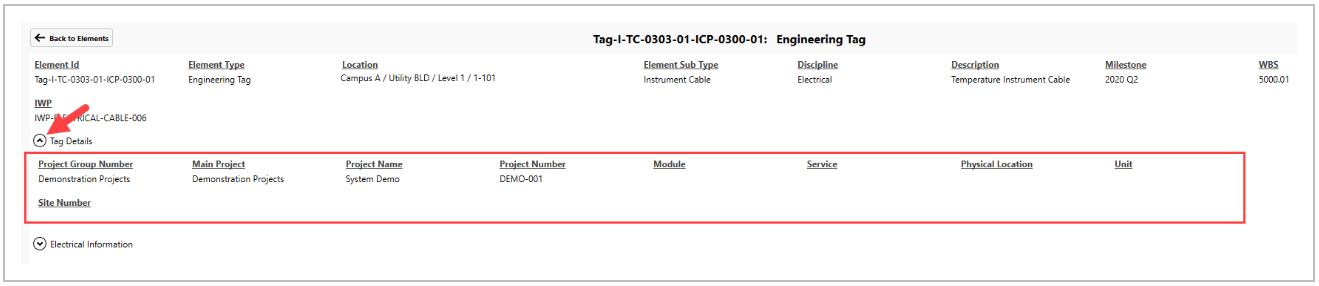


6.1.2 Element Details

When you select an element, the Element Details page opens.

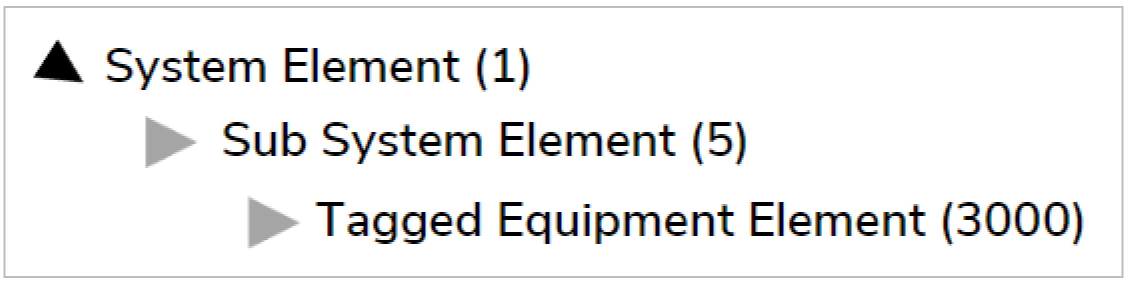


To expand additional attributes for each element description, click the **down arrow** next to the Element Details description.



6.1.3 Nested Elements

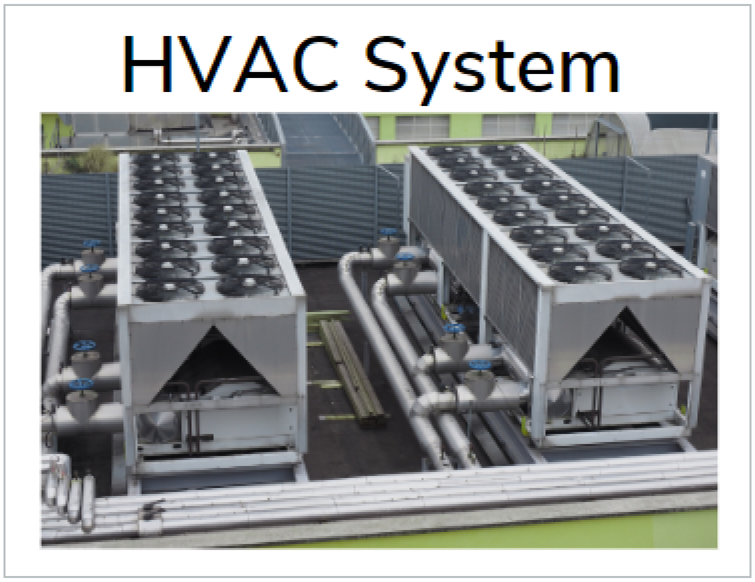
By nesting elements together, you can create a defined structure to categorize your elements. System elements can contain several sub-system elements. For example, sub-systems can contain many engineering tag elements. To isolate, quickly identify, and locate these various types of elements, it is helpful 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 organizing and searching for specific elements within the HVAC system.

6.1.3.1 Example

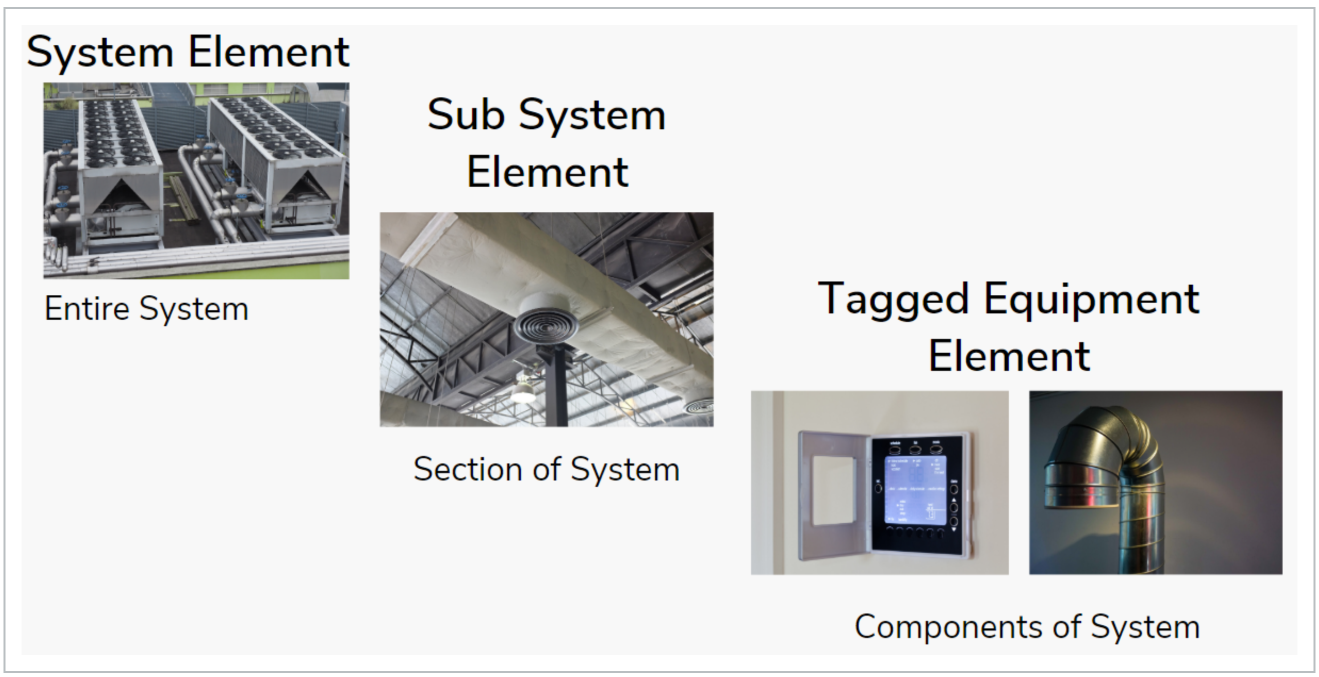
HVAC air handlers are often located on the top of a building, which serves the purpose of supplying conditioned air throughout the entire building. This would be labeled as the HVAC System Element.



On each floor there are individual HVAC control units, which control the temperature for each one of the floors or zones. An HVAC control unit is considered here as part of a sub-system element.

In 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 elements 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.



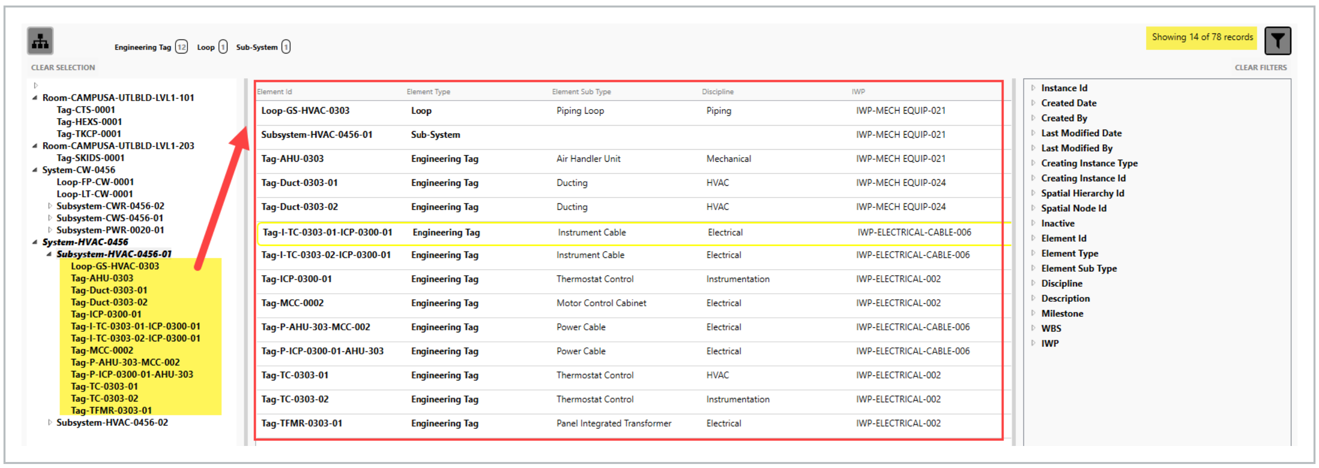
6.2 NAVIGATE ELEMENT HIERARCHY

6.2.1 Navigate Element Hierarchy

In the Elements module, Element IDs are listed in the register view. To view the hierarchy behind those elements, click the **Hierarchy** button in the upper left.

TIP Toggling the Hierarchy button hides the hierarchy slide-out panel but does not clear any selection.

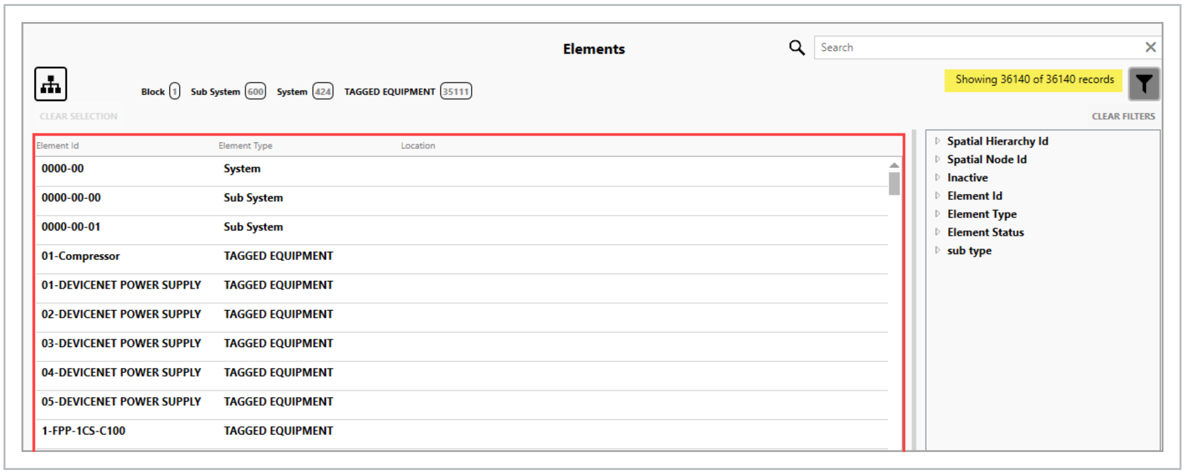
Looking at the hierarchy in the image below, Subsystem-HVAC-0456-01 is the direct parent to those shown in yellow. System-HVAC-0456 is the direct parent to Subsystem-HVAC-0456-01.



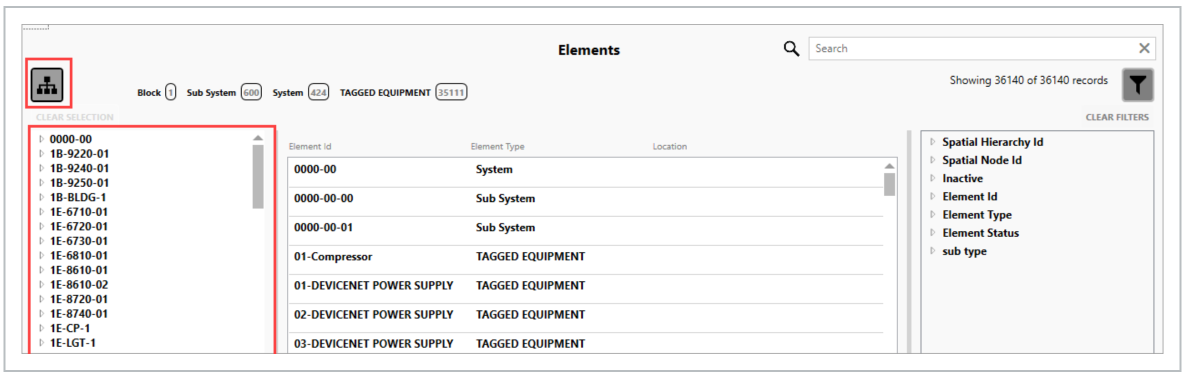
6.2.1.1 Hierarchies

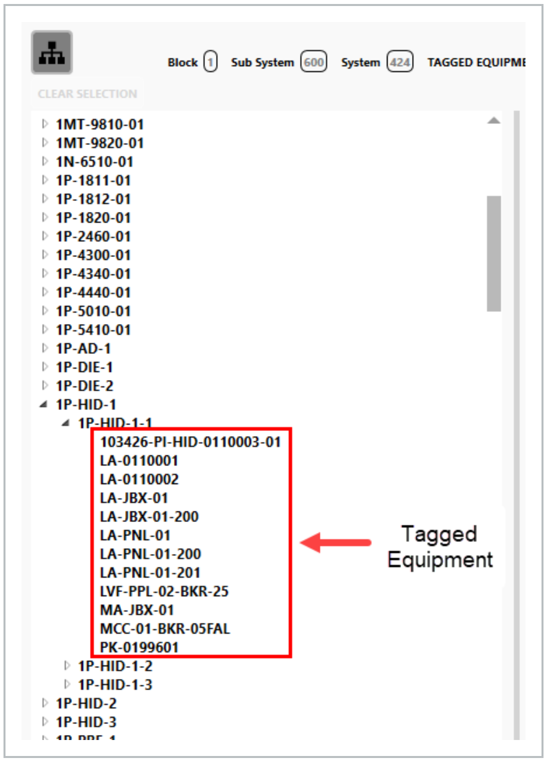
Using an HVAC System as an example, when you click on the HVAC sub-system for one of the floors, it is possible to isolate individual components in the HVAC systems and sub-system. You can view detailed information for each of the individual components, which might include associated checklists, issues, inspections, and certificates.

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

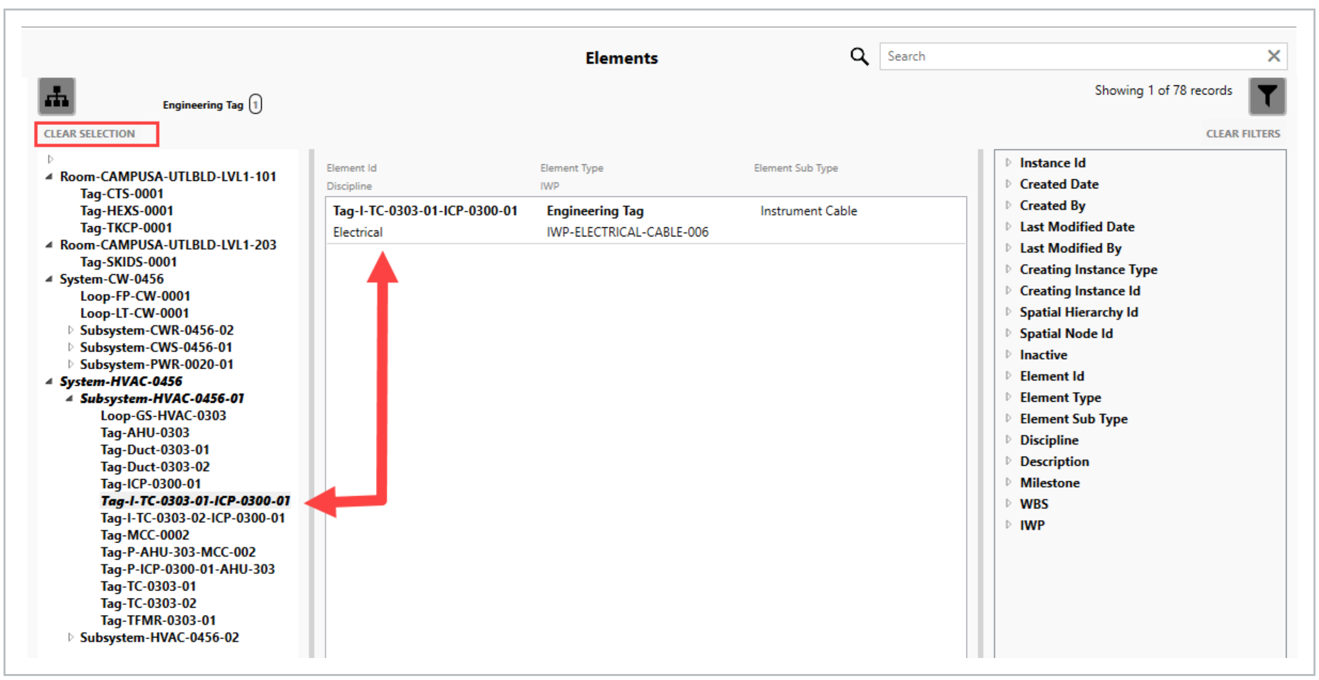


If you select the Hierarchy button, you can better isolate the various groupings of elements in a nested hierarchy. You are also able to view the relationships and details of each of the elements.

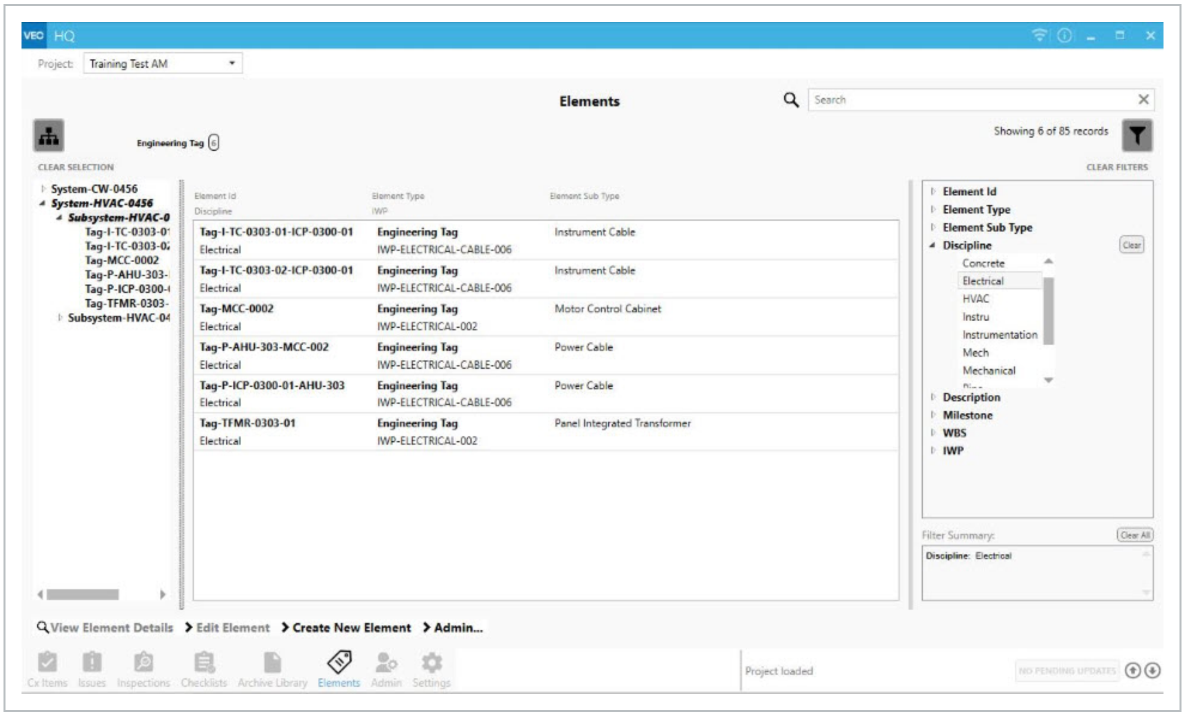




When you are in an element within a specific hierarchy, to easily return to the listing of all elements, click **Clear Selection** below the Hierarchy button.

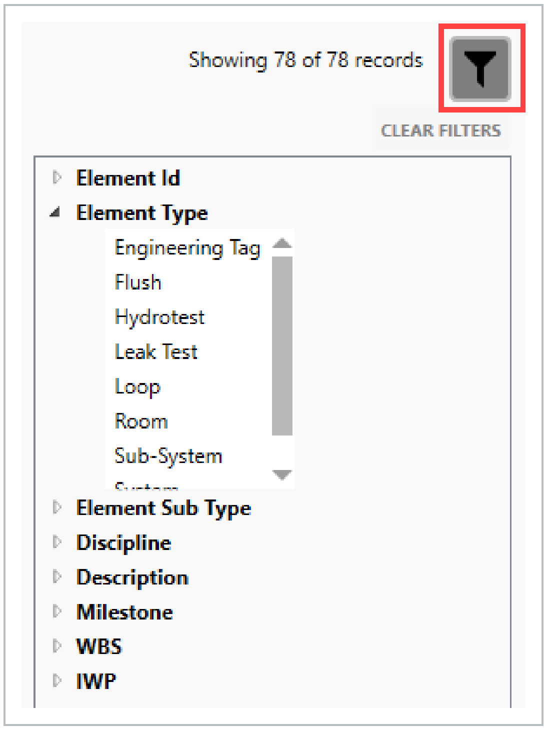


You can use the Hierarchy and Filter buttons in conjunction with each other. Hierarchy lets you filter for specific hierarchical groupings of elements. The Filter button lets you filter for specific metadata in those elements.



6.2.1.2 Filters

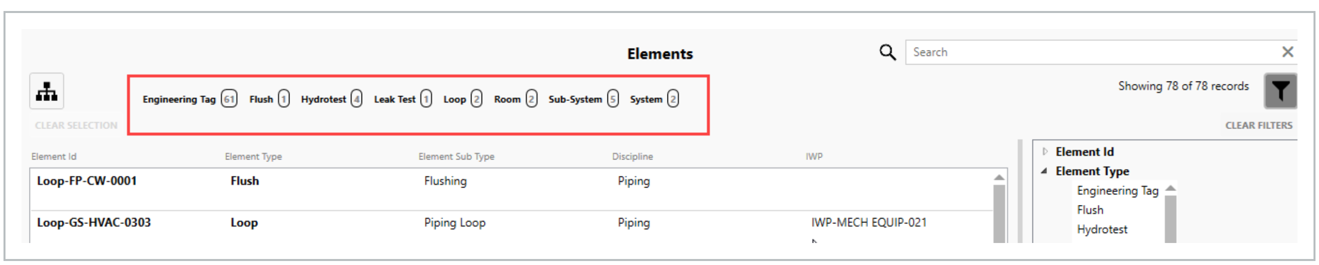
The Filter icon in the upper right lets you jump to a desired element by selecting from the detail filter list. To select multiple items in the filters slide-out panel, hold down the **Ctrl** key and select items.



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

6.2.1.3 Quick Filters

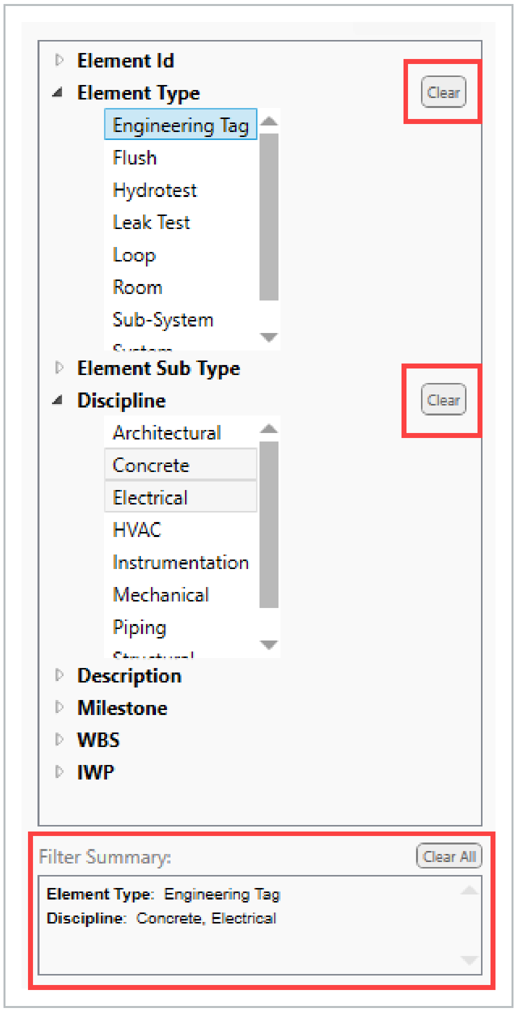
Quick filters are a way to quickly view specific element types. By selecting one of the quick filters, such as Sub-System, you can view all of the elements that are tagged as sub-systems.



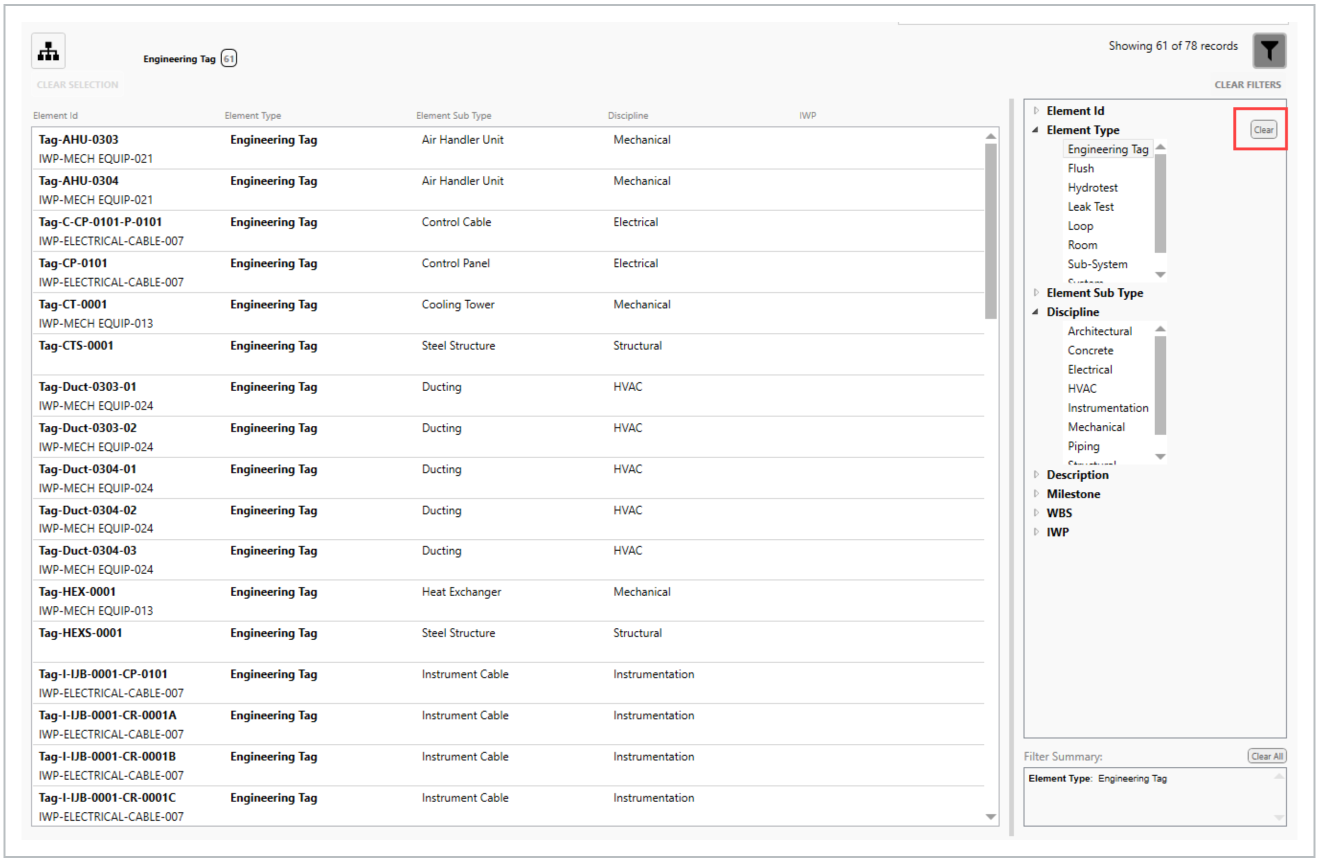
NOTE	Elements and their associated hierarchy should be created and structured according to your project by your responsible team.

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

1. Click the **Clear All** button to remove all quick filters from the list of records. As shown in the image below, if you had filtered on all engineering tag elements and concrete and electrical disciplines, clicking the Clear All button returns you to the listing of all records.
2. You can also remove advanced filters individually.



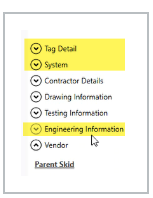
If you click the **Clear** button next to Element Type, all records are listed.



6.3 ELEMENTS IMPORT

A typical job has many tagged objects in the system. To avoid manually loading or manipulating the data individually requires an alternate technique. Importing a Microsoft Excel file with the data into Completions HQ streamlines the process.

For example, the three highlighted areas in the image below can all come from your the design engineering firm on a project, but even from there, the data might be compiled from many different sources and get consolidated in the upload sheets.



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

Upload sheets can import the following:

- Base information into elements
- Other tables and fields of information into Completions
- Element 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.

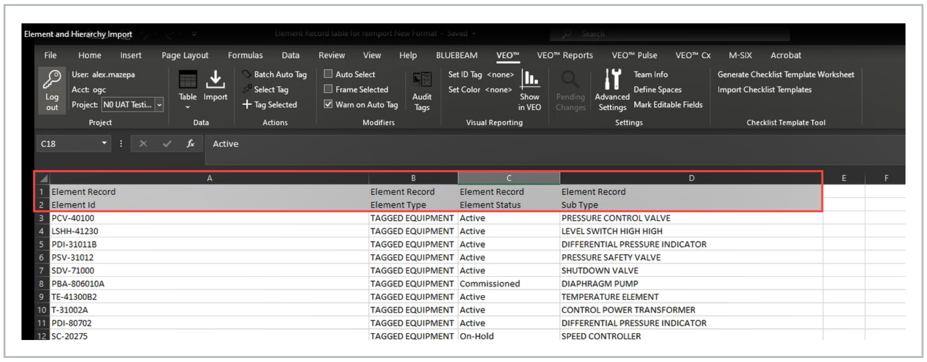
The steps below show how to set-up and begin your Excel file.

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 following rows are important for data import:
   - Row 1: Identifies which table you are writing information to.
   - Row 2: Identifies the column that you are writing to in the table.
   - Row 3: This is for reference only and identifies the data type. For example, a data type of STRING:32 indicates that the field can only be 32 characters long.
   - Row 4: This is for reference only and identifies the widget name. For example, it indicates if the field is a picklist or not. If it is, ensure that information exists in the Generic Picklist table before import.

NOTE You must delete rows 3 and 4 before you import the Excel file.

	A	B	C	D
1	Element Record	Element Record	Element Record	Element Record
2	Element Id	Element Type	Element Sub Type	Inactive
3	STRING	STRING	STRING	STRING
4		Picklist = Element.Type	Picklist = Element.Subtype	



NOTE Field names must match exactly what is 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 a piece of Tagged Equipment pertaining to a Pressure Control Valve

    NOTE If the field being uploaded to is a defined picklist, you must ensure that the values in Excel match the values defined. If the picklist is a hierarchy picklist, it must follow the convention of "Value 1", " / ", "Value 2", " / ", "Value 3". This might require concatenation of multiple columns from the data source.

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

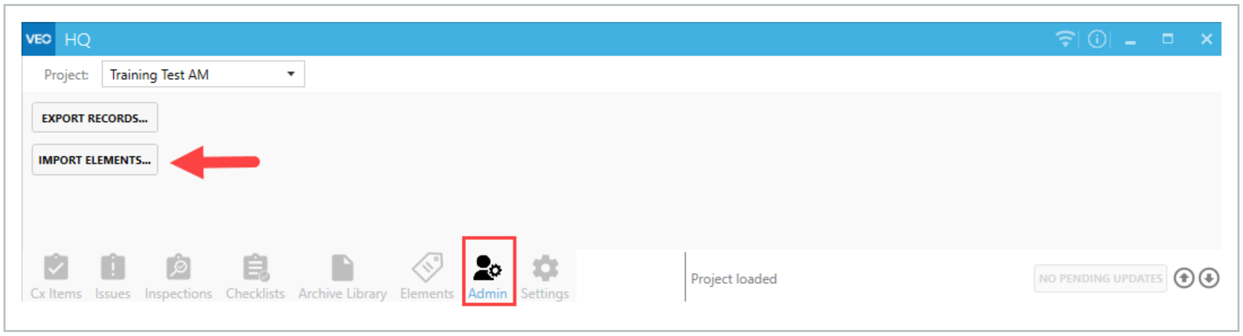
6.3.2 Load Base Information into the System

After you create an Excel Import file, you can import that file into your project.

For the import to work correctly, be sure to upload your data hierarchically from the top down. For example, if you try to import an element and reference its parent but you have not imported the parent yet, a warning is shown.

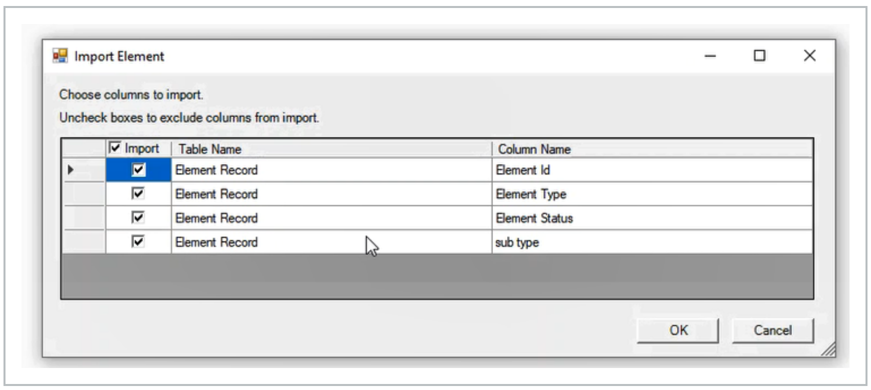
6.3 Step by Step 2 — Load Base Information into the System

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

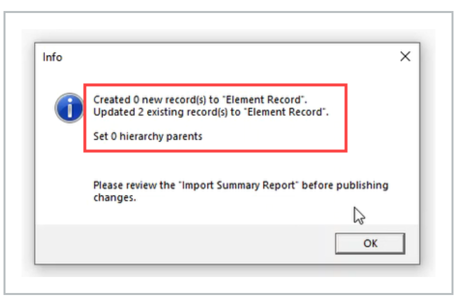


3. Navigate to and open the newly created Excel .XLSX file.
    - The system analyzes the top two rows of the .XLSX file for upload

NOTE	There is an option to deselect, or not import, certain columns into the system by deselecting the applicable Import column check box.



4. Click **OK**.
    - All the records from the sheet are analyzed against the current database. If any values are different, those values are added.
    - A dialog box shows what was created and modified.



5. Click **OK**.

NOTE The import replaces all values for each record that is imported. If a field is uploaded as blank from the import, any values in the system are overwritten. It is standard practice to select the **Ignore blank values** check box in the lower right.

6.3.2.1 View Imported Changes

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

If there is a warning about a piece of data, that particular piece will not be shown. For example, a warning about not recognizing a hierarchy parent results in the element not showing up in the hierarchy.

To save this report, click **Save** in Excel.

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

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

Row Number	Element Id	Table Name	Column Name	Diff
3	Test Package-HT-CW-0010	Element Record	Element Sub Type	-
3	Test Package-HT-CW-0010	Element Record	-	New Eler
3	Test Package-HT-CW-0010	Tag Details	Stored Location	-
3	Test Package-HT-CW-0010	Tag Details	-	New Exte
3	Test Package-HT-CW-0010	Element Record	-	-

Import Summary Report | Import Summary Report Data | Sheet1

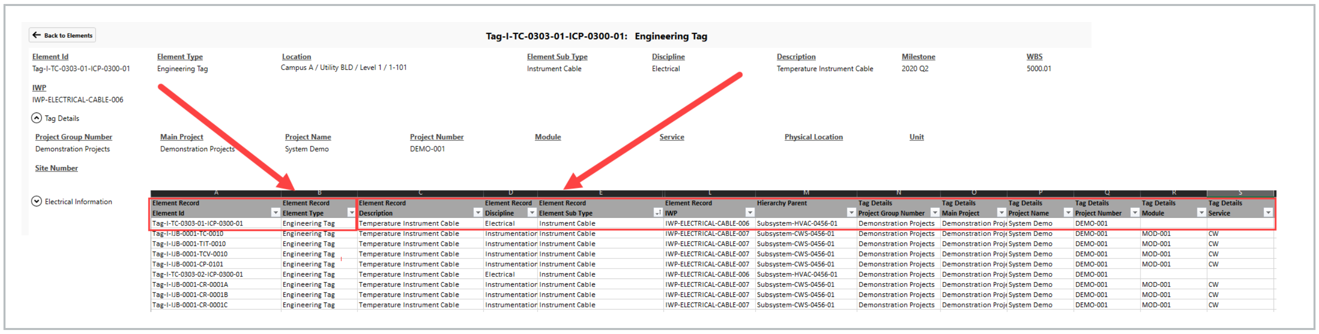
To close the report, click the **Don’t Save** button.

Click on the **Pending Updates** button in the lower right.

Click **Publish** or **Discard**, and then click **OK**.

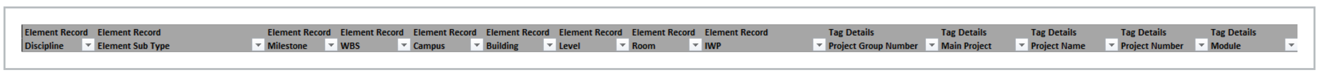
6.3.3 Import Other Tables and Fields of Information into Excel

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. Refer to the data model provided by your PDC for correct table names.

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



Uploading data follows the same process as shown above.

6.3.4 Change Element Engineered Tags Using Import

If a tag for an existing element needs to change, but you do not want to lose corresponding data on any other table, using an Instance ID makes that happen.

In all other situations, everything keys off the Element Id unless there is 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 looks 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 Record** 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	Element Record	Element Record	Element Record	Element Record
Instance Id	**Element Id**	**Element Type**	**Element Status**	**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	

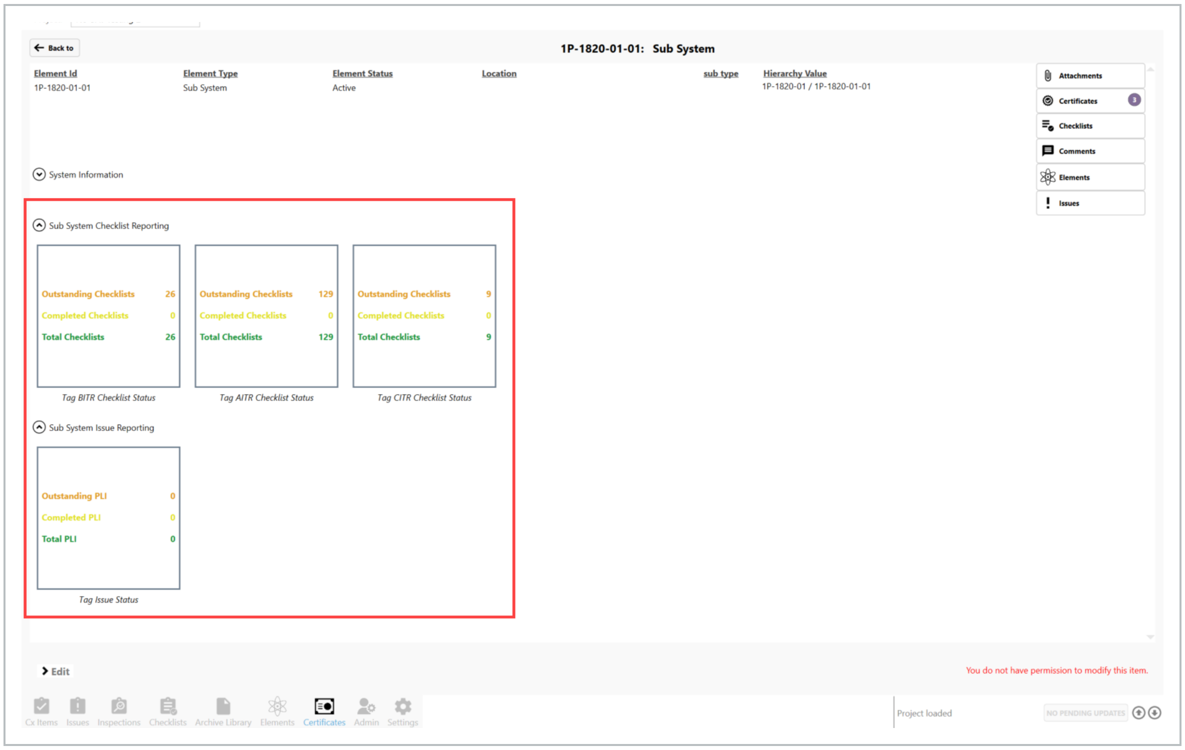
5. Save the Upload file.
6. Import the file to Completions.

6.4 PROGRESS ROLL-UP REPORTS

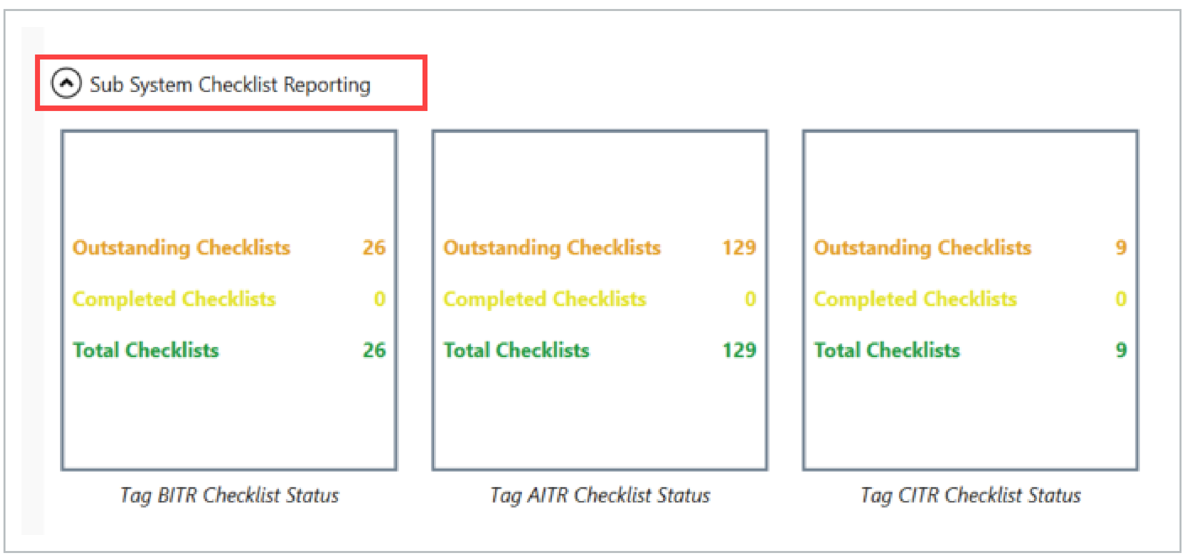
6.4.1 Value of Progress Roll-up Reports

Progress roll-up reports provide a way to quickly view elements and the status of items linked to them from a system or sub-system level.

In this example, and from within a sub-system, two drop-down lists provide a visual representation of both checklist and issue status.



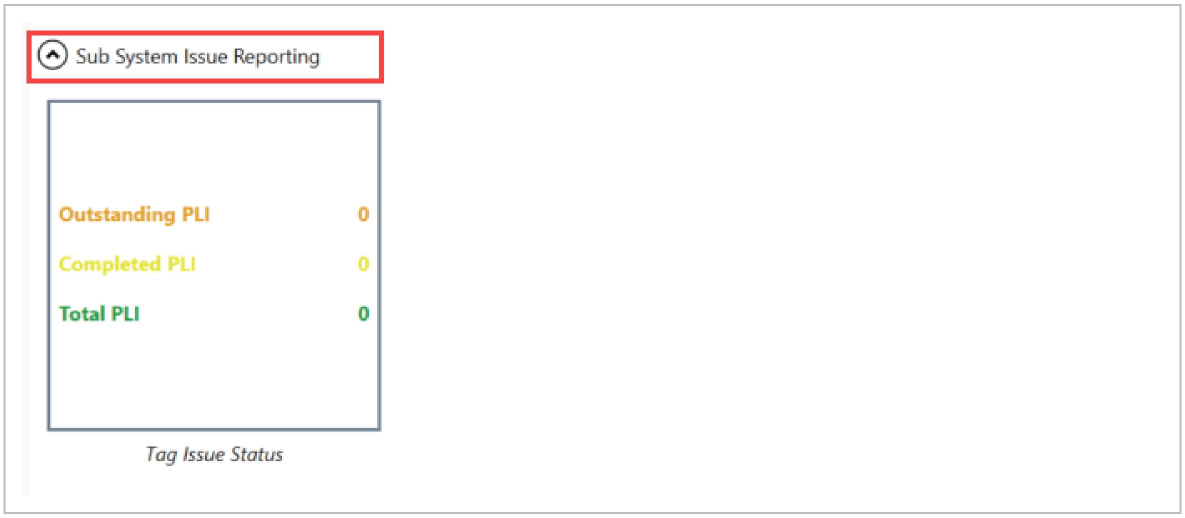
After you click the **Sub-System Checklist Reporting** drop-down list, you can see three blocks showing Outstanding, Completed and Total Checklist statuses for each of the checklist types:



TIP

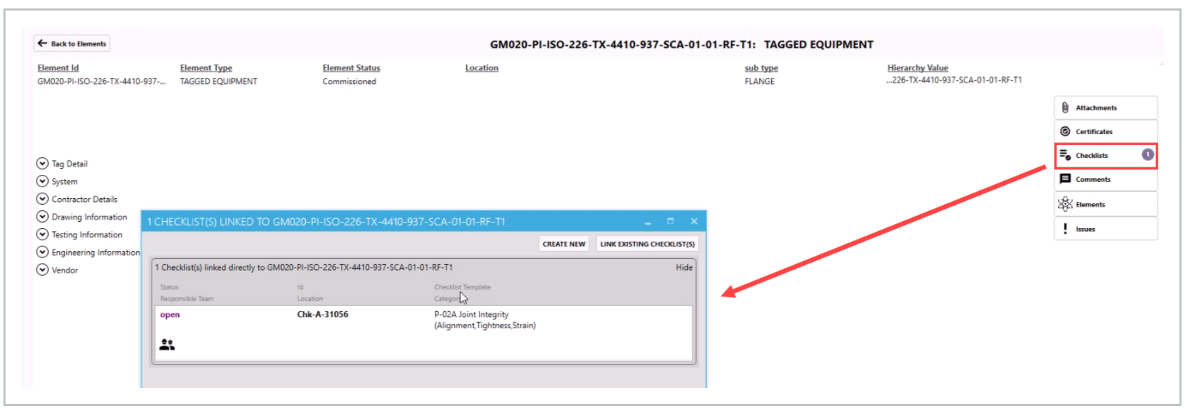
Type A (AITR) qualify against the Construction Complete (CC) Certificate.
Type B (BITR) looks at the Ready for Commissioning (RFC) Certificate.
Type C (CITR) looks at the Ready For Startup (RFSU) Certificate.

After you click on the **Sub-System Issue Reporting** drop-down list, the Tag Issue Status Report is shown, which summarizes the issues against the children in the sub-system.



With 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.

Many custom roll-up reports can be configured. In this example, for a tagged equipment element, checklists are shown counting it against the overall total, as shown in the blocks above.



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 Completions

---

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

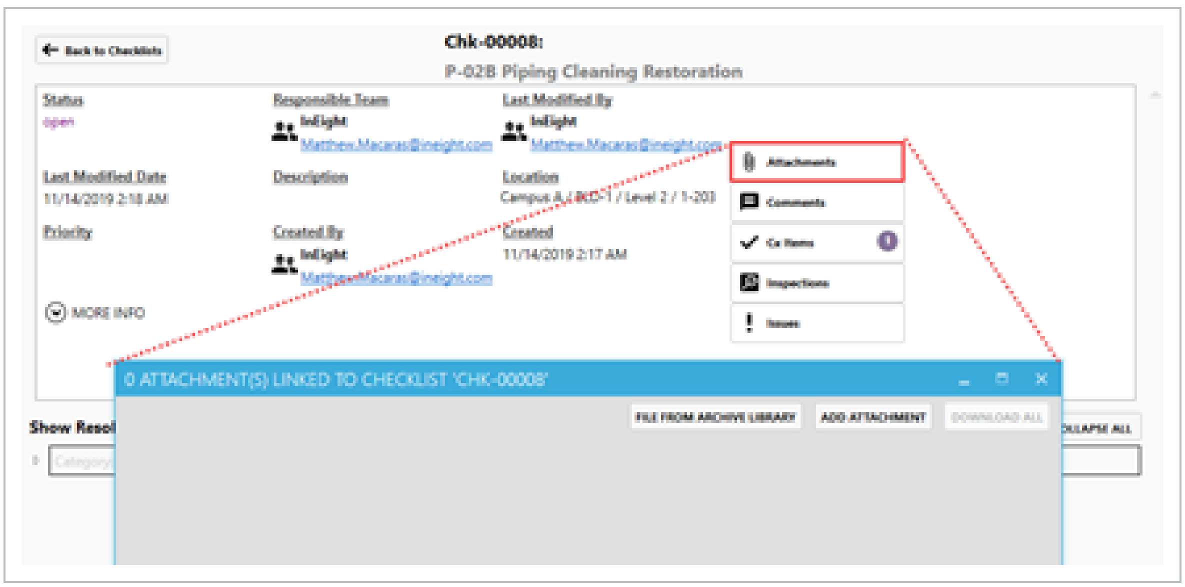
7.1 ATTACHMENT MANAGEMENT

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.

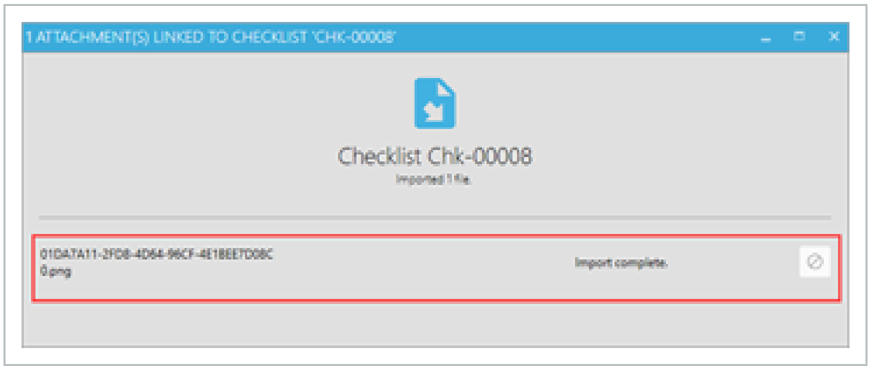
Attachments can be added to any module based on your permission level, using a Cx Item as an example below. They can be added in the same manner to a Phase, an Issue, Inspection and a Checklist.



7.1 Step by Step 1 — Add an Attachment

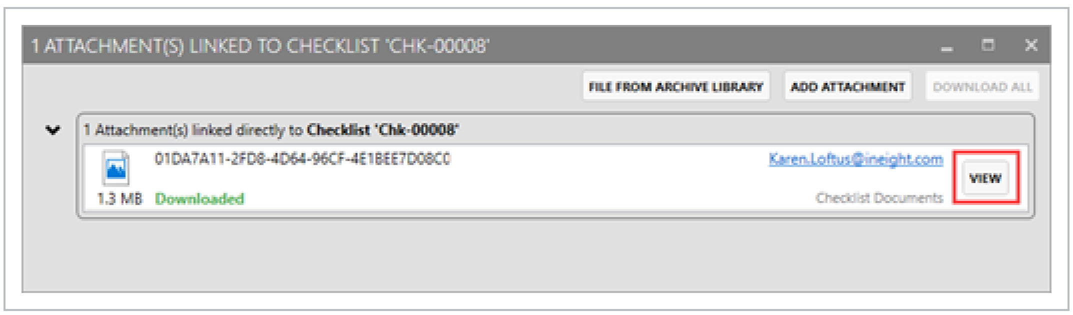
1. Starting from the desired Cx Item, Phase, Issues, Inspection or Checklist, click the **Attachments** button.
2. Click the **Add Attachment** button.
3. Select the image from the desired folder or location.

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

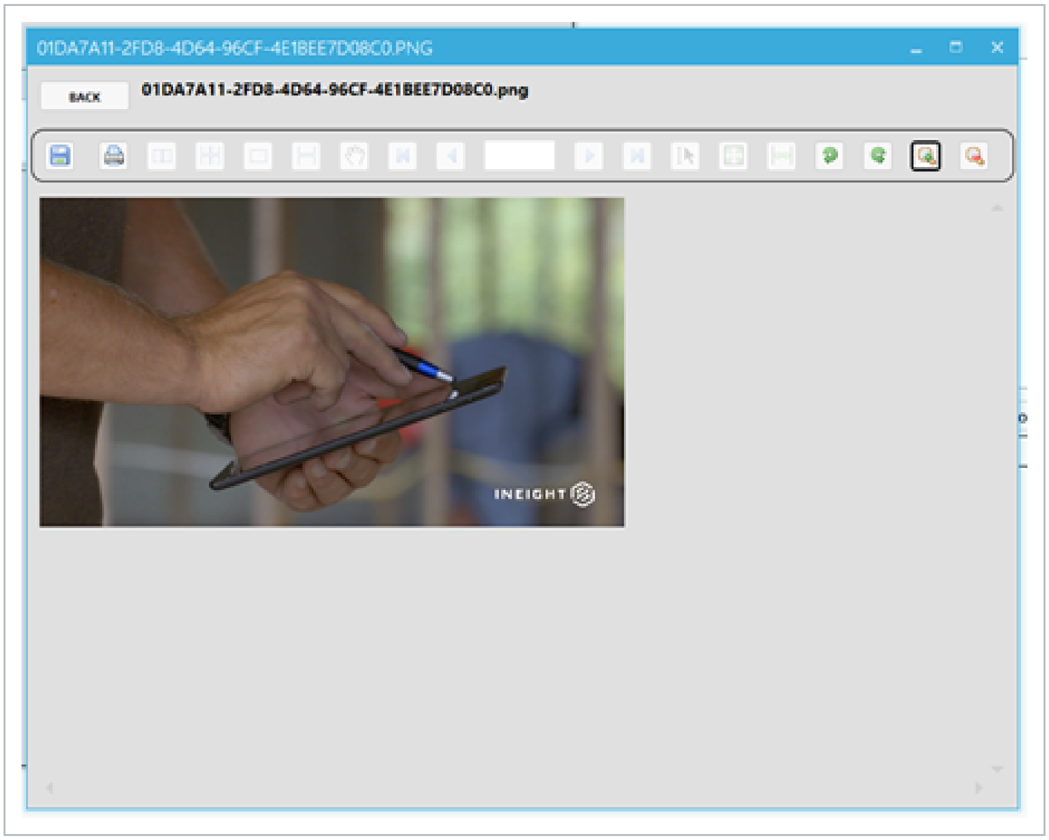


.

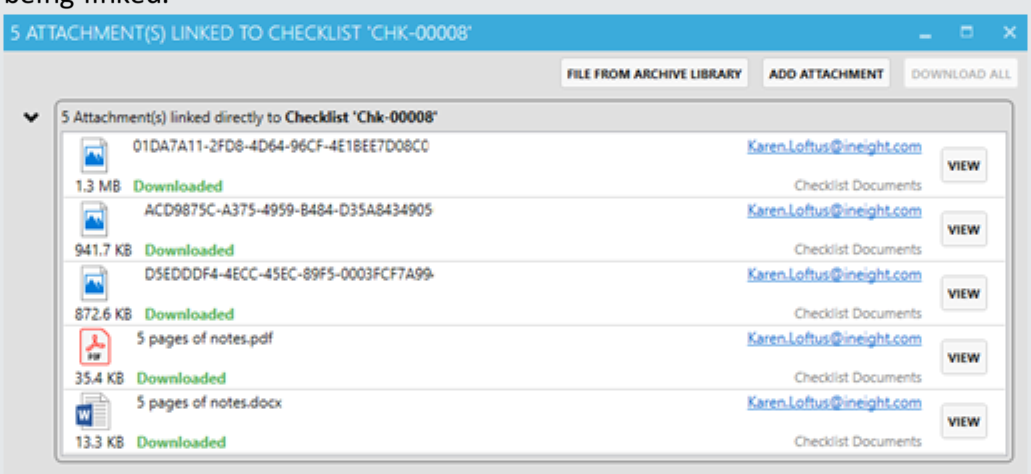
5. Click **OK**.
   - The attachment now appears in the Attachment pop-up, along with additional data about the attachment and the email of the individual that uploaded the attachment



- 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.

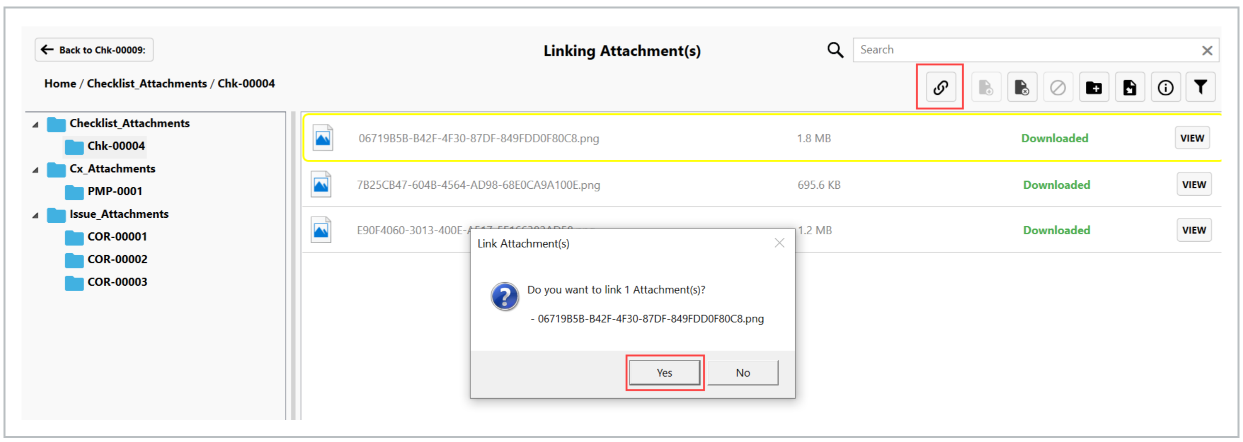


TIP To remove an image, right-click on the attachment record within the Attachment(s) Linked to Checklist pop-up window.

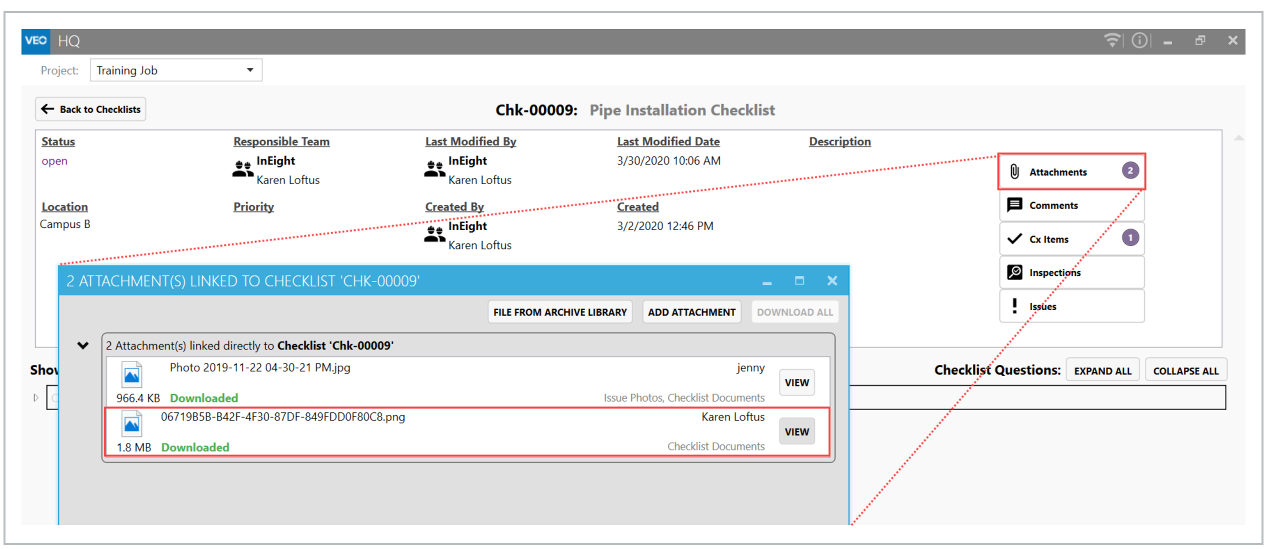
The following Step-By-Step outlines the process for adding a file from the archive library.

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.



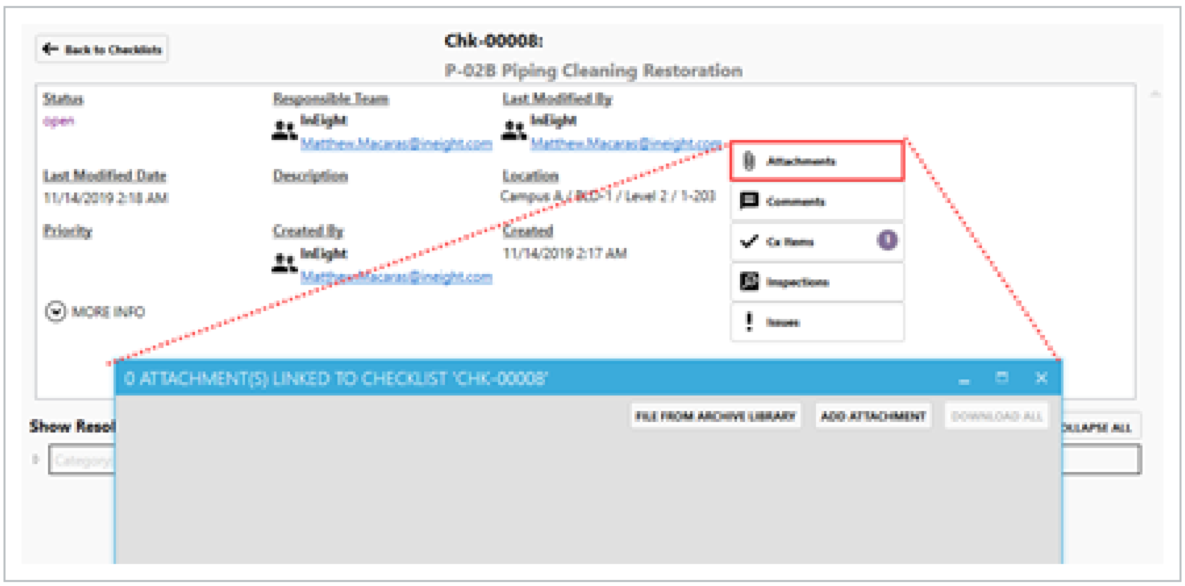
7.2 ATTACHMENT UPLOAD

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.

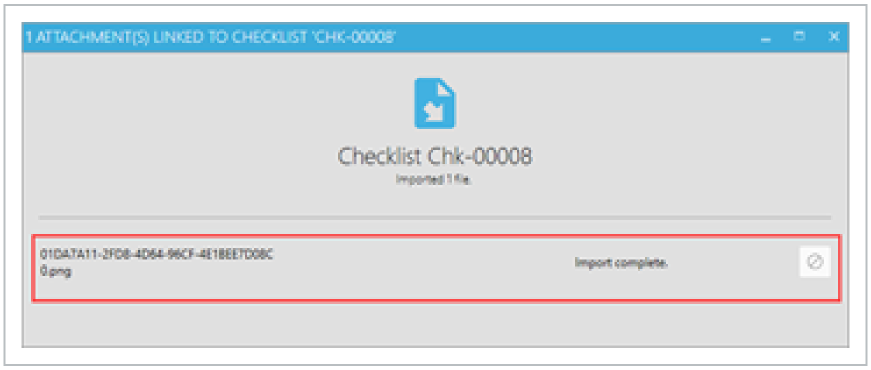
Attachments can be added to a specific Cx Item as shown below. They can be added in the same manner to a Phase, an Issue, Inspection and a Checklist.



7.2 Step by Step 1 — Add an Attachment

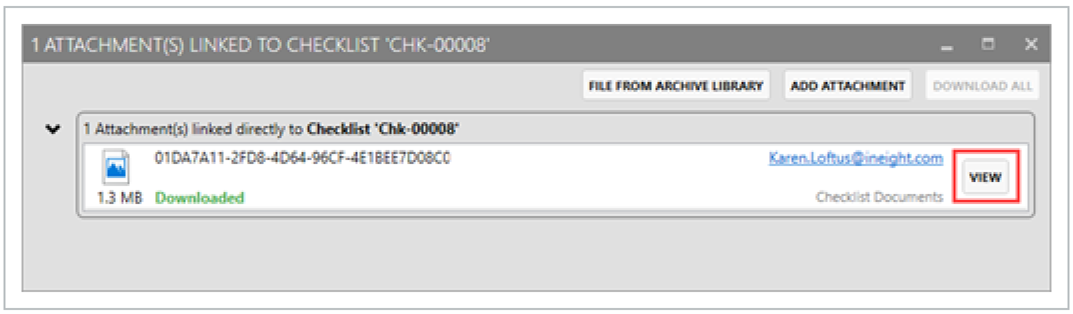
1. Starting from the desired, Cx Item, Phase, Issues, Inspection or Checklist, click the **Attachments** button.
2. Click the **Add Attachment** button.
3. Select the image from the desired folder or location.

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

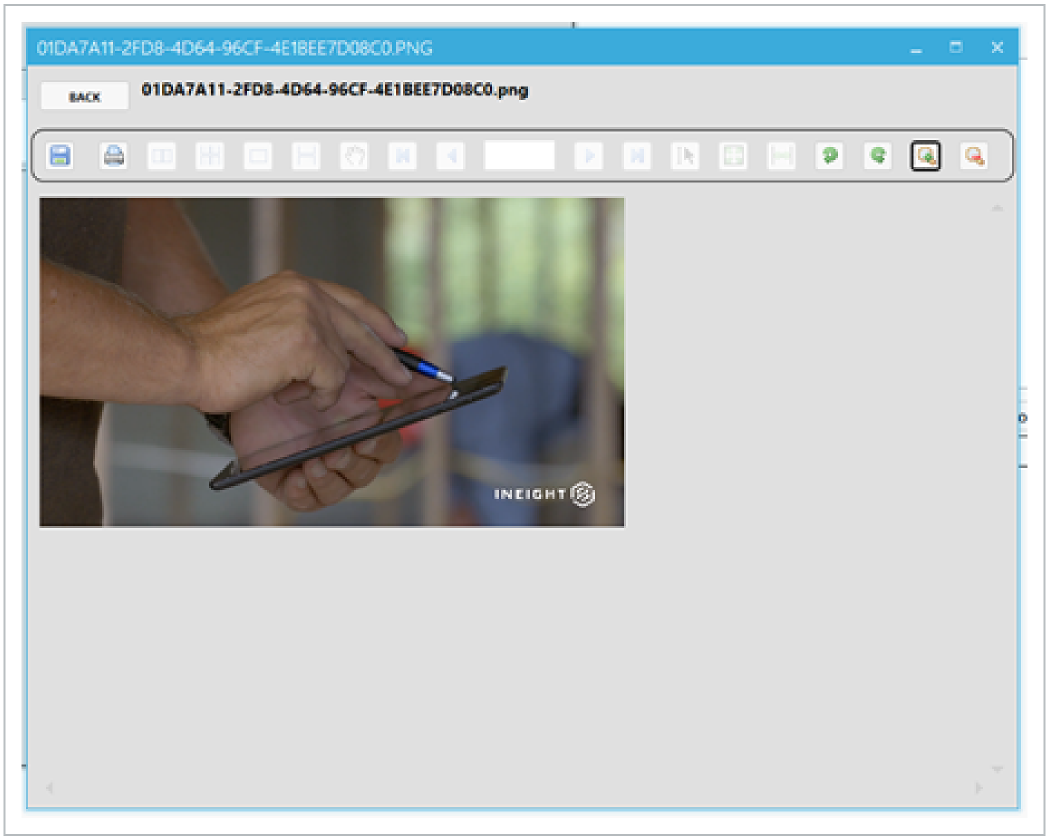


.

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

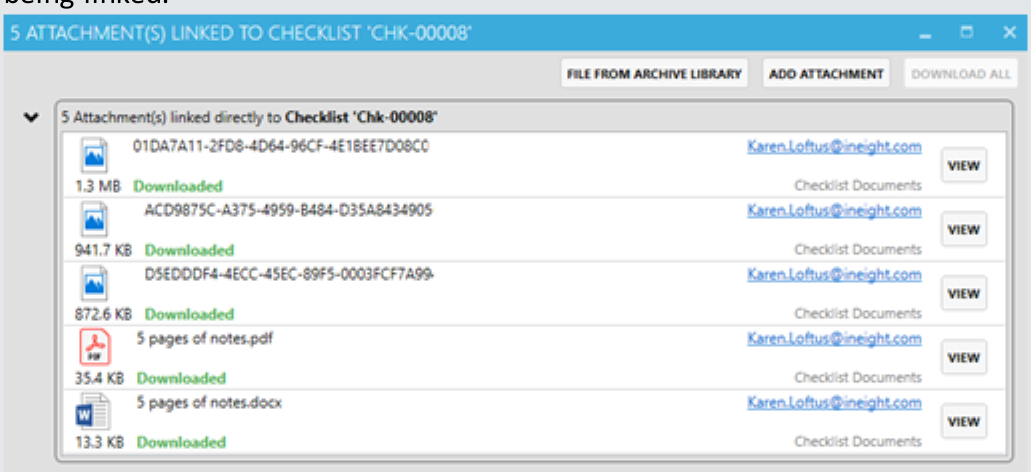


- Additionally, you can now view the attachment by clicking the **View** button



NOTE

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



TIP

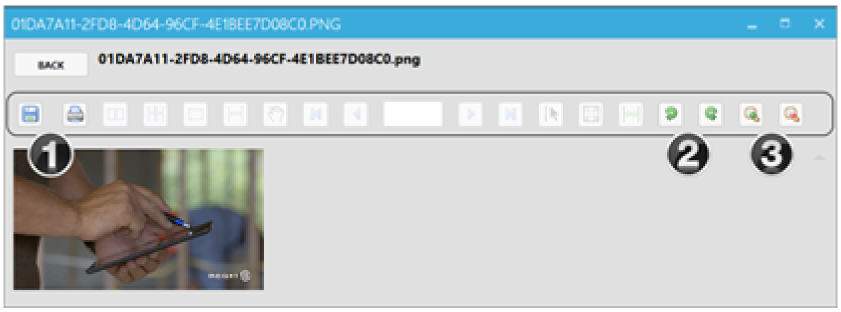
To remove an image, right-click on the attachment record within the Attachment(s) Linked to Checklist pop-up window.

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:

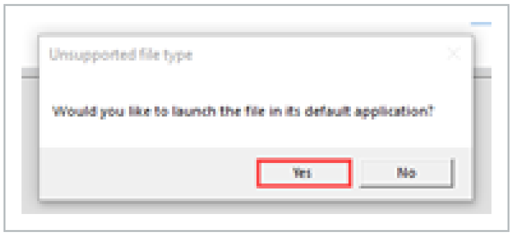
1. Save and Print
2. Rotate clockwise and counter-clockwise
3. Zoom In and Zoom Out



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.

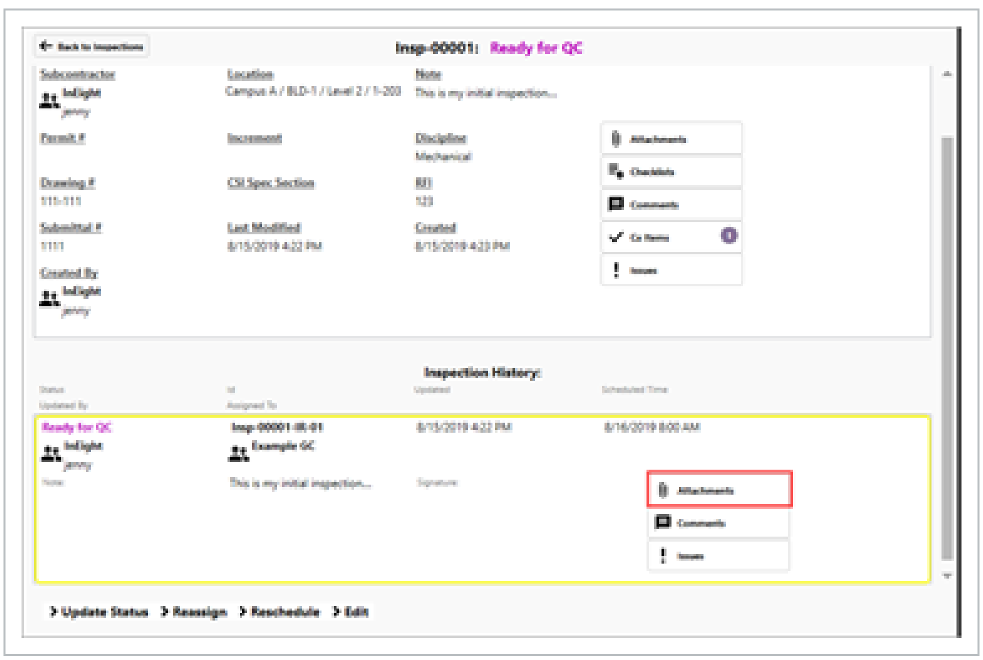


TIP We do not recommend uploading external applications such as Word or Excel, due to conversion issues when printing.

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.



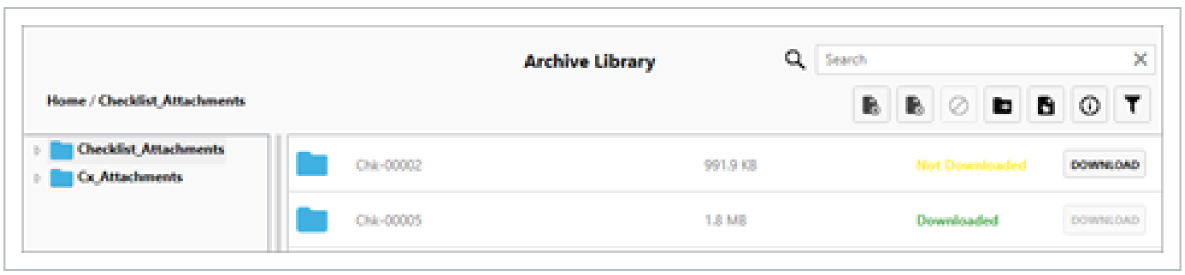
With no current attachments tied to this inspection, click on **File From Archive Library**.

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

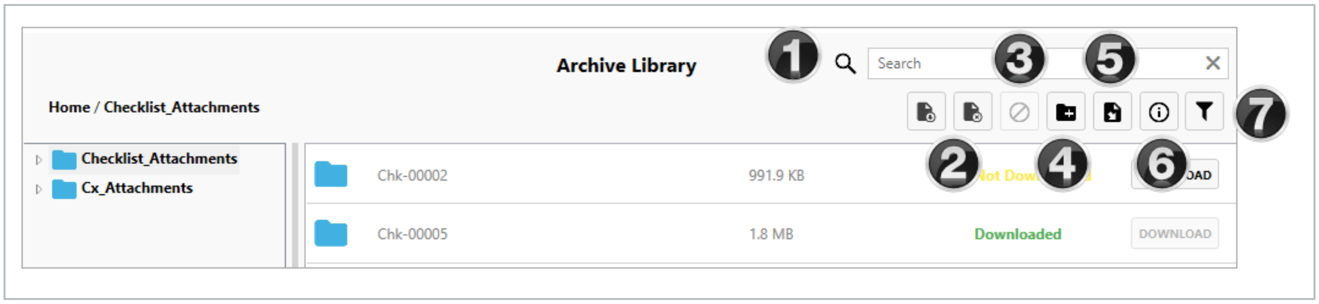
The Archive Library is used to store and distribute versioned project documents.

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



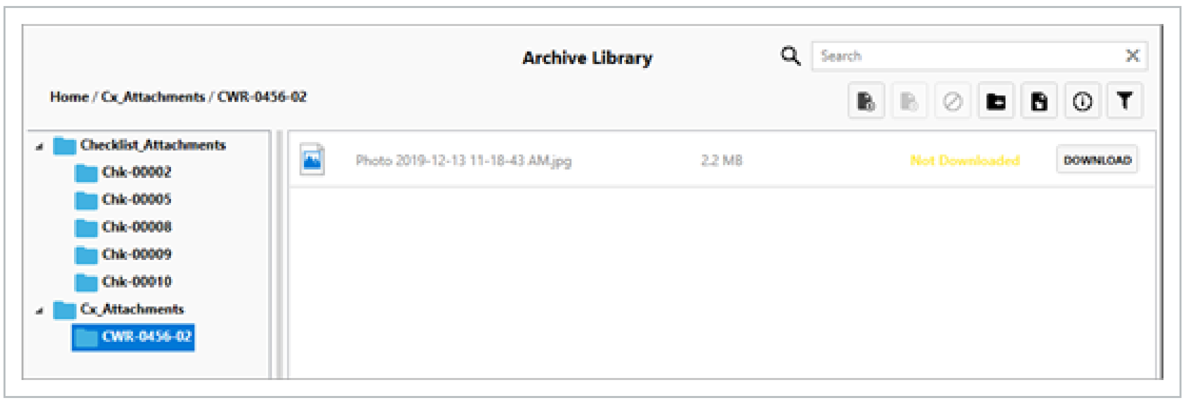
The following Step-By-Step outlines how to view attachments within a selected archive folder.

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

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

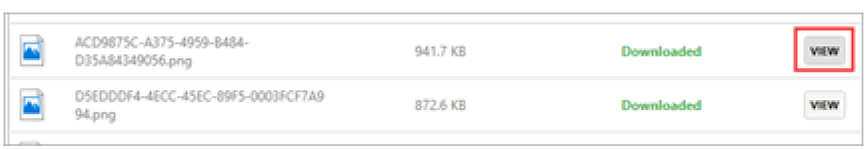
2. Open any folder by clicking on the **folder tile** or the **Carrot** to the left of the file folder.

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.

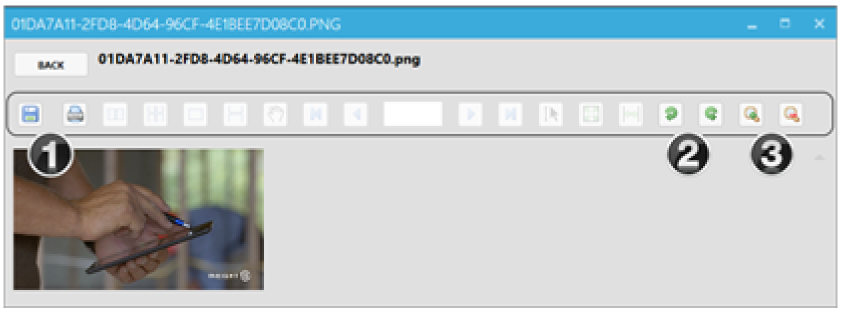


7.4 HQ ATTACHMENTS

7.4.1 View an Attachment

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

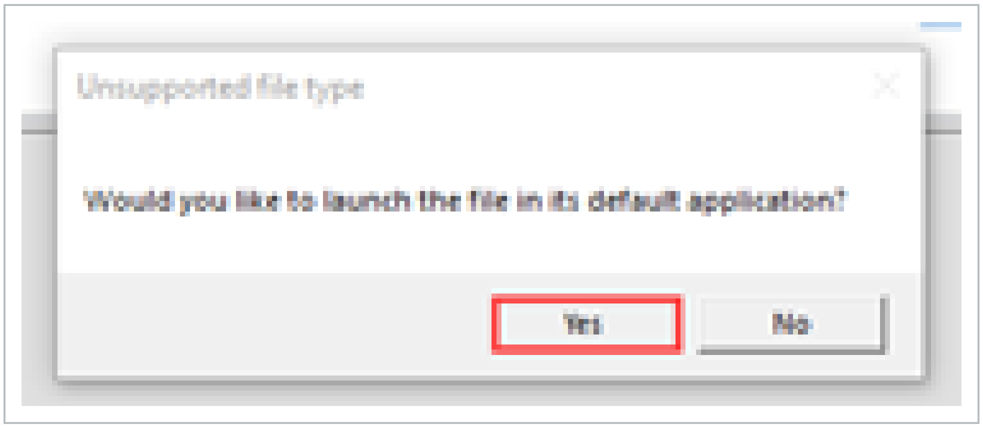
1. Save and Print
2. Rotate clockwise and counter-clockwise
3. Zoom In and Zoom Out



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

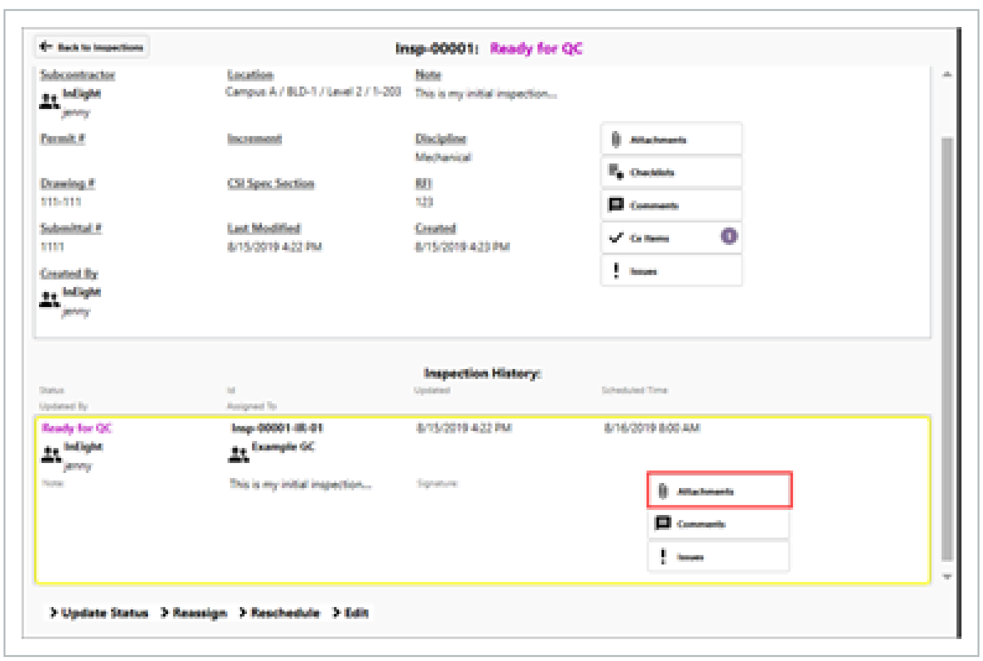
When opening a Word or Excel document, a pop-up asks if you would like to launch the file in its default application. Click **Yes** to proceed.



7.4.2 Link Attachments

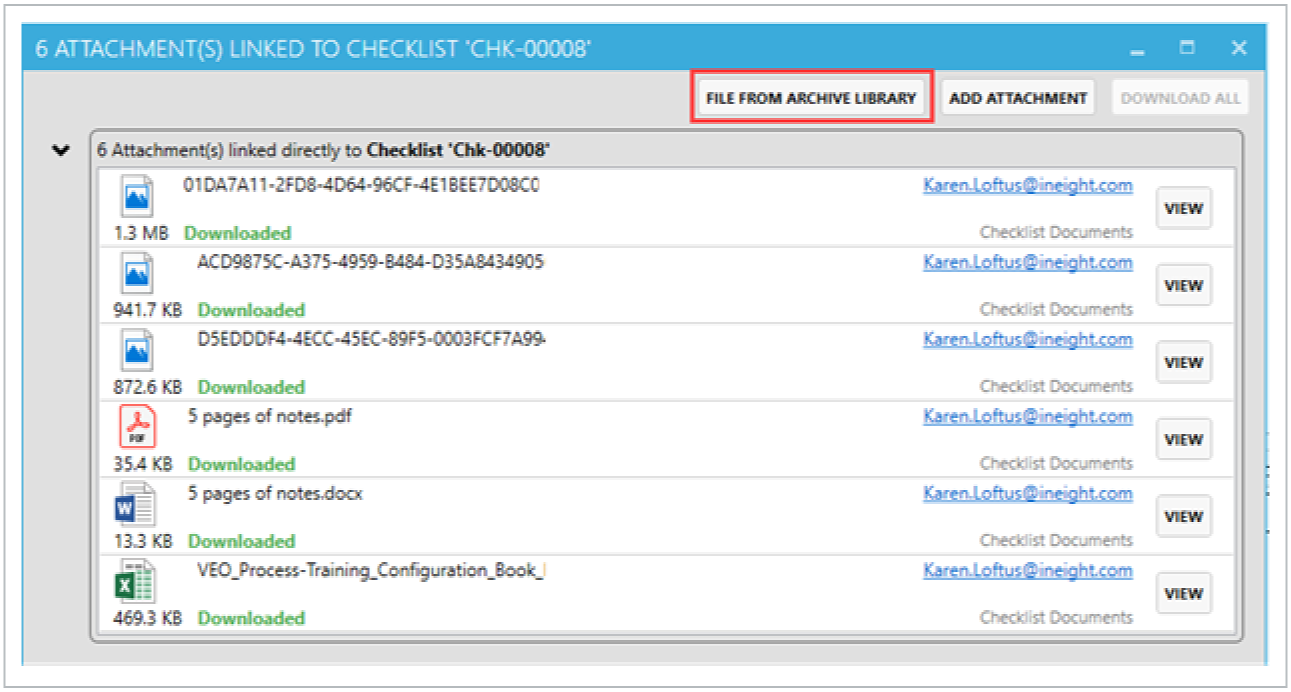
Linking an attachment is useful when a desired attachment exists in one area, and also when tying it to another aspect of the project.

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

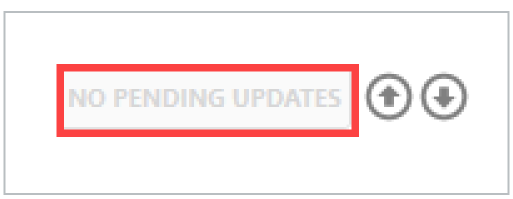


With no current attachments tied to this inspection, click on **File From Archive Library**.

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.



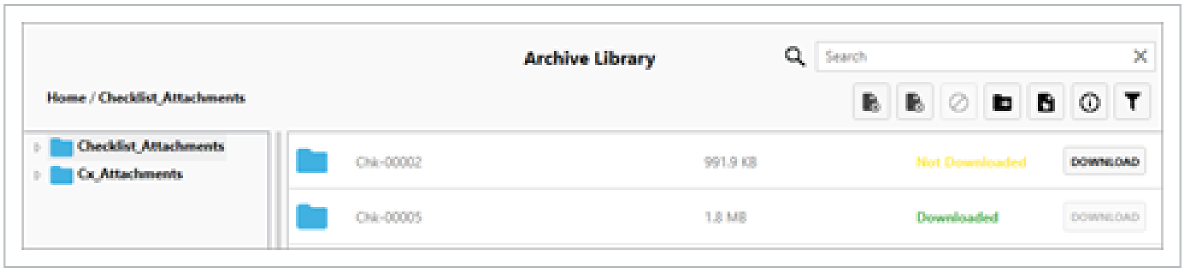
Ensure the **No Pending Updates** button is greyed out at the bottom of the page, meaning all attachments will show in the Archive Library.



7.4.3 The Archive Library

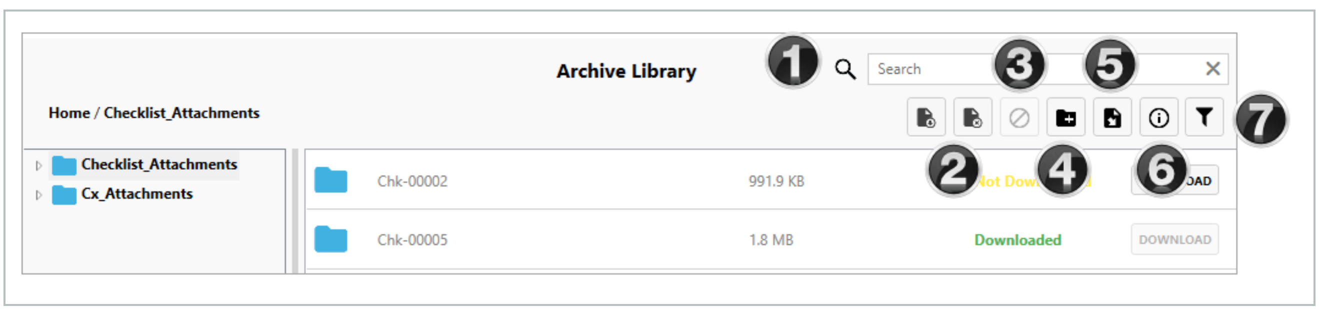
The Archive Library is used to store and distribute versioned project documents.

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

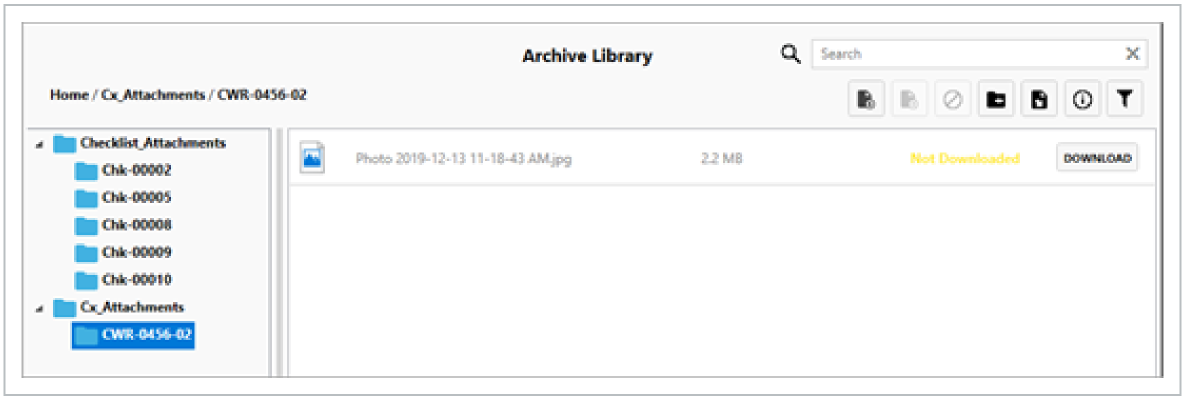


7.4 Step by Step 1 — View Attachment List Within an Archive Folder

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

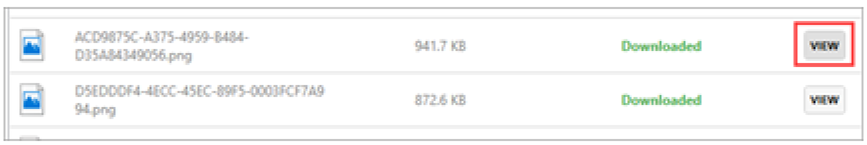
2. Open any folder by clicking on the **folder tile** or the **Carrot** to the left of the file folder.

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:

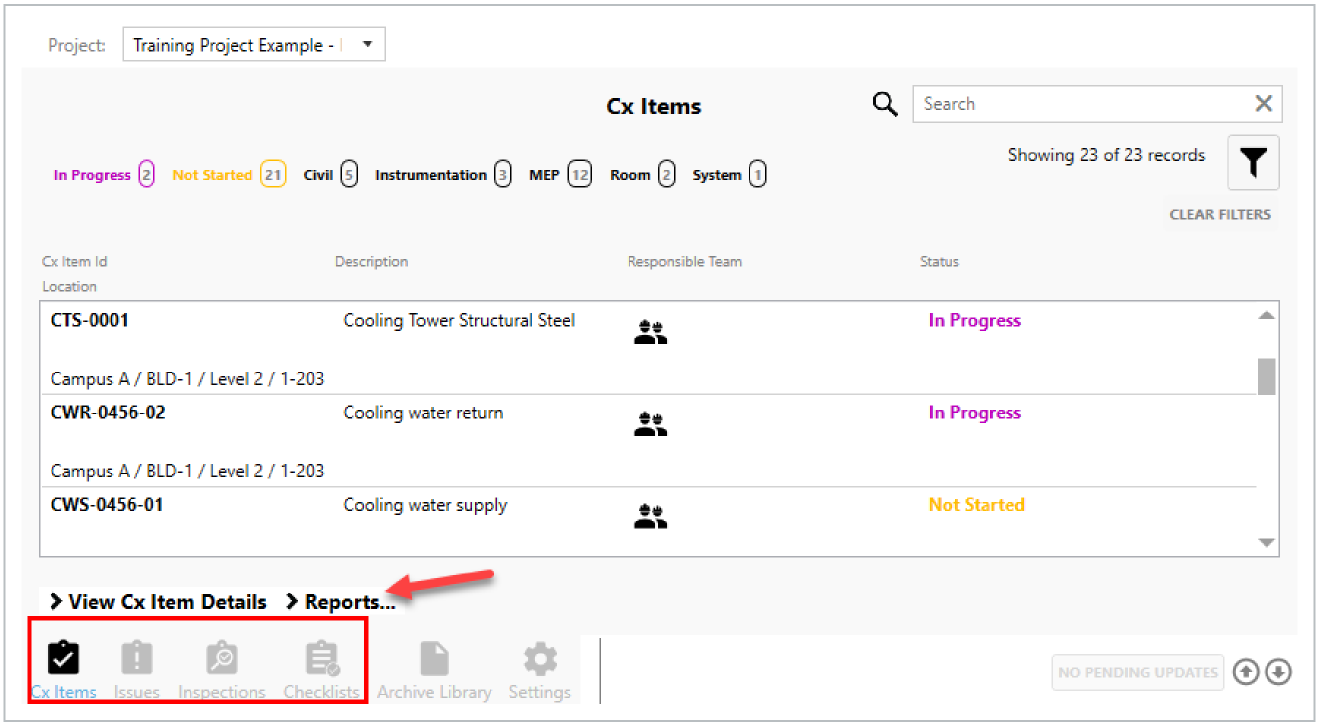
- Access Reports
- Generate Excel and PDF reports
- Review Reports

Topics in this Lesson

8.1 ACCESS AND REVIEW REPORT OUTPUT

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 Overview	X				This report is consumed by project admins or management. This

Overview – InEight Completions Report List (continued)

Report Name	Cx Items	Issues	Inspections	Checklists	Description
					report is 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

Overview – InEight Completions Report List (continued)

Report Name	Cx Items	Issues	Inspections	Checklists	Description
					accumulative lines are helpful visuals for evaluating performance.
Excel Issues per Phase	X				This report is mostly used by management and owners, and is used 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.

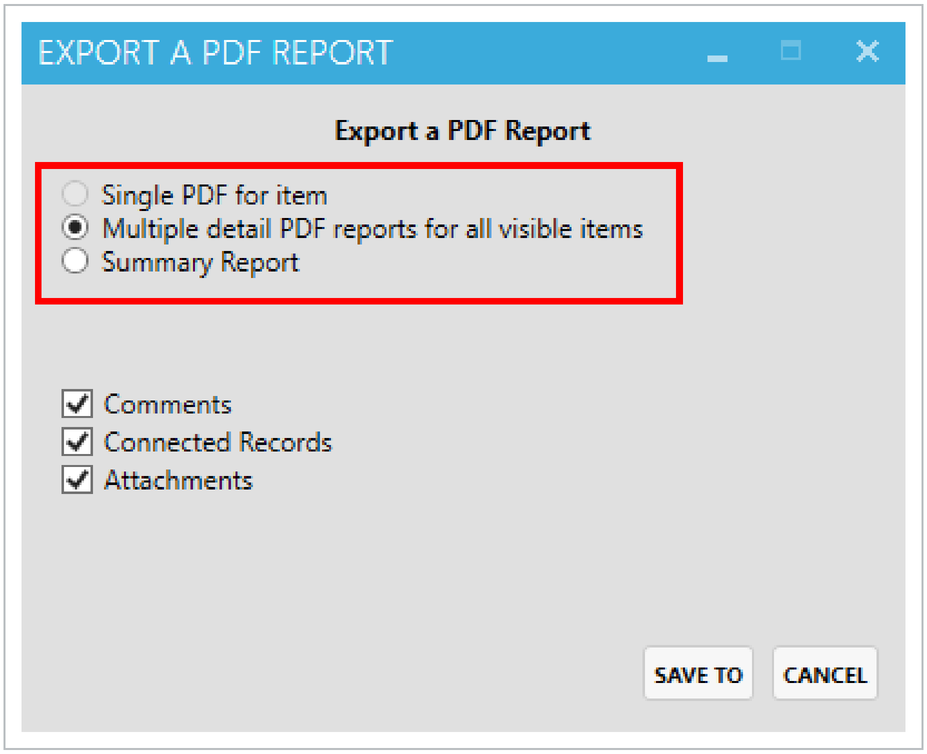
NOTE The InEight Completions Reports are configurable, therefore the structure may vary from project to project.

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:

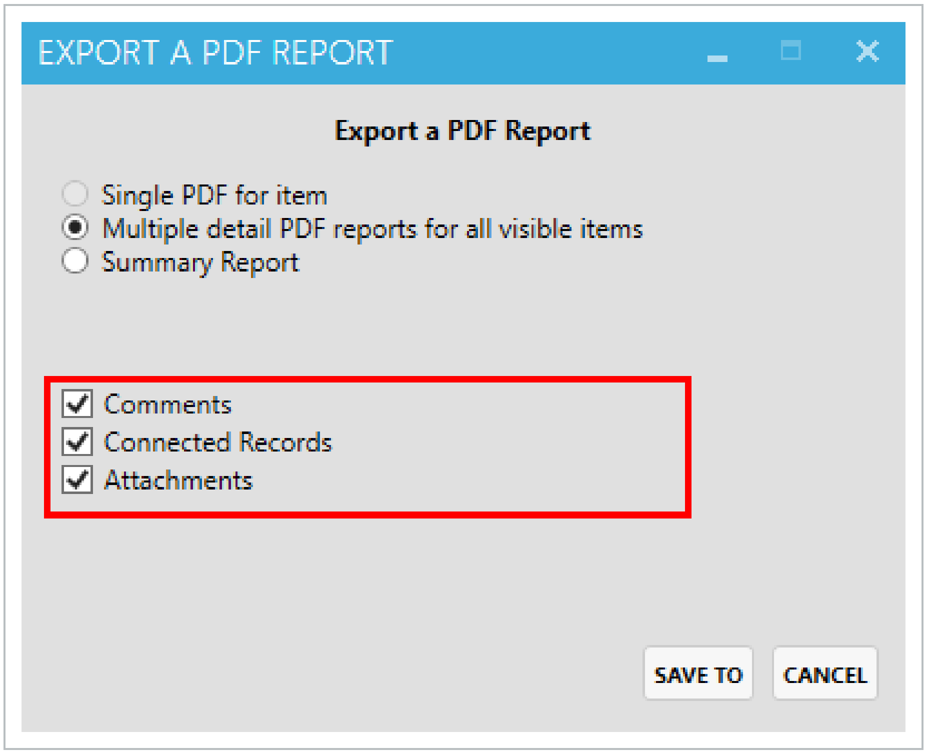
- Output the report so that multiple PDF reports show all visible items
- Output a summary report



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

- Comments
- Connected records

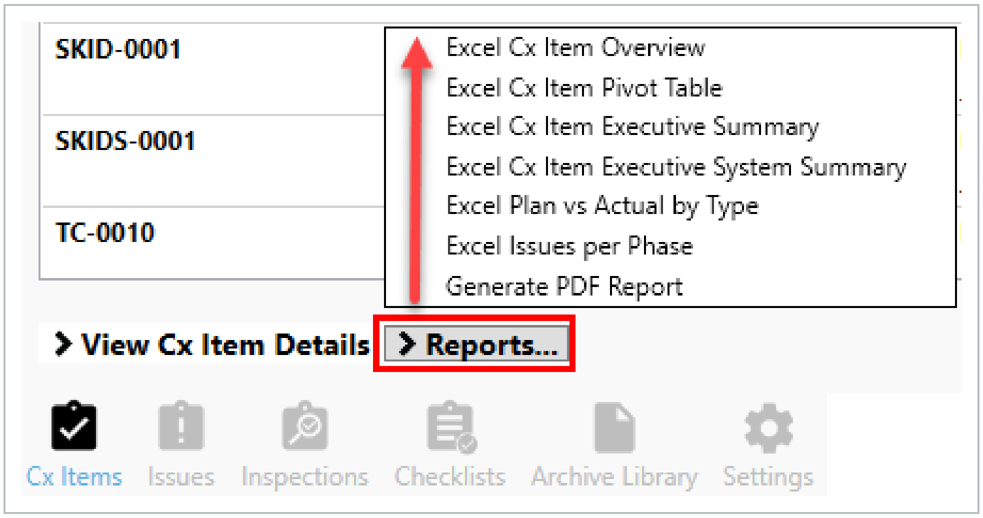
- Attachments



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

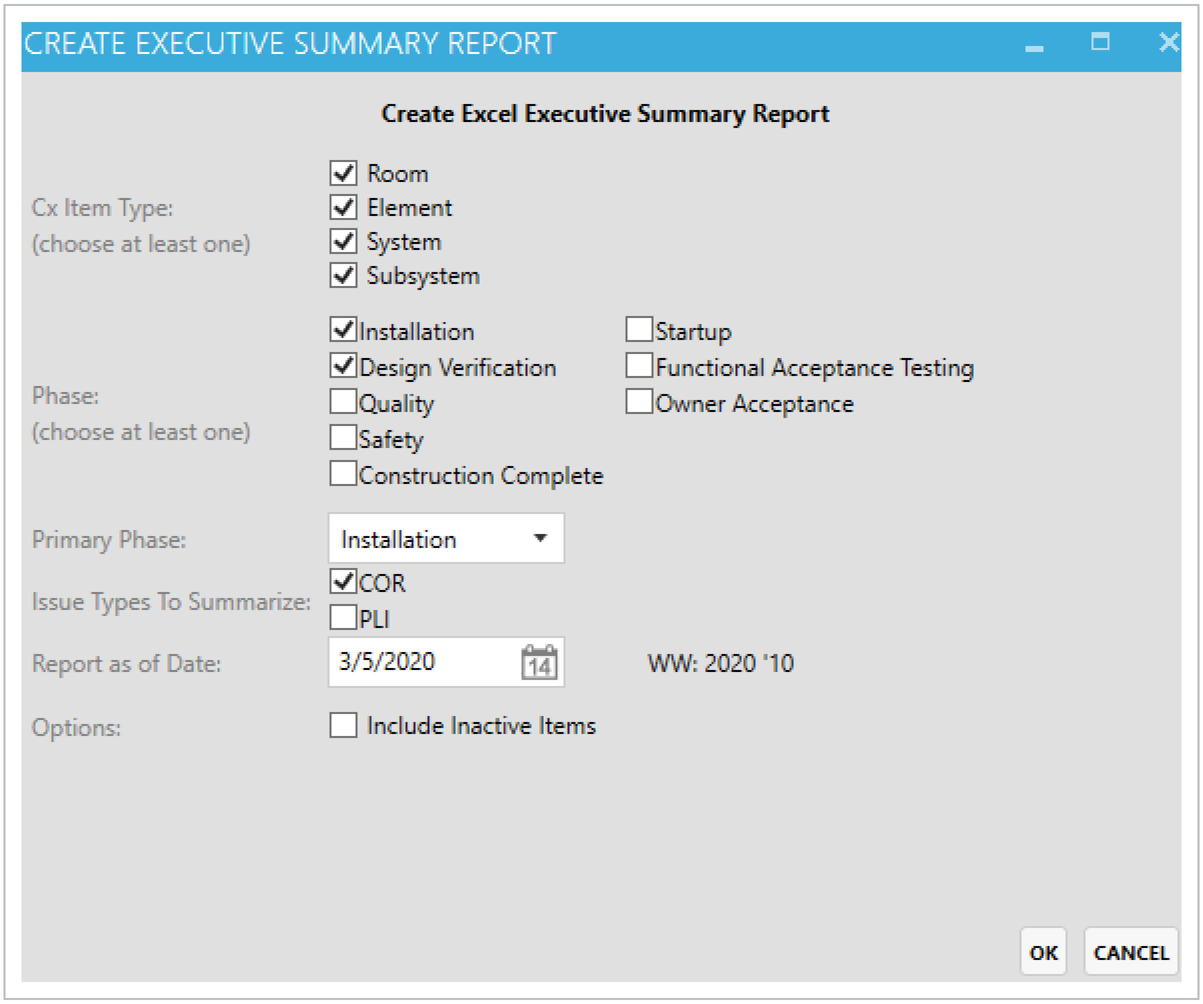
Excel Cx Item Pivot Table

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.

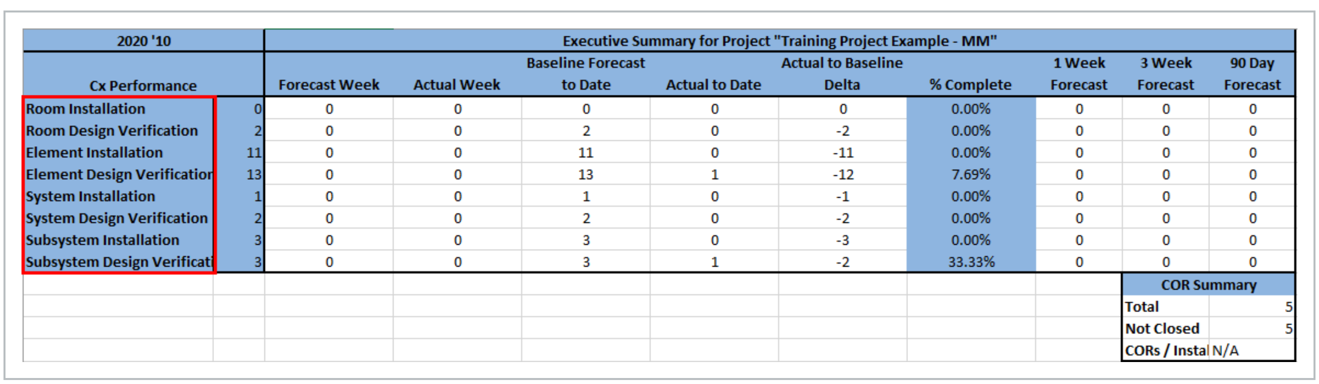
										Issues		
WBS	Main Equipment	Installation	Design Verification	Quality	Safety	Construction Complete	Startup	Functional Acceptance Testing	Owner Acceptance	Sum of Open COR	Sum of Total COR	Sum of Open PLI
1000.01	CAMPUS_A-UTLBLD-	(blank)	7/2/2019	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	0
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	0
2000.01	CT-0001	(blank)	2/24/2020	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	3	3	0
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	0
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	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	0
2000.01	HEX-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	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	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	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	0
1000.01	PMP-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	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	0
2000.01	SKID-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	0	0
4000.01	TK-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	0
4000.01	PMP-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	0
4000.01	SKID-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	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	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.



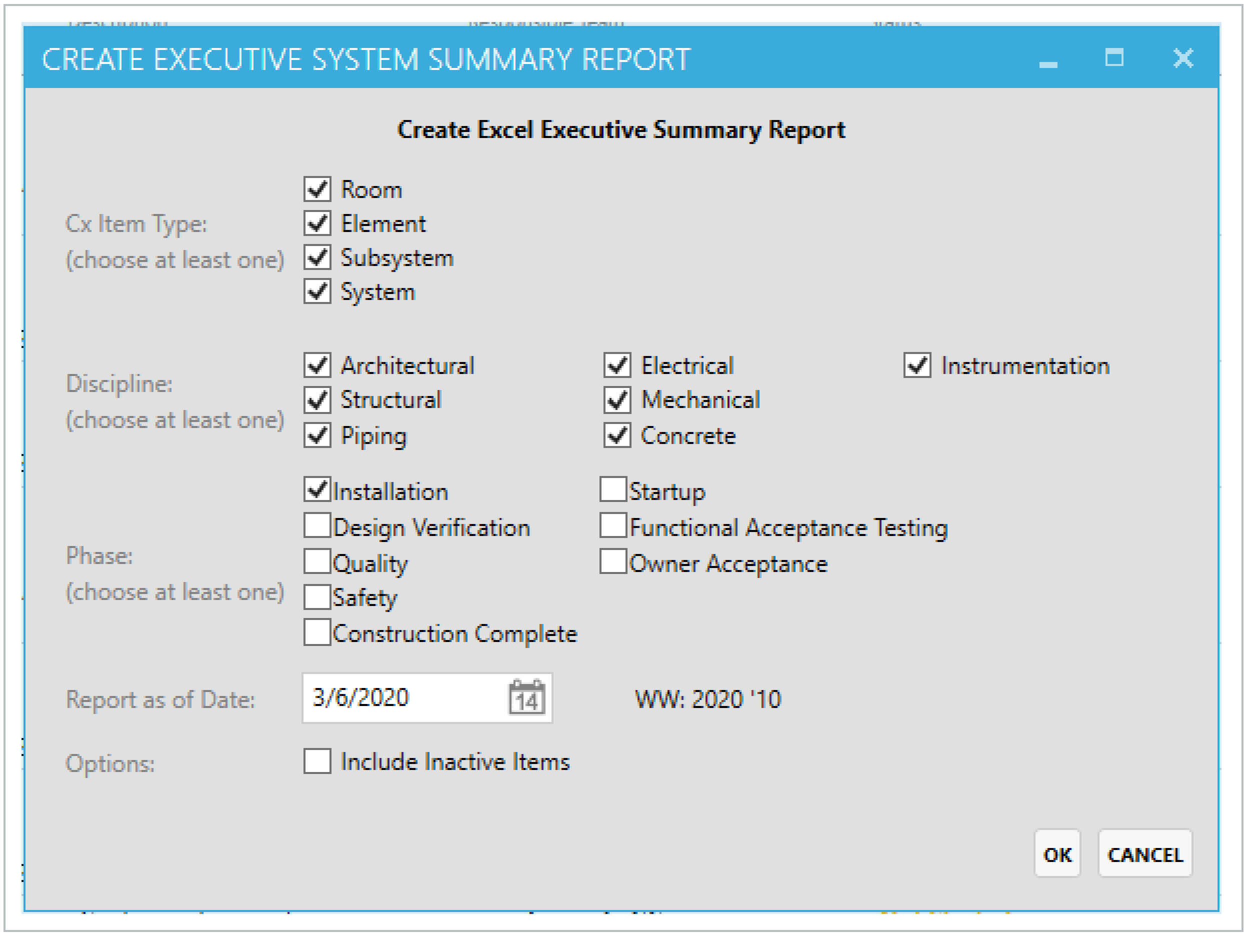
Based upon the Installation and Design Verifications Phase selections made in the above pop-up window, only those you can see in the Installation and Design Verification phase types are shown in the report below.



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.

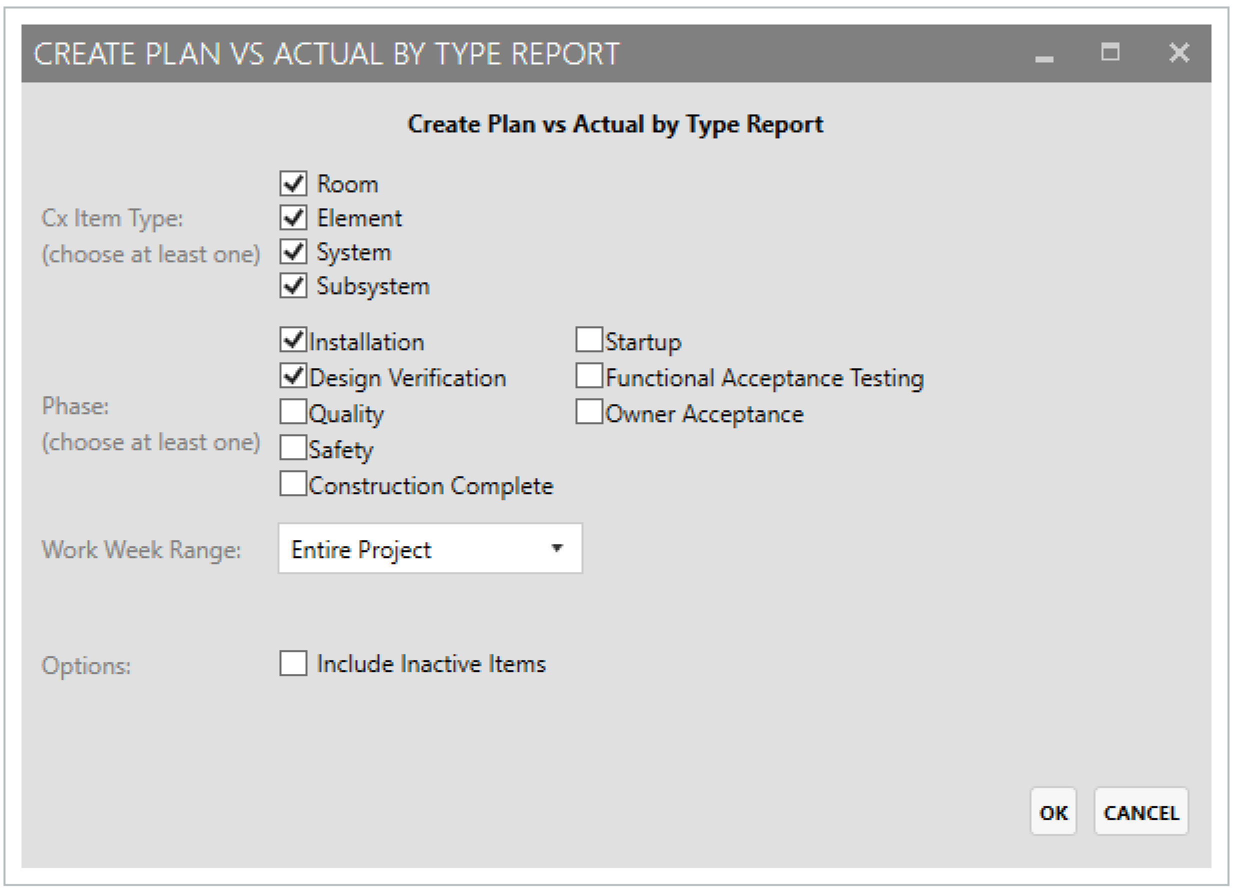


Based upon the Installation Phase selections made above, in the example below, you can see the data represented by Discipline in the report.

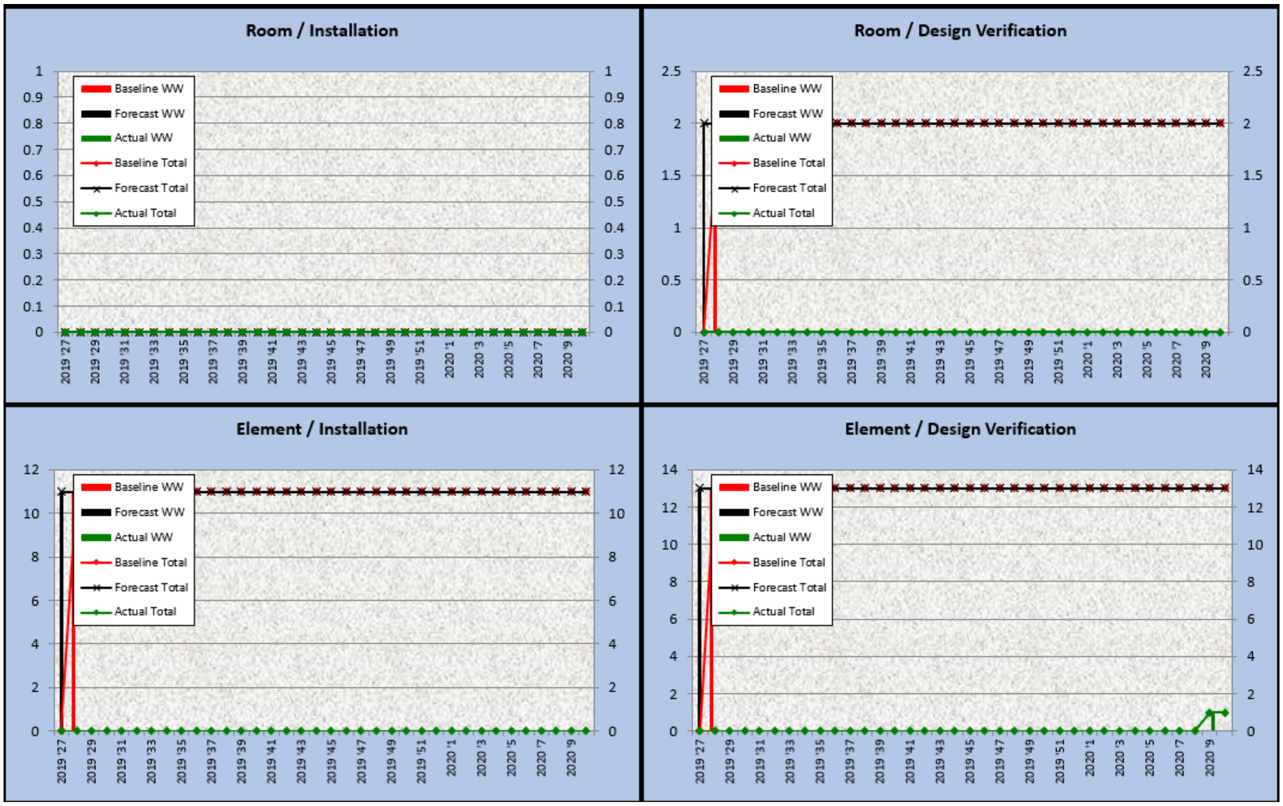
2020 '10	Executive System Summary for Project "Training Job"																			
	Element Installation					Room Installation					Subsystem Installation					System Installation				
Discipline	Total	Forecast to Date	Actual to Date	% Comp	Next 3 Weeks	Total	Forecast to Date	Actual to Date	% Comp	Next 3 Weeks	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.

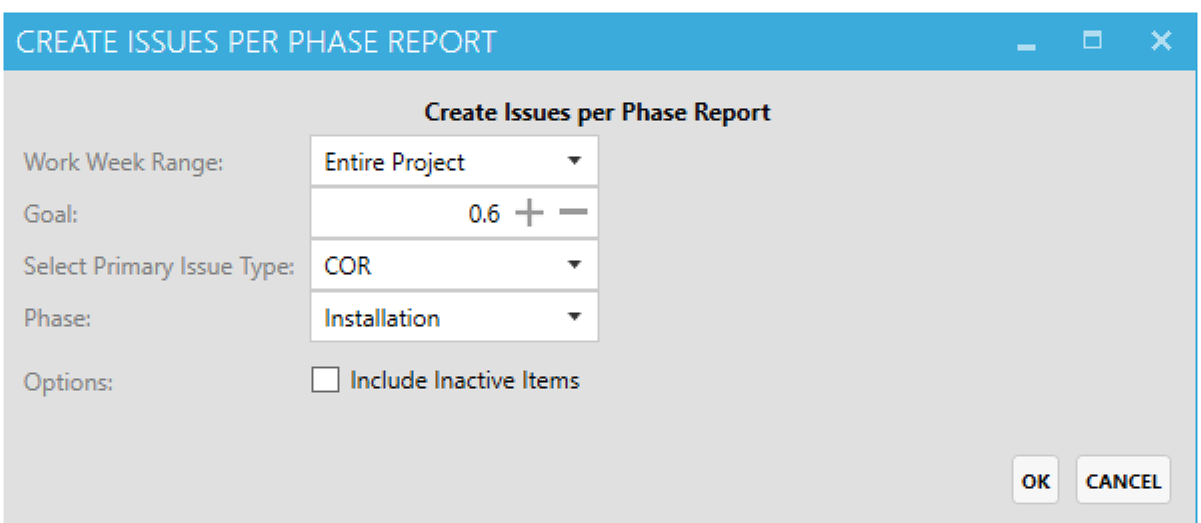


Based upon the selections made in the above pop-up window above, you can see the chosen results in the below report.

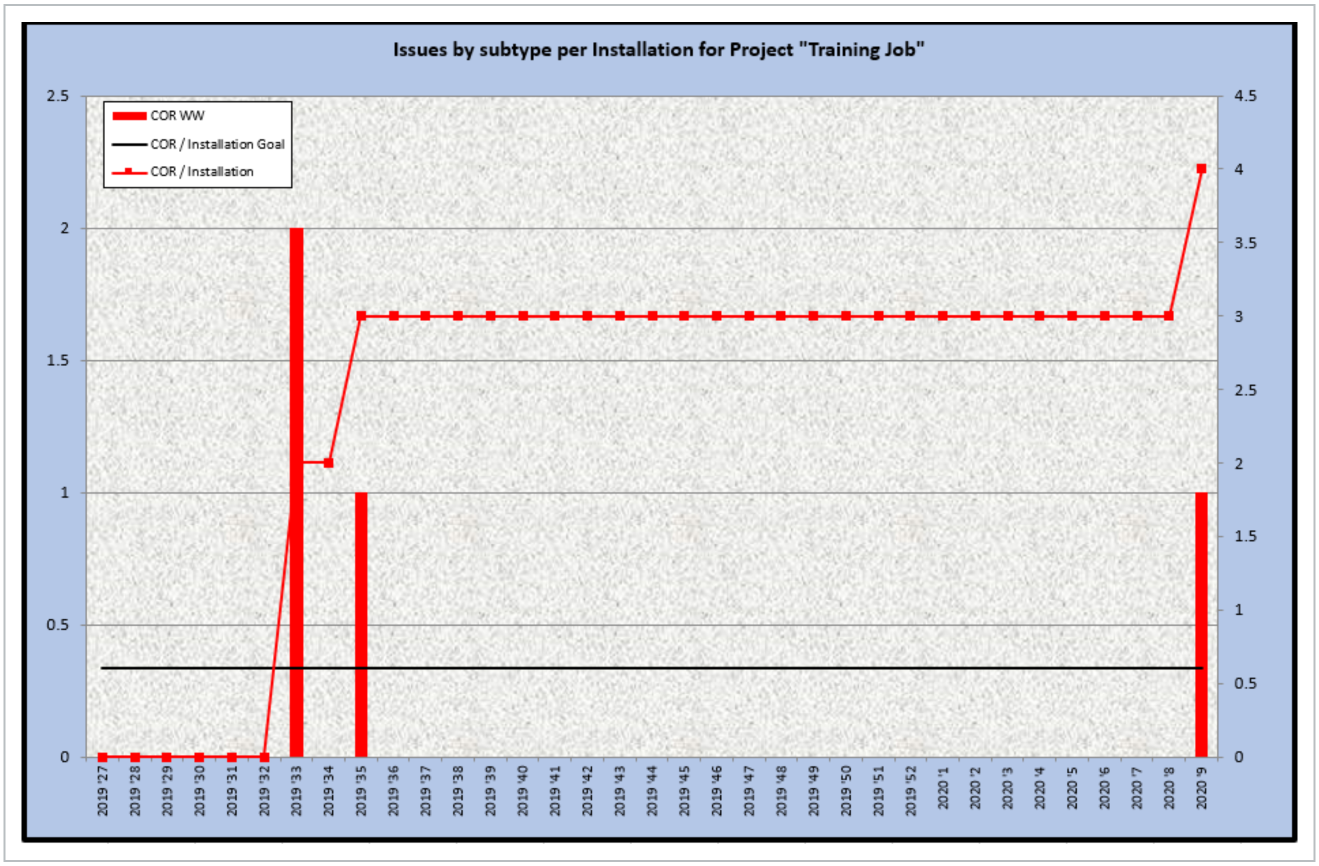


Excel Issues per Phase

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.

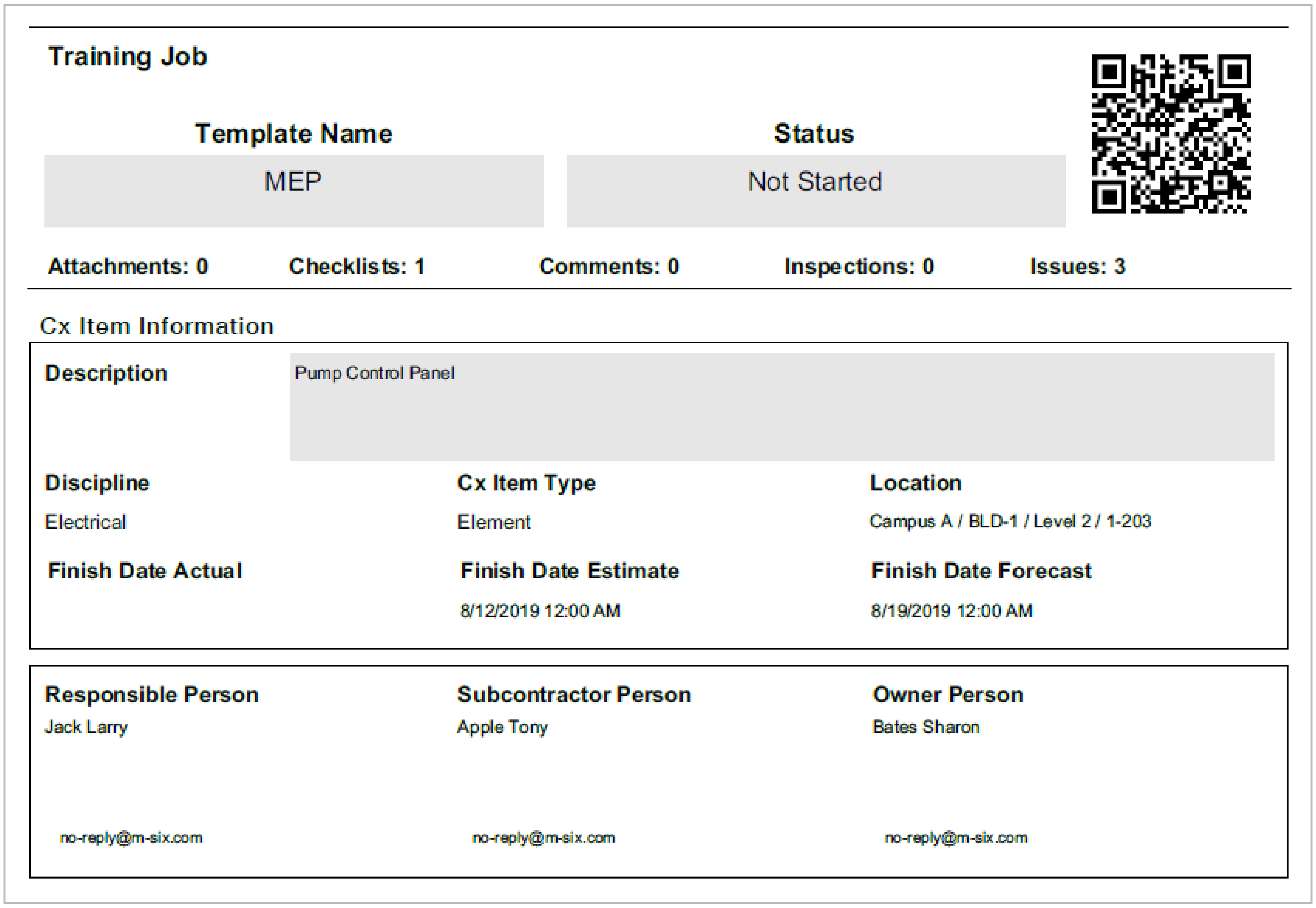


Report results are shown below.



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

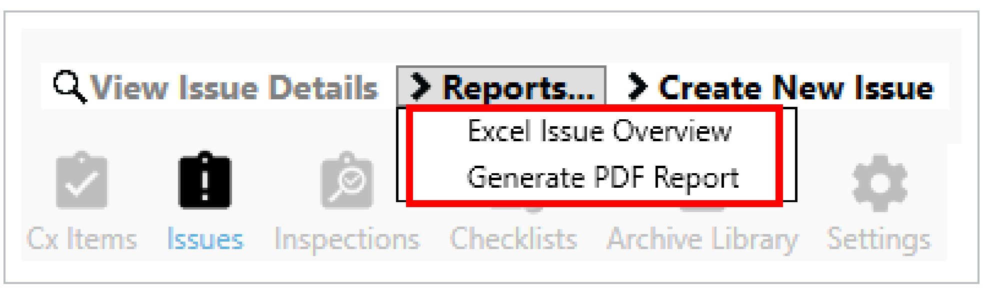
Description Pump Control Panel

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

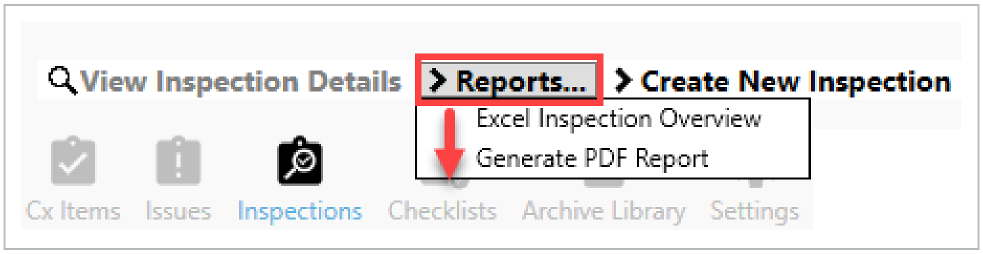
Responsible Team
InEight

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

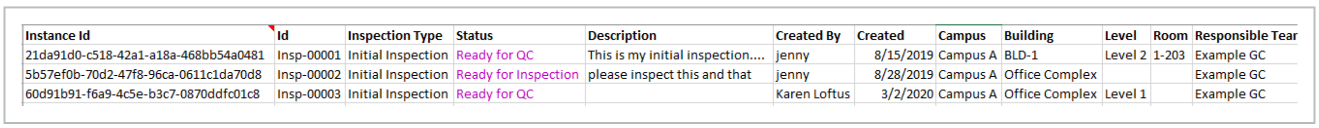
8.1.2.4 Inspections reports

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



Excel Inspection Overview

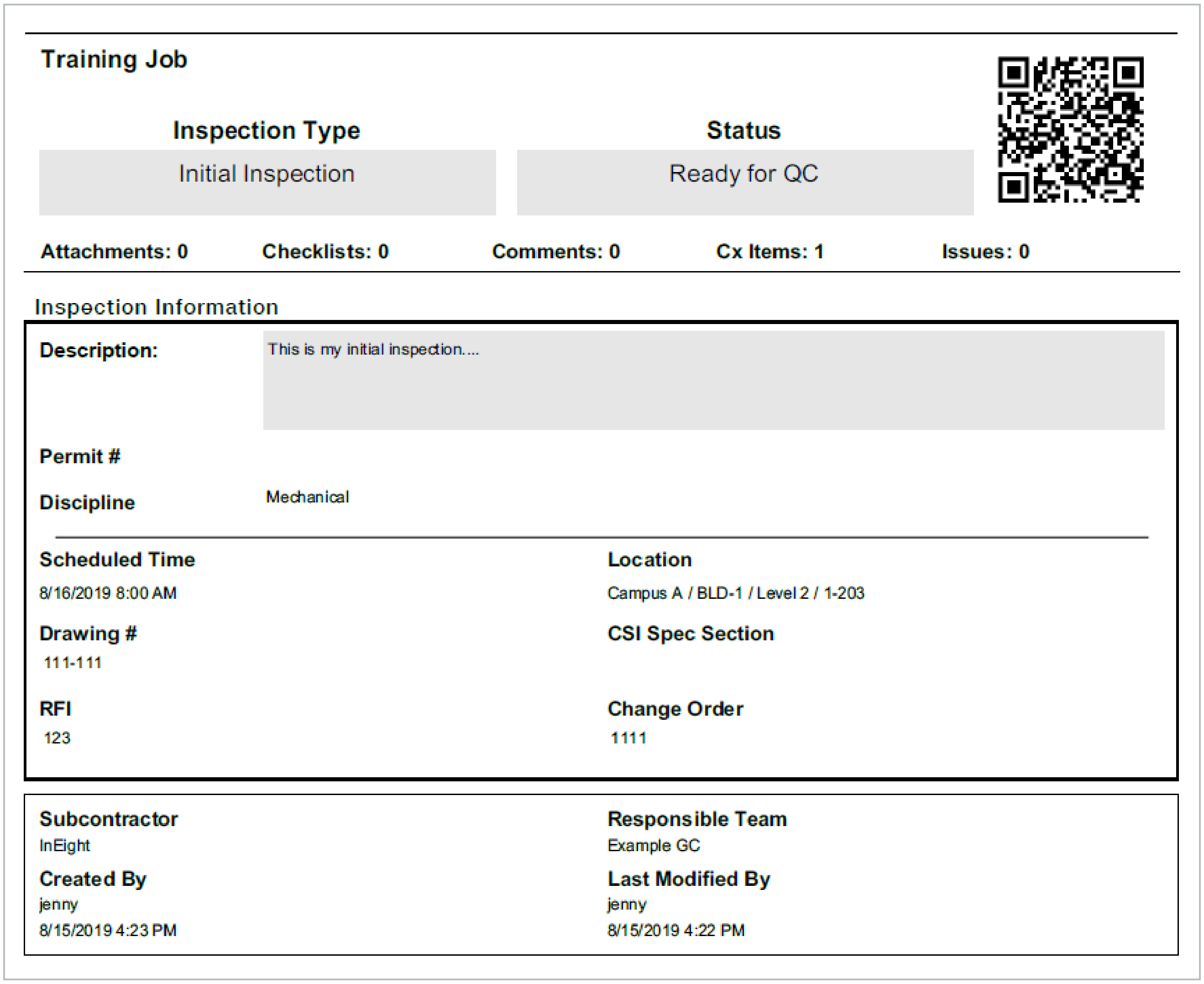
The Excel Inspection Overview report displays Inspection ID's along with columns such as: Status, Description, Created By and the various Inspection locations.



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

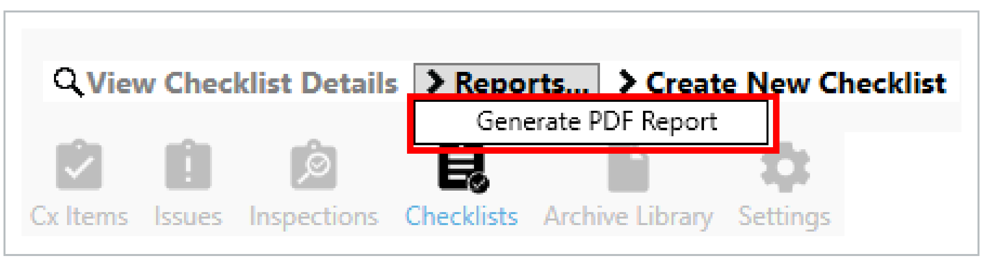
Responsible Team
Example GC

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

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

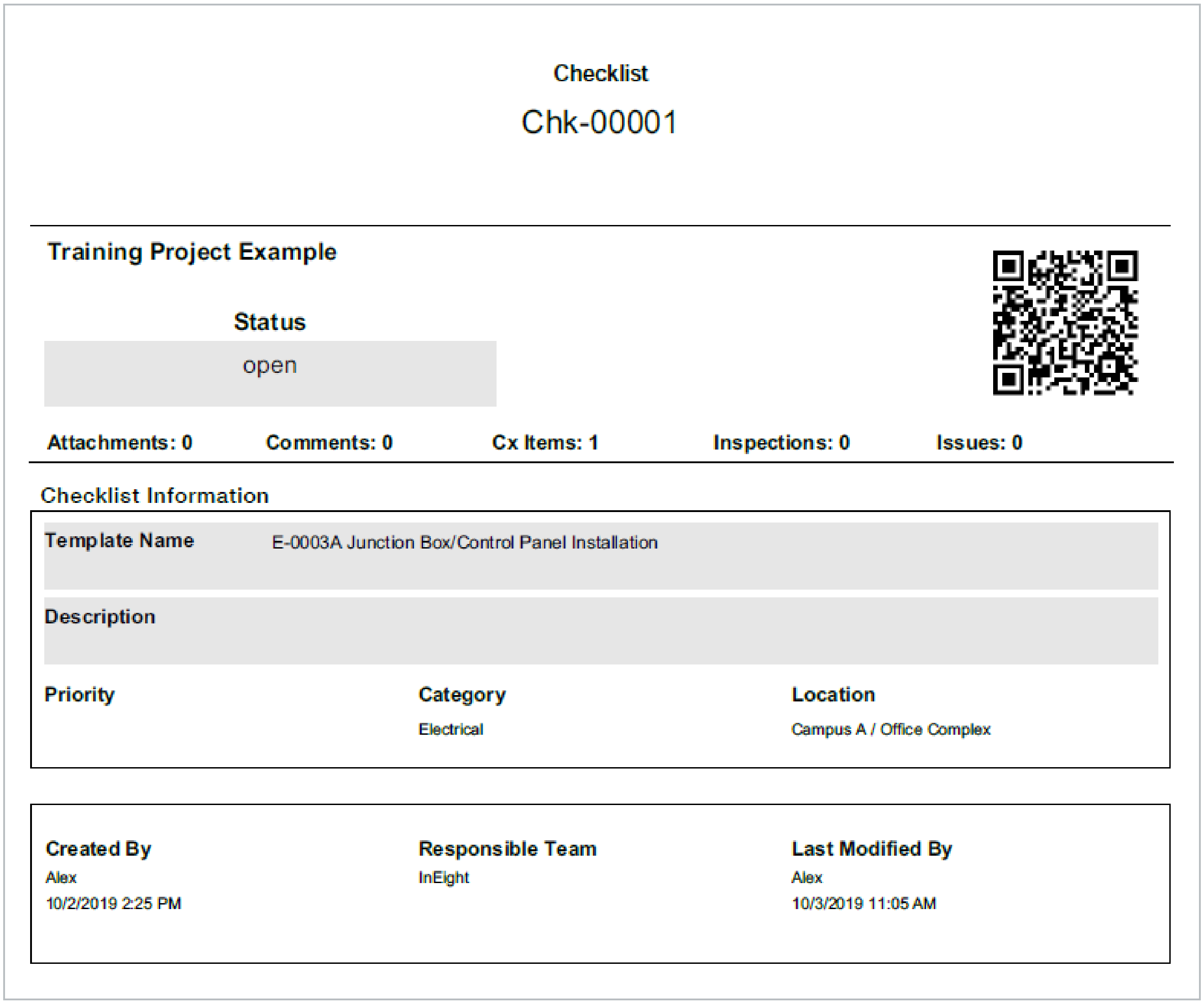
8.1.2.5 Checklists reports

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

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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

LESSON 8 – CERTIFICATES

Lesson Duration: 20 minutes

Lesson Objectives

After completing this lesson, you will be able to:

- View Certificate Details
- Reassign a Phase
- Update a Phase Status
- Review a Progress Roll-up Report
- Generate a PDF Report
- Create an Ad Hoc Certificate

Topics in this Lesson

8.1 CERTIFICATES OVERVIEW

A Certificate is a legal document used to transition between phases of a project led by different parties, functions or companies.

	Construction	Pre-Commissioning	Commissioning	Start Up	Operations
Elements	Certification by Elements of type Sub-System	Certification by Elements of type Sub-System	Certification by Elements of type System	Certification by Elements of type System	Certification by Elements of type Block
Checklists	All CON Checklists of type A-ITR must be completed	All PRECOMMs Checklists of type B-ITR must be completed	All COMS Checklists of type C-ITR must be completed	Performance Test Criteria Reports	
Issues	All issues of type Punch and category "A"	All issues of type Punch and category "A / B"	All issues of type Punch and category "A / B / C"	All issues of type Punch and category "A / B / C"	
Inspection	Inspections of type "System Walkdown" are completed by Construction, Commissioning and client representatives	Inspections of type "System Walkdown" are completed by Pre- commissioning, Commissioning and client representatives	Inspections of type "System Walkdown" are completed by Commissioning, Startup and client representatives	Inspections of type "System Walkdown" are completed by Startup, Operations and client representatives	
Certificate	RFPC certificate signed by Construction Authority and Commissioning Authority	RFC Certificate signed by the Pre-Commissioning Authority and the Commissioning Authority	RFSU certificate signed by Commissioning Authority and Startup Authority. MC Certificate sign by Commissioning Authority and Startup Authority.		
Attachment	Turnover dossier containing application redlines, and reports stating how the as-is conditions of the system.		Turnover dossier containing application redlines, and reports stating how the as-is conditions of the system.		
Preservations	Preservations are managed through the project lifecycle				

A certificate is a summary document that officiates multiple aspects of the Completions database for a scope of work. For example, in a Ready for Pre-Commissioning (RFPC) Certificate, the requirements include:

- The scope of work for the certificate is all pieces of equipment associate to the Sub-System
- All construction checklists (A-ITR) for equipment in that scope are complete
- Any issue of type Punch and Category A are resolved
- A Final Walkdown Inspection of the work has been completed
- A turnover package has been created for review

After all those conditions are met, the project can initiate the certificate sign off process where the Issuer individuals (Construction) and the Receiver individuals sign the certificate. After all signature are collected, on most projects, the scope of work transfers from the Issuer team to the Receiver team where they are able to perform their work activities.

Examples of types of Completion Certificates include:

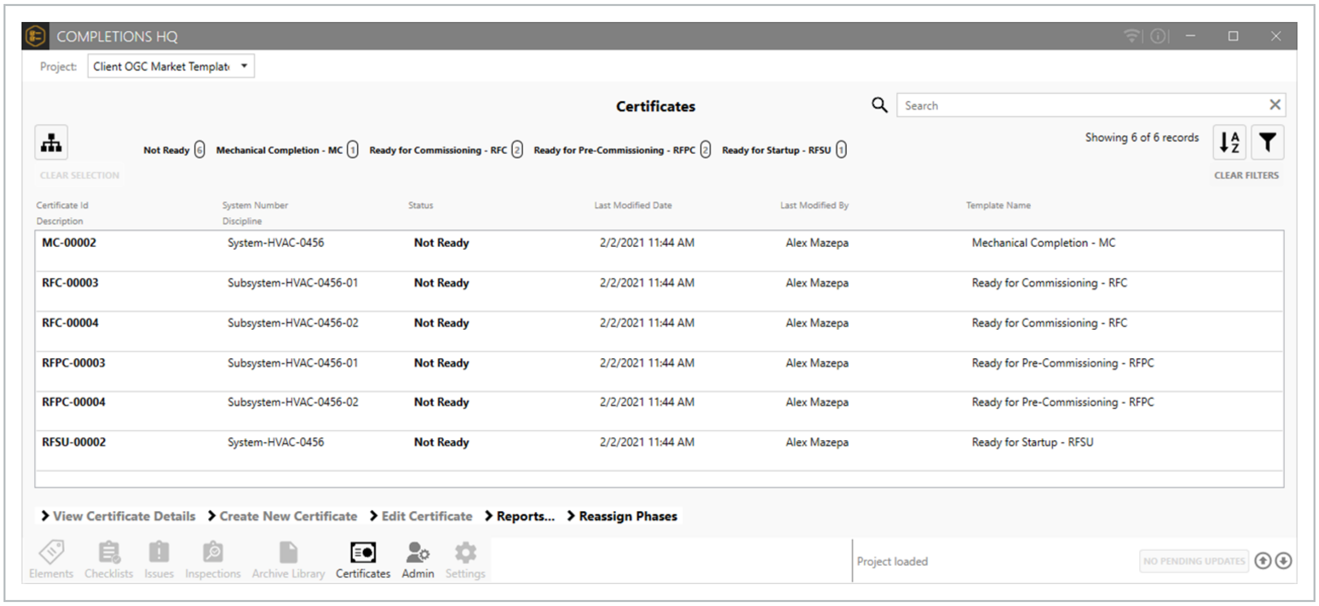
- Construction Complete (CC)
- Ready for Commissioning (RFC)
- Ready for Start Up (RFSU)

- Ready for Operation
- Facility Acceptance

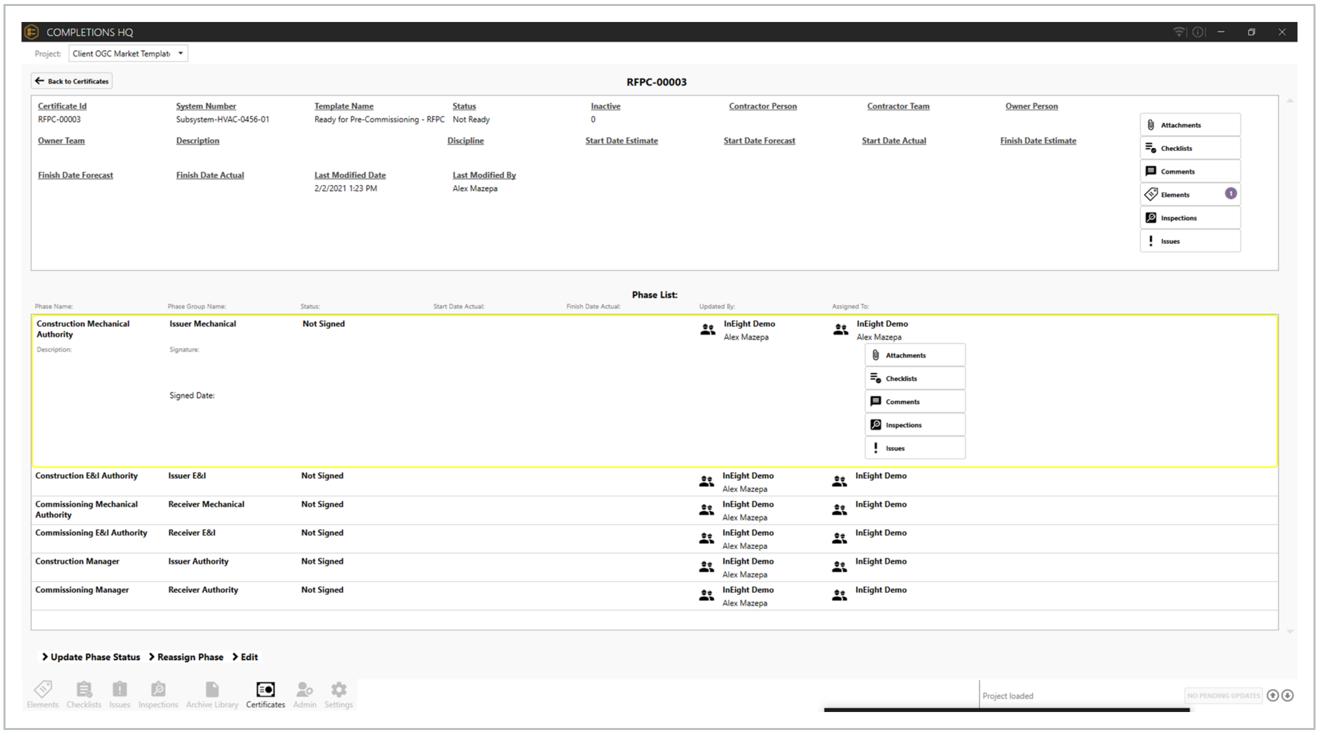
Signed Certificates becomes part of the final Turnover Package that the issuer signs off, saying that they have met all their obligations, and is handed over to the receiver.

8.1.1 View Certificate Details

From the Certificates tab, certificates are listed by columns such as Certificate ID, System Number, Discipline, Status, and Template Name.



You can double-click on a specific Certificate to show you the Certificate's detail information and Phase List. You can also select a Certificate ID, and then click **View Certificate Details**.



8.1.2 Reassign a Phase

Before the certificate phases can be signed by the appropriate authorities, the project admin is required to reassign each phase to the appropriate team responsible for signing the Phase. Reassigning tells the user who is responsible to sign that line item, and tells the application to allow signatures.

Although editing a certificate's Phase Status is a function of the Completions Coordinator or Admin, reassigning a Phase is used by the Coordinator to tell the system, and the user, who is supposed to sign that line item.

8.1 Step by Step 1 — Reassign a Phase

1. From the Certificate tab, select a Certificate ID to reassign.
2. Select a Phase.

3. Select **Reassign Phase**.
4. Select a new Responsible Team.
5. Click **OK**.

At this point, Completions starts to evaluate the Workflow Gates defined by the project. It evaluates content for a scope of work such as completion of:

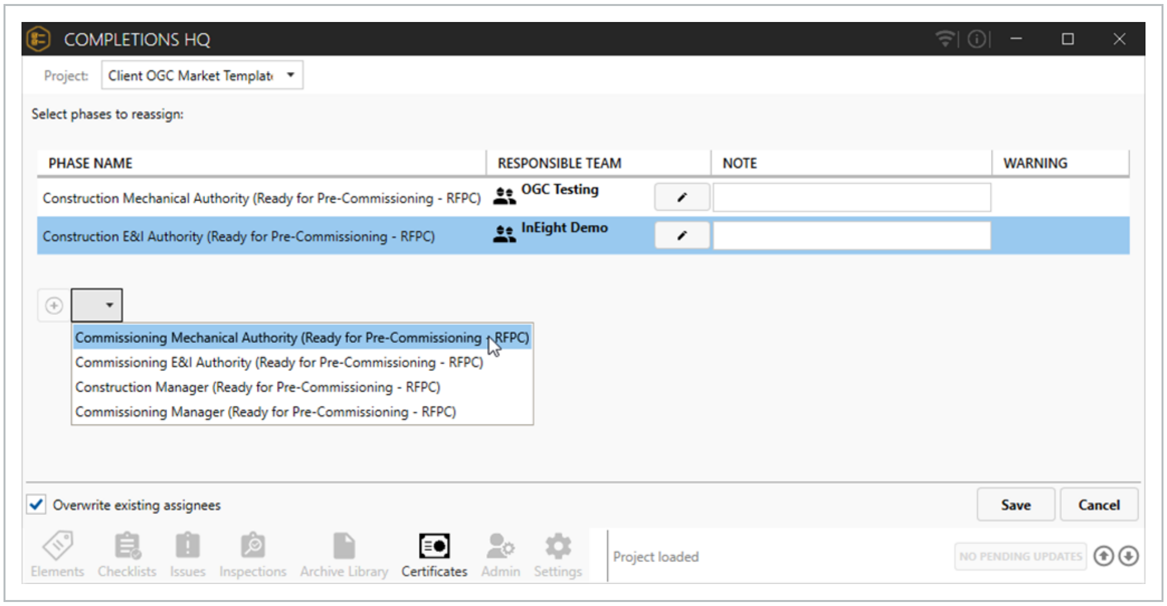
- Checklists of a certain type
- Issues of a certain type and severity
- Inspection of a certain type

8.1.3 Bulk Reassign a Phase

Assigning each phase of a certificate can be a long task for an admin. The admin can assign multiple phases of multiple certificate records at the same time.

Bulk Reassign a Phase

1. From the Certificate tab, select one or many Certificates while holding the CTRL key.
2. Select **Reassign Phases**.
3. Choose Phases from the lower drop-down menu, and then select to add them.
4. Choose the Responsible Team and add any notes.
5. Select **Save**.
   - The system reassigns the phases for all selected certificates with those phases



8.1.4 Update Phase Status

After all Completions requirements are met, you can update the Phase Status to Signed.

A sequencing of certificate signatures is built into Completions to ensure the proper authorities review the turnover package.

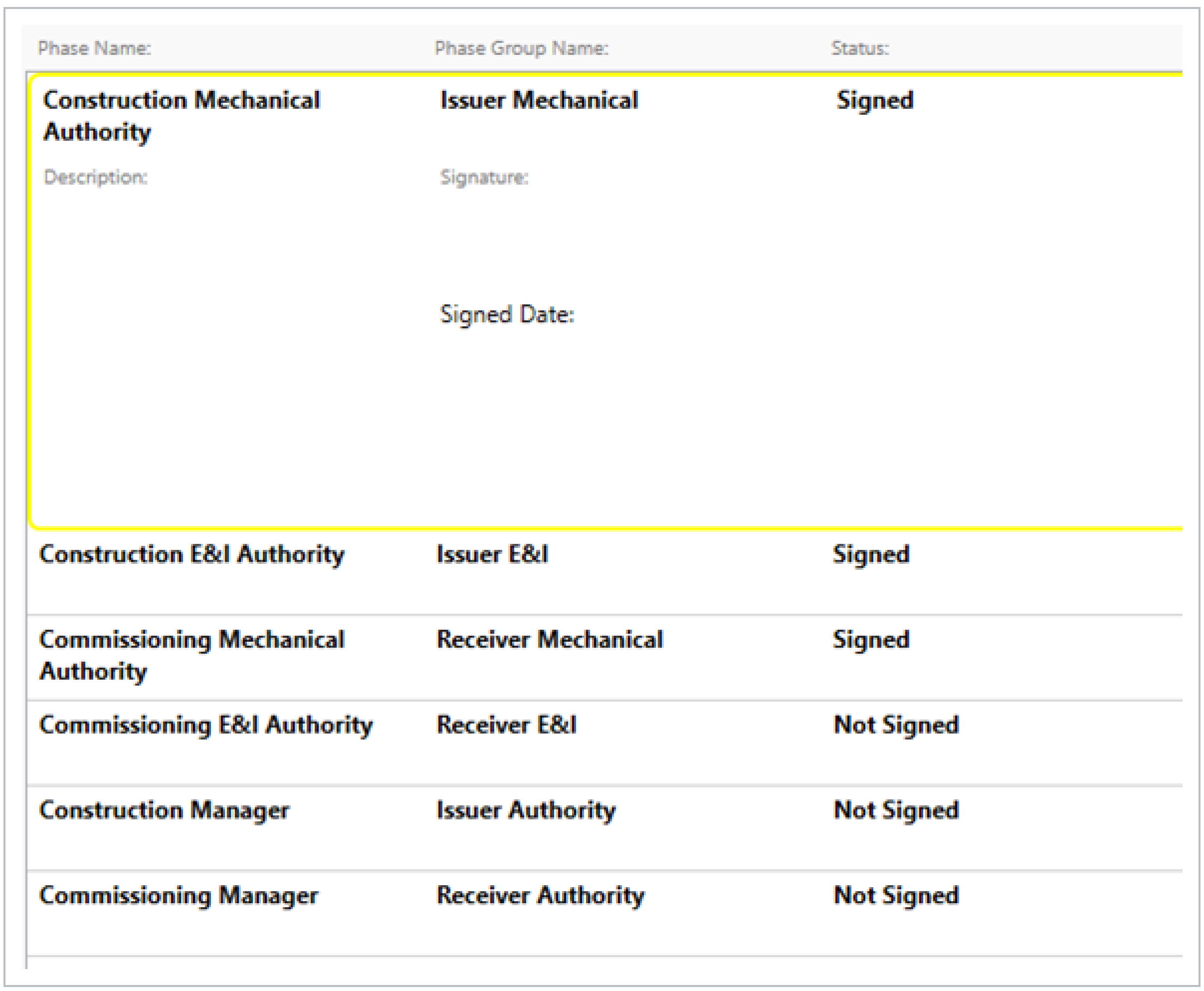
In the example of this certificate:

• Construction Discipline signatures need to sign first

• After a single Construction Discipline has been signed, the Commissioning Authority of the same discipline can sign

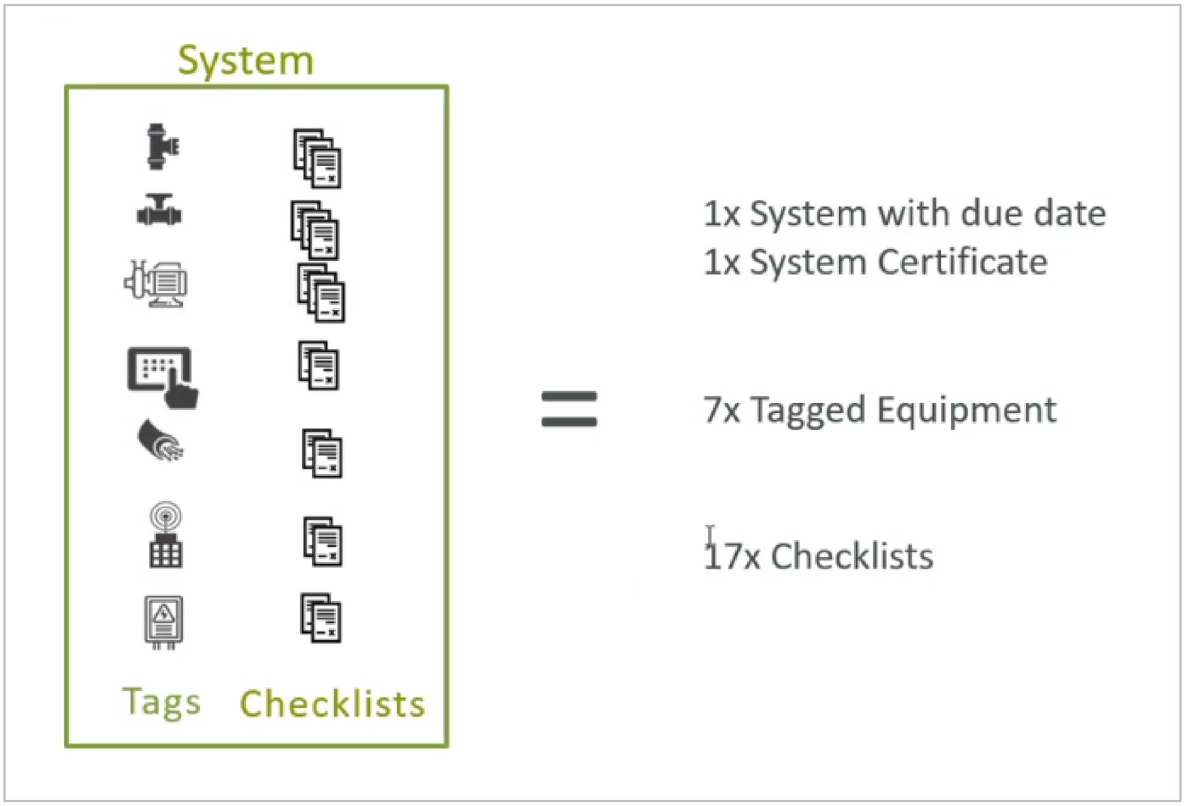
• The Construction Manager can only sign after all the Commissioning Discipline Authorities have signed

• The Commissioning Manger can only sign after the Construction Manager has signed



It is critical to know that Certificate Gates, created at the admin level, prevent someone from signing off on a Sub-System Certificate unless all Phase Checklists have previously been signed off on.

In the example shown, this system has seven pieces of tagged equipment with a total of 17 checklists. Each checklist must be completed as dictated by the created Certificate Gates.



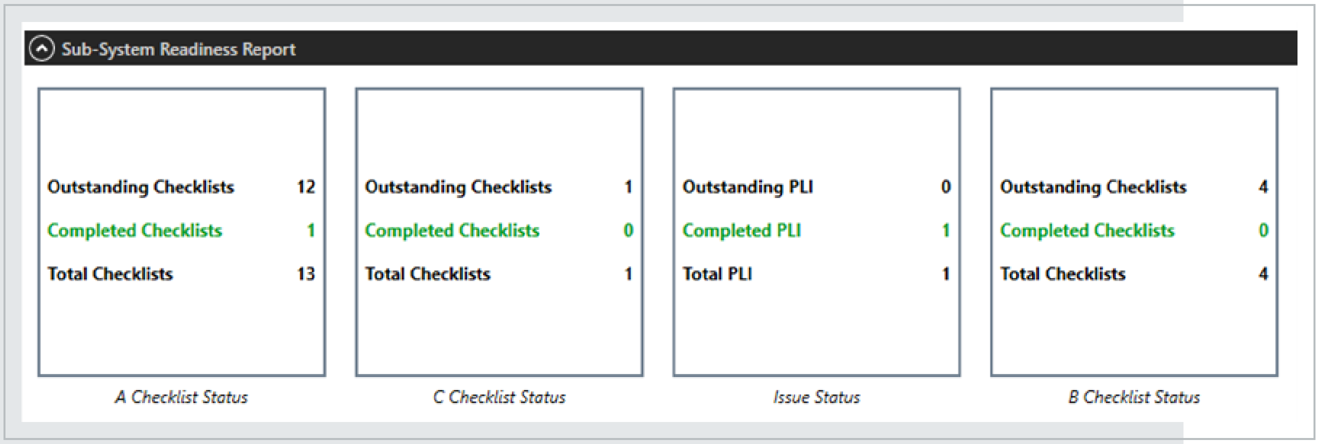
8.1.4.1 Progress Roll-Up Reports

To validate that all certificates are completed, you can look at the Progress Roll-up Reports. These reports are configured to be in the context of how the project evaluates completeness.

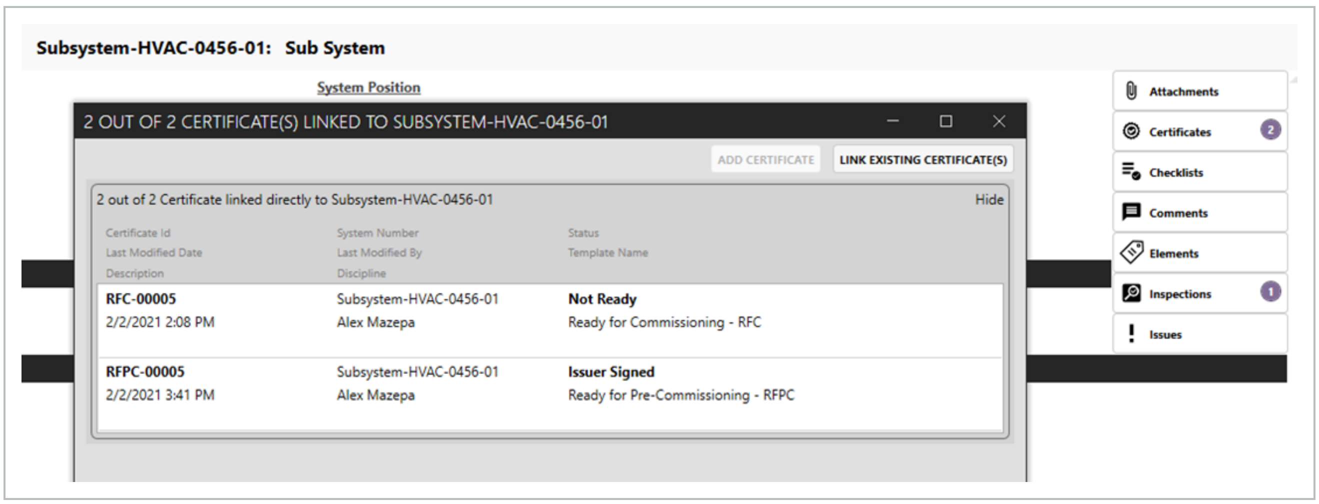
8.1 Step by Step 2 — Progress Roll-Up Report Review

1. From the Certificates tab, double-click to select a Certificate ID.
2. Click on the **Elements** context path button.
3. Click to open the Sub-System.
4. Click on the **Sub-System Readiness Reporting** drop-down arrow.
5. View the number of Completed Checklists as compared to Total Checklists.

NOTE In the example shown below, only one of the 13 needed A Checklists are completed.



To view the details on those certificates, click the Certificates context path button to view the current status of the Certificates linked to the Sub-System.



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

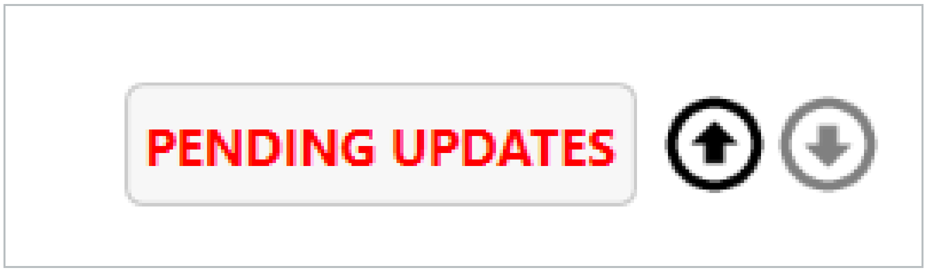
If all Certificates are complete, go back into the Certificate and click Update Phase Status > **SIGN**.

8.1.4.2 Role of Pending Update

When changes have been made, updates need to be synced to send all updates to the server.

8.1 Step by Step 3 — Pending Updates

1. Hover over the up arrow to show the number of changes waiting to be published.



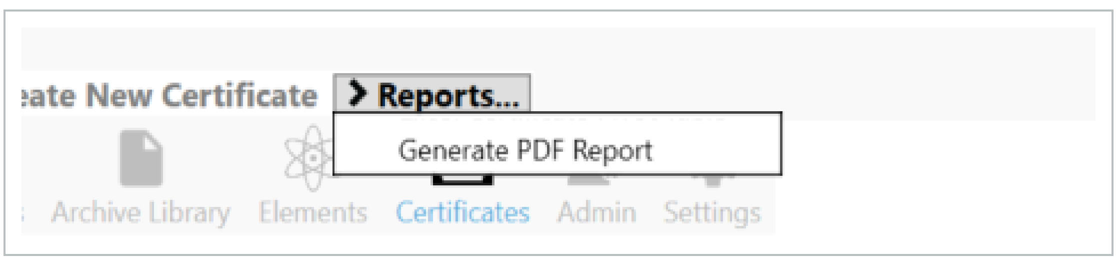
2. Click **Pending Updates**.
3. Review the pending changes.
4. Click **Publish**.
   - After doing so, the red Pending Updates button changes to a dimmed No Pending Updates

8.1.5 PDF Reports

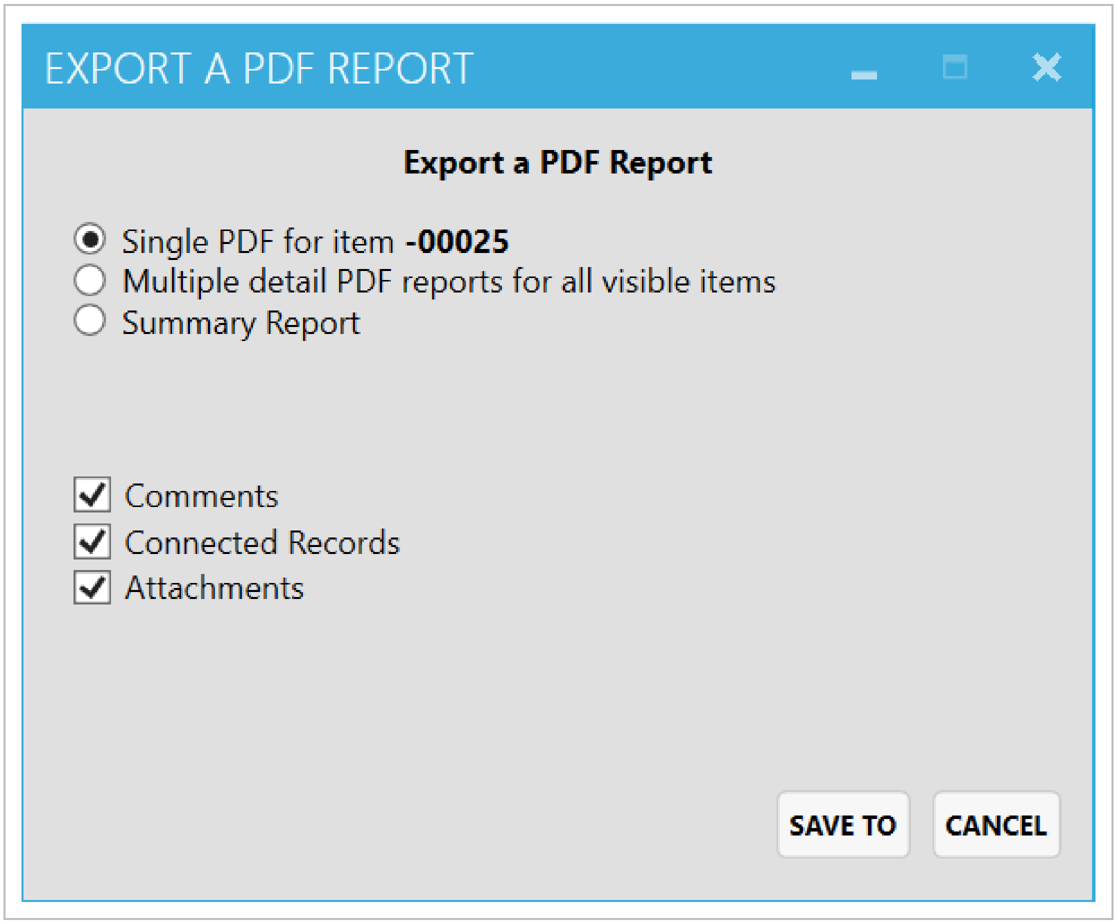
Certificate status can be documented as an artifact, or snapshot, of progress.

8.1 Step by Step 4 — Generate PDF Report

1. Click Certificates > **Reports...**, and then select **Generate PDF Report**.

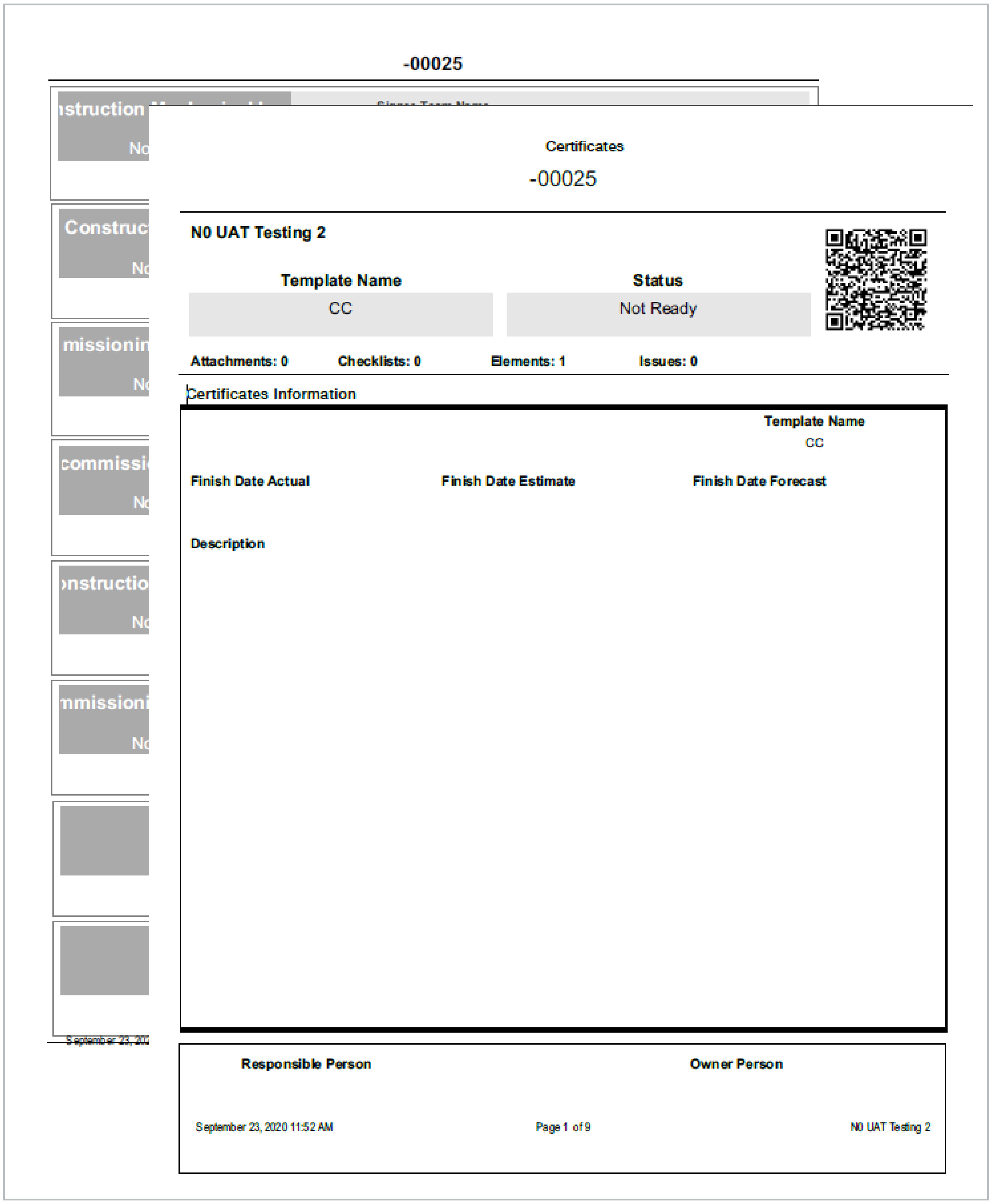


2. In the dialog box, adjust the options, if necessary.



3. Click **Save To**.
4. Navigate to the folder where you want to save the PDF file.
5. Rename the file, if necessary.
6. Click **Save**.

- Wait for the file to be generated
- The PDF shows in a separate window



Certificates

-00025

N0 UAT Testing 2

Template Name	Status
CC	Not Ready

Attachments: 0 Checklists: 0 Elements: 1 Issues: 0

Certificates Information

Template Name
CC

Finish Date Actual	Finish Date Estimate	Finish Date Forecast

Description

Responsible Person	Owner Person

September 23, 2020 11:52 AM Page 1 of 9 N0 UAT Testing 2

LESSON 8 – PRESERVATION PLAN

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

8.1 PRESERVATION PLAN SETUP OVERVIEW

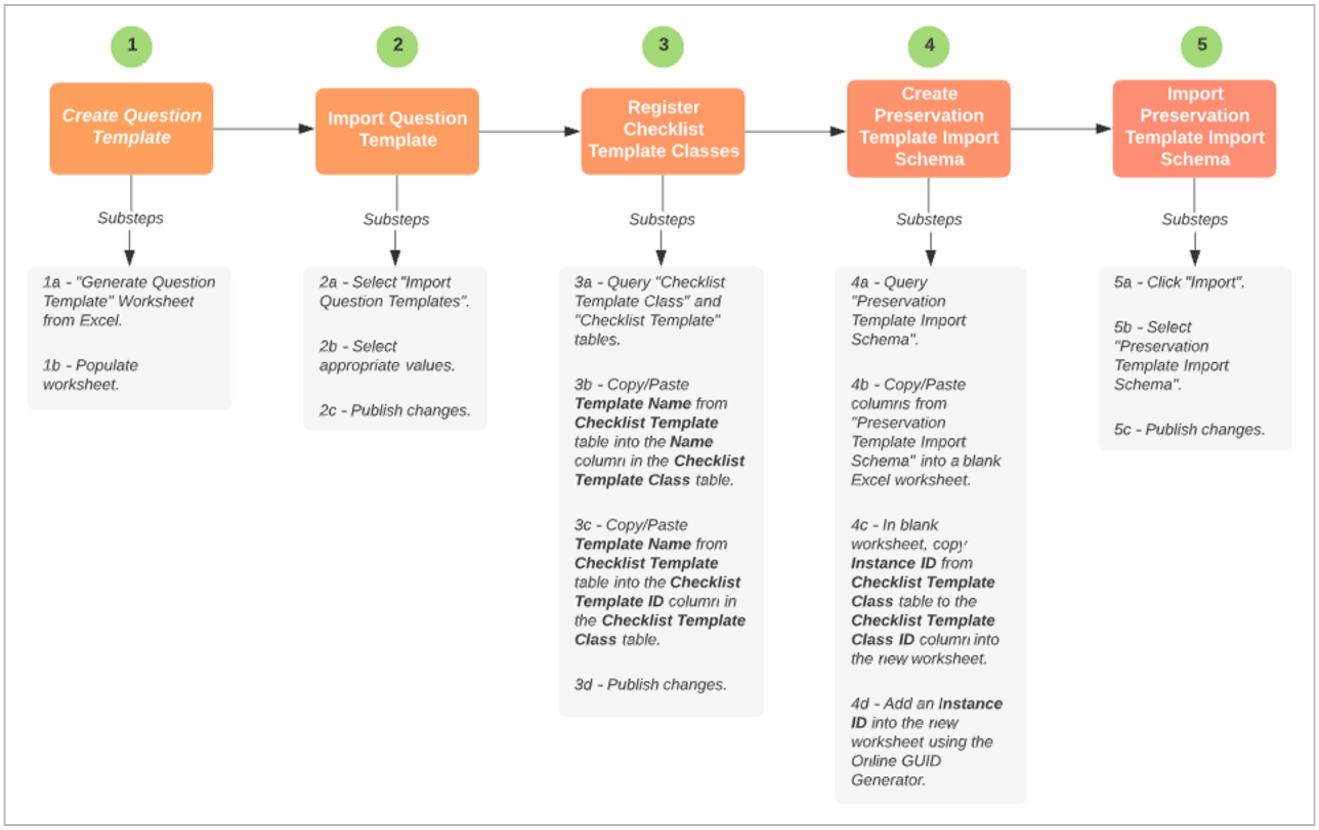
8.1.1 Role of Project Admin

All equipment that is subject to a reoccurring Preservation activity requires a Preservation Plan. For each piece of equipment, a scheduled frequency of care is identified. Each of these scheduled frequencies is called a Preservation Plan. The schedule of steps to be completed is configured by the Project Admin in the InEight Excel Plugin.

8.1.2 Setting up a Preservation Plan

To set up frequency-bound Preservations, the following tasks need to be completed by the Project Admin.

8.1.2.1 Preservation Plan Setup in a Nutshell



8.2 QUESTION TEMPLATES

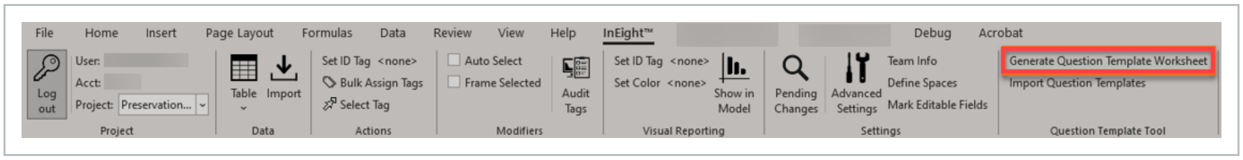
Question Template creation has the same process as Checklist question creation.

8.2.1 Create the Question Template

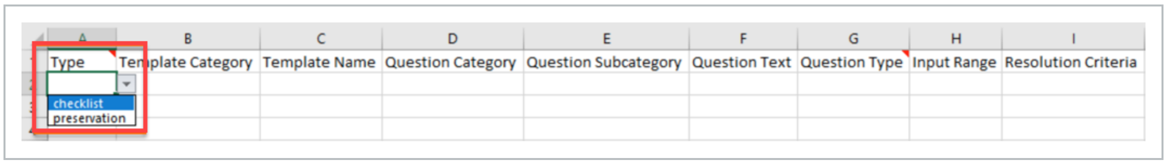
Follow this step-by-step to create the question template.

8.2 Step by Step 1 — Create the Question Template

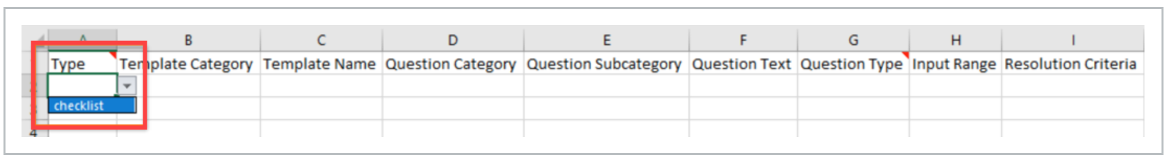
1. Login to the Excel Plugin and select your project.
2. Select the **Generate Question Template Worksheet**.



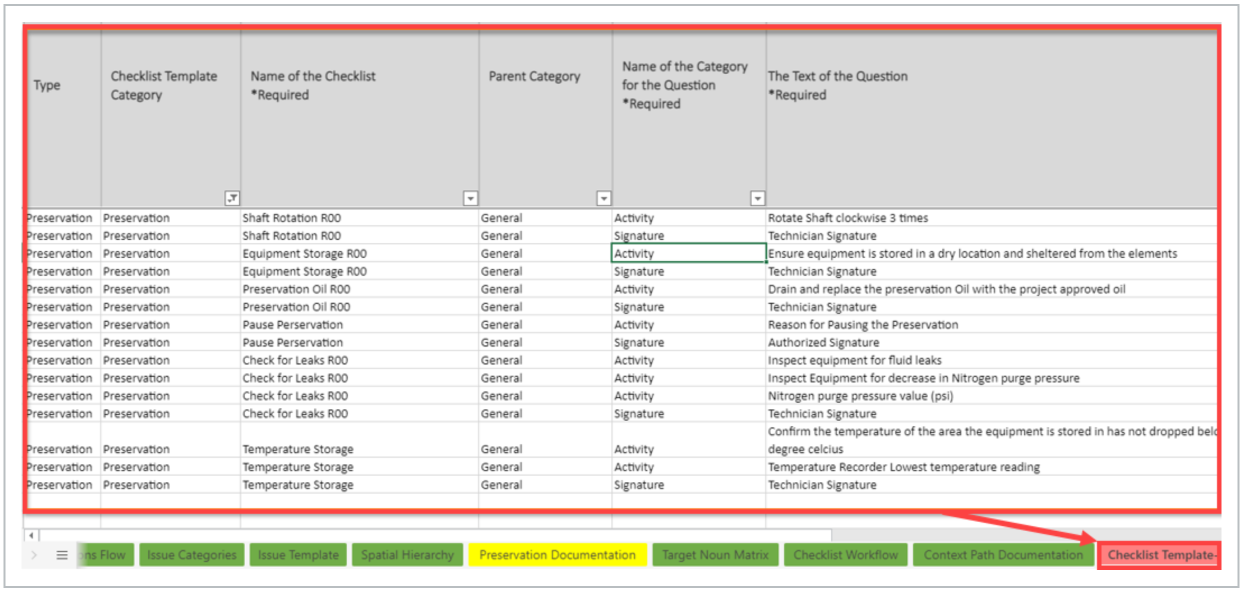
3. In the Type column, specify the applicable checklist type by selecting the Type drop-down.
4. Then, select either **checklist** or **preservation**.
   - If the project has the Preservations module enabled, it shows as an option in the drop-down menu.



   - If the project does not have the Preservations module enabled, checklist is then the only option in the drop-down menu



   - If left blank, the template can be used in both modules.
5. Enter the values from the Checklist Template tab in your Config Book into the **Question Template** worksheet.



Type	Checklist Template Category	Name of the Checklist *Required	Parent Category	Name of the Category for the Question *Required	The Text of the Question *Required
Preservation	Preservation	Shaft Rotation R00	General	Activity	Rotate Shaft clockwise 3 times
Preservation	Preservation	Shaft Rotation R00	General	Signature	Technician Signature
Preservation	Preservation	Equipment Storage R00	General	Activity	Ensure equipment is stored in a dry location and sheltered from the elements
Preservation	Preservation	Equipment Storage R00	General	Signature	Technician Signature
Preservation	Preservation	Preservation Oil R00	General	Activity	Drain and replace the preservation Oil with the project approved oil
Preservation	Preservation	Preservation Oil R00	General	Signature	Technician Signature
Preservation	Preservation	Pause Perservation	General	Activity	Reason for Pausing the Preservation
Preservation	Preservation	Pause Perservation	General	Signature	Authorized Signature
Preservation	Preservation	Check for Leaks R00	General	Activity	Inspect equipment for fluid leaks
Preservation	Preservation	Check for Leaks R00	General	Activity	Inspect Equipment for decrease in Nitrogen purge pressure
Preservation	Preservation	Check for Leaks R00	General	Activity	Nitrogen purge pressure value (psi)
Preservation	Preservation	Check for Leaks R00	General	Signature	Technician Signature
Preservation	Preservation	Temperature Storage	General	Activity	Confirm the temperature of the area the equipment is stored in has not dropped belo degree celcius
Preservation	Preservation	Temperature Storage	General	Activity	Temperature Recorder Lowest temperature reading
Preservation	Preservation	Temperature Storage	General	Signature	Technician Signature

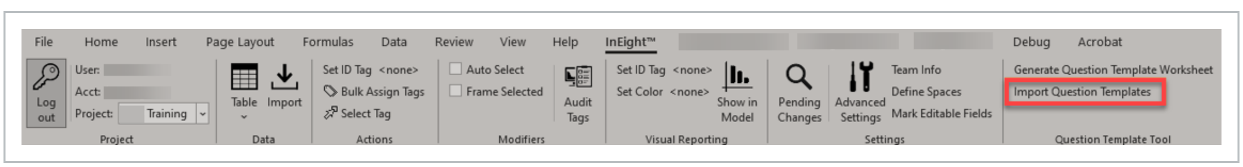
NOTE It is best practice to always include a revision number to the Template Name. This will serve an important role in the Register the Checklist Template Classes step-by-step.

8.2.2 Import Question Templates

Follow this step-by-step to import question templates.

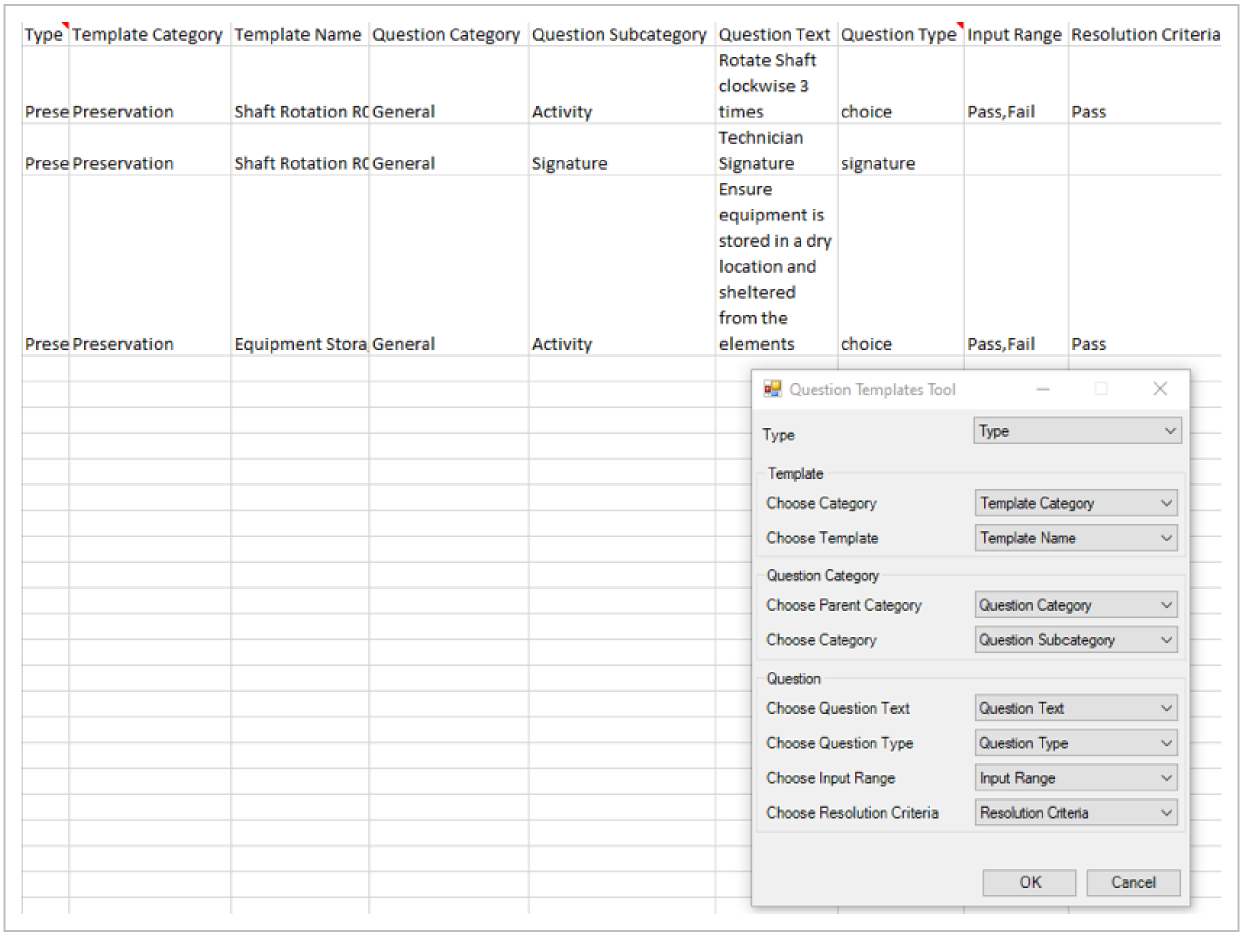
8.2 Step by Step 2 — Import Question Templates

1. Select **Import Question Templates**



2. Make the appropriate selections based on the values expected by the application.

NOTE If the headers in the worksheet match the information in the Question Template Tool, the values then autofill.



3. Publish the pending changes.

8.3 REGISTER THE CHECKLIST TEMPLATE CLASSES

Checklist Template class registration is important because the Preservations module references the Template Class as opposed to the Checklist Template. This allows a Project Admin revise the checklist template in the application without first having to delete the existing preservation.

Follow this step-by-step to register checklist template classes.

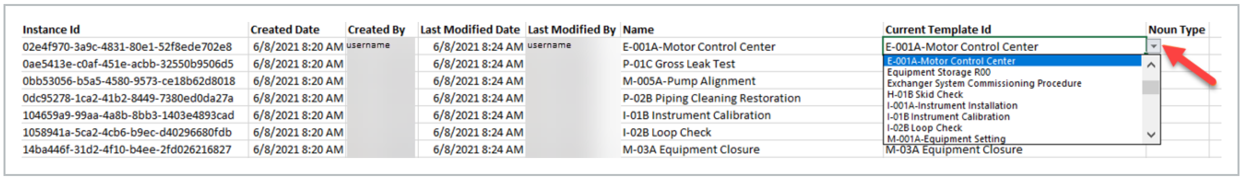
8.3 Step by Step 1 — Register Checklist Template Classes

1. From the Excel Plugin, query the following tables:
   - Checklist Template Class

NOTE	This table may be blank is data does not exist.

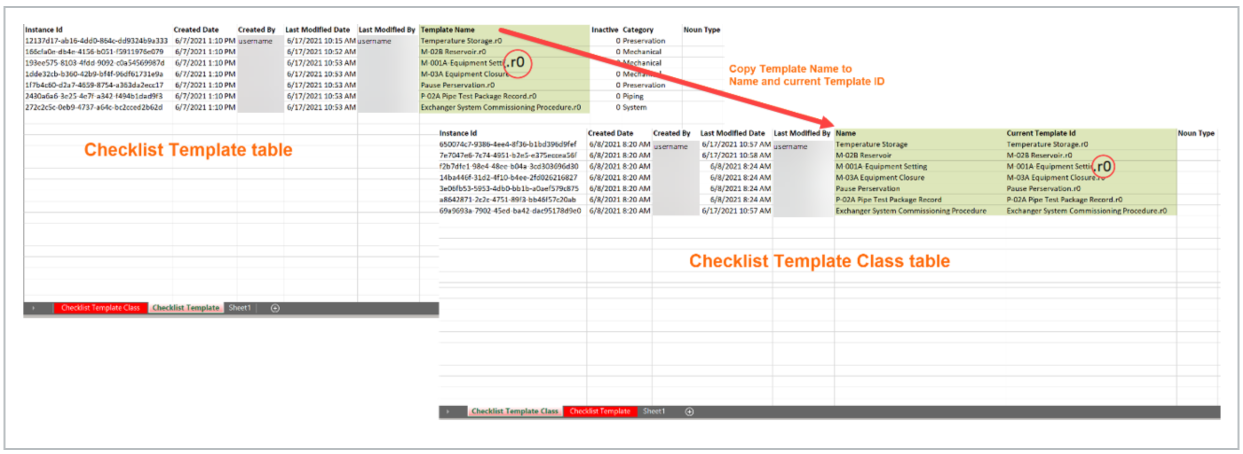
   - Checklist Template
2. Copy and then paste the **Template Name**column from the Checklist Template table into the Name column of the Checklist Template Class table.

   If editing the Checklist Template ID is all that is needed, use of the drop-down selection in the CHECKLIST TEMPLATE ID column.



Instance Id	Created Date	Created By	Last Modified Date	Last Modified By	Name	Current Template Id	Noun Type
02e4f970-3a9c-4831-80e1-52f8ede702e8	6/8/2021 8:20 AM	username	6/8/2021 8:24 AM	username	E-001A-Motor Control Center	E-001A-Motor Control Center	
0ae5413e-c0af-451e-acbb-32550b9506d5	6/8/2021 8:20 AM		6/8/2021 8:24 AM		P-01C Gross Leak Test		
0bb53056-b5a5-4580-9573-ce18b62d8018	6/8/2021 8:20 AM		6/8/2021 8:24 AM		M-005A-Pump Alignment		
0dc95278-1ca2-41b2-8449-7380ed0da27a	6/8/2021 8:20 AM		6/8/2021 8:24 AM		P-02B Piping Cleaning Restoration		
104659a9-99aa-4a8b-8bb3-1403e4893cad	6/8/2021 8:20 AM		6/8/2021 8:24 AM		I-01B Instrument Calibration		
1058941a-5ca2-4cb6-b9ec-d40296680fdb	6/8/2021 8:20 AM		6/8/2021 8:24 AM		I-02B Loop Check		
14ba446f-31d2-4f10-b4ee-2fd026216827	6/8/2021 8:20 AM		6/8/2021 8:24 AM		M-03A Equipment Closure	M-03A Equipment Closure	

3. Copy and then paste the **Template Name** column from the Checklist Template table to the Current Template ID column in the Checklist Template Class table.



As a best practice, add a revision number to each Template Name, similar to the circled labels in the screenshot above, in the checklist Template table. Then in the Checklist Template Class table, remove the revision number from the Name column and keep it in the Current Template ID column.

Copy	From	To
Table	Checklist Template	Checklist Template Class
Column	Template Name	Name and Current Template ID

8.3.0.1 Noun Type Column

Similar to the Question Template Worksheet, there is a column in the Checklist Template Class table called **Noun Type**. This column is used to indicate a Checklist or Preservation.

If you do not specify a Noun Type, the template is then accessible in both the Checklist and Preservation modules. This is identified in both tables because there may be times that a checklist may not contain a checklist template class, but the admin still wants to make the checklist visible in only one of the modules.

8.4 PRESERVATION TEMPLATE

8.4.1 Create the Preservation Template Import Schema

Follow this step-by-step to create the Preservation Template Import Schema.

8.4 Step by Step 1 — Create the Preservation Template Import Schema

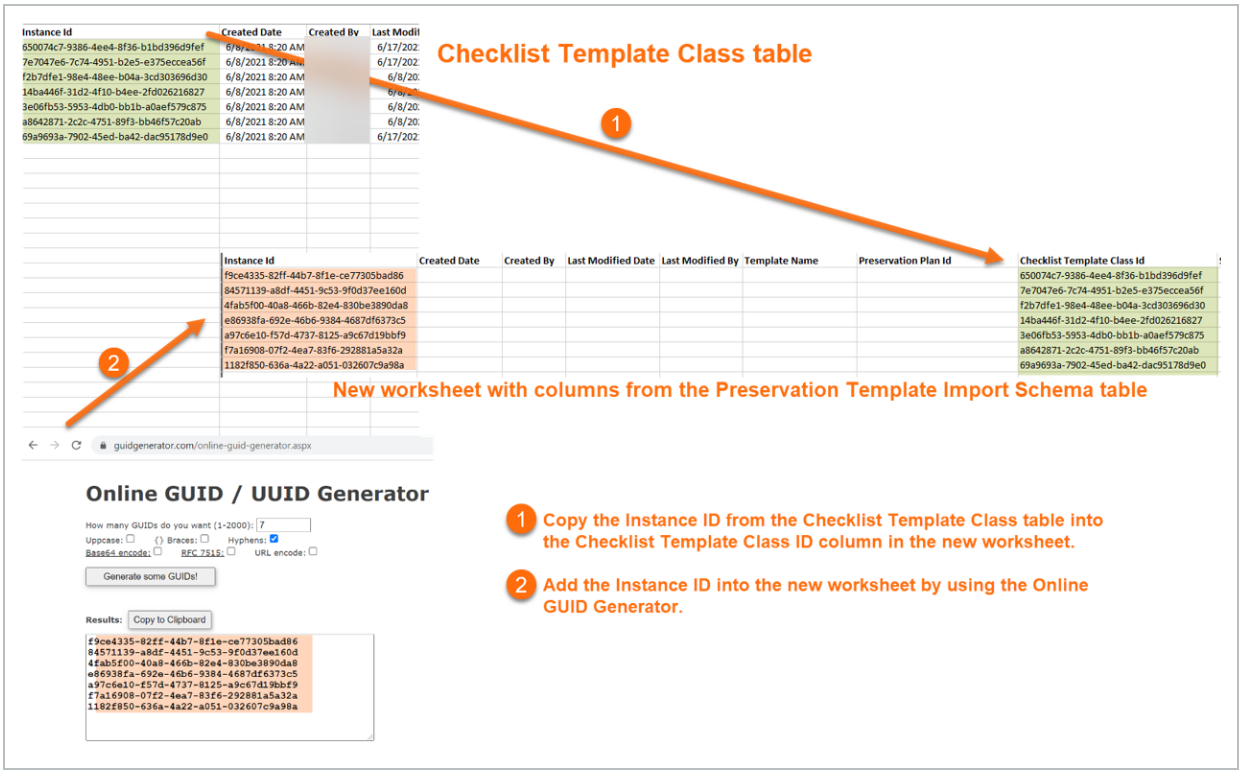
1. Query the Preservation Template Import Schema table.
2. Copy and then paste the columns from the Preservation Template Import Schema table into a blank Excel Worksheet

   NOTE You cannot directly edit the queried table from step 1. New Preservation Plans need to be imported from an offline worksheet.

3. In the blank worksheet, copy the Instance ID from the Checklist Template Class table to the Checklist Template Class ID column into the new worksheet, Preservation Import Template Schema.

4. Add an Instance ID into the new worksheet, Preservation Template Import Schema

> **NOTE** The import does not create an Instance ID. To obtain Instance IDS, go to the Online GUID Generator and generate values based on the number of rows. These values remain permanently static.



8.4.1.1 Notable Columns in the Preservation Import Template Schema

Column Name	Value Description
Template Name	This is the NAME from the Checklist Template Class table.
Preservation Plan ID	This can be anything you assign to this column name. It does not need to be a unique value.
Scheduled Value	This is the unit of how many days, weeks, months, or years new Preservation Plans are created.
Scheduled Time Unit	This is the unit of reoccurrence. Acceptable values are Days, Weeks, Months, or Years.

Column Name	Value Description
	NOTE The Schedule Value **MUST** be plural. For example, days not day.

Trigger Columns

Trigger columns represent different conditions that define whether a Preservation Plan is going to be created or not.

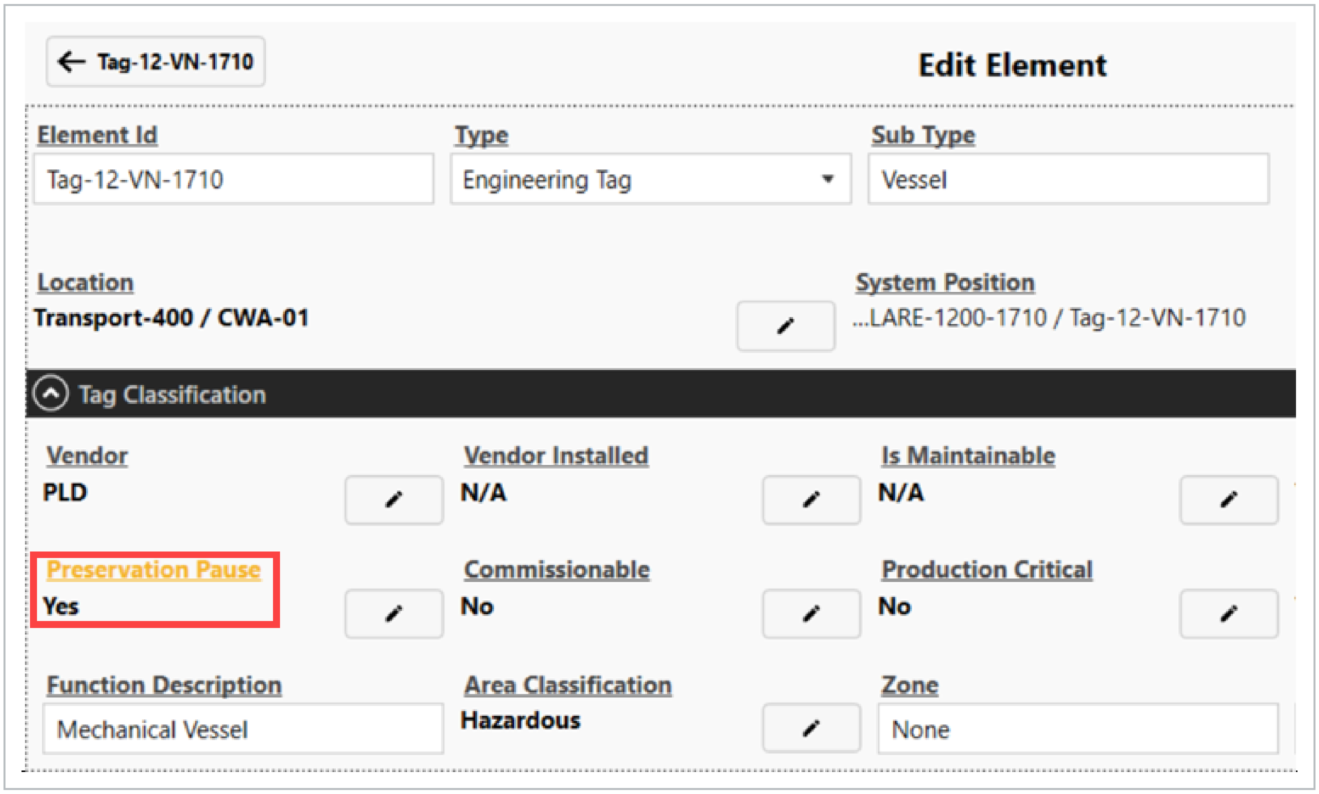
Trigger columns include the following:

- element: Sub Type Trigger
- element_tagdetails: Manufacturer Trigger
- element_tagclassification: Preservation Pause Trigger

An example of this is shown in the screenshot below. For the Circulation Pump Sub-Type, if the physical location is Energized, for any manufacturer type (*) including blank, and preservation is not paused, the system creates this Preservation Plan. Provided that the triggers do not change, the system continues to make the Preservation Template, Preservation Oil R00, every six months.

I	J	K	L	M	N
Schedule Value	Schedule Time Unit	element: Sub Type Trigger	element_tagdetails: Physical Location Trigger	element_tagdetails: Manufacturer Trigger	element_tagclassification: Preservation Pause Trigger
1	Weeks	Heat Exchanger	Laydown, Warehouse, Installed	*	No
1000	Days	*	*	*	Yes
1	Days	Circulation Pump	Laydown, Warehouse	*	No
1	Days	Heat Exchanger	Laydown, Warehouse	*	No
1	Weeks	Air Handler Unit	Laydown, Warehouse, Installed	*	No
1	Days	Air Handler Unit	Laydown, Warehouse	*	No
6	Months	Circulation Pump	Energized	*	No
1	Months	Circulation Pump	Laydown, Warehouse	*	No
3	Months	Circulation Pump	Energized	*	No
3	Months	Circulation Pump	Laydown, Warehouse, Installed	*	No
3	Months	Air Handler Unit	Energized	*	No
1	Weeks	Circulation Pump	Laydown, Warehouse, Installed	*	No
6	Months	Circulation Pump	Laydown, Warehouse, Installed	*	No
1	Months	Air Handler Unit	Laydown, Warehouse, Installed	*	No
1	Months	Heat Exchanger	Laydown, Warehouse	*	No

The Pause Preservation trigger allows for a pause in the Preservation Plan. For example, a vendor may have taken the equipment off-site to work on it for a given period, for which that Preservation Plan can be paused. To create a pause in the preservation for a particular element, the Project Admin can Edit the element data field called **Preservation Pause** to Yes. See below screenshot.



8.5 IMPORT PRESERVATION TEMPLATE

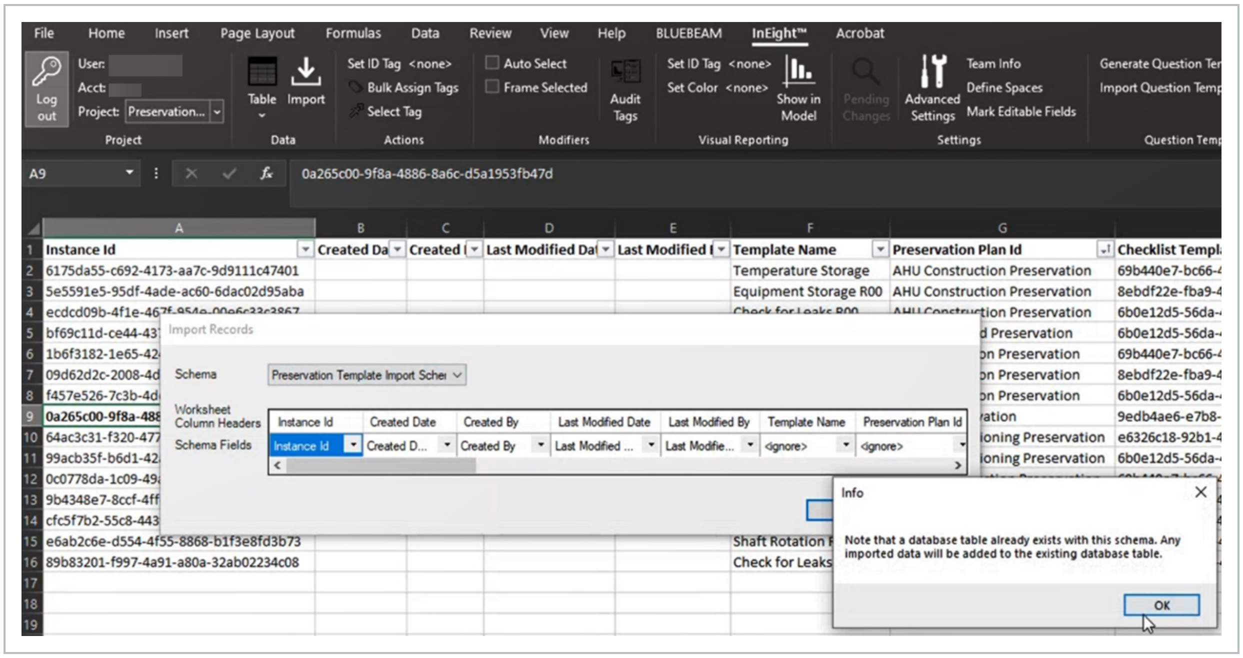
Delete this text and replace it with your own content.

Follow this step-by-step to import the Preservation Template Import Schema.

8.5 Step by Step 1 — Import the Preservation Template Import Schema

1. Click **Import**.
2. Select the **Preservation Template Import Schema**.
3. Click **Ok**.
4. Publish pending changes.

   The system will recognize if there are any Preservations that need immediate action that need to be created immediately



NOTE If you import an item that currently has a value registered in the system, a value you forgot to strike out for example), it will be rejected **without** providing an alert. Only add records through the import. If you need to change these values after the fact, this can only completed through querying and editing the Preservation Template Import Schema table.

8.6 EDIT A PRESERVATION PLAN

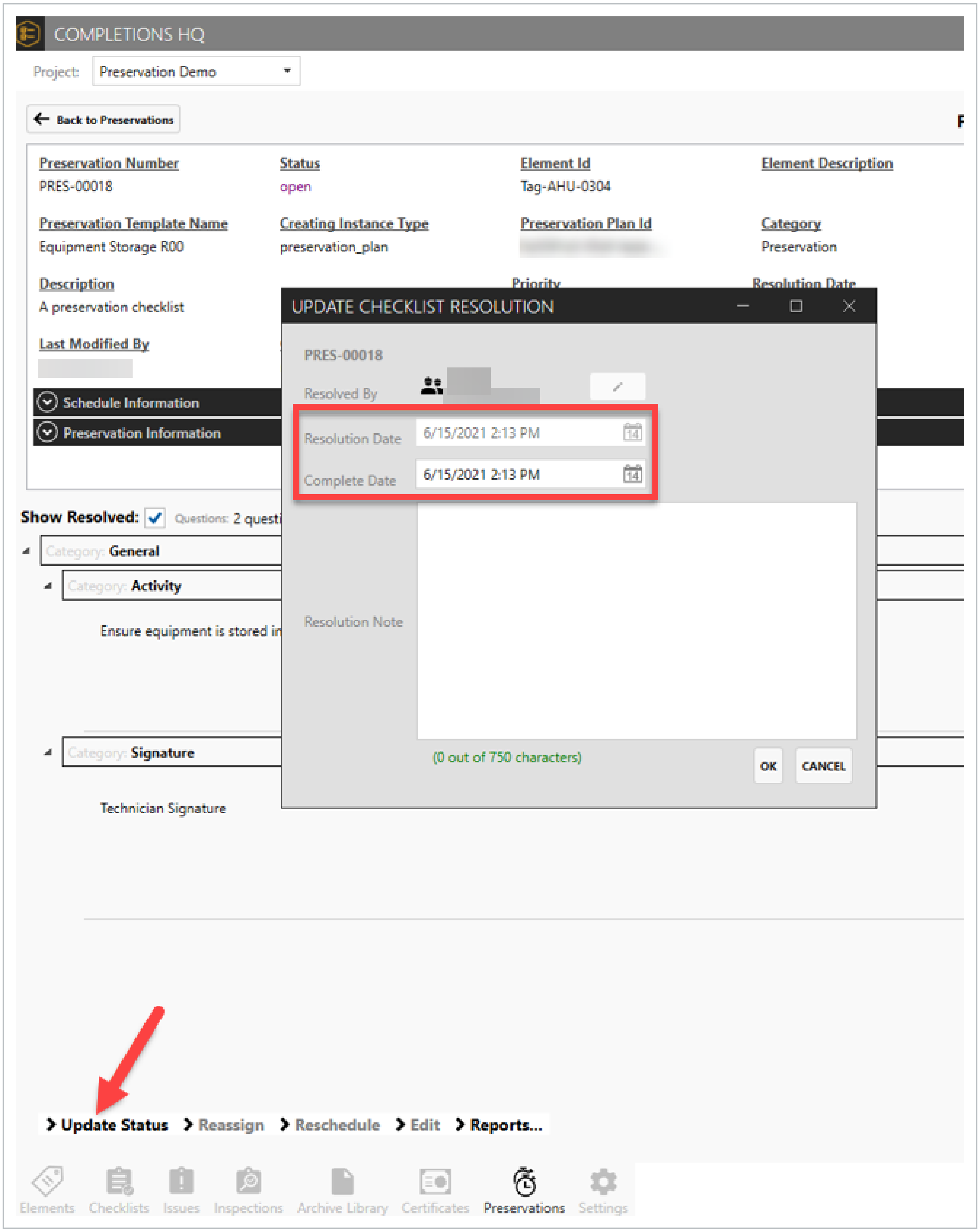
8.6.1 Completing a Preservation Activity

When completing a Preservation activity, the next plan date reflects the completed date cadence specified in the template. For example, 1 week.

There are now two dates presented in Update Checklist Resolution:

- **Resolution Date (non-editable)**: This date represents when the activity is closed in the system.
- **Completed Date (editable)**: This date represents when the activity was physically completed.

The reason both fields exist is because you may have completed the activity out in the field on Monday but did not have access to Wi-Fi until Wednesday. Resolution Date is then set as that Wednesday and the Completed Date is set as that Monday.

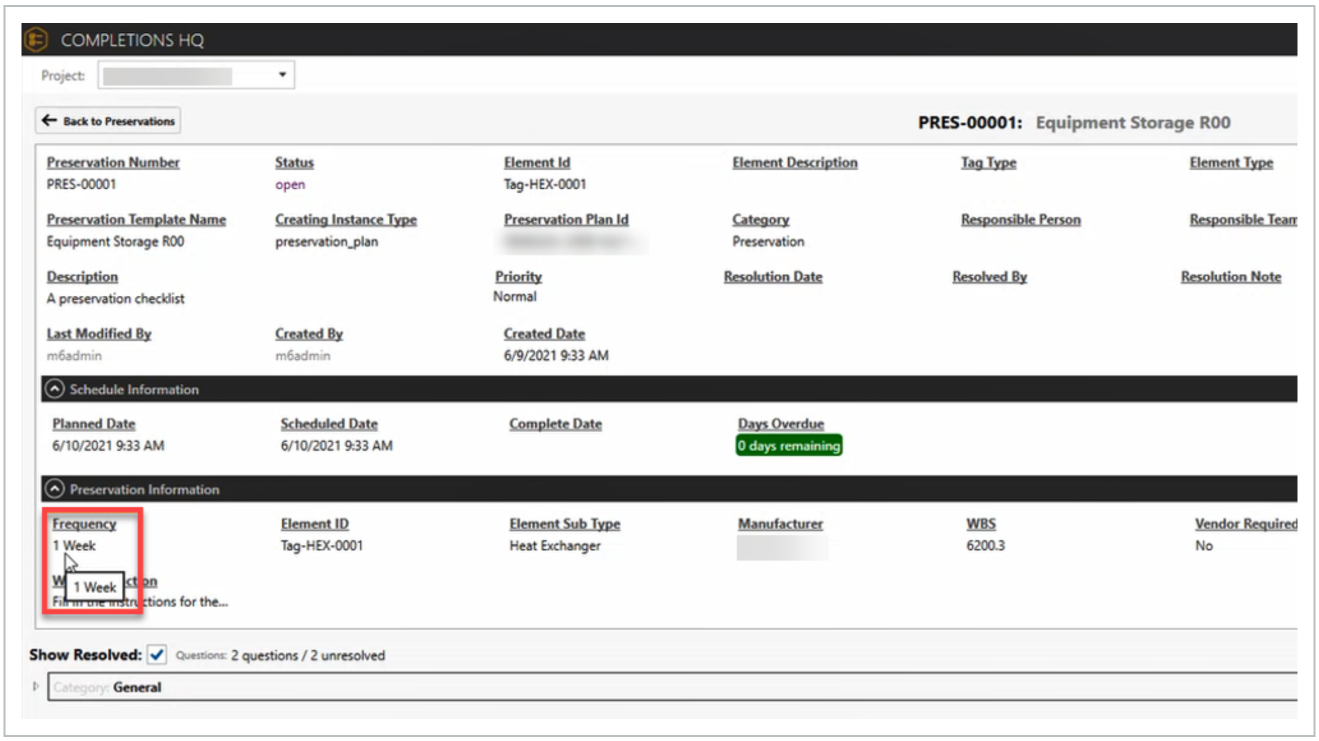

COMPLETIONS HQ
Project: Preservation Demo
Back to Preservations
Preservation Number
PRES-00018
Status
open
Element Id
Tag-AHU-0304
Element Description
Preservation Template Name
Equipment Storage R00
Creating Instance Type
preservation_plan
Preservation Plan Id
Category
Preservation
Description
A preservation checklist
Priority
Resolution Date
Last Modified By
Schedule Information
Preservation Information
Show Resolved:
Category: General
Category: Activity
Ensure equipment is stored in
Category: Signature
Technician Signature
UPDATE CHECKLIST RESOLUTION
PRES-00018
Resolved By
Resolution Date
6/15/2021 2:13 PM
Complete Date
6/15/2021 2:13 PM
Resolution Note
(0 out of 750 characters)
OK
CANCEL
Update Status
Reassign
Reschedule
Edit
Reports...
Elements
Checklists
Issues
Inspections
Archive Library
Certificates
Preservations
Settings

8.6.2 Edit a Preservation Plan

As a Project Admin, you can edit conditions in a Preservations Plan. Simply query the **Preservation Template Import Schema** and edit as needed. The changes then reflect on the Preservation Plan Template in the Completions HQ and Mobile applications.

The changes are not reflected in Preservation activities that are in progress, but rather on the next scheduled activity. For example, if you change the Preservation activity in the screenshot below from 1 week to 3 weeks, the Frequency is then shown as 3 weeks next time it iterates and creates a new activity.

> **NOTE** If you delete a line in the Preservation Template Import Schema Worksheet, the current activity cannot be deleted and it will prevent the next activity from being created.



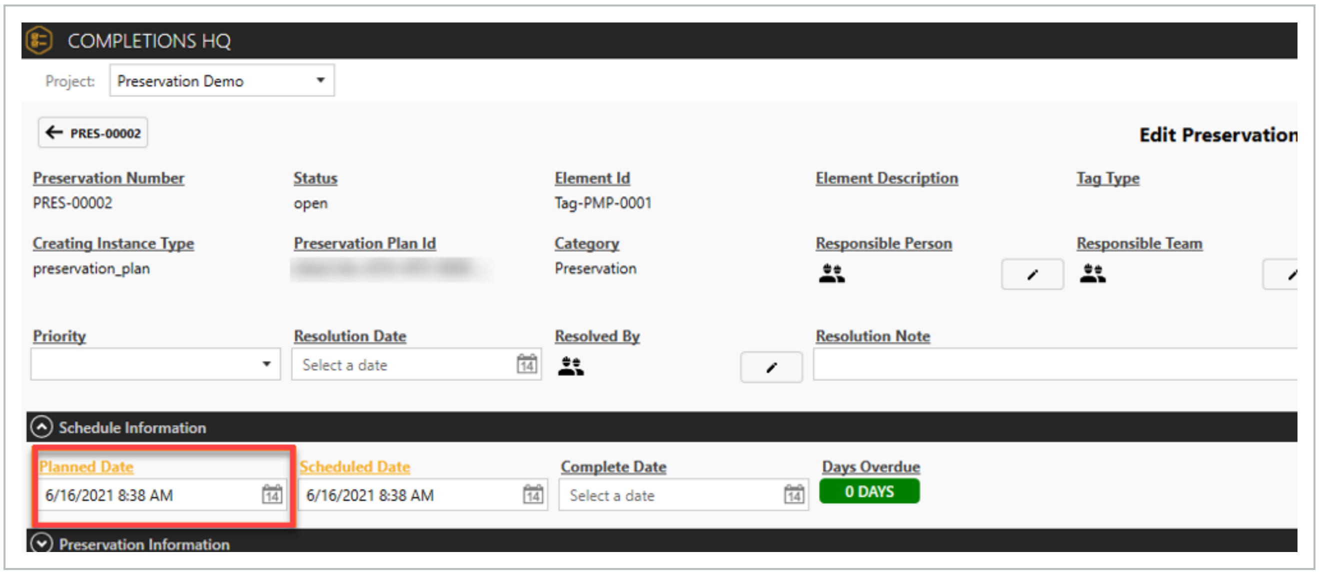
> **NOTE** Be mindful if you change the frequency midstream, 3 weeks to 2 weeks for example. The Project Admin needs to change the Planned Date on the current activity to ensure it is not done late.

8.7 TRANSITION TO DIFFERENT PRESERVATION PLAN

There are circumstances that warrant the transition of a piece of equipment to a different Preservation Plan.

The Project Admin needs to reconcile between the previous and new plans to ensure continuity in the maintenance. For example, if a piece of equipment is changed from **Energized** to **Laydown, Warehouse**, the frequency changes and needs to be reconciled.

For another example, the equipment is moving from a 3-month to a 6-month frequency cadence. If the activity for the first month was completed under the previous plan, then the new plan date needs to reflect a completed date 5 months out. The old plan is then abandoned.



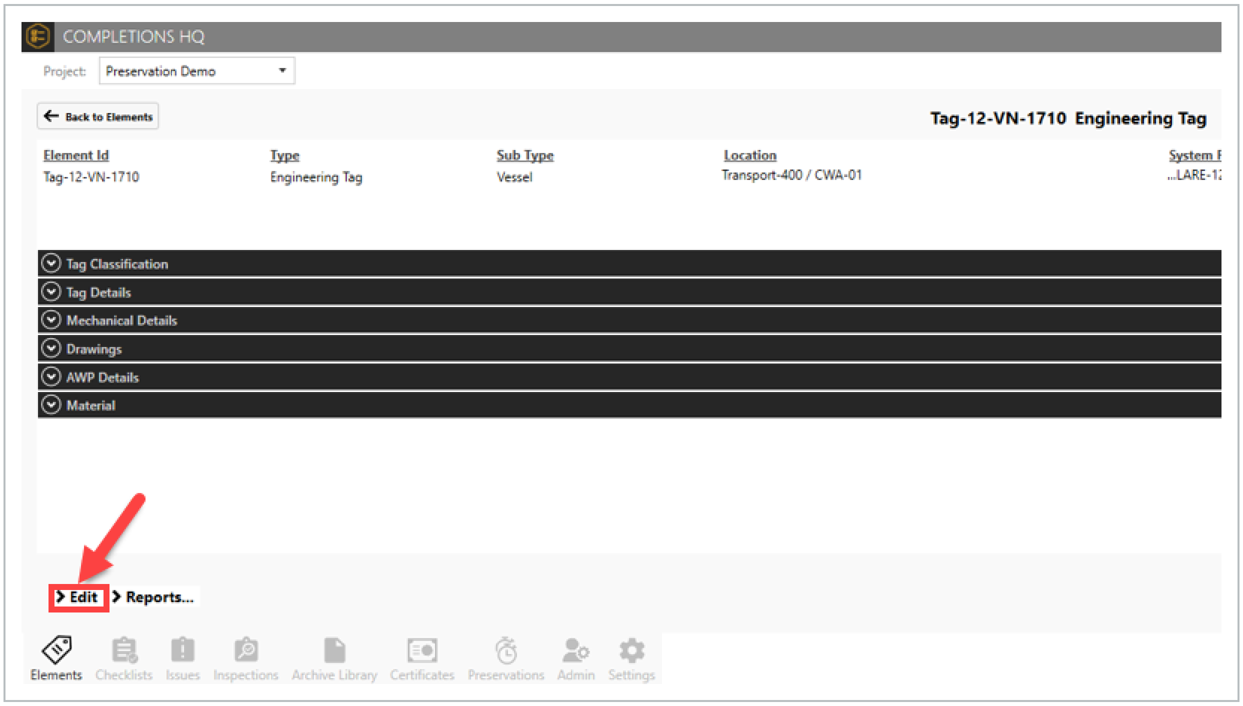
8.8 PAUSE A PRESERVATION PLAN

A Preservation can be paused directly from Completions. If a piece of equipment is paused, the current Preservation Plan is abandoned, and it transitions to the Pause Preservation Plan.

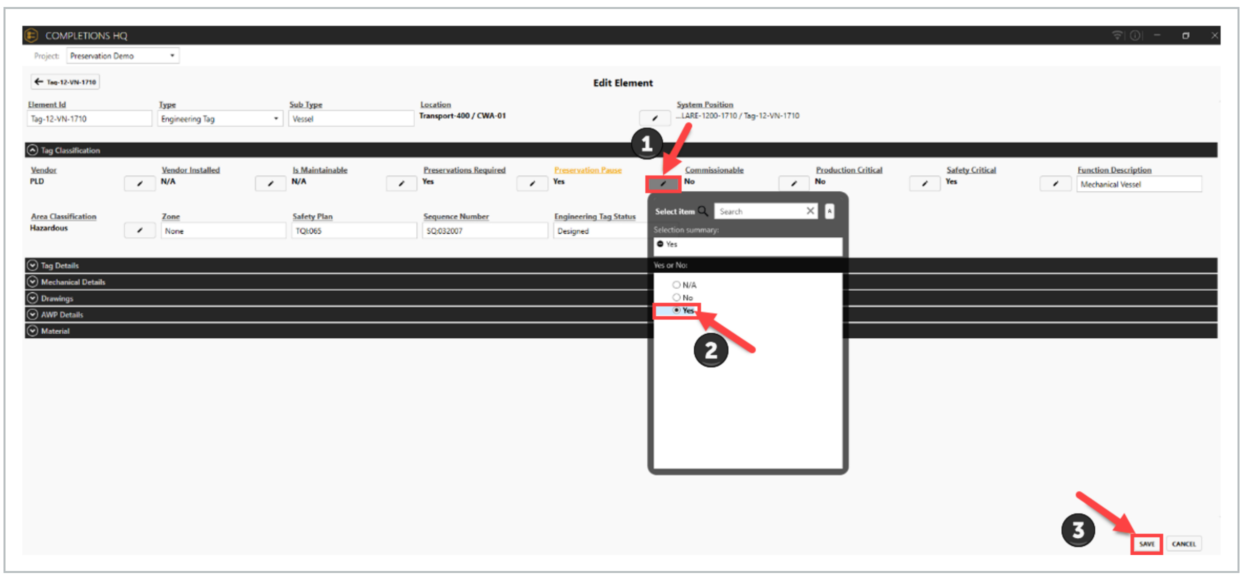
Follow this step-by-step to pause a Preservation Plan.

8.8 Step by Step 1 — Pause a Preservation Plan

1. From the Elements module, select the equipment you need to pause the Preservation Plan and click **Edit**.

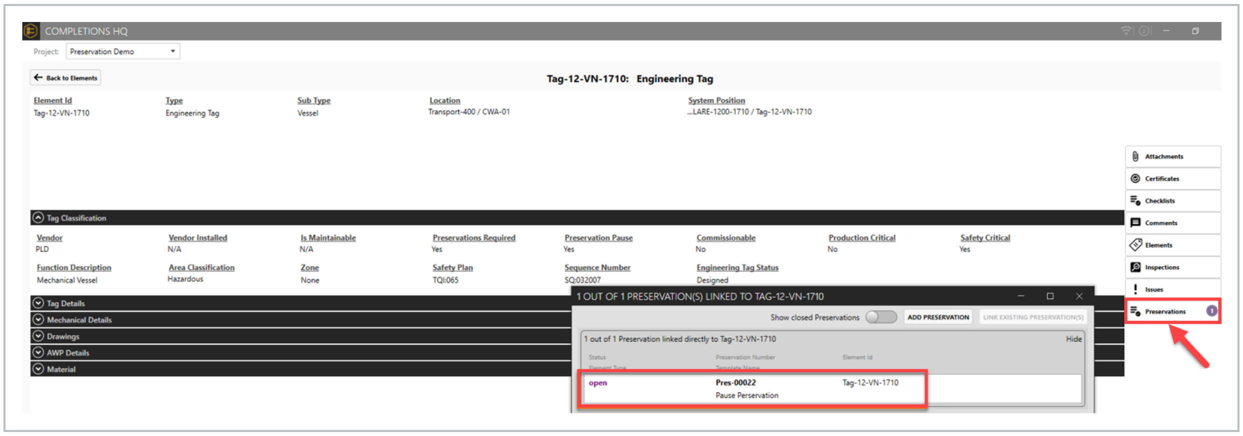


2. Click to Edit the Preservation Pause field. Then, select **Yes**, and then **Save**.



3. Publish pending changes.

   In the screenshot below, you will see Tag-12-VN-1710 is on a Pause Preservation Plan. Change the Pause Preservation to **No** to restart the previous Preservation Plan based on the date it was unpaused.

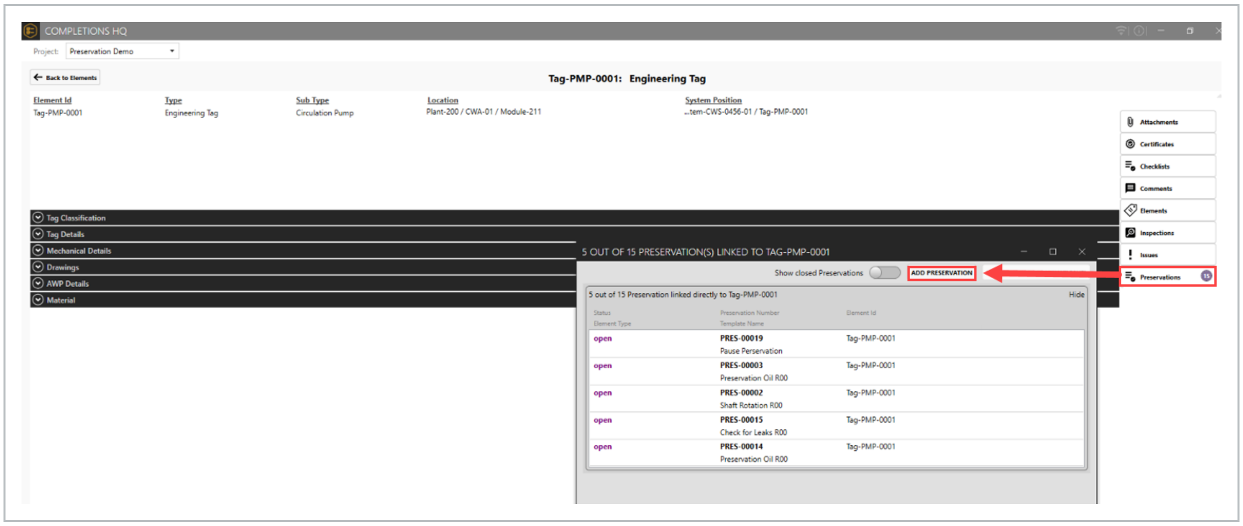


8.9 AD HOC PRESERVATION PLAN

Follow this step-by-step to create an Ad Hoc Preservation Plan from an Element.

8.9 Step by Step 1 — Create an Ad Hoc Preservation Plan from an Element

1. Click **Preservations**, and then **Add Preservation**.



2. From the Select Checklist Template window, select the appropriate Checklist. Then click **Next**.
3. Fill in required preservation detail information. Then click **OK**.
4. Click **Pending Updates** to publish pending changes.

NOTE An Ad Hoc Preservation Plan does not include scheduled information by default as it does not follow a plan. It includes the information from the creating Element.

LESSON 8 – ADMIN TOOLS

Topics in this Lesson

8.1 INTRODUCTION

Admin Tools is a central portal for administrators to configure the settings for Completions and Model projects and user accounts.

8.1.1 Browser compatibility

Admin Tools is compatible with the following browsers:

- Chrome
- Firefox
- Safari
- Edge

8.2 LOGIN

Single sign-on (SSO) reduces the need to maintain separate credentials to access Admin Tools. You can use existing credentials to open Admin Tools.

NOTE	Conversion to single sign-on (SSO) applies across all InEight Model and Completions applications including Admin Tools and the Excel Plugin.

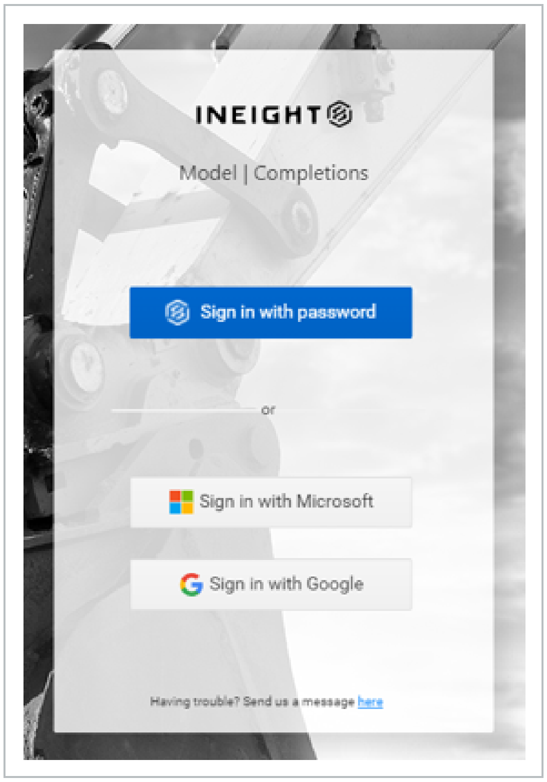
NOTE	You must go through your InEight services representative to convert to SSO.

NOTE	One SSO user per email address is permitted in an account.

The Login screen lets you use a single set of credentials and authenticate with SSO provide (Google or Microsoft) to sign into any projects that you have access to. SSO increases administrative efficiency by mitigating new user creation. Existing users can continue to sign in using their existing user name and password.

SSO authentication reduces the need to maintain separate credentials, and also minimizes the need to maintain a standalone set of credentials.

To enable SSO functionality for your organization, contact your account administrator.

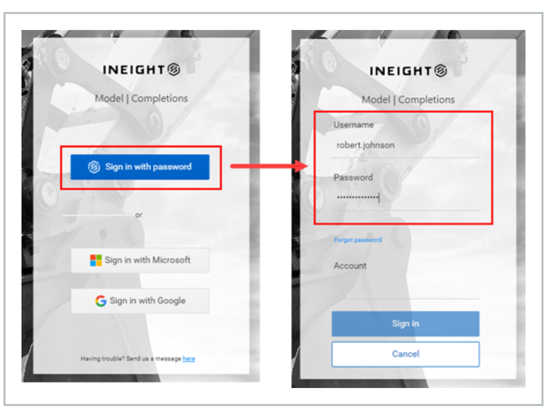


User organizations can integrate with the Excel Plugin authentication service with their own existing authentication servers, which eliminates the need for standalone Excel Plugin user credentials.

Single sign-on recognizes which accounts users have access to, and presents a helpful account drop-down list. Authenticated users are then presented with a list of projects within the selected account that are controlled and assigned by the administrator.

8.2.1 Log-in Options

8.2.1.1 Username and Password Credentials

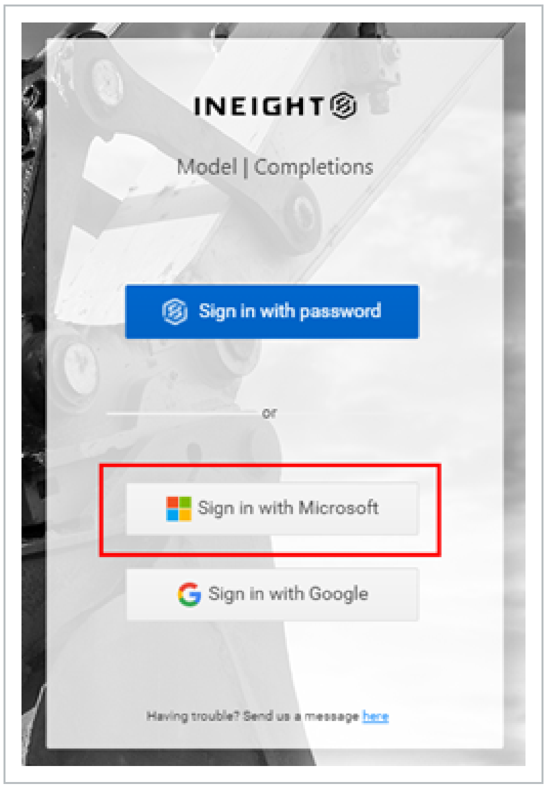


Reset password

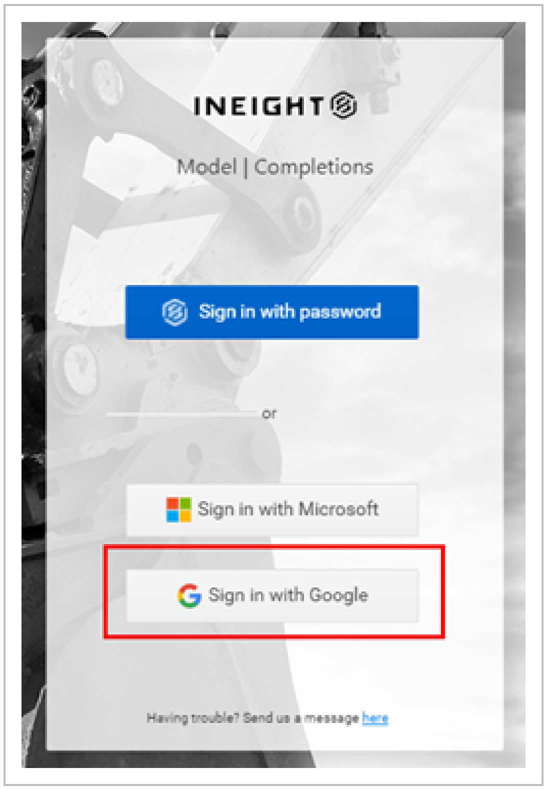
If you forget your password when signing in via your username and password, click Forgot Password. Enter your user name, account, and email address, and then click Submit. If your request is successful, an email is sent to you with instructions to complete your password reset. Return to the login page to enter your new password.

NOTE	The Submit button is disabled until you enter a valid email address..

8.2.1.2 SSO by Microsoft

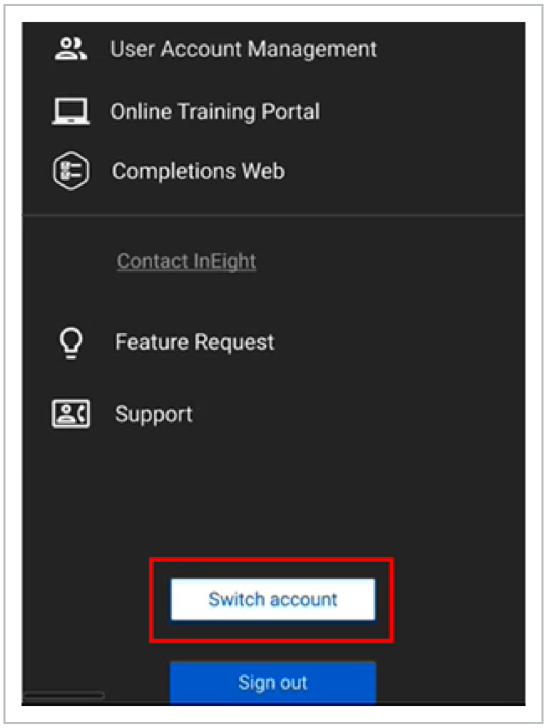


8.2.1.3 SSO by Google



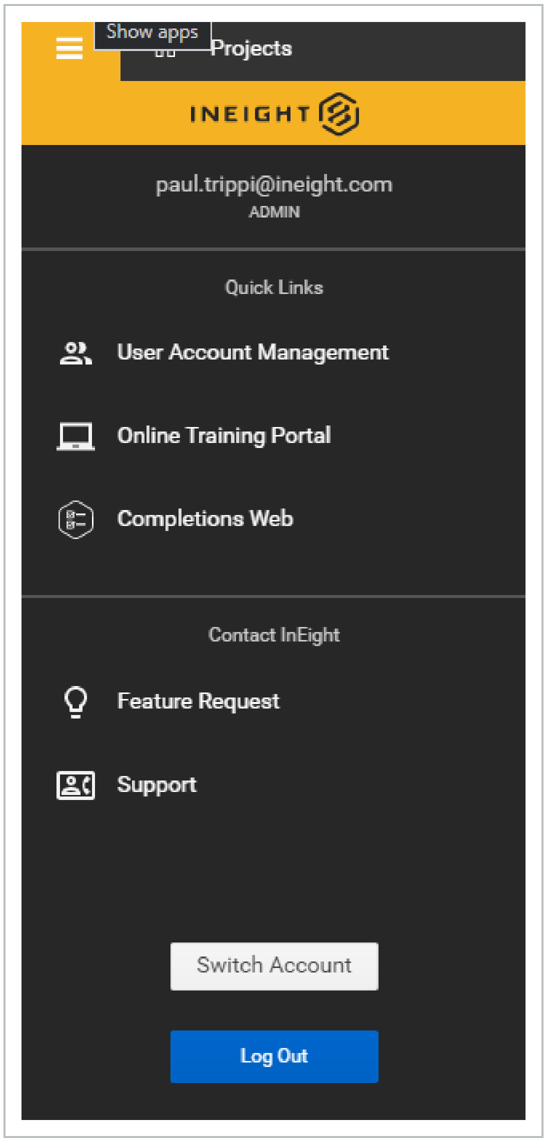
8.2.2 Switch account

The Switch account button, located on the lower left panel, lets SSO users change between accounts to access different project lists.



8.3 SLIDE-OUT PANEL

The slide-out panel gives you quick links to pages both inside and outside of Admin Tools. You can also use the slide-out panel to log out of Admin Tools.



To open the slide-out panel, click the hamburger menu icon.

The slide-out panel contains the following links:

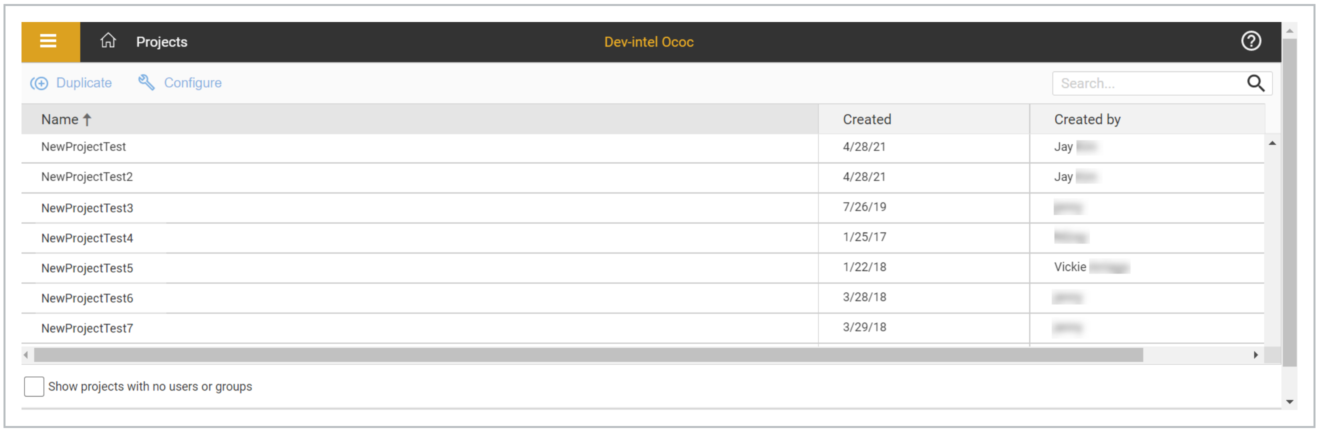
- User Account Management – See User Account Management for information about this page
- Online Training Portal – Takes you to the Knowledge Library
- Completions Web – Opens the Completions web interface in your browser
- Feature Request – Submit a request for a new feature
- Support – Opens an email to InEight support
- Switch Account - Lets SSO users change between accounts to access different project lists

8.4 PROJECTS

The Projects page shows all available projects. When you log into Admin Tools, the Projects page is the first page that opens. You can also click the Home icon to open the Projects page.

There are several methods to open the Configurations page opens for a specific project:

- Double-click the project name.
- Select a project, and then click **Configure**.
- Right-click a project, and then select **Configure** from the drop-down menu.



8.5 DUPLICATE A PROJECT

You can create a new project by duplicating an existing project and adjusting certain project settings, as necessary.

NOTE	You must be an account administrator to duplicate a project.

8.5.1 Duplicate a project

You can duplicate a project in the following ways from the Projects list:

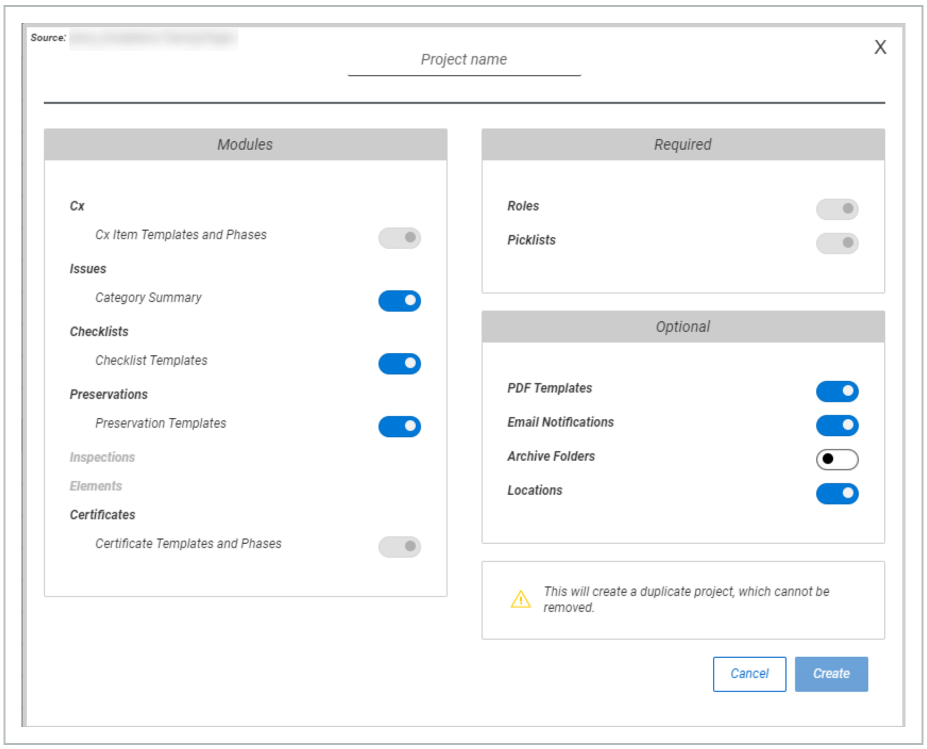
- Select a project, and then click the **Duplicate** button.
- Right-click a project, and then select **Duplicate** from the drop-down menu.

The following Step by Step walks through how to duplicate a project using the Duplicate button.

8.5 Step by Step 1 — Duplicate a project

1. From the Projects list, select a project, and then click the **Duplicate** button.
2. In the dialog box, enter a name for the new project in the top field.

> **NOTE** You can use the same name as an existing project, but this is not recommended. If the new project name matches an existing project name, a warning message is shown.



3. In the Modules section, turn on the toggle for content from each module, such as templates, that you want to include in this project.

> **NOTE** By default, all modules' content is copied. Copied content is only the project structure, not actual data records.

4. In the Optional section, turn on or off the toggles for PDF Templates, Email Notifications, Archive Folders, or Locations, as necessary.

> **NOTE** The Archive Folders toggle is set to off by default.

5. Click **Create**.

> **NOTE** After you create a duplicate project, you cannot remove it.

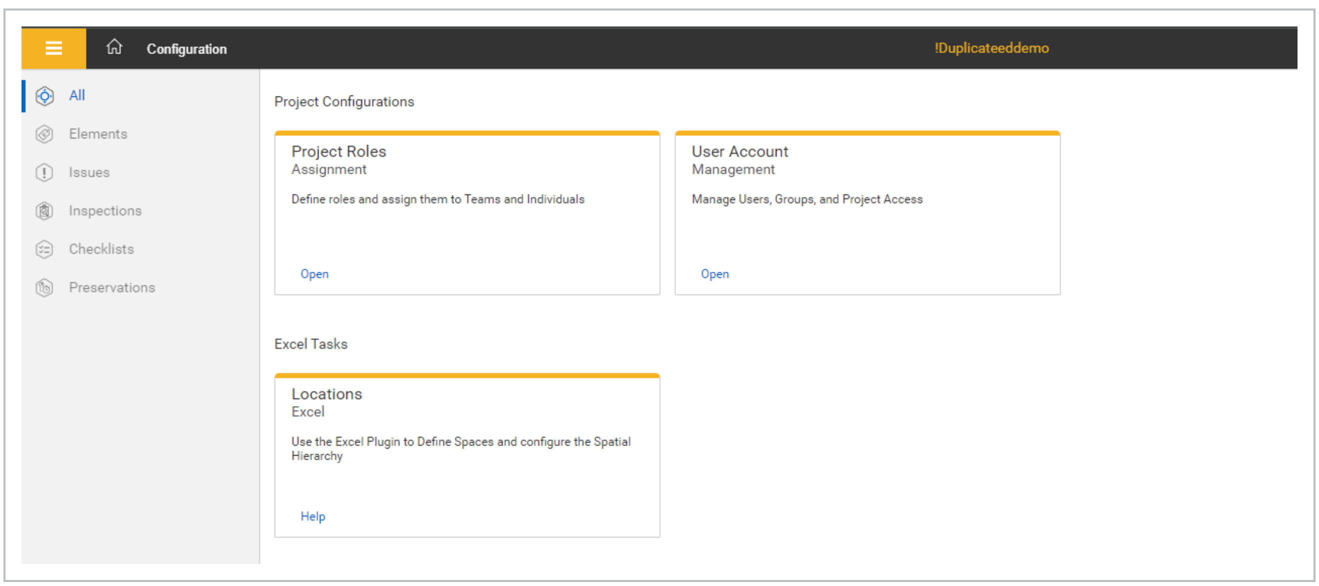
After you create the project, the Configurations page opens for the new project. You can now assign user groups and use Completions HQ and Microsoft Excel to import project-specific data. You are also assigned project administrator permissions so you can update project configurations.

8.6 CONFIGURATION

The Configuration page lets you manage the configuration related settings for a project. The page is organized into tiles for each group of settings.

You can currently manage configurations for the User Account Management tile if you have account administrator permissions.

Project Roles is a project role based configuration setting where you can assign roles to teams and individuals.



8.7 USER ACCOUNT MANAGEMENT

User Account Management settings let you manage users, user groups, and their access to projects. You can get to User Account Management through either the tile in Configurations or the quick link in the slide-out panel.

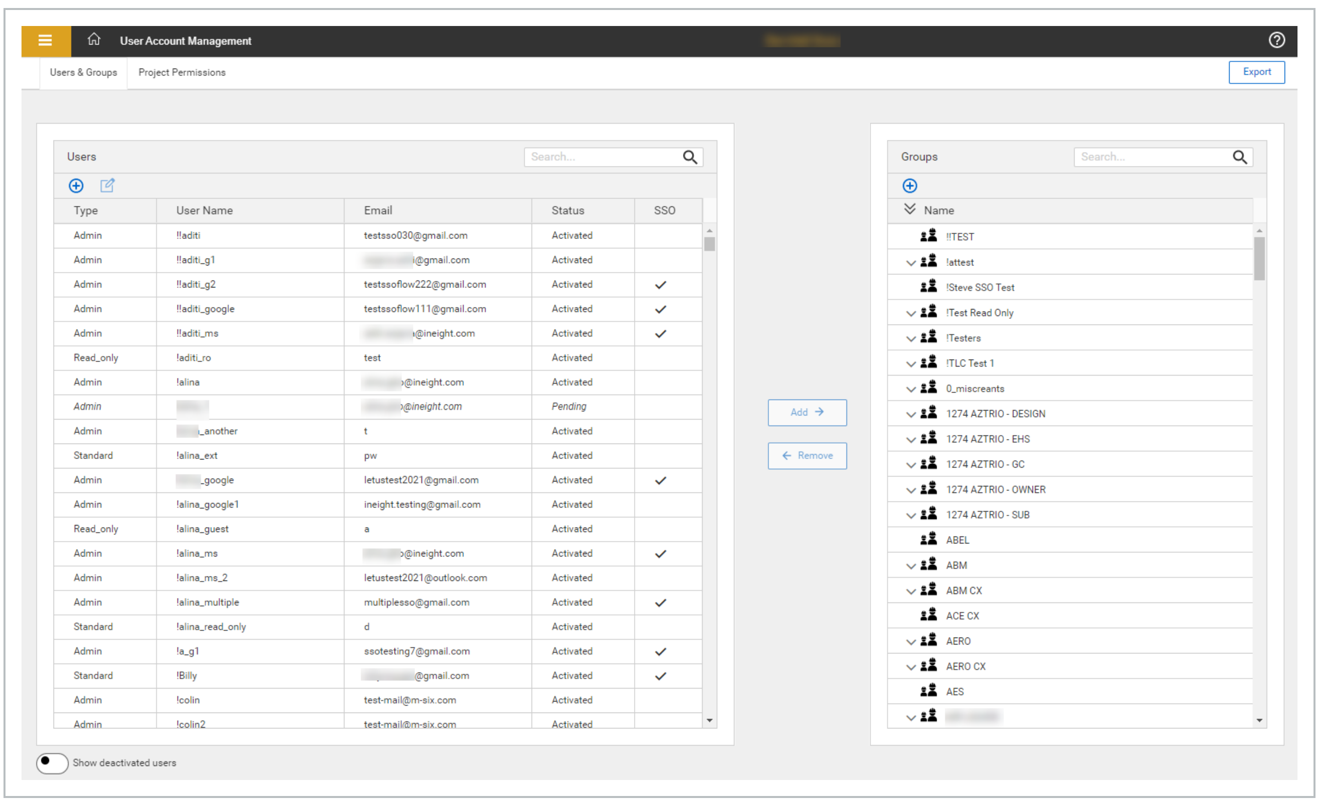
NOTE	You must be an account administrator to manage user accounts.

The User Account Management page is organized into the following tabs:

- Users & Groups – Manage users and user groups
- Project Access – Assign users and user groups to projects

8.7.1 Users & Groups Tab

The Users & Groups tab is organized into two panels. The Users panel lets you manage users and the Groups panel lets you manage groups. You can use the buttons in the center of the page to add and remove selected users to and from groups.



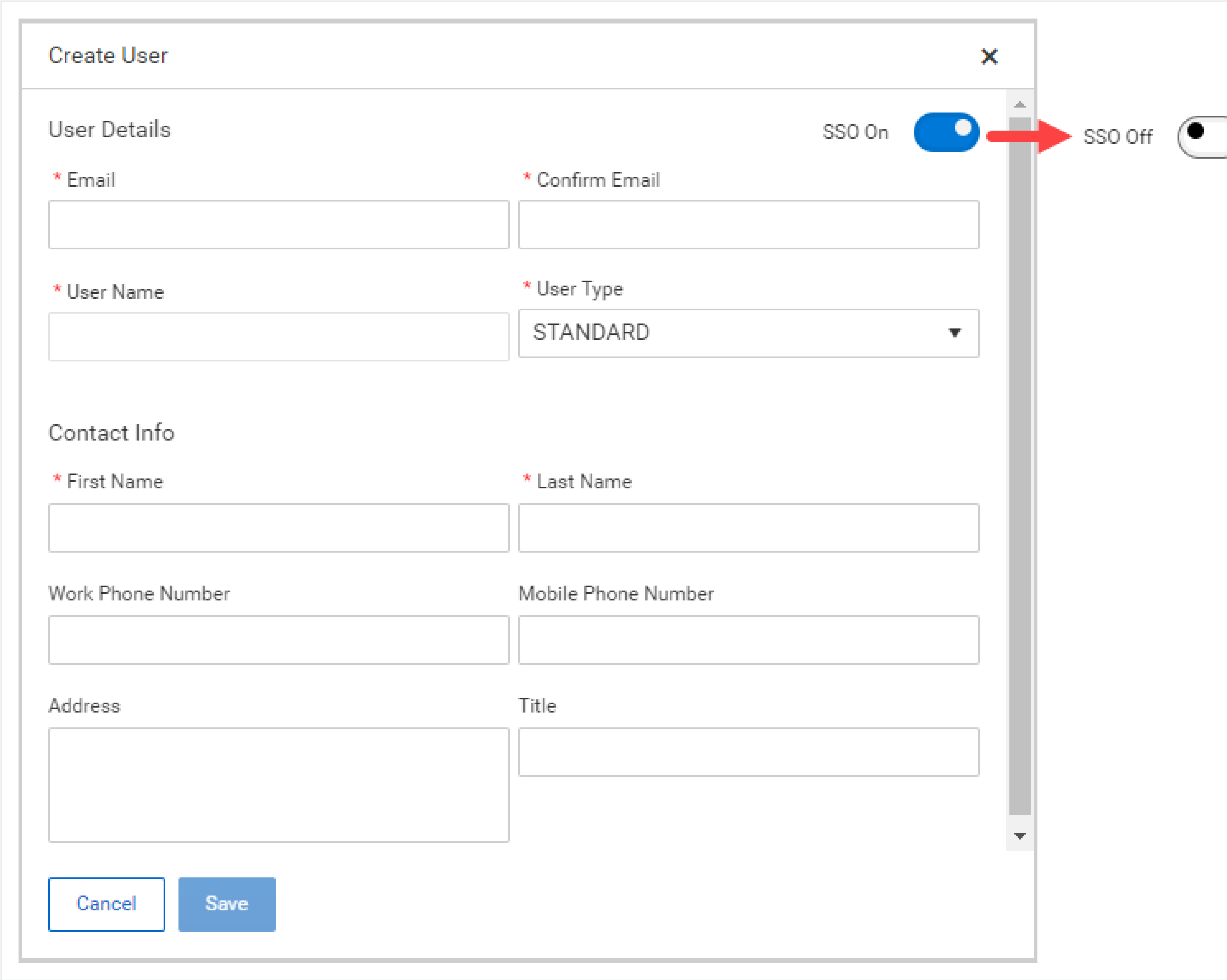
8.7.1.1 Users

Users can be of the following types:

- Standard
- Read Only – Cannot make changes to the project even if they have roles that would otherwise allow it.
- Admin – Can create and manage users, and duplicate projects.

8.7.1.2 Create SSO or Password User

When creating a new user, the SSO toggle lets you choose between creating an SSO user, or as a user that signs in via user name and password. The default setting is SSO On and it cannot be changed in edit mode.



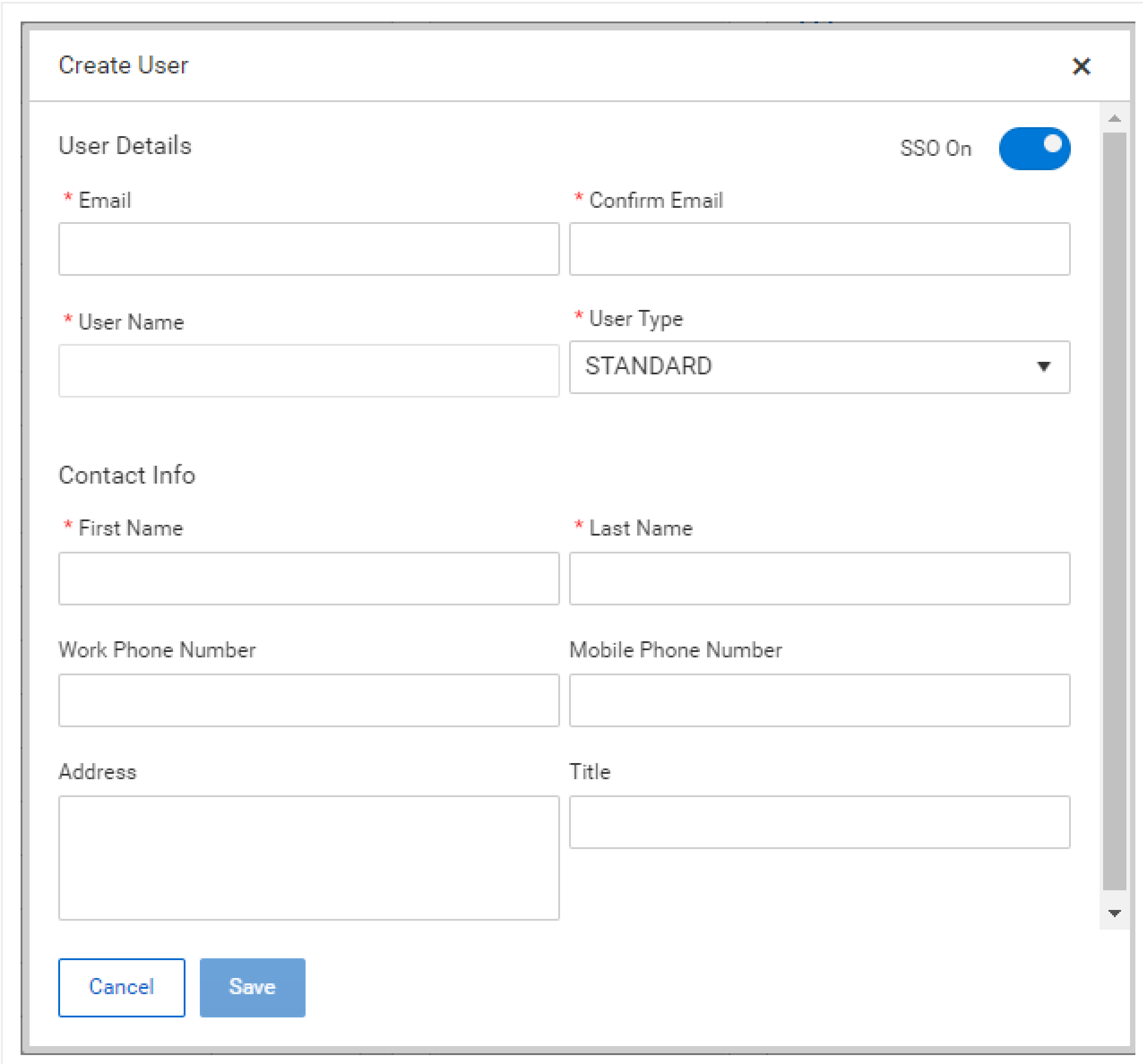
Add a User

The following Step by Step walks you through how to add a new user.

8.7 Step by Step 1 — Add a User

1. Click the **Add user** icon in the Users panel.
2. In the dialog box, fill out the required fields indicated by an asterisk.

- The SSO toggle lets you choose between creating an SSO user, or as a user that signs in via user name and password.



3. Click **Save**.

Edit a User

You can edit an existing user in the following ways:

- Click the **Edit user** icon at the top of the Users panel.
- Right-click a user, and then select **Edit User** in the drop-down menu.

The following Step by Step walks you through how to edit a user using the Edit button.

8.7 Step by Step 2 — Edit a User

1. Click the **Edit user** icon in the Users panel.
2. In the dialog box, edit the fields you want to change.
    - The SSO toggle cannot be changed in edit mode.

    NOTE User name cannot be edited.

3. Click Save.

Activate a User

To activate a user, right-click the user, and then select **Activate user** in the drop-down menu.

NOTE To see deactivated users that you want to activate, enable the **Show deactivated Users** toggle at the bottom of the Users panel.

Deactivate a User

To deactivate a user, right-click the user, and then select **Deactivate User** in the drop-down menu. A deactivated user can no longer access their account.

Reset a User's Password (SSO off)

To reset a user's password, right-click the user, and then select **Reset Password** in the drop-down menu. The user receives an email with instructions and a link to reset their password.

Set a User's Temporary Password (SSO off)

To set a temporary password for a user, right-click the user, and then select **Set Temp Password** in the drop-down menu. A temporary password lets you manually set a new password for the user.

Delete a Pending User

To delete a pending user, right-click the user, and then select **Delete User** in the drop-down menu.

NOTE You can only delete pending users for non-sso users.

Resend Activation Email (SSO off)

To resend an activation email to a pending user, right-click the user, and then select **Resend Account Activation Email** in the drop-down menu.

8.7.1.3 Groups

Groups are made up of users and let you assign multiple users to projects at once.

Add a Group

To add a new group, click the **Add group** icon at the top of the Groups panel. In the dialog box, enter a group name, and then click **Save**.

Delete a Group

To delete a group, right-click a group, and then select **Delete Group** in the drop-down menu.

NOTE	A group must unassigned to be deleted.

Rename a Group

To change a group's name, right-click a group, and then select **Rename Group** in the drop-down menu.

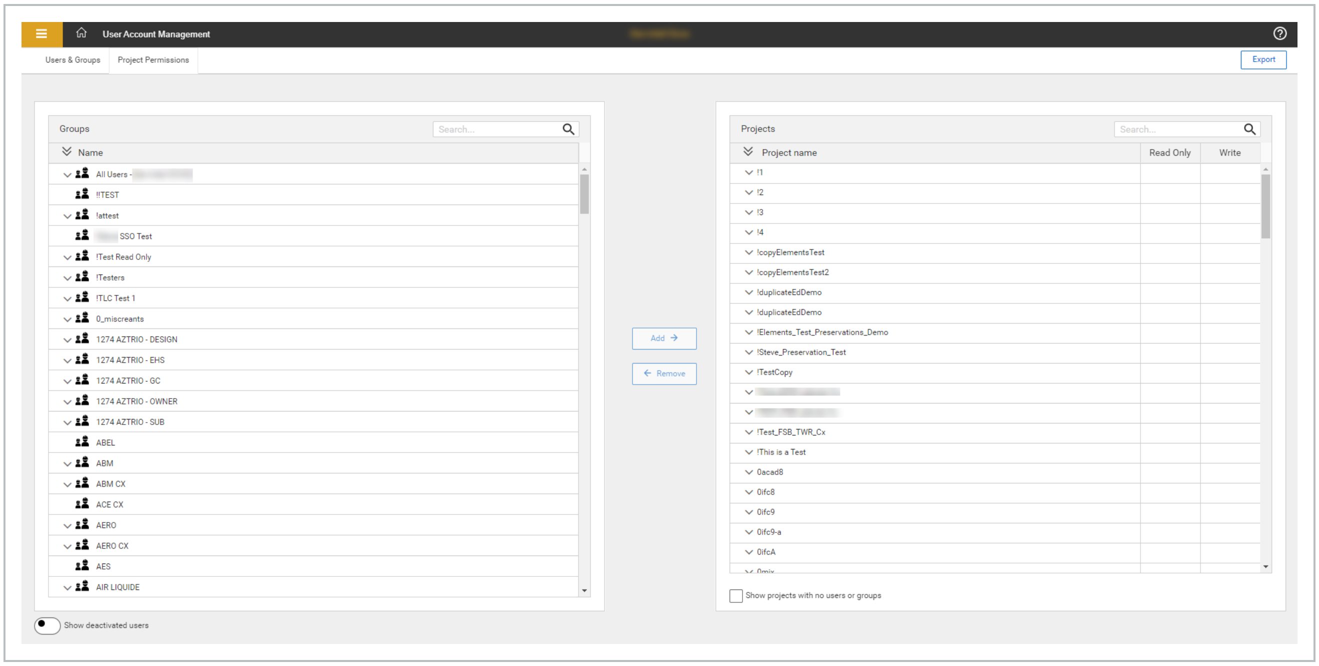
NOTE	The new group name is shown in all historical data about the group.

8.7.2 Project Permissions Tab

The Project Permissions tab is organized into two panels. The Groups panel shows groups and their users. The Projects panel shows projects and the users and groups assigned to each project. The Projects panel also lets you manage what type of access users and groups have to a project. You can use the buttons in the center of the page to add and remove selected users and groups to and from projects.

NOTE	Users can only belong to one group per project.

TIP	Best practice is to add groups to projects instead of adding individual users.



Users and groups assigned to projects can be given the following types of access:

- Read Only
- Write – Default access given to a user or group

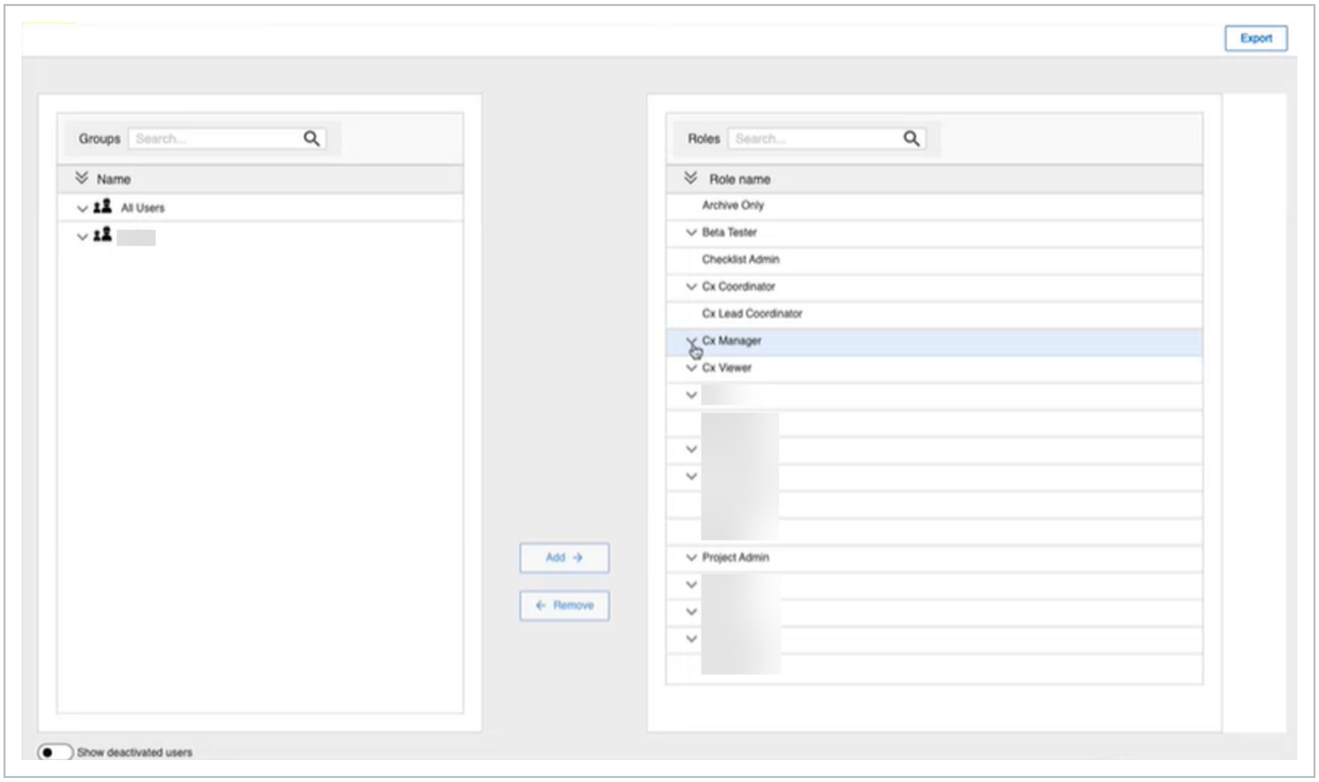
8.7.3 Export

You can export a Microsoft Excel file with user information and which projects users are assigned to. Export files are useful for audits.

To export, click **Export** in the upper right of the page to download the file.

8.8 PROJECT ROLES ASSIGNMENT

Project Roles Assignment lets you assign roles for groups or individuals in a given project.



NOTE If the group is not listed, navigate back to UAM and assign the group to the project.

8.8.1 Add a group to a role

The following step-by-step walks you through how to add a group or user to a role.

8.8 Step by Step 1 — Add a group or user to a role

1. From the Groups column, select the group or user you want to add to a role.
2. From the Roles column, select the role the previously selected group will be added to.
3. Click **Add**.

8.8.2 Remove a group from a role

The following step-by-step walks you through how to remove a group from a role.

8.8 Step by Step 2 — Remove a group or user from a role

1. Click the role drop-down to find the group or user you want to remove from a role.
2. Select the group or user you want to remove from the drop-down.
3. Click **Remove**.

8.8.3 Export

You can export a Microsoft Excel file to show the users and group of the project. To export, click **Export** in the upper right of the page to download the file.

LESSON 9 – COMPLETIONS MOBILE

Topics in this Lesson

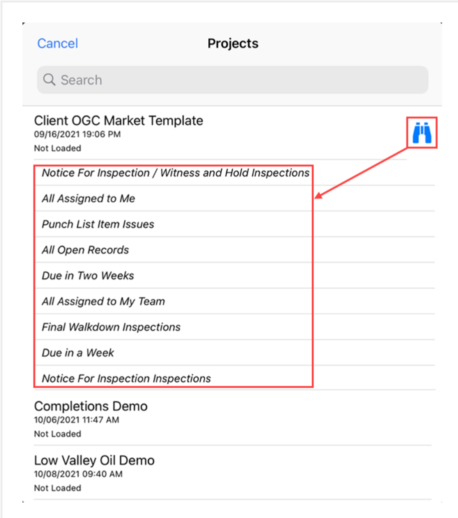
9.1 VIEW MODE

This topic explains how to use View Mode in Completion Mobile.

View Mode lets you select prefilters after you sign into Completions Mobile. This reduces the amount of information that loads into the application so you can view the required data quickly and perform necessary actions.

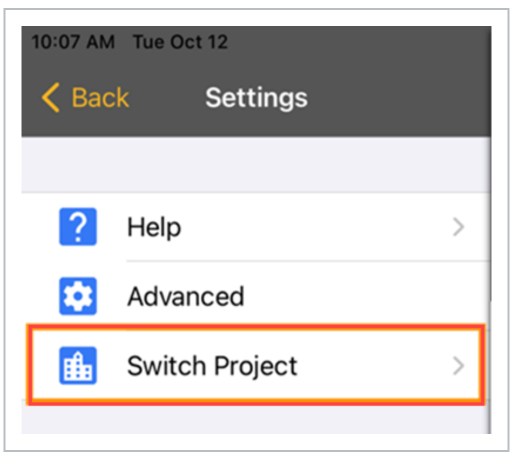
To see available views, in the Projects list, tap the **Views** binoculars icon. The list of available views opens.

NOTE	You can see the icon only when View Mode is enabled for a project.



Under each project name, you can see whether the project or view is already loaded or not.

From the Setting page, you can switch between multiple views and projects. To switch, tap on Settings > **Switch Project**.



9.2 CHECKLISTS

9.2.1 Summary

This topic gives a brief description of checklists in Completions Mobile.

Checklists in 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.

9.2.2 Links

For more information about checklists in Completions HQ, see Checklists.

9.3 CREATE A STANDALONE CHECKLIST

This topic explains how to create a standalone checklist in Completion Mobile.

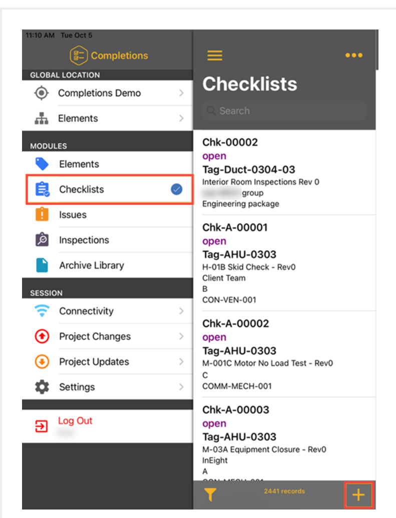
9.3.1 Considerations

The ability to create a standalone checklist is based on permissions. If you do not have permission to create standalone checklist, then you can create a new checklist based on other modules through Create & Connect.

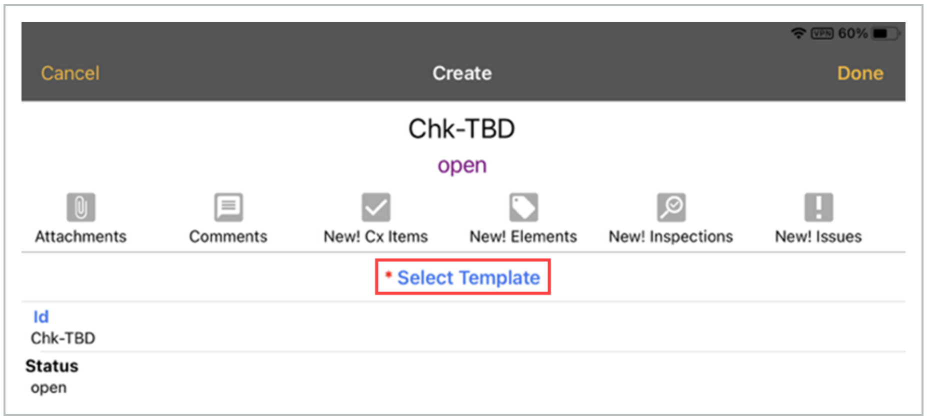
9.3 Step by Step 1 — Create a Standalone Checklist

After you log into Completions Mobile and select a project, follow the steps below to create a standalone checklist:

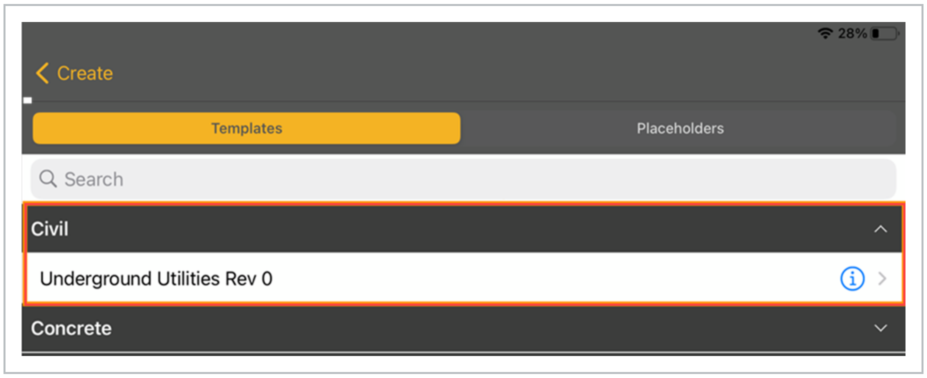
1. Tap on the **Checklists** module.
2. At the bottom of the Checklists side panel, tap the **Add** icon.



3. Tap **Select Template**.



4. In the Templates list, select a template, and then fill in the details of the Checklist.



5. Tap **Done** to create the standalone checklist.

   All unsaved changes of the checklist are discarded if you tap **Cancel**.

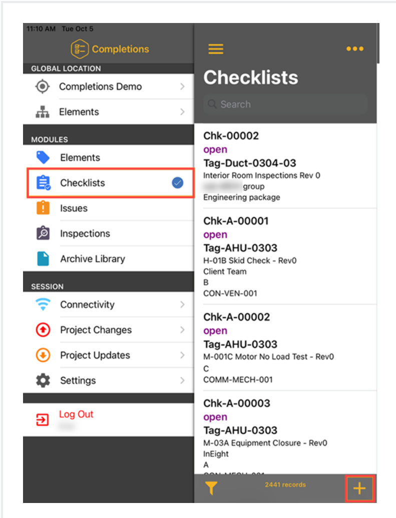
9.4 VIEW A CHECKLIST TEMPLATE

This topic explains how to search for and view a checklist template in Completion Mobile.

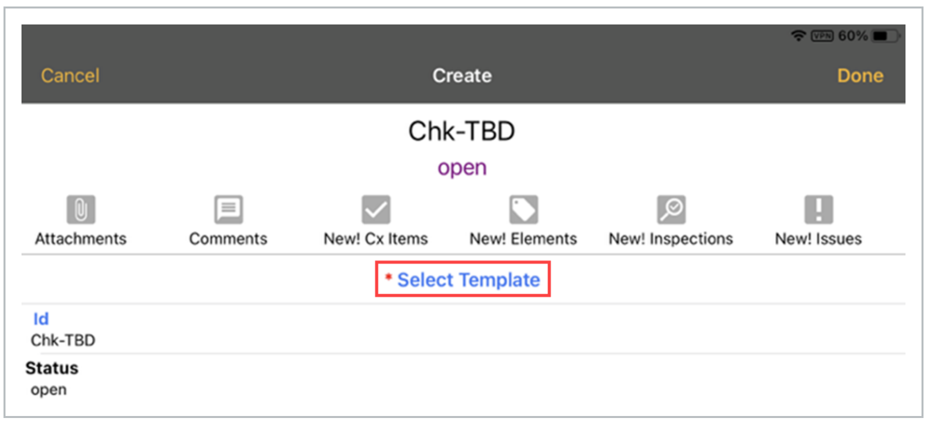
9.4 Step by Step 1 — Search for and View a Checklist Template

After you log into Completions Mobile and select a project, follow the steps below to search for and view a checklist template:

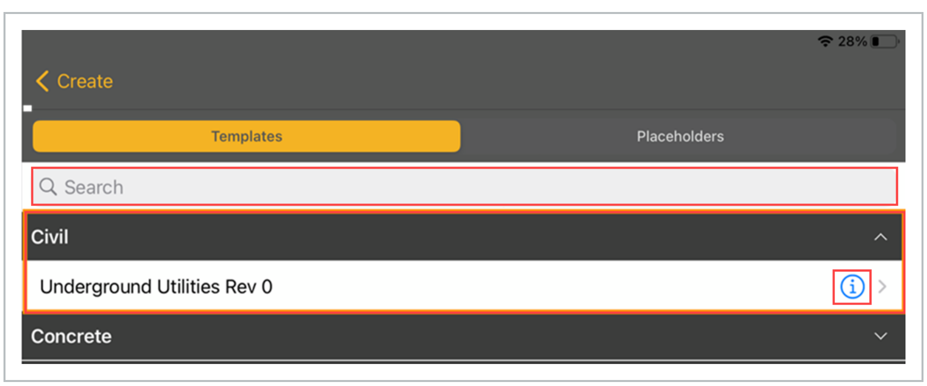
1. Tap on the **Checklists** module.
2. At the bottom of the Checklists side panel, tap the **Add** icon.



3. Tap **Select Template**.



4. Enter the template name in the search bar. You can also tap on the one of the disciplines to see a list of available templates.
5. Tap the Information icon to view details of the checklist template.



9.5 ANSWER A CHECKLIST

This topic explains how to answer a checklist in Completion Mobile.

When answering checklist questions, you can do the following:

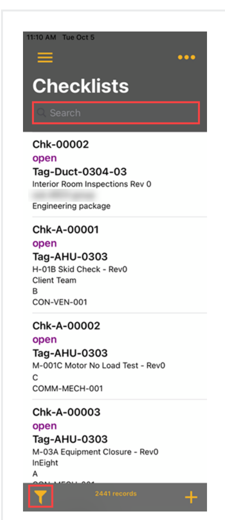
- Select options for Pass, Fail, or NA.
- Add attachments, comments, and link issues related to the checklist.
- See the last updated or resolved time stamp for each question in the checklist questions.

NOTE	You cannot answer checklist questions for a checklist placeholder.

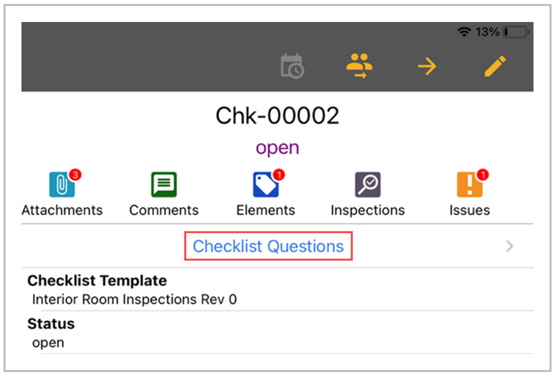
9.5 Step by Step 1 — Answer a Checklist

After you log into Completions Mobile and select a project, follow the steps below to answer a checklist:

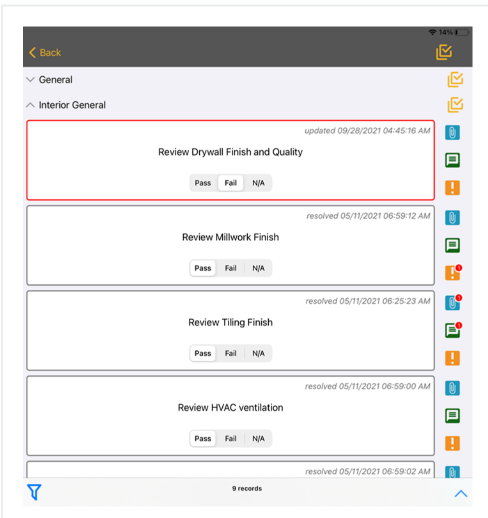
1. Tap on the **Checklists** module.
2. In the side panel, use the search or filter options to look up a checklist.



3. Open a checklist.
4. Tap **Checklist Questions**.



5. Answer the questions in the checklist.



9.6 BULK ANSWER A CHECKLIST

This topic explains how to answer checklist questions in bulk in Completion Mobile.

Bulk answering supports all question types.

9.6.1 Considerations

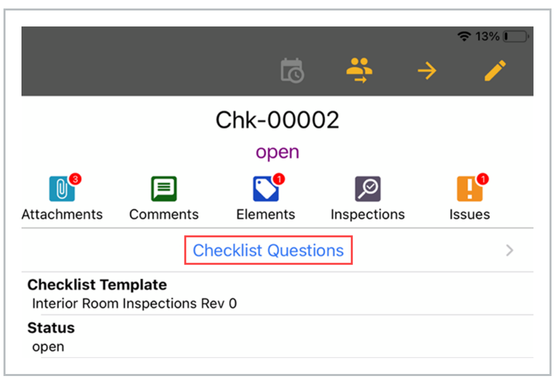
- The ability to bulk answer is based on permissions. If you do not have permission to answer checklist questions in bulk, the buttons and action items that initiate a bulk operation are disabled.
- If an entire set of questions contains distinct types and input ranges, an alert is shown instead of the Bulk Answer Questions dialog box.

- If you try to answer questions in bulk for a set with only a single question, an alert is shown instead of the Bulk Answer Questions dialog box.
- If you try to bulk answer a set of questions that has both answered and unanswered questions at the start of the bulk operation, an alert is shown with the following options when you try to commit the bulk operation:
  - Override: All questions, either answered or unanswered originally, get updated with the bulk response.
  - Don't Override: Only questions that were unanswered before the bulk operation are answered with the bulk response. Answered questions are left intact.
  - Cancel: The bulk operation is canceled and no question responses are updated.

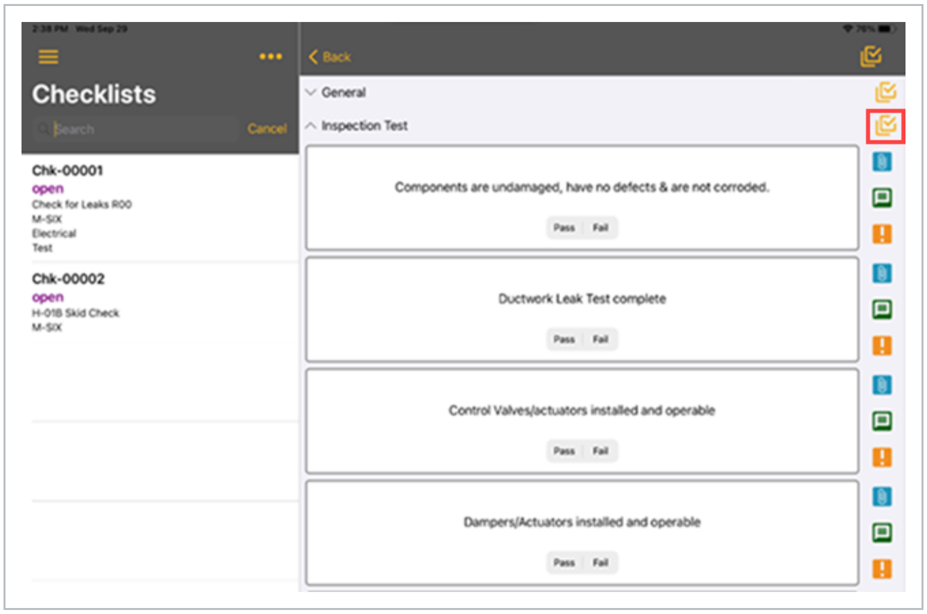
9.6 Step by Step 1 — Bulk Answer a Checklist

After you log into Completions Mobile and select a project, follow the steps below to answer checklist questions in bulk:

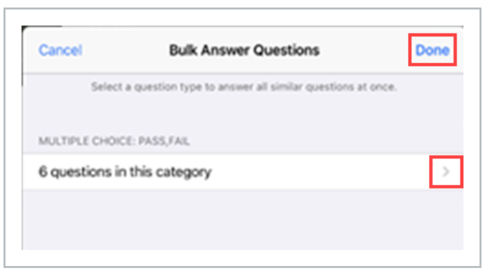
1. Tap on the **Checklists** module.
2. Tap on a checklist to open it, and then tap **Checklist Questions**.



3. Tap on the **Bulk Answer** icon to the right of the checklist question category name.



4. Tap the arrow in the Bulk Answer Questions dialog box.
5. Select your answer, and then tap **Done**.



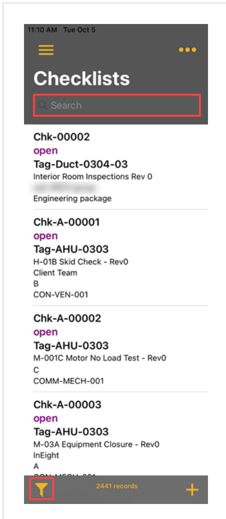
9.7 REASSIGN A CHECKLIST

This topic explains how to reassign a checklist to another team in Completion Mobile.

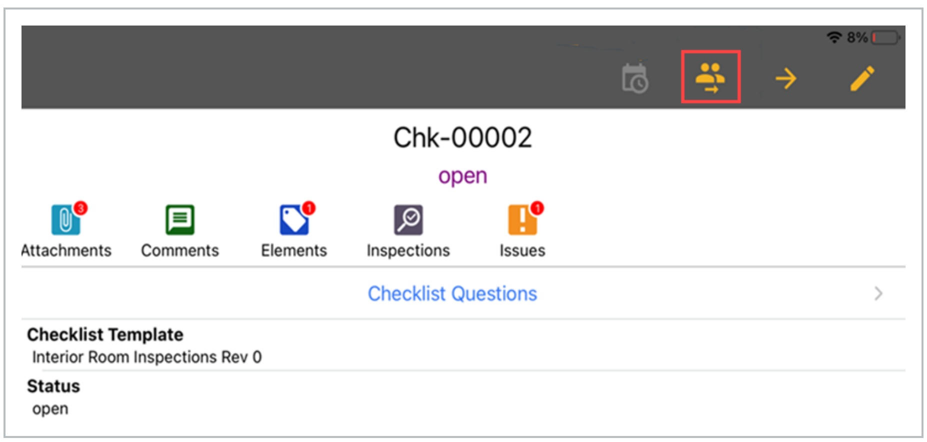
9.7 Step by Step 1 — Reassign a Checklist

After you log into Completions Mobile and select a project, follow the steps below to reassign a checklist:

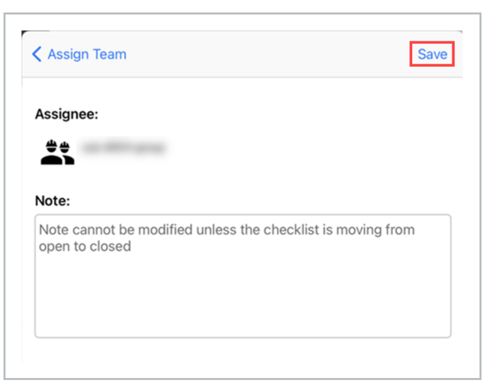
1. Tap on the **Checklists** module.
2. In the side panel, use the search or filter options to look up a checklist.



3. Tap the **Assign Team** icon in the upper right in detail view.



4. In the Assign Team dialog box, select the team you want to assign. Optionally, add a note.
5. Tap **Save**.



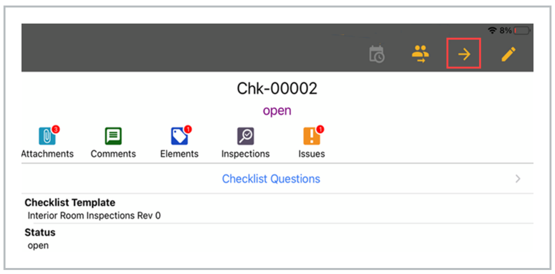
9.8 UPDATE THE STATUS OF A CHECKLIST

This topic explains how to update the status of a checklist in Completion Mobile.

9.8 Step by Step 1 — Update the Status of a Checklist

After you log into Completions Mobile and select a project, follow the steps below to reassign a checklist:

1. Tap on the **Checklists** module.
2. In the side panel, use the search or filter options to look up a checklist.
3. Tap the **Update status** icon in the upper right in detail view.



4. In the Assign Team dialog box, select the appropriate team to assign to the checklist. Optionally, add a note.
5. Tap **Save**.