COMPLETIONS USER GUIDE



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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

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1.1 INITIATE APPLICATION

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

Completions HQ 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 Completions application. The Completions project administrators are also the first to contact for any sign-in or account access issues.

1.1.1 System recommendations

- **CPU**: 64 bit Pentium 4 (x86 or 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 Completions HQ

Completions HQ should only be installed if instructed by your project administrator.

1.1 Step by Step 1 — Install Completions HQ Desktop Application

1. Open https://ineight.com/ineight-software-downloads/ in your web browser.

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	IFC Plugin Info		

- 2. From InEight Completions, select **Completions HQ Installer** to begin downloading the application.
- 3. After the download completes, click the file to run the application, and then select **Open**.

1.1.3 Launch Completions HQ

Administrators create projects, user accounts, and roles or settings before assigning users to any projects. After this initial setup, administrators send out user sign-in information via email. When you receive this email, click on the link provided to finalize your account setup. Then, click on the Completions HQ icon on your desktop to launch the application. Enter the provided sign-in information and your password on the sign-in screen to access your assigned projects. Depending on your project role and account settings, you might have access to multiple projects.

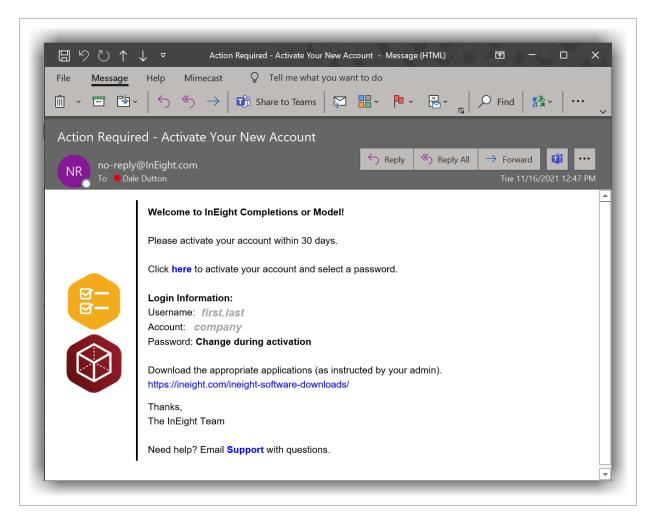
The sign-in page lets you enter a username and password credentials or single sign-on (SSO). To enable SSO functionality for your organization, contact your account administrator.

- NOTE Conversion to SSO applies across all InEight Model and Completions application including Admin Tools and Excel Plugin.
- **NOTE** InEight Services is the point of contact for user account creation.
- NOTE One SSO user per email address is permitted in one account.

Completions HQ offers the option to work offline by switching the online to offline toggle on the sign-in page. This feature lets you work from the most recent version of a project by accessing the project file from your local cache folder. For this reason, new projects or projects that have not yet been opened on your desktop require internet connectivity.

1.1 Step by Step 2 — Launch Completions HQ

1. Open the email from your administrator and then click on the link provided to finish your account setup.



- 2. Set your password, and then close or minimize your browser.
- 3. Double-click on the Completions icon on your desktop.
- 4. Either use SSO or the username and account ID provided by your administrator.



5. Click **Sign in** to launch the desktop application.

NOTE A Windows Security Alert might be shown.

6. Select any of the network types the computer running Completions HQ will be connected to, and then select **Allowaccess**.

NOTE Selecting all available network types provides the most flexibility.

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.

V Select Project	_	×
Training Job		
	ОК	
	ОК	

- 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

		Cx Items	م	Search		×
In Progress 4 Not Started 43 Civi	I 5 Instrumentation 11 MEP 28 Re	oom 2 System 1			Showing 47 of 47 records	FILTERS
(Item Id	Description	Responsible Team	Status		Location	
C-CP-0101/P-0101	Pump Control Cable	* *	Not Started			Î
Campus A / BLD-1 / Level 2 / 1-203						
CAMPUSA-UTLBLD-LVL1-101	Utility Area	**	Not Started			
Campus A / Utility BLD / Level 1 / 1-101						
CAMPUSA-UTLBLD-LVL1-203	Utility Room	* *	In Progress			
Campus A / BLD-1 / Level 2 / 1-203						
CP-0101	Pump Control Panel	* *	In Progress			
Campus A / BLD-1 / Level 2 / 1-203						
C T-0001 Campus A / BLD-1 / Level 1 / 1-101	Cooling Tower	* *	In Progress			
CTS-0001	Cooling Tower Structural Steel	**	In Progress			
Campus A / BLD-1 / Level 2 / 1-203						
CWR-0456-02	Cooling water return	**	Not Started			
Campus A / BLD-1 / Level 2 / 1-203						
CWS-0456-01 Campus A / BLD-1 / Level 2 / 1-203	Cooling water supply	Č *	Not Started			
P-CW-0001	Cooling Water System Flush Package	**	Not Started			
Campus A / BLD-1 / Level 2 / 1-203						
HEX-0001	Heat Exchanger	<u>**</u>	Not Started			
Campus A / Utility BLD / Level 1 / I-101						
HEXS-0001	Heat Exchanger Structural Steel	* *	Not Started			
Campus A / BLD-1 / Level 2 / 1-203						

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. $\overrightarrow{\text{Cx Items}} \stackrel{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Inspections}}{\overset{\text{log}}{\underset{\text{Checklists}}{\overset{\text{log}}{\underset{\text{Archive Library}}{\overset{\text{log}}{\underset{\text{Elements}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Inspections}}{\overset{\text{log}}{\underset{\text{Checklists}}{\overset{\text{log}}{\underset{\text{Archive Library}}{\overset{\text{log}}{\underset{\text{Elements}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Inspections}}{\overset{\text{log}}{\underset{\text{Checklists}}{\overset{\text{log}}{\underset{\text{Archive Library}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\overset{\text{log}}{\underset{\text{Issues}}{\underset{\text{Issues}}{\overset{\text{Issues}}{\underset{\text{Issues}}{\overset{\text{Issues}}{\underset{\text{Issues}}{\overset{\text{Issues}}{\underset{\text{Issues}}{\overset{\text{Issues}}{\underset{\text{Issues}}{\overset{\text{Issues}}{\underset{\text{Issues}}{\overset{\text{Issues}}{\underset{\text{Issues}}{\overset{\text{Issues}}{\underset{\text{Issues}}{\underset{\text{Issues}}{\overset{\text{Issues}}{\underset{\text{Issues}}}{\underset{\text{Issues}}{\underset{\text{Issues}}{\underset{\text{Issues}}{\underset{\text{Issues}}{\underset{\text{Issues}}}{\underset{\text{Issues}}}{\underset{\text{Issues}}{\underset{\text{Issues}}{\underset{\text{Issues}}}{\underset{\text{Issues}}{\underset{\text{Issues}}{\underset{\text{Issues}}}{\underset{\text{Issues}}}{\underset{\text{Issues}}}{\underset{\text{Issues}}}{\underset{\text{Issues}}}{\underset{\text{Issues}}}{\underset{\text{Issues}}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{Issues}}{\underset{$

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

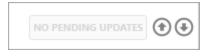
1. At the bottom of your screen, click on the **Pending Updates** button to see the many changes made.



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

PENDING UPDATES		l
-	Pending changes to be published	BL
▲ Checklists (22)		
▲ New Checklists (21)		1
Chk-TBD (2981cc) (21)		L
▲ Updated Checklists (1)		BL
> Chk-00006 (1)		
▲ Issues (3)		ľ
▲ New Issues (2)		1
PLI-TBD (8f1d5b) (2)		
♦ Updated Issues (1)		1
PUBLISH DISCARD	CANCEL	
		I

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



1.3 CLEAR CACHE

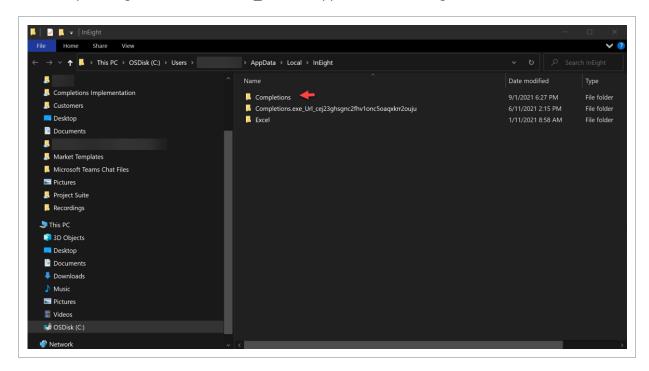
Clearing cache from HQ Completions and Mobile Completions lets you load the software from a clean slate. For example, if there are configuration changes that did not go through the application correctly or old login data files, you need to clear your cache to free up space and correct any data issues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



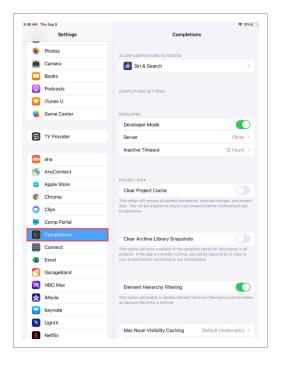
- 4. Log into HQ and verify that you can still access your projects(s) (running the application will recreate the HQ folder with freshly synced data from the server).
- 5. Delete the OLD_Completions folder.

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.

		≑ 11%
Settings	Completions	
se Photos	ALLOW COMPLETIONS TO ACCESS	
Camera	Siri & Search	>
Books		
Podcasts	COMPLETIONS SETTINGS	
😂 iTunes U		
🐞 Game Center	DEVELOPER	
	Developer Mode	
S TV Provider	Server	Other >
-	Inactive Timeout	12 hours >
aha		
AnyConnect	PROJECT DATA	
Apple Store		
	Clear Project Cache	
Chrome	This option will remove all cached documents, unsaved ch	
Chrome	This option will remove all cached documents, unsaved ch data. You will be required to resync your projects before	
Chrome Clips	This option will remove all cached documents, unsaved ch data. You will be required to resync your projects before	
Clips Comp Portal	This option will remove all cached documents, unaved d data. You will be required to respine your projects before Clear Archive Library Snapshots This option will force a refresh of the metadata stored for	documents in all
Chrome Clips Comp Portal Completions	The option will remove all cached documents, unsared of data. You will be required to respon your projects before or completions.	documents in all
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Chrome Clips Comp Portal Comp Portal Connect Excel Scole GarageBand HBO Max	This option will remove all cached documents, unaveid of data, thou will be reacted to respree your projects before consolitions. Clear Archive Library Snapshots These option all titoes archives of the metadata stored for project barline continuing to use Completions. Element Hierarchy Filtering	documents in all red to re-login to
Chrome Clips Comp Portal Comp Portal Competitons Excel Excel GarageBand HBD Max HBD Max	This action will remove all sached decuments, unaved of decipations.	documents in all red to re-login to

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

Welcome to Completions	
Clear Cache Do you want to clear your local cache? Yes No Yes No	

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
- InEight Completions is a Windows application used for ______ and document management.
 - a. Forecasting
 - b. Inventory
 - c. Process
 - d. Scheduling
- 3. Once your project administrator creates your user account, and adds you to the system, you will then:
 - a. Receive an email requesting to activate account
 - b. Be able to log into account
 - c. Log into your account and add new tabs
 - d. None of the above

Lesson 1 Summary

As a result of this lesson, you can:

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



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

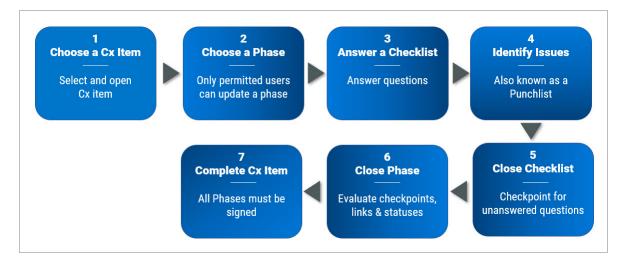
2.1 Work with Cx Items	30
2.2 Cx Item Maintenance	39
2.3 Update and Close a Cx Item Phase	40
Lesson 2 Review	42
Lesson 2 Summary	42

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.

	0 0 0	0 0	Cx Items	Q Search	Showing 17 of 22 records
n Progress 1 Not Started 16 C	ivil 5 Instrumentation 3 MEP 7 R	oom 1 System 1			CLEAR FILTERS
Item Id	Description	Responsible Team	Status	Location	
CAMPUS_A-UTLBLD-LVL1-203	Utility Room	Example GC Jack Larry	Not Started	Campus A / BLD-1 / Level 2 / 1-203	ŕ
P-0001	Pump Control Panel	Example GC Jack Larry	Not Started	Campus A / BLD-1 / Level 2 / 1-203	
TS-0001	Cooling Tower Structural Steel	Lack Larry	Not Started	Campus A / BLD-1 / Level 2 / 1-203	
WR-0456-02	Cooling water return	Example GC Jack Larry	Not Started	Campus A / BLD-1 / Level 2 / 1-203	
WS-0456-01	Cooling water supply	Example GC Jack Larry	Not Started	Campus A / BLD-1 / Level 2 / 1-203	
ooling System-0001	Cooling System	Example GC Jack Larry	Not Started	Campus A / BLD-1	
IEXS-0001	Heat Exchanger Structural Steel	Jack Larry	Not Started	Campus A / BLD-1 / Level 2 / 1-203	
JB-00001	Temperature Instrument Junction Box	Jack Larry	Not Started	Campus A / BLD-1 / Level 2 / 1-203	
ACC-0001	Pump Motor Control Cabinet	👋 Example GC	Not Started	Campus A / BLD-1 / Level 2 / 1-203	

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	jenny	inEight jenny	
Design Verification	Complete	7/9/2019 12:00 AM	8/15/2019 5:00 PM	jenny	inEight jenny	
Quality	Complete	7/9/2019 12:00 AM	8/15/2019 5:16 PM	jenny	jenny	
Safety	In Progress	7/3/2019 12:00 AM		jenny	inEight jenny	
Construction Complete	In Progress	7/21/2019 12:00 AM		jenny	inEight jenny	
Startup	Not Started	7/26/2019 12:00 AM		jenny	**	
Functional Acceptance Testing	Not Started	8/8/2019 12:00 AM		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.

	Pump Concrete Pad	Example GC Jack Larry	Not Started
PMP-0001	Cooling Water Circulation Pu	mp Example GC Jack Larry	In Progress
SKID-0001	Vendor Skid	Example GC	Not Started
SKIDS-0001	Skid Structural Steel	👋 🛱 Example GC	Not Started

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

				Î (Î) - □
Project: Training Job	•			
Back to Cx Items		PMP-0001		
F <u>emplate Name</u> MEP	Description Cooling Water Circulation Pump	<u>Status</u> In Progress		
<u>ocation</u> ampus A / BLD-1 / Level 2 / 1-203	<u>Cx Item Type</u> Element	<u>Discipline</u> Mechanical		
Responsible Team Bee Example GC	Subcontractor 🖕 Mechanical Sub #1	<u>Owner</u> 🚓 Example Owner Team	🛛 Attachments 🔹	
Jack Larry	Blackman Chris	Bates Sharon	= Checklists	
lesponsible Team Example GC	Start Date Forecast 7/3/2019 12:00 AM	Start Date Actual 8/15/2019 4:30 PM	Comments	
Jack Larry			Dispections	
inish Date Forecast /19/2019 12:00 AM	Finish Date Actual		Issues 2	
		Phase List:		
	Status:	Phase List: Forecast Start Date:	Finish Date Actual:	
pdated By:	Assigned To:		Finish Date Actual: 8/15/2019 4:30 PM	
pdated By: nstallation InEight	Assigned To: Complete	Forecast Start Date:		
pdated By: nstallation InEight jenny	Assigned To: Complete	Forecast Start Date:		
pdated By: Installation InEight jenny Design Verification InEight	Assigned To: Complete inEight jenny Complete inEight	Forecast Start Date: 7/9/2019 12:00 AM	8/15/2019 4:30 PM	
pdated By: installation inEight jenny besign Verification inEight jenny	Assigned To: Complete inEight jenny Complete inEight jenny	Forecast Start Date: 7/9/2019 12:00 AM 7/9/2019 12:00 AM	8/15/2019 4:30 PM 8/15/2019 5:00 PM	
pdated By: nstallation InEight jenny besign Verification InEight jenny tuality InEight InEight	Assigned To: Complete inEight jenny Complete inEight	Forecast Start Date: 7/9/2019 12:00 AM	8/15/2019 4:30 PM	
esign Verification InEight	Assigned To: Complete inEight jenny Complete inEight jenny Complete inEight inny	Forecast Start Date: 7/9/2019 12:00 AM 7/9/2019 12:00 AM	8/15/2019 4:30 PM 8/15/2019 5:00 PM	

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

- Back to Cx Items		PMP-0001		
Phase Name: Updated By:	Status: Assigned To:	Forecast Start Date:	Finish Uate Actual:	
Installation InEight jenny Description:	Complete InEight jenny Signature: InEig jenny	7/9/2019 12:00 AM	8/15/2019 4:30 PM Attachments = Checklists Comments Issues	
Design Verification	Complete	7/9/2019 12:00 AM	8/15/2019 5:00 PM	

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

Safety InEight jenny	In Progress InEight jenny	7/3/2019 12:00 AM	
Description:	Signature:		Attachments 1 =o Checklists 1 =o Comments 1 Issues 1

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

Startup InEight	Not Started	7/26/2019 12:00 AM	
Description:	Signature:		Attachments
			= Checklists
			Comments
			Issues

2.1.2.1 Add an Attachment

To learn more about attachments, see the <u>Attachments</u> lesson.

0 ATTACHMENT(S) LINKED TO CXITEM 'CP-0001'		_ = ×
	FILE FROM ARCHIVE LIBRARY ADD ATTACHMENT	DOWNLOAD ALL

2.1.2.2 Add or Link a Checklist

To learn more about checklists, see the Checklists lesson.

4 CHECKLIST(S) LINKED TO CP-0001	_ = ×
	ADD CHECKLIST LINK EXISTING CHECKLIST(S)

2.1.2.3 Add a Comment

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

0 COMMENT(S) LINKED TO CXITEM 'CP-0001'	-		×
	ADD	сомм	ENT

2.1.2.4 Add or Link an Inspection

To learn more about inspections, see the Inspections lesson.

0 INSPECTION(S) LINKED TO CP-0001		_ = ×
	ADD INSPECTION	LINK EXISTING INSPECTION(S)

2.1.2.5 Add or Link an Issue

To learn more about issues, see the <u>Issues</u> 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

		Phase List:		
hase Name:	Status:	Forecast Start Date:	Finish Date Actual:	
pdated By:	Assigned To:			
esign Verification	Not Started	7/9/2019 12:00 AM		
🖕 InEight	**			
Matthew.Macaras@ineic	aht.com			
Pescription:	Signature:		U Attachments	
			= Checklists	
			Comments	
Update Pha			Issues	
IN PROGRESS	COMPLETE			
> Update Phase Status	> Reassign Phase			
· opuate rhase statu:	* Reassign Flase			
	良臣力			
		Project	loaded	NO PENDING UPDATES

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	-	n error, and didn't want to update the status sequent pop-up window.	s, click In Progress , then
	UPDATING DES	IGN VERIFICATION TO IN PROGRESS	_ = ×
	Status	In Progress	
	Responsible Team	Karen.Loftus@ineight.com	/
	Description		
			OK CANCEL

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.

		REASSIGN DESI	GN VERIFICATION	_ = ×	
'hase Name: Jpdated By:	Status: Assigned To:	Responsible Team	InEight Karen.Loftus@ineight.com	<u> </u>	
Design Verification	Not Started				
InEight Matthew.Macaras@ineig	ght.com				
Description:	Signature:	Description			
	2				
> Update Phase Statu	Reassign Phase				
	ė.	-	Project loaded	NO PENDING UPDATES	

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**.

Phase Name: Updated By:	Status: Ansigned To:	_	GN VERIFICATION	0,	
Design Verification	Not Started	-		-	
InEight	11				
<u>Matthew.Macaras@ine</u> Description:	<u>ignt.com</u> Signature:	Description			
> Update Phase State	Reassign Phase	-			

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.

Phase Name:	Status:	Forecast Start Date:	Phase List: Finish Date Actual:	Updated By:	Assigned Tax
Design Verification	Complete	7/9/2019 12:00 AM	2/24/2020 8:25 AM	Karen Loftus @ineight.com	Let InEight Karen Loftus Bineight.com
Description: <add description="" here=""></add>					B Attachments
	Maren_ KA				E Ovecklists
					Comments
					herone
Quality	Not Started	7/9/2019 12:00 AM		▲ Infight	* -

Lesson 2 Review

- 1. Your Project Administrator will assign the same roles to different Teams or individual Users.
 - a. True
 - b. False
- 2. Once you click on a singular Cx Item Id, which components are shown? (select all that apply)
 - a. The metadata for the project
 - b. The sequence of each Phase of the project
 - c. The option to reassign a phase
 - d. The ability to update phase status
 - e. The ability to add or link to attachments, checklists, comments, inspections, and/or issues
 - f. Only options A, B & E
 - g. Options A through E
- 3. A Phase cannot be completed with open Issues.
 - a. True
 - b. False

Lesson 2 Summary

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



LESSON 3 – CHECKLISTS

Lesson Duration: 20 Minutes

Lesson Objectives

After completing this lesson, you will be able to:

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

Topics in this Lesson

3.1 Create a Checklist	44
3.2 Checklist Placeholder	50
3.3 Manipulate and Answer a Checklist	55
3.4 Open and Close a Checklist	65
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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.

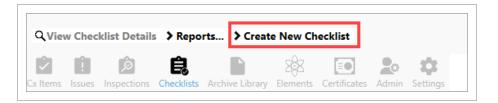
3.1.1 Create a Checklist

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.

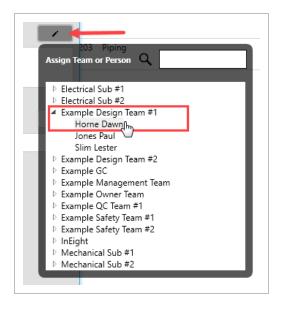
3. Click Create New Checklists.



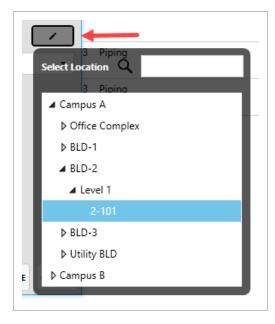
4. In the pop-up dialogue box, click on the system for which you want to create the new checklist, in this example, Instrument Calibration, then click **Next**.

	jenny			
SELE	CT CHECKLIST TEMPLATE	-		×
Q	Search			×
.⊿ C	oncrete			
	CV-0001A-Concrete Installation			
⊿ E	lectrical			
	E-0002A-Cable Installation			
	E-0003A Junction Box/Control Panel Installation			
	E-001A-Motor Control Center Installations			
4 II	Pipe Installation Checklist			
a b	Instrumentation			
- "	I-001A-Instrument Installation			
-	-01B Instrument Calibration			
	I-02B Loop Check			
ÞN	1echanical			
ÞP	iping			
_	tructural			
	ystem			
ÞV	endor			
		NEXT	CA	NCEL

- 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

1	SET REQUIRED (CHECKLIST FIELDS	Commune A (Libility DLC	□ ×
	* Responsible Team	Example Design Team #1		
	Description	<add a="" checklist="" description="" for="" here.="" new="" the=""></add>		
1		(47 out of 750 characters)		(
-	* Location	Campus A / BLD-2 / Level 1 / 2-101		
	Priority			•
	*Required Field			
			CREATE	CANCEL

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

Г

* Location	Campus A / BLD-2 / Level 1 / 2-101	/
Priority		*
*Required Field	low	
	medium	
	high	
	critical	

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

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

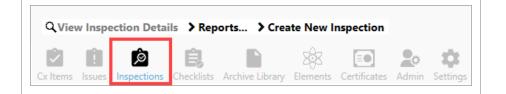
12. Click Create.

SET REQUIRED	CHECKLIST FIELDS	_ = ×
* Responsible Team	Example Design Team #1 Horne Dawn	1
Description	<add a="" checklist="" description="" for="" here.="" new="" the=""></add>	
* Location	(47 out of 750 characters)	
* Location	Campus A / BLD-2 / Level 1 / 2-101	
Priority	medium	-
*Required Field		
		CREATE CANCEL

You can create a checklist from any available Completions tab.

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

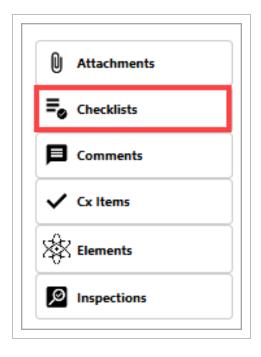
1. As an example, you can create a checklist by selecting the Inspections tab.



2. Select a specific Inspection tile.

Showing 4 of 10 records
CLEAR FILTE
iving

3. Click Checklists.



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

CREATE NEW

LINK EXISTING CHECKLIST(S)

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.

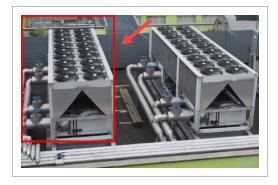
A **Checklist Placeholder** looks exactly like a Checklist Record. There is no differentiation between a Checklist and a Checklist Template, other than a placeholder checklist is not yet finalized and therefore cannot be edited. In order to use a Checklist Template it must first be executed.

For more information on Checklists, visit the "3.1 Create a Checklist" on page 44 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.

Getpper, Header Getpper, Header					
Anove		Answer:	0		
Ta	Tag Number	Image: Description of the second se	Last Update: 6/11/2020 12:39 PM		
		Answer	0		
	Tag Description	Image: block of the second s	Last Update: 6/11/2020 12:39 PM		
	Joystem Number	Answert	0		
		Attachments Comments Issues	Last Update: 6/11/2020 12:39 PM		

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.

This item cannot be modified becaus	se it is not executed
Project loaded	

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.

	Answer:			0
		Attachments Comments	Issues	Last Update: 6/19/2020 11:09 AM
Records now	Answer:			0
available for data entry.		Attachments Comments	Issues	Last Update: 6/19/2020 11:09 AM
	Answer:			0
		Attachments	lssues	Last Update: 6/19/2020 11:09 AM

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.

		C	hecklists	Q Search	>
closed 1 open 7 medium	1				Showing 8 of 8 records
tatus	ld	Checklist Template	Responsible Team	Location	Category
open	Chk-00006	I-01B Instrument Calibration	Example Design Team #1	Campus A / BLD-2 / Level 1 / 2-101	Instrumentation
open	Chk-00005	M-005A-Pump Alignment	jenny	Campus A / Utility BLD / Level 1 / 1-101	Mechanical
open	Chk-00004	Example Checklist	inEight jenny	Campus A / BLD-1 / Level 2 / 1-203	Vendor
open	Chk-00003	M-04B Centrifugal Pump	jenny	Campus A / BLD-1 / Level 2 / 1-203	Mechanical
open	Chk-00002	M-005A-Pump Alignment	jenny	Campus A / BLD-1 / Level 2 / 1-203	Mechanical
closed	Chk-00001	M-001A-Equipment Setting	👳 InEight	Campus A / BLD-1 / Level 2 / 1-203	Mechanical

• 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.

_				
4 Cate	ory Header			
4	tegory Header			
		Answer		0
	Tag Number		Image: Description of the second se	Last Update: 6/11/2020 12:39 PM
		Answer:		0
	Tag Description		Attachments Comments Issues	6/11/2020 12:39 PM
		Answer		0
	Subsystem Number		Attachments Comments Issues	Last Update: 6/11/2020 12:39 PM

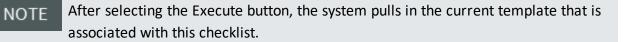
• Notice how the Answer checkbox is greyed out, along with the Last Update checkbox

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



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

Project update complete	

6. Select Publish.

PENDING UPDATES
Pending changes to be published
▲ Checklists (2)
▲ Updated Checklists (2)
▲ Chk-A-25369 (2)
Updated Modification Info on checklist 'Chk-A-25369', Changed FMD_LAST_MODIFIED_DATE from ' (ES) Comentarios: (EN) Comments: (1)
PUBLISH DISCARD CANCEL

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.

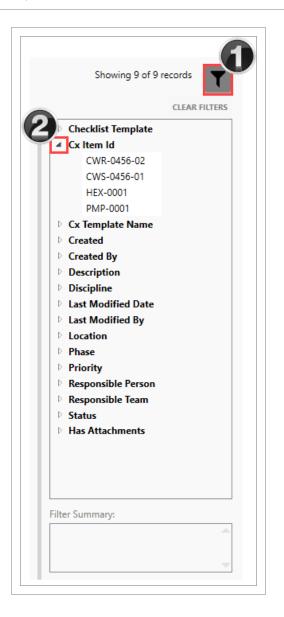
3.3.1 Locate a Checklist

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**.

open 1				Showing 1 of 9 records
				CLEAR FILTE
tatus	ld	Checklist Template	Responsible Team	Checklist Template
ocation	Category			Cx Item Id Clea
open	Chk-00005	M-005A-Pump Alignment	nEight	CWR-0456-02
			jenny	CWS-0456-01
Campus A / Utility BLD / Level 1 /	Mechanical			HEX-0001
1-101				PMP-0001
				Cx Template Name
				▷ Created

4. Double-click on the checklist to open.

TIP	Click either the Clear Filt	ers, Clear or Clear	All buttons to remo	ve filtering.	
	Showing 1 of 9 recor	ds			
	 Checklist Template Cx Item Id CWR-0456-02 CWS-0456-01 HEX-0001 PMP-0001 Cx Template Name Created Created Rv 	Cear			
	Filter Summary: Cx Item Id: HEX-0001	Clear All			

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

			Checklists		Q Search	
closed (5) open (24153)						Showing 24160 of 24160 records
						CLEAR FILTER
tatus hecklist Type	Splid	Template Name	Element Id	Responsible Team	Category	
open	Chk-A-33869		LSHH-42135	*	Instrumentation	
BITR						
closed	Chk-A-39771		PT-41190	* *	Instrumentation	
BITR						
open	Chk-00040		LVF-PPL-01-BKR-12	Kiewit	Instrumentation	
open	Chk-A-31799		HS-21672	<u></u>	Instrumentation	
BITR						
open	Chk-A-43784		TW-1005C (X20692)	<u></u>		
BITR						
open	Chk-A-45150		VLP-872021	*		
AITR						
open	Chk-A-45123		VJB-802001	<u>**</u>		
AITR						
open	Chk-A-37604		PIT-1103 (X22196)	<u>.</u>		
BITR	CI. 4 20000		07.04400			
open	Chk-A-38098	Chacklist	PIT-31413C	* *		
- Them encounter by						

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

			Checklists		Q Search	
closed 5						Showing 5 of 24160 records
						CLEAR FILTE
tatus hecklist Type	Spiid	Template Name	Element Id	Responsible Team	Category	
closed	Chk-A-38342		PIT-5100 (X22240)	<u>.</u>	Instrumentation	
BITR						
closed	Chk-A-25830		AE-18200124	* *	Instrumentation	
BITR						
losed	Chk-A-27068		FCPS-9	<u>**</u>	Electrical	
AITR						
closed	Chk-A-25126		3R-6720010102	*	Electrical	
AITR						
losed	Chk-A-39771		PT-41190	*	Instrumentation	
BITR						

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.

ltem	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 Esternal Mede estate to reactive a seen of the sheeldist DDE with a OD code

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.

<u>tatus</u> losed	Category Instrumentation	Responsible Team	Last Modified By Kiewit Zach Dill	Last Modified Date 6/25/2020 6:25 AM	3
escription		Location		<u>Element Id</u> PIT-5100 (X22240)	Attachments Comments
<u>b type</u> ESSURE TRANSMITTER	Priority .	Resolution Date 6/25/2020 6:25 AM	Resolved By		✓ Cx Items
esolution Note		<u>Checklist Type</u> BITR			Elements Inspections
					! Issues
	27 questions / 27 unresolved		4		Insues Checklist Questions: DYPAND ALL COLLAPSE ALL
ow Resolved: Questions Category: Header Category: General	27 questions / 27 unresolved		4		
Category: Header	27 questions / 27 unresolved		•		
Category: General	6		0		

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.

			Issue History: Assigned To		
Status	Due Date	ld	Assigned To	Updated By	
New	3/5/2020 8:00 AM	PLI-TBD-HIST-TBD	tnEight	InEight	
		+ +		A	
		• • • • •			

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.

Back to 04-DEVICENET POWER SUP	PLY:	Chk-A-33869:	I-08A Instrument Installa	tion		External Mode
Status open	Category Instrumentation	Responsible Team	Last Modified By M-SIX alex.mazepa	Last Modified Date 6/11/2020 12:39 PM		
Description		Location		Element Id LSHH-42135	AttachmentsComments	
evel switch high high	Priority	Resolution Date	Resolved By		✓ Cx items	
Resolution Note		Checklist Type BITR			Elements 2	
					Issues	
ow Resolved: 🗸 Questions: 27	questions / 27 unresolved				Checklist Questions: EXPAN	ND ALL COLLAPSE AL
Category: Header						
Category: General						

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

how Resolved: 🗸	Questions: 20 questions / 20 unresolved	Checklist Qu	estions:	EXPAND ALL	COLLAPSE ALL
Category: General					
▲ Category: Equipm	nent Inspection				
Component	detail (type, quantity, materials, etc) match current datasheet	Yes Q Attachments	No E Comments	N/A s Issues	Last Update: 2/20/2020 2:02 PM
IP ratings of	enclosures, cable glands & sealing washers are hazardous area compliant	Yes Q Attachments	No P Comments	N/A I Issues	O Last Update: 2/20/2020 7:26 AM

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.

Resolved: Questions: 20 questions / 20 unresolved	Checklist Questions:	EXPAND ALL	COLLAPSE A
egory: General			
Category: Equipment Inspection			
	Yes No	N/A	\otimes
Component detail (type, quantity, materials, etc) match current datasheet	0 F Attachments Comment	s Issues	Last Update 2/20/2020 2:02 PM
IP ratings of enclosures, cable glands & sealing washers are hazardous area compliant New Issue? ×	Yes No	N/A I Issues	Cast Update 2/20/2020 2:12 PM
Tags & signage meet project language requirements & are visible	Yes No	N/A	Last Update 2/20/2020
lpdate Status → Reassign → Edit	Attachments Comment	s Issues	2:12 PM

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

TIP

To learn more about elements, see the Elements lesson.

linked directly to Chk-A-38342			
Element Id	Element Type	Location	

3.3.3.2 Add an Attachment

To learn more about attachments, see the <u>Attachments</u> lesson.

0 ATTACHMENT(S) LINKED TO "COMPONENT DETAIL (TYPE, QUANTITY, MATERIALS, ETC) MATCH CURR"	-		×
FILE FROM ARCHIVE LIBRARY ADD ATTACHMENT	DOWN	ILOAD /	ALL

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.



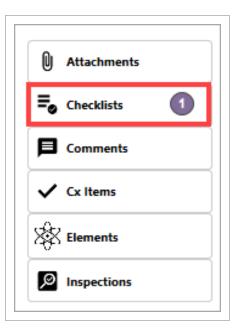
NOTE

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 65 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.

Responsible Team	Last Modified By	Last Modified Date 2/20/2020 7:26 AM	Description <add description="" here=""></add>	Attachments
Priority	Created By	Created		Comments
Level 1 / high 0 ISSUE(S) LINKED TC CHK-TBD	Karen Loftus	2/20/2020 7:26 AM	_ = × •	Cx Items
			ADD ISSUE LINK EXISTING ISSUE(5)	Inspections

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.

	Category Instrumentation	Responsible Team	Last Modified By M-SIX alex.mazepa	Last Modified Date 6/11/2020 12:39 PM	
					U Attachments
	2 ELEMENT(S) LINKED TO CHK	-A-33869		_ = ×	Comments
			AD	D ELEMENT LINK EXISTING ELEMENT(S)	✓ Cx Items
н	2 linked directly to Chk-A-33869			Hide	Elements 2
	Element Id	Element Type	Location		장장 Elements 🌑
	04-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT			Inspections
	LSHH-42135	TAGGED EQUIPMENT			Issues

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

Back to Chk-A-33869:		Linking Elements to Chk-A-33869:	Q Search		×
Block (1	Sub System 600 System 424 TAGGED EQUIPMENT 3510	a)		Showing 36138 of 36140 records	۴Ţ
EAR SELECTION		_		CLEA	AR FILTER
ment ld	Element Type Location				
-FPP-1CS-G132	TAGGED EQUIPMENT				í
-FPP-1CS-G133	TAGGED EQUIPMENT				_
-FPP-1CS-G212	TAGGED EQUIPMENT				
-FPP-1CS-K131	TAGGED EQUIPMENT				
-FPP-1CS-K131-1	TAGGED EQUIPMENT				
-FPP-1CS-K131-2	TAGGED EQUIPMENT				
-FPP-1CS-K131-3	TAGGED EQUIPMENT				
-FPP-1CS-K210	TAGGED EQUIPMENT				
-FPP-1CS-K220	TAGGED EQUIPMENT				
-FPP-1CS-S223	TAGGED EQUIPMENT				
INK SELECTED					
		o 🙃	1		

- 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 <u>Issues</u> lesson.

0 ISSUE(S) LINKED TO CHK-00009



3.4 OPEN AND CLOSE A CHECKLIST

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

> U	odate S	tatus > R	eassign 🕽	Edit				
	0	Ŕ	Ê				20	-0
	Issues		Checklists	Archive Library	Elements	Certificates	Admin	

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.

		C	hecklists	Q Search			>
closed 1 open 7 medi	um (1)				S	howing 8 of 8 records	
tatus	ld	Checklist Template	Responsible Team	Location	Category		
open	Chk-00006	I-01B Instrument Calibration	Example Design Team #1	Campus A / BLD-2	2 / Level 1 / 2-101 Instrum	entation	
open	Chk-00005	M-005A-Pump Alignment	jenny	Campus A / Utility 1-101	BLD / Level 1 / Mechan	cal	
open	Chk-00004	Example Checklist	inEight jenny	Campus A / BLD-1	/ Level 2 / 1-203 Vendor		
open	Chk-00003	M-04B Centrifugal Pump	inEight jenny	Campus A / BLD-1	/ Level 2 / 1-203 Mechan	cal	
open	Chk-00002	M-005A-Pump Alignment	jenny	Campus A / BLD-1	I / Level 2 / 1-203 Mechan	cal	
closed	Chk-00001	M-001A-Equipment Setting	InEight jenny	Campus A / BLD-1	I / Level 2 / 1-203 Mechan	cal	

• The given checklist appears



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.

0.11.1					
Back to Issues			PLI-TBD: New		
ubtype	Category	Summary	Responsible Team	Subcontractor	
	Mech	09 - Mechanical Tagging	Karen.Loftus	**	
ocation		Description		Due Date	
ampus B		Add description here		6/29/2020 8:00 AM	O Attachments
ast Modified	Last Modified By	Created	Created By	Resolution Date	E Checklists
/26/2020 7:54 AM	InEight Training	6/26/2020 7:54 AM	Karen.Loftus		-
	Karen.Loftus	0	Karen.Loftus		Comments
esolution Note	0 CHECKLIST(S) LINKED TO	PLI-TBD		_ = ×	✓ Cx Items
laterial Required			CREATE	NEW LINK EXISTING CHECKLIST(S)	Elements
Issue Category A					

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.

← Back to Elements		04-DEV	CENET POWER SUPPLY:	TAGGED EQUIPMENT		
Element Id	Element Type	Element Status	Location			
04-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT	On-Hold				
sub type	Hierarchy Value					
DISTRIBUTION BOARD	00 / 04-DEVICENET POWER SUPPLY				Attachments	1
					Ocertificates	
오 Tag Detail					≡ _© Checklists	3
System					Comments	
Procurement Details					Stements	4
 Contractor Details 					Issues	
 Drawing Information 					Issues	
 Testing Information 						
 Engineering Information 						
Vendor						
System Information						

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

			CREATE NEW	LINK EXISTING CHECKLIST
3 Checklist(s) linked directly to	04-DEVICENET POWER SUPPLY			Hid
Status	Spiid	Template Name		
Element Id	Responsible Team	Category		
Checklist Type				
open	Chk-A-33869			
LSHH-42135	<u>*</u> *	Instrumentation		
	-			
BITR				
open	Chk-A-34628			
LV-2414A (X20684)	**	Instrumentation		
	-			
CITR				
open	Chk-A-39456			
PSV-5202 (X22236)	**	Instrumentation		
AITR				

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

			CREATE NEW	LINK EXISTING CHECKLIST(
Checklist(s) linked directly to	04-DEVICENET POWER SUPPLY			Hide
Status	Spiid	Template Name		
Element Id	Responsible Team	Category		
Checklist Type				
open	Chk-A-33869			
LSHH-42135	**	Instrumentation		
	_			
BITR				
open	Chk-A-34628			
LV-2414A (X20684)	<u>**</u>	Instrumentation		
CITR				
open	Chk-A-39456			
PSV-5202 (X22236)	**	Instrumentation		
	ř.			
AITR				

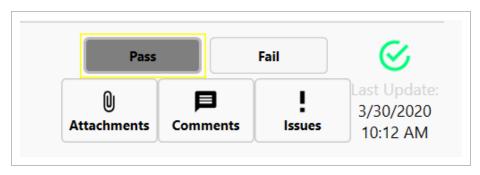
• The checklist appears

Back to 04-DEVICENET POWER SL	IPPLY:	Chk-A-33869:	I-08A Instrument Installa	tion		External Mode
<u>Status</u> open	Category Instrumentation	Responsible Team	Last Modified By M-SIX alex.mazepa	Last Modified Date 6/11/2020 12:39 PM		
Description		Location		Element Id LSHH-42135	 Attachments Comments 	
sub type LEVEL SWITCH HIGH HIGH	Priority	Resolution Date	Resolved By		Cx Items	
Resolution Note		Checklist Type BITR			Elements 2	
					. Issues	
ow Resolved: 🗸 Questions: 2	7 questions / 27 unresolved				Checklist Questions: EXPAN	ID ALL COLLAPSE AL
Category: Header						
Category: General						
Category: Acceptance						

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.



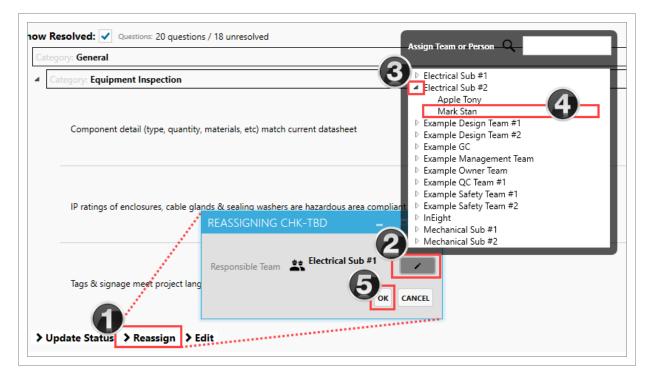
3.4.2 Reassign a Checklist

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.

> Update Status > Reassign > Edit	You do not	have permission to modify this item.
Cx.Items Issues Inspections Checklists Archive Library Settings	Project loaded	

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.

			Chk-A-2828	87: I-08A Instrument In	stallation			External Mod
Status open Location Resolution Note	Category Instrumentation	Responsible Team	Last Modified By M-SIX Mac.mazepa sub.type FLOW INDICATING TRANSMITTER	Last Modified Date 7/2/2020 12:50 PM Priority	Description Resolution Date	<u>Resolved By</u>	Image: Alterhamments Comments Comments Image: Comments Image: Comments Image: Comments Image: Comments	
ow Resolved: 🗹 Questo Category: Header Category: General Category: Acceptance	= 27 questions / 27 unresolved			Checklist Execution Mode? ion will change the execution meth sure you would like to proceed?	od from digital to external.		Checklist Questions:	DRPAND ALL
					2K Cancel			

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.

View	Check	dist Details	> Reports	> Create	New Ch	ecklist		
			Excel Chec	klist Overvie	w			
	Û.	Ó	Gergrate F	DF Report	2		20	101

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

	🚔 Kiewit				
	EXPORT A PDF REPORT	-		×	
	Export a PDF Report				
	Single PDF for item Chk-A-28287 Multiple detail PDF reports for all visible items				
	 Summary Report 				
	Comments				
	Connected Records				
	Attachments				
_					
	S/	WE TO	CAN	CEL	
	► • Electric	cal			

- 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.

south as for	Working with Elem	ents 040530 Element Import 0408 G	Checklist Chk-A-282		
					7/2/2020 12:50 PM
Scale for Sec	N0 UAT Testing	2 Status open			
	Attachments: 0	Comments: 0	Cx Items: 0	:1	Inspections: 0
Scale Ma Sat	Checklist Informa	tion			
	Description:				

- 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.

Project: NO UAT Testing 2 •
DPORT RECORD.
MPORT LLIMINTS.
ער מיני אנוניים אנוניים אינטיניים אנוניים אנוייל אינטין באני איניינע איני איילי אני באני איל איל איילי איני אי

2. Pull up the completed checklist.

nport R	Record File	Document M	nager														
/	Status	Spiid	Template Name	Element Id	Responsible Team	Category	Checklist Type	Template Class Version	Page Number	Page Count	Import Summary		Modified				
•	open i	Chk-A-28287		FIT-90722		Instrumentatio	onBITR		1	10	Success	0 /	•				
			De l														
		-			and the second					and the			and and an and a	-			
				and a	الارد ال	-	-		e an er			-	an a	an sea a	وسو الدهيو		فسندم
	Land				الارخاص	~		and a state of the state of	the section of the se	and the		-	ستحدث المحاط	an series a	وسو المراهيو	and all see	مسدم
					المحدر المراحي	~			the second second	and the		-	an an ann an		وسيو الداهيو	and the second	فسندم
		~			الارغاني	~~	-	and a second second	t and the	and the		~~~~	and and and a state		وسو الدعميو	and the second	فسندم
	-				هي خري	~~	~		r se presente de la construcción de	-	and the second		بالمحلوق المحاطي المحاطي		وسيو الداهيو	and and and	g
					الارخاص	~~~			r ser	-		-	با الکرون الکرون الک الک الک الک	an sense a	وسيو الداهيو	and dee	
		~			الارخاص	~~~			the sector	-		-	and and a second second		وسبو عرجميو		
-		n y			الارخاص	~~	~	and a second	the sector				بر الکرور الکرور الکر ال		وررو عرجميو		فسندم
		~~~		and the second sec	الارخاص	~~~			t set				an a		وسيو ع هي		••
	ords are se				9. S. S.		~		~				and and and a second		وررو که همو	SAVE	CANCEL

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

port	Record File	e Document	Manager										
/	Status	Spiid	Template Name	Element Id	Responsible Team	Category	Checklist Type	Template Class Version		Page Count	Import Summary		Modif
/	open	Chk-A-282							- -	= ×	Success	0 /	۴
			BACK	-A-28287									
					H 🕅 🛛	1							
						Cheo Chk-A-				^			
						Chk-A-	28287	7(2)2020 12 80 PM					
					N0 UAT Testing 2			100					
					Status open								
						ments: 0 Cx Items: 0	:1 4	spections: 0					
					Checklist Information								
					Description:								
					Priority	Category	Spatial Hierarch	м,					
						ad whether							
					Responsible Team	Created By	Last Modified B	,					
						\$282820 1.90 PW	70/000 12:58 PM						
					More Information								
					3.6/2, 2020 12:52 PM	Page 1	#10	NO LIAT Testing 2					
					_	_				· · ·			
			4							)			

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.

	Category	Checklist Type	Template Class Version	Page Number	Page Count	Import Summary		Modifie
I	nstrumentatio	nBITR		1	10	Success	0 🖊	
	UPDAT	e checklist f	RESOLUTION		_ =	×		
	Chk-A	-28287	$\Im$					
	Resolve	ed By	/					
	Resolut	tion Date 7/2/2	020 12:54 PM	1				
	Dest	- N						
	Kesolu	tion Note						
		(0 c	ut of 750 characters)					

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.

File: Cli/Jaser/Jales.mazepr/Documents/Cuite A-22227 2020-07 20172-52 39.pdf       Import Second Microardia       Import Second Mi
Confirm Import
1 of 1 records are selected CANCE

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

				Check	dists	Q Search	
closed 10 open 2415	low 1						
Status	Spiid	Template Name	Element Id	Responsible Team	Category	Checklist Type	

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

Status closed	Category Instrumentation	Responsible Team	Last Modified By M-SIX alex.mazepa	Last Modified Date 7/2/2020 12:56 PM	Description			
							Attachments	0
Location		Element Id FIT-90722	sub type FLOW INDICATING TRANSMITTER	Priority	Resolution Date 7/2/2020 12:54 PM	Resolved By	Comments	
Resolution Note		Checklist Type				alex.mazepa	✓ Cx Items	
Resolution Note from paper checklis	st	1 ATTACHMENT(S) LINKED TO	O CHECKLIST 'CHK-A-28287'		_ = ×		Stements	0
				FILE FROM ARCHIVE LIBRARY	ADD ATTACHMENT DOWNLOAD ALL		D Inspections	
		1 Attachment(s) linked direct					Issues	
		Chk-A-28287.pc 618.6 KB Downloaded	r		alex.mazepa External			
Show Resolved: 🗸 Questions: 27 q	uestions / 27 unresolved	010.0 KB Downloaded	6		External			Chec
Category: Header								
Category: General								
Category: Acceptance		_						

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
- 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	80
4.2 Issue Maintenance	86
4.3 Resolve an Issue	96
Lesson 4 Review	100
Lesson 4 Summary	100

# 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.

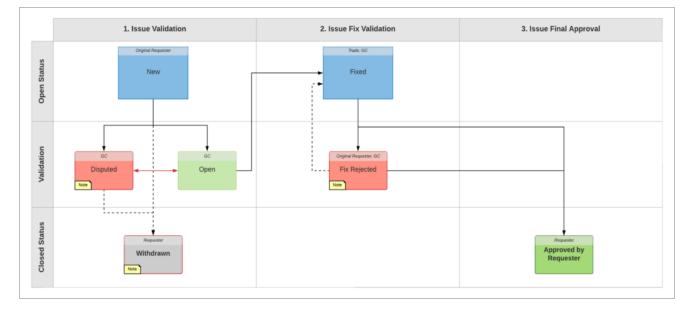
InEight Completions Issues can be defined as: a to-do list, a type of a deviation, or a type of nonconformance that eventually needs to be corrected.

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

← Cancel		Create New Issue
• Subtype	PLI COR	
* Category 2	· · · · · · · · · · · · · · · · · · ·	
* Responsible Te	•	
5 Subcontractor * Location 6		
Totalion Description		
8 * Due Date	2/23/2020 8:00 AM 14	
*Required Field		

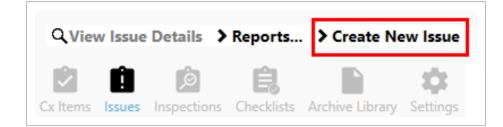
TIP In the Description field, it is important to provide a clear description of the issue in order for the Responsible Team clearly understands the issue.

# 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.

* Subtype	PLI
* Category	Electrical 🔹
* Summary	09 - Grounding & Bonding 🔹
* Responsible Team	Electrical Sub #1
Subcontractor	Electrical Sub #2
* Location	Campus A
* Description	Missing/Incorrect Core Marker
	(29 out of 750 characters)
* Due Date	2/27/2020 8:00 AM
*Required Field	

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

	2.2.	Issue History:	
Status Updated By	Due Date	ld	Assigned To
New	2/27/2020 8:00 AM	COR-TBD-HIST-TBD	Electrical Sub #1
Paul Trippi Note: Missing/Incorrect Core Marker Last Updated: 2/24/2020 10:10 AM	Signee Team:	Signee Person:	Attachments
			Comments

## 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.

Updated By			Assigned To	
New InEight Paul Trippi	2/27/2020 8:00 AM	COR-TBD-HIST-TBD	Electrical Sub #1	
Note: Missing/Incorrect Core Marker Last Updated: 2/24/2020 10:10 AM	Signee Team:	Signee Person:	Attachments	
			Comments	

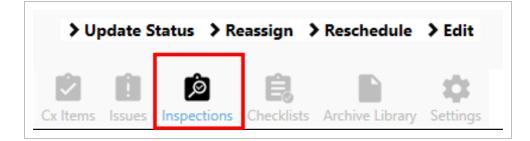
# TIP The Issues screen by default displays open issues currently associated with this project. Select the Show Closed/Withdrawn checkbox to view all Issues.

d .ocation	Category	Summary	Description	Subcontractor	Created	Status	
COR-00002	Instrumentation	03 - Missing/Incorrect Core Marker	<ul> <li>Failed checklist question: 'Piping &amp; components are restored to suppo</li> </ul>		11/14/2019 2:18 AM	New	
Campus A / BLD-1 / Level 2 / 1-2	203						
COR-00003	Mech	11 - Verify Bolt Torque	Failed checklist question: 'All relief valves, bursting discs & orifice plat	<b>.</b>	12/12/2019 5:07 PM	New	
Campus A / BLD-1 / Level 2 / 1-2	:03						
COR-00004	LSS	03 - Sample Ports	Failed checklist question: 'Flange check sheets are complete for all re.	<u>.</u>	1/30/2020 4:48 PM	New	
Campus A / BLD-1 / Level 2 / 1-2	203						
COR-00005	Electrical	06 - Conductor Labeling	NOTE ABC123	InEight Karen.Loftus@ineight.com	2/24/2020 2:29 PM	New	
Campus A / BLD-1 / Level 2 / 1-2	203						
	ports > Create New Iss						Show Closed / With

#### 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.

		Inspections	Q Search	×
Ready for Inspection 1	Ready for QC (1)			Showing 2 of 2 records
Status Location	ld Responsible Team	Scheduled Time Subcontractor	Inspection Type Note	
Ready for QC Campus A / BLD-1 / Lev	vel 2 / 1-203	8/16/2019 8:00 AM	Initial Inspection This is my initial inspection	

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

← Back to Inspections	Ir	sp-00001: Ready for QC	
Inspection Type Initial Inspection	Scheduled Time 8/16/2019 8:00 AM	Responsible Team Example GC	
Subcontractor InEight jenny	Location Campus A / BLD-1 / Level 2 / 1-203	<u>Note</u> This is my initial inspection	
<u>Permit #</u>	Increment	<u>Discipline</u> Mechanical	Attachments
<u>Drawing #</u> 111-111	CSI Spec Section	<u>RFI</u> 123	<b>≡</b> ₆ Checklists <b>□</b> Comments
<u>Submittal #</u> 1111	Last Modified 8/15/2019 4:22 PM	<u>Created</u> 8/15/2019 4:23 PM	✓ Cx Items
Created By			Issues

NOTE	The buttons on the right of the	e screen are all customizable, and also permission based.
	Attachments	
	Comments	
	🗸 Cx Items 🕕	
	Inspections	
	l Issues	

# **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.

		lssues	<b>Q</b> Search	CL : 0.60 L	>
COR 6 PLI 2 New 7 Valid 1	)			Showing 8 of 8 records	T
				CLEAR	FILTER
i i	Category	Summary	Description		
ubcontractor	Created	Status	Location		
COR-00001	Mech	02 - Labels	Label doesnt match P8	kID	
Mechanical Sub #1	8/15/2019 4:57 PM	New	Campus A / BLD-1 / Le	vel 2 / 1-203	
COR-00002	Mech	07 - Other	Cables on the floor		
**	8/15/2019 5:17 PM	Valid	Campus A / BLD-1 / Le	vel 2 / 1-203	
COR-00003	Instrumentation	03 - Missing/Incorrect Core Marker	Shaft Laser Alignment	serial number	
Example Design Team #2	8/27/2019 1:25 PM	New	Campus A / Utility BLD 1-101	/ Level 1 /	
COR-00004	CSA	08 - Incorrect Component	System malfunction in	section 8	
Electrical Sub #1	2/20/2020 2:55 PM	New	Campus A		
COR-TBD	Electrical	09 - Grounding & Bonding	test		
Electrical Sub #2	2/24/2020 10:06 AM	New	Campus A		
COR-TBD	Electrical	09 - Grounding & Bonding	Missing/Incorrect Core	e Marker	
Electrical Sub #2	2/24/2020 10:08 AM	New	Campus A		
PLI-00001	Instrumentation	04 - Missing/Incorrect Cable Gland	Component details (typ		
Electrical Sub #2	2/20/2020 7:28 AM	New	materials, etc.) match c Campus A / BLD-2 / Le		
PLI-TBD	CSA	04 - Tagging issues	Issue 77		
Example Design Team #1	2/24/2020 10:00 AM	New	Campus B		

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

		COR-TBD: New		
Subtype	<u>Category</u>	Summary		
COR	Electrical	09 - Grounding & Bonding		
Responsible Team	Subcontractor	Location		
Electrical Sub #1	Electrical Sub #2	Campus A		
	Due Date	Last Modified	O Attachments	
<u>Description</u> Missing/Incorrect Core Marker	2/27/2020 8:00 AM	2/24/2020 10:10 AM	= Checklists	
Last Modified By	<u>Created</u> 2/24/2020 10:08 AM	Created By	Comments	
Paul Trippi	2/24/2020 10:08 AM	Paul Trippi	✓ Cx Items	
Resolution Date	Resolution Note			
tatus	Due Date	Issue History:	Assigned To	
	Due Date	<b>Issue History:</b> Id	Assigned To	
Status Jpdated By <b>New</b>	Due Date 2/27/2020 8:00 AM	-	Assigned To	
Jpdated By <b>New</b>		Id	-	
Jpdated By New InEight Paul Trippi	2/27/2020 8:00 AM	Id	-	
Jpdated By New InEight Paul Trippi		Id	-	

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.

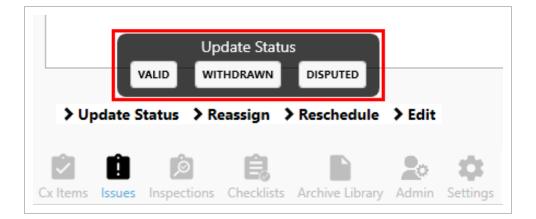
> Up	date S	tatus 📏 R	eassign 🕻	Reschedule	> Edit
Cx Items		(Decisions)	<b>E</b>	Archive Library	<b>\$</b>

# 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.



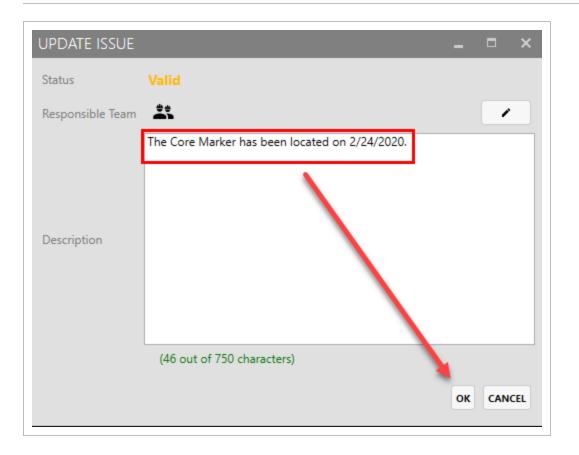
Update Status options are specific to a project. In the below example, the project administrator has created three Update Statuses: Valid, Withdrawn, and Disputed. Your company may choose a different variation of statuses. Resolving an issue is discussed in the Resolve and Issue topic.



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

UPDATE ISSUE		_		×
Status	Valid			
Responsible Team	<u>*</u>		1	
Description				
Description				
	(0 out of 750 characters)			
		ок	CANC	EL

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.

Status	Due Date	Issue History:	Assigned To	
Updated By				
Withdrawn	2/23/2020 8:00 AM	COR-00004-HIST-TBD	Electrical Sub #1	
Paul Trippi		5		
The Core Marker has been located	Signee Team:	Signee Person:	O Attachments	
on 2/24/2020.			Comments	]
Last Updated: 2/24/2020 11:55 AM			<b>-</b>	

# 4.2.2 Reassign



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

UPDATE ISSUE		_ = ×
Responsible Team	Electrical Sub #1	~
Description		
	(0 out of 750 characters)	
Select a new Respo	onsible Team	OK CANCEL

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

UPDATE ISSUE	_ = ×
Responsible Team	Mechanical Sub #1
	Reassigning to Mechanical Sub because this issue needs an engineer to fix.
Description	
	(74 out of 750 characters)
	OK CANCEL

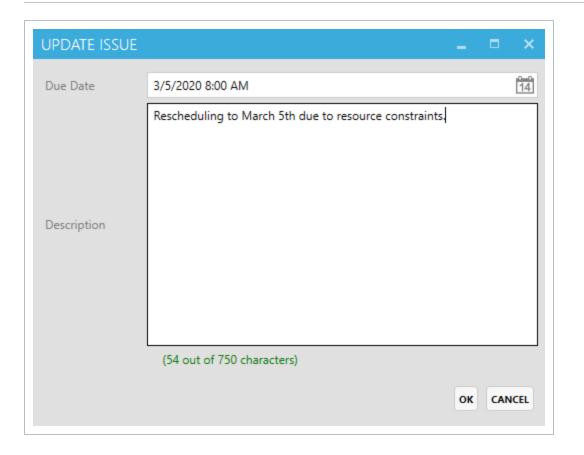
# 4.2.3 Reschedule

> Update Status > Reassign > Reschedule > Edit	
------------------------------------------------	--

Selecting the Reschedule button allows you to reschedule the issue.

UPDATE ISSUE		-	<b>–</b> ×
Due Date	2/23/2020 8:00 AM		14
Description			
	(0 out of 750 characters)		
Please update the	Due Date	ок	CANCEL

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



# 4.2.4 Edit

> Update Status > Reassign > Reschedule > Edit	
------------------------------------------------	--

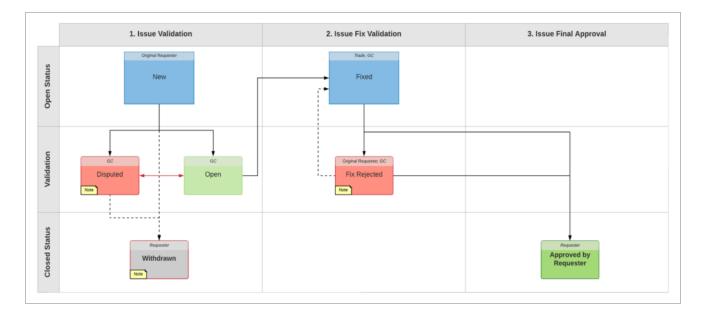
Selecting the Edit button allows you to edit an existing issue, as long as the correct roles and permissions are assigned.

← COR-TBD		Edit Issue
* Subtype	COR	
* Category	Electrical	•
* Summary	09 - Grounding & Bonding	•
* Responsible Team	Mechanical Sub #1	
Subcontractor	Electrical Sub #2	*
* Location	Campus A	/
* Description	Missing/Incorrect Core Marker	
	(29 out of 750 characters)	
* Due Date	3/5/2020 8:00 AM	
*Required Field		

# 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.

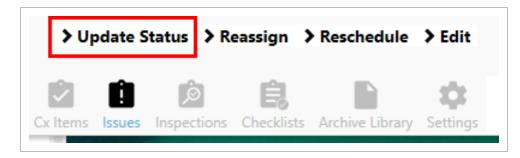
- 1. Issue Validation
- 2. Issue Fix Validation
- 3. Final Approval



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

			Issues	Q Search
NCR 2 New 2 Assigned 1	To Me 1			
d ireated	Category Status	Summary Location	Description	Subcontractor
NCR-TBD	Electrical	03 - Conduit 360 Degree Rule	test 555	Mechanical Sub #1 Blackman Chris
2/25/2020 8:15 AM	New	Campus A / BLD-1 / Level 2 / 1-2	203	
NCR-TBD	Electrical	06 - Conductor Labeling	test 999	Mechanical Sub #1 Blackman Chris
2/25/2020 8:16 AM	New	Campus A / BLD-1 / Level 2 / 1-2	03	

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.

		RESOLVED	date Statu wiтнi	S	
≯ UF	odate S	tatus 📏 Ro	eassign 🕽	Reschedule	> Edit
	Ô	Ó	Ė,		\$
Cx Items	Issues	Inspections	Checklists	Archive Library	Settings

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**.

UPDATE ISSUE	_ = ×
Status	Resolved
Responsible Team	Example GC
	Issue with the circuit breaker box has been fixed. New box has been replaced.
Description	
	(79 out of 750 characters) OK CANCEL

The Issue is now resolved.

Status	Due Date	Id	Assigned To	Updated By
New	2/28/2020 8:00 AM	NCR-TBD-HIST-TBD	ee Example GC	Karen Loftus
Resolved	2/28/2020 8:00 AM	NCR-TBD-HIST-TBD	🛻 Example GC	Karen Loftus
Note: Issue with the circuit breake	Signee Team: r box has	Signee Person:	Last Updated: 2/25/2020 9:32 AM	U Attachments
been fixed. New box has be				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	102
5.2 Inspection Maintenance	. 108
5.3 Complete an Inspection	112
Lesson 5 Review	116
Lesson 5 Summary	116

# 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.

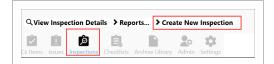
**EXAMPLE**: A field engineer is performing a weekly walk. He finds the relevant inspection, updates the information, assigns the responsible parties, and finally updates the inspection status.

# 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

Cancel		Create New Inspection
* Inspection Type		•
* Scheduled Time	2/25/2020 8:00 AM	
* Responsible Team	<b>*</b>	/
* Subcontractor	<b>taren.Loftus@ineight.com</b>	
* Location		1
Note		
Permit #		-
Discipline	SELECT	
Drawing #		
CSI Spec Section		
RFI		
Submittal #		
*Required Field		
	ada an at	

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

* Inspection Type		•
* Scheduled Time	Equipment Inspection	П
	Final Inspection	- 1
* Responsible Team	Initial Inspection	
* Subcontractor	Material Inspection	- 1
	Karen.Lottus@ineight.com	
* Location		•

- 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.

Inspection Type	Material Inspection	•
Scheduled Time	2/25/2020 8:00 AM	
Responsible Team	Karen.Loftus@ineight.com	
Subcontractor	Jenny Libin	/
Location	Campus A / Utility BLD / Level 1 / 1-101	
Note		Select Location
		Campus A
Permit #		Office Complex
renne *		▶ BLD-1
Discipline	⊙ SELECT	▶ BLD-2
Drawing #		▶ BLD-3
CSI Spec Section		✓ Utility BLD
RFI		∠ Level 1
Submittal #	<b>-</b>	1-101
		Campus B

- 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

Inspection History:					
Status Assigned To	ld	Updated	Scheduled Time	Updated By	
Ready for Inspection	Insp-TBD-IR-TBD	2/24/2020 11:58 AM	2/25/2020 8:00 AM	InEight Karen.Loftus@ineight.com	
InEight Karen.Loftus@ineight.com	1			-	

# 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 <u>Attachments</u> lesson.

0 ATTACHMENT(S) LINKED TO INSPECTION HISTORY 'INSP-TBD-	IR-TBD'	_ = ×
	FILE FROM ARCHIVE LIBRARY ADD ATTACHMENT	DOWNLOAD ALL

## 5.1.2.2 Add or Link a Checklist

To learn more about checklists, see the Checklists lesson.

0 CHECKLIST(S) LINKED TO INSP-00003		– • ×
	ADD CHECKLIST	LINK EXISTING CHECKLIST(S)

## 5.1.2.3 Add a Comment

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

0 COMMENT(S) LINKED TO INSPECTION HISTORY 'INSP-TBD-IR-TBD'	_ = ×
	ADD COMMENT

# 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 <u>Issues</u> lesson.

0 ISSUE(S) LINKED TO INSP-TBD-IR-TBD	_ = ×
	ADD ISSUE LINK EXISTING ISSUE(S)

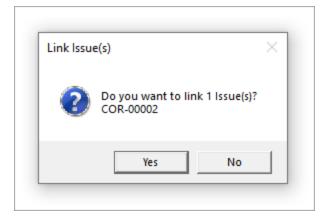
If the Link Existing Issues button is selected, a new pop-up appears identifying New Issues.

#### 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.

Here Back to Insp-00001:		Linking Issues to	nsp-00001: 0	Search	>
COR 3 New 3					Showing 3 of 3 records
					CLEAR FILTER
	Category	Summary	Description	Subcontractor	
reated	Status	Location			_61
COR-00002	Instrumentation	03 - Missing/Incorrect Core Marker	Failed checklist question: 'Piping & components are restored to suppo		U
11/14/2019 2:18 AM	New	Campus A / BLD-1 / Level 2 / 1-203			
COR-00003	Mech	11 - Verify Bolt Torque	Failed checklist question: 'All relief valves, bursting discs & orifice plat.		
12/12/2019 5:07 PM	New	Campus A / BLD-1 / Level 2 / 1-203			
COR-00004	LSS	03 - Sample Ports	Failed checklist question: 'Flange check sheets are complete for all re	<u>.</u>	
1/30/2020 4:48 PM	New	Campus A / BLD-1 / Level 2 / 1-203			
2					
LINK SELECTED ISSUE(S)					Show Closed / Withdra

8. Click Yes to confirm linkage.



• Now the issues button has a new item identified

<ul> <li>Back to Inspections</li> </ul>		Insp-00001: F	Ready for Inspection	
Inspection Type Equipment Inspection	Scheduled Time 10/4/2019 8:00 AM	Responsible Team InEight Matthew.Macaras@ineig	Subcontractor InEight Matthew.Macaras@inei	ightcom
<u>Location</u> Campus A / BLD-1 / Level 2	Note	Permit #	Increment	0 Attachments
<u>Discipline</u> Piping	Drawing #	CSI Spec Section	<u>RFI</u>	E Comments
<u>Submittal #</u>	Last Modified 10/3/2019 9:53 AM	<u>Created</u> 10/3/2019 9:31 AM	Created By	✓ Cx Items
Status Assigned To	ld	<b>Inspect</b> Updated	<b>tion History:</b> Scheduled Time	Updated By
Ready for Inspection	Insp-00001-IR-07	10/3/2019 9:53 AM	10/4/2019 8:00 AM	hEight Matthew.Macaras@ineight.com
InEight				
watthew.wataras@ineign	<u>t.com</u>	Signature:	ee InEight <u>Matthew.Mac</u>	<ul> <li>Attachments</li> <li>Comments</li> <li>Issues</li> </ul>
Matthew.Macaras@ineigh Note:	Lcom Insp-00001-IR-06	Signature: 10/3/2019 9:45 AM		Comments

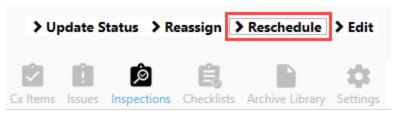
# **5.2 INSPECTION MAINTENANCE**

# 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.

UPDATING INSP	-TBD	_ = ×
Scheduled Time	2/25/2020 5:00 PM	14
	February 2020	A COLUMN AND A COLUMN
	Su Mo Tu We Th Fr Sa	
	26 27 28 29 30 31 1	
	2 3 4 5 6 7 8 9 10 11 12 13 14 15	
Note	16 17 18 19 20 21 22	
	23 24 25 26 27 28 29	5 • : 0 • PM •
	1234567	
	(19 out of 750 characters)	AUTOFILL NOTE FROM LAST UPDATE
		OK CANCEL

- 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

		Insp-TBD: Read			
Inspection Type Material Inspection	Scheduled Time 2/25/2020 5:00 PM	Responsible Team InEight Paul.Trippi@InEight.com	Subcontractor InEight Jenny Libin		
<u>Location</u> Campus A / Utility BLD / Level 1 /.	<u>Note</u>	Permit #	Increment	Attachments	
Discipline	Drawing #	CSI Spec Section	RFI	= Checklists	
Submittal #	Last Modified	Created	Created By	Comments	
	2/24/2020 12:24 PM	2/24/2020 11:58 AM	InEight Karen.Loftus@ineight.com	✓ Cx Items	
				Issues	
Status	ld	Inspection Updated	History: Scheduled Time	Updated By	
real Cara	14			opdated by	
ssigned To					
Ready for Inspection	Insp-TBD-IR-TBD	2/24/2020 12:24 PM	2/25/2020 5:00 PM	Karen_Loftus@ineight.com	
Ready for Inspection	Insp-TBD-IR-TBD	2/24/2020 12:24 PM 2/24/2020 12:08 PM	2/25/2020 5:00 PM 2/25/2020 6:00 AM	LinEight Karen Loftus@ineight.com	
Ready for Inspection				Karen.Loftus@ineight.com	

# 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.

UPDATING I	NSP-00003	_ = ×
Responsible Te	aam Ast InEight Paul.Trippi@InEight.com	
-		Assign Team or Person Q
ig Note		
s	(0 out of 750 characters)	AUTOFILL NOTE FROM LAST UPDATE
Select a new	Responsible Team	OK CANCEL
L	Signature:	

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

			tion History:	
Status	Id	Updated	Scheduled Time	Updated By
Assigned To				
Ready for Inspection	Insp-TBD-IR-TBD	2/24/2020 12:08 PM	2/25/2020 8:00 AM	👳 InEight
				Karen.Loftus@ineight.com
a. InEight				
Paul.Trippi@InEight.com				
Ready for Inspection	Insp-TBD-IR-TBD	2/24/2020 11:58 AM	2/25/2020 8:00 AM	In Fight
	insp-roo-in-roo	2/24/2020 11:36 AW	2/23/2020 8:00 AW	ee InEight
Ready for inspection				
				Karen.Loftus@ineight.com
InEight				Karen.conoswineight.com

# **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.

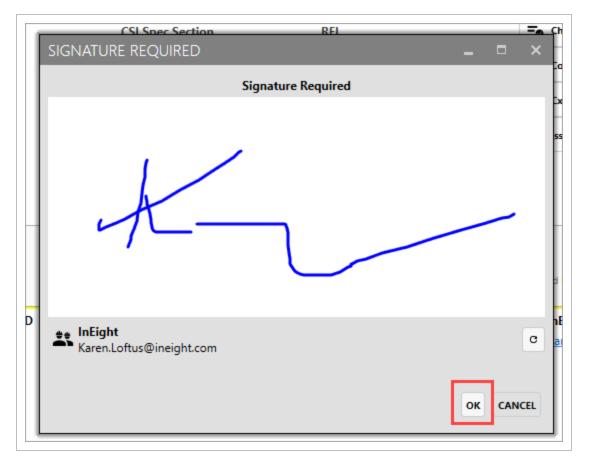
Ready for Insp	PASSED CANCELLED
> Update S	Status > Reassign > Reschedule > Edit
7 opune -	

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

	UPDATING INSP	P-00001 RFI = X	
	Status	Passed	
	Responsible Team	Matthew.Macaras@ineight.com	55
		<add here="" note=""></add>	-
-	Note		-
			н
)			h
			a
		(15 out of 750 characters)	
		OK CANCEL	

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

### 6. Click OK.



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

- Back to Inspections		Insp-0	0001: Passed		
Piping Submittal #	Last Modified	Created	Created By	Comments	
Submittar	2/24/2020 1:27 PM	10/3/2019 9:31 AM	InEight Matthew.Macaras@ineig	↓ Cx Items	
			Mattiew.Macaras@heig		
		Inspec	tion History:		
Status Assigned To	Id	Updated	Scheduled Time	Updated By	
Passed	Insp-00001-IR-TBD	2/24/2020 1:27 PM	10/4/2019 8:00 AM	🝵 InEight	
Matthew.Macaras@ineig	ht.com				
Ready for Inspection	Insp-00001-IR-TBD	2/24/2020 1:15 PM	10/4/2019 8:00 AM	Le InEight KarenLoftus@ineight.com	
InEight Matthew.Macaras@ineig		2/24/2020 1:15 PM Signature:	10/4/2019 8:00 AM	Attachments	
€ŧ InEight			10/4/2019 8:00 AM	Karencondswineignickom	
InEight Matthew.Macaras@ineig	ht.com Insp-00001-IR-07		10/4/2019 8:00 AM 10/4/2019 8:00 AM	Attachments	

#### Lesson 5 Review

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

	Inspections	<b>Q</b> Search	×
Passed 1 Ready for Inspection 1 Ready for QC 1 Assigned To Me 1		Showin	g 3 of 3 records
			CLEAR FILTERS

- 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**

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6.3 Elements Import	131
6.4 Progress Roll-Up Reports	137
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Lesson 6 Summary	140

# 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.

ilement Id	Element Type	Element Sub Type	Discipline	IWP
Subsystem-CWR-0456-02	Sub-System	Piping Sub-System	Piping	IWP-Piping Rack Run
Subsystem-CWS-0456-01	Sub-System	Piping Sub-System	Piping	IWP-Piping Rack Run
Subsystem-HVAC-0456-01	Sub-System			IWP-MECH EQUIP-021
Subsystem-HVAC-0456-02	Sub-System			IWP-MECH EQUIP-021
Subsystem-PWR-0020-01	Sub-System		Electrical	
System-CW-0456	System			
System-HVAC-0456	System			
Tag-AHU-0303	Engineering Tag	Air Handler Unit	Mechanical	IWP-MECH EQUIP-021
Tag-AHU-0304	Engineering Tag	Air Handler Unit	Mechanical	IWP-MECH EQUIP-021
Tag-C-CP-0101-P-0101	Engineering Tag	Control Cable	Electrical	IWP-ELECTRICAL-CABLE-007
Tag-CP-0101	Engineering Tag	Control Panel	Electrical	IWP-ELECTRICAL-CABLE-007
Tag-CT-0001	Engineering Tag	Cooling Tower	Mechanical	IWP-MECH EQUIP-013
Tag-CTS-0001	Engineering Tag	Steel Structure	Structural	
Tag Duct 0202 01	Engineering Tag	Ducting	LIVAC	

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
Тад	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			

	Elements	Q	Search	>
Engineering 1	iag 25 Loop 1 Sub-System 2 Sy	stem 1	Showing 29 of 78 records	T
CLEAR SELECTION			CLEAR	FILTERS
Element Id Discipline	Element Type	Element Sub Type	3	
Subsystem-HVAC-0456-01	Sub-System IWP-MECH EQUIP-021			
Subsystem-HVAC-0456-02	Sub-System IWP-MECH EQUIP-021			
System-HVAC-0456	System			
Tag-AHU-0303 Mechanical	Engineering Tag IWP-MECH EQUIP-021	Air Handler Uni	it	
Tag-AHU-0304 Mechanical	Engineering Tag IWP-MECH EQUIP-021	Air Handler Uni	t	
Tag-Duct-0303-01 HVAC	Engineering Tag IWP-MECH EQUIP-024	Ducting		
Tag-Duct-0303-02 HVAC	Engineering Tag IWP-MECH EQUIP-024	Ducting		

# 6.1.2 Element Details

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

← Back to Elements			01-	DEVICENET POWER SUPPLY:	TAGGED EQUIPMENT		
Element Id 01-DEVICENET POWER SUPPLY	Element Type TAGGED EQUIPMENT	Element Status Active	Location		<u>sub type</u> Instrument Cable	Hierarchy Value st / 01-DEVICENET POWER SUPPLY	
							() Attachments
							Certificates
							<b>≡</b> ₆ Checklists
Procurement Details							Comments
Contractor Details							Elements
<ul> <li>Drawing Information</li> <li>Testing Information</li> </ul>							! Issues
<ul> <li>Engineering Information</li> </ul>							
Vendor							

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

ement Id	Element Type	Location		Element Sub Type	Discipline	Description	Milestone	WBS
g-I-TC-0303-01-ICP-0300-01	Engineering Tag	Campus A / Utility BLD / Level	1 / 1-101	Instrument Cable	Electrical	Temperature Instrument Cable	2020 Q2	5000
IP IP-P F RICAL-CABLE-006								
) Tag Details								
roject Group Number	Main Project	Project Name	Project Number	Module	Service	Physical Location	Unit	
emonstration Projects	Demonstration Projects	System Demo	DEMO-001					
ite Number								

# 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.

# HVAC System



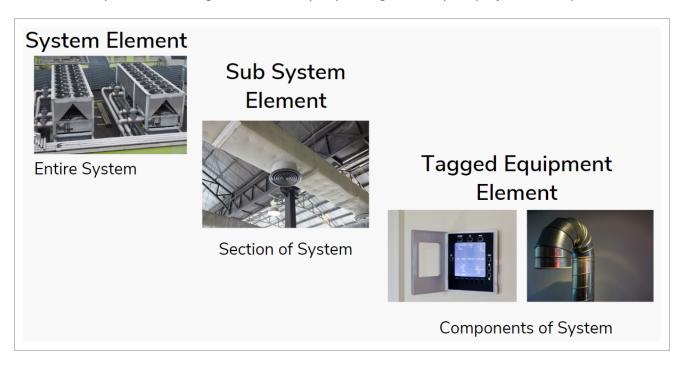
On each floor there are individual HVAC control units, which control the temperature for each one of the floors or zones. An HVAC control unit is considered here as part of a sub-system element.



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.

Engineering Tag 12 Loop 1 Sub-	System 1					Showing 14 of 78 records
AR SELECTION						CLEAR F
com-CAMPUSA-UTLBLD-LVL1-101	Element Id	Element Type	Element Sub Type	Discipline	IWP	▷ Instance Id
Tag-CTS-0001 Tag-HEXS-0001	Loop-GS-HVAC-0303	Loop	Piping Loop	Piping	IWP-MECH EQUIP-021	Created Date     Created By
Tag-TKCP-0001	Subsystem-HVAC-0456-01	Sub-System			IWP-MECH EQUIP-021	Last Modified Date     Last Modified By
Tag-SKIDS-0001 ystem-CW-0456	Tag-AHU-0303	Engineering Tag	Air Handler Unit	Mechanical	IWP-MECH EQUIP-021	Last Modified By     Creating Instance Type
Loop-FP-CW-0001 Loop-LT-CW-0001	Tag-Duct-0303-01	Engineering Tag	Ducting	HVAC	IWP-MECH EQUIP-024	Creating Instance Id     Spatial Hierarchy Id
Subsystem-CWR-0456-02     Subsystem-CWS-0456-01	Tag-Duct-0303-02	Engineering Tag	Ducting	HVAC	IWP-MECH EQUIP-024	▶ Spatial Node Id
Subsystem-PWR-0020-01 ystem-HVAC-0456	Tag-I-TC-0303-01-ICP-0300-01	Engineering Tag	Instrument Cable	Electrical	IWP-ELECTRICAL-CABLE-006	<ul> <li>▶ Inactive</li> <li>▶ Element Id</li> </ul>
Subsystem-HVAC-0456-01	Tag-I-TC-0303-02-ICP-0300-01	Engineering Tag	Instrument Cable	Electrical	IWP-ELECTRICAL-CABLE-006	▶ Element Type
Tag-AHU-0303 Tag-Duct-0303-01	Tag-ICP-0300-01	Engineering Tag	Thermostat Control	Instrumentation	IWP-ELECTRICAL-002	<ul> <li>Element Sub Type</li> <li>Discipline</li> </ul>
Tag-Duct-0303-02 Tag-ICP-0300-01	Tag-MCC-0002	Engineering Tag	Motor Control Cabinet	Electrical	IWP-ELECTRICAL-002	Description     Milestone
Tag-I-TC-0300-01 Tag-I-TC-0303-01-ICP-0300-01 Tag-I-TC-0303-02-ICP-0300-01	Tag-P-AHU-303-MCC-002	Engineering Tag	Power Cable	Electrical	IWP-ELECTRICAL-CABLE-006	▶ WBS
Tag-MCC-0002 Tag-P-AHU-303-MCC-002	Tag-P-ICP-0300-01-AHU-303	Engineering Tag	Power Cable	Electrical	IWP-ELECTRICAL-CABLE-006	► IWP
Tag-P-ICP-0300-01-AHU-303 Tag-TC-0303-01	Tag-TC-0303-01	Engineering Tag	Thermostat Control	HVAC	IWP-ELECTRICAL-002	
Tag-TC-0303-02 Tag-TFMR-0303-01	Tag-TC-0303-02	Engineering Tag	Thermostat Control	Instrumentation	IWP-ELECTRICAL-002	
Subsystem-HVAC-0456-02	Tag-TFMR-0303-01	Engineering Tag	Panel Integrated Transformer	Electrical	IWP-ELECTRICAL-002	

### 6.2.1.1 Hierarchies

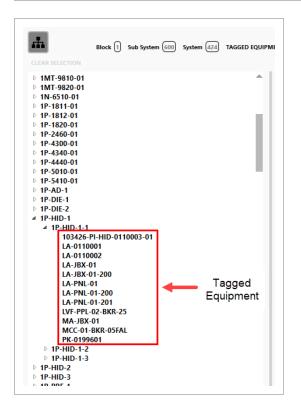
Using an HVAC System as an example, when you click on the HVAC sub-system for one of the floors, it is possible to isolate individual components in the HVAC systems and sub-system. You can view detailed information for each of the individual components, which might include associated checklists, issues,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

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

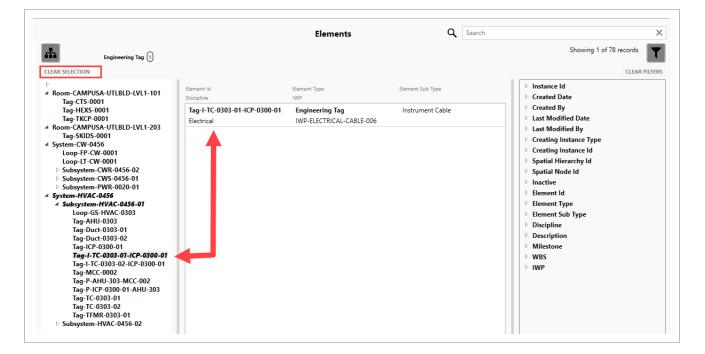
		Elements	Q Search	
Block () Sub	System 600 System 424 TAGGED EQUIPMENT 35111			Showing 36140 of 36140 records
lement ld	Element Type Location		Þ	Spatial Hierarchy Id
0000-00	System			Spatial Node Id Inactive
0000-00-00	Sub System		Þ	Element Id
0000-00-01	Sub System			Element Type Element Status
01-Compressor	TAGGED EQUIPMENT		4	sub type
01-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT			
02-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT			
03-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT			
04-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT			
05-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT			
1-FPP-1CS-C100	TAGGED EQUIPMENT			

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.

			Elements	Q Search		×
	Block 1 Sub System 600 S	ystem (424) TAGGED EQUIPMENT (35111)	)			Showing 36140 of 36140 records
<ul> <li>▷ 0000-00</li> <li>▷ 18-9220-01</li> <li>▷ 18-9240-01</li> </ul>	Î	Element Id	Element Type Location			<ul> <li>Spatial Hierarchy Id</li> <li>Spatial Node Id</li> </ul>
<ul> <li>▶ 18-9250-01</li> <li>▶ 18-BLDG-1</li> <li>▶ 1E-6710-01</li> </ul>		0000-00-00	Sub System			<ul> <li>Inactive</li> <li>Element Id</li> <li>Element Type</li> </ul>
<ul> <li>▷ 1E-6720-01</li> <li>▷ 1E-6730-01</li> <li>▷ 1E-6810-01</li> </ul>		0000-00-01 01-Compressor	Sub System TAGGED EQUIPMENT		- 11	<ul> <li>Element Status</li> <li>sub type</li> </ul>
<ul> <li>▷ 1E-8610-01</li> <li>▷ 1E-8610-02</li> <li>▷ 1E-8720-01</li> </ul>		01-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT		-	
▷ 1E-8740-01 ▷ 1E-CP-1		02-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT			
IE-LGT-1		03-DEVICENET POWER SUPPLY	TAGGED EQUIPMENT			



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.

			Elements	Q Search		>
Engineerin	a Tea 6				Showing 6 of 85 rec	ords
EAR SELECTION						CLEAR FILTER
System-CW-0456 System-HVAC-0456 Subsystem-HVAC-0	Element Id Discipline	Element Type (WP	Element Sub Type		<ul> <li>Element Id</li> <li>Element Type</li> </ul>	
Tag-I-TC-0303-01 Tag-I-TC-0303-01-ICP-0300-1 Tag-I-TC-0303-07 Electrical	Tag-I-TC-0303-01-ICP-0300-01 Electrical	Engineering Tag IWP-ELECTRICAL-CABLE-006	Instrument Cable		<ul> <li>Element Sub Type</li> <li>Discipline</li> </ul>	Clear
	Tag-I-TC-0303-02-ICP-0300-01 Electrical	Engineering Tag IWP-ELECTRICAL-CABLE-006	Instrument Cable		Concrete Concrete	
		Engineering Tag IWP-ELECTRICAL-002	Motor Control Cabinet		HVAC Instru Instrumentation	
		Engineering Tag IWP-ELECTRICAL-CABLE-006	Power Cable		Mech	
	Tag-P-ICP-0300-01-AHU-303 Electrical	Engineering Tag IWP-ELECTRICAL-CABLE-006	Power Cable		Discription	
	Tag-TFMR-0303-01 Electrical	Engineering Tag IWP-ELECTRICAL-002	Panel Integrated Transformer		<ul> <li>Milestone</li> <li>WBS</li> </ul>	
					₽ IWP	
					Filter Summary:	(Clear)
					Discipline: Electrical	
View Element Details	> Edit Element > Create New	Element > Admin				

### 6.2.1.2 Inactive elements

When a parent element is made inactive in Microsoft Excel, it is dimmed in the Element Hierarchy and cannot be edited. You can move the child elements to a new active parent deactivate them.

This feature lets you work on the same elements, system, and sub systems repeatedly in a single session without having to expand the hierarchy tree and filter accordingly each time you want to go back to the same group.

When a parent element is inactivated in Excel and the updates are accepted in HQ, and you have the applicable permissions, you get a notification asking if you want to inactivate the child elements or leave them active.

The Such System (i)			Elements		٩
EAR SELECTION	Dament id	Dement Type	Element Sub Type	Rement Description	Herarchy Position
OLIAPSE ALL	1000-0100	Engineering Tag	SKID	The Rest of the second	han to be
Reads 11 American American		Engineering Tag	PROTECTION PANEL	Chick Spectra (Spectra Spectra)	
Comparison Test		Engineering Tag	PROTECTION PANEL	Chief Space (pp. 200-1)	1000
Zone 1		Engineering Tag	PROTECTION PANEL	COMPANY SALES AND THE	-
			Element Deactivated	has been deachvated. Nddren? Yes No Syncing	

If you deactivate the children, then the parent and children are removed from the element hierarchy and are no longer visible to be selected or edited in the list view.

If you do not deactivate the children, the parent is dimmed in the element hierarchy and are no longer visible, selectable, or editable in the list view. The children are still visible and selectable in the element hierarchy and visible, selectable, and editable in the list view.

### 6.2.1.3 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.

	Showing 78 of 78 records
	CLEAR FILTERS
⊳ Ele	ment ld
⊿ Ele	ment Type
	Engineering Tag Flush Hydrotest Leak Test Loop Room Sub-System
	Custam
Dis Dis	ment Sub Type scipline
	scription lestone
⊳ WI	
⊳ IW	

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.

### 6.2.1.4 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.

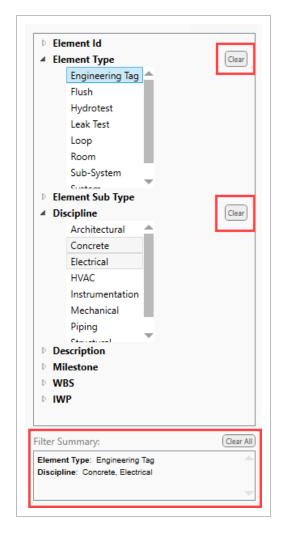
			Elements	Q Search	
	ngineering Tag 61 Flush (1) Hydrotest	(d) Leak Test (1) Loop (2) Room (2) S	sub-System (5) System (2)		Showing 78 of 78 records
Element Id	Element Type	Element Sub Type	Discipline	IWP	Element Id
Loop-FP-CW-0001	Flush	Flushing	Piping	<u> </u>	Element Type Engineering Tag
Loop-GS-HVAC-0303	3 Loop	Piping Loop	Piping	IWP-MECH EQUIP-021	Flush Hydrotest

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.

Engineering T	fag (61)				Showing 61 of 78 records
ement ld	Element Type	Element Sub Type	Discipline	IWP	Element Id
Tag-AHU-0303 IWP-MECH EQUIP-021	Engineering Tag	Air Handler Unit	Mechanical		Element Type     Engineering Tag     Flush
Fag-AHU-0304 WP-MECH EQUIP-021	Engineering Tag	Air Handler Unit	Mechanical		Hydrotest Leak Test
Tag-C-CP-0101-P-0101 WP-ELECTRICAL-CABLE-007	Engineering Tag	Control Cable	Electrical		Loop Room
Tag-CP-0101 WP-ELECTRICAL-CABLE-007	Engineering Tag	Control Panel	Electrical		Sub-System
Tag-CT-0001 IWP-MECH EQUIP-013	Engineering Tag	Cooling Tower	Mechanical		Element Sub Type     Discipline     Architectural
Tag-CTS-0001	Engineering Tag	Steel Structure	Structural		Concrete
Tag-Duct-0303-01 WP-MECH EQUIP-024	Engineering Tag	Ducting	HVAC		HVAC
Tag-Duct-0303-02 WP-MECH EQUIP-024	Engineering Tag	Ducting	HVAC		Mechanical Piping
Fag-Duct-0304-01 WP-MECH EQUIP-024	Engineering Tag	Ducting	HVAC		Description     Milestone
f <b>ag-Duct-0304-02</b> WP-MECH EQUIP-024	Engineering Tag	Ducting	HVAC		WBS     WP
Fag-Duct-0304-03 WP-MECH EQUIP-024	Engineering Tag	Ducting	HVAC		
Fag-HEX-0001 WP-MECH EQUIP-013	Engineering Tag	Heat Exchanger	Mechanical		
Tag-HEXS-0001	Engineering Tag	Steel Structure	Structural		
Tag-I-IJB-0001-CP-0101 WP-ELECTRICAL-CABLE-007	Engineering Tag	Instrument Cable	Instrumentation		
Tag-I-IJB-0001-CR-0001A WP-ELECTRICAL-CABLE-007	Engineering Tag	Instrument Cable	Instrumentation		
Tag-I-IJB-0001-CR-0001B WP-ELECTRICAL-CABLE-007	Engineering Tag	Instrument Cable	Instrumentation		Filter Summary: Clear
ag-I-IJB-0001-CR-0001C NP-ELECTRICAL-CABLE-007	Engineering Tag	Instrument Cable	Instrumentation		

# **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.

🕑 Tag Deta	a 👘
System	
Contract	or Details
<ul> <li>Drawing</li> </ul>	Information
Testing In	formation
⊘ Engineer	ing Information
<ul> <li>Vendor</li> </ul>	4
Parent Skid	

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.
------	----------------------------------------------------------------

	А	В	С	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	

ment and Hierarchy Import					
File Home Insert Page	e Layout Formulas Data	Review View Help BLUE	BEAM VEO™ VEO	™ Reports VEO™ Pulse VEO™ Cx	M-SIX Acrobat
User: alex.mazepa Acct: ogc out Project: NO UAT Testi *	Table Import + Tag Selected			Pending Changes Changes	Generate Checklist Template Worksheet Import Checklist Templates
Project	Data Actions	Modifiers	Visual Reporting	Settings	Checklist Template Tool
4	A	В	c	D	E F
1 Element Record		Element Record	Element Record	Element Record	
2 Element Id		Element Type	Element Status	Sub Type	
		TAGGED EQUIPMENT	Active	PRESSURE CONTROL VALVE	
3 PCV-40100					
4 LSHH-41230		TAGGED EQUIPMENT		LEVEL SWITCH HIGH HIGH	
4 LSHH-41230 5 PDI-31011B		TAGGED EQUIPMENT	Active	DIFFERENTIAL PRESSURE INDICATOR	
4 LSHH-41230 5 PDI-31011B 6 PSV-31012		TAGGED EQUIPMENT TAGGED EQUIPMENT	Active Active	DIFFERENTIAL PRESSURE INDICATOR PRESSURE SAFETY VALVE	
4 LSHH-41230 5 PDI-31011B 6 PSV-31012 7 SDV-71000		TAGGED EQUIPMENT TAGGED EQUIPMENT TAGGED EQUIPMENT	Active Active Active	DIFFERENTIAL PRESSURE INDICATOR PRESSURE SAFETY VALVE SHUTDOWN VALVE	
4 LSHH-41230 5 PDI-31011B 6 PSV-31012 7 SDV-71000 8 PBA-806010A		TAGGED EQUIPMENT TAGGED EQUIPMENT TAGGED EQUIPMENT TAGGED EQUIPMENT	Active Active Active Commissioned	DIFFERENTIAL PRESSURE INDICATOR PRESSURE SAFETY VALVE SHUTDOWN VALVE DIAPHRAGM PUMP	
4 LSHH-41230 5 PDI-31011B 6 PSV-31012 7 SDV-71000 9 PBA-806010A 9 TE-41300B2		TAGGED EQUIPMENT TAGGED EQUIPMENT TAGGED EQUIPMENT TAGGED EQUIPMENT TAGGED EQUIPMENT	Active Active Active Commissioned Active	DIFFERENTIAL PRESSURE INDICATOR PRESSURE SAFETY VALVE SHUTDOWN VALVE DIAPHRAGM PUMP TEMPERATURE ELEMENT	
4 LSHH-41230 5 PDI-31011B 6 PSV-31012 7 SOV-71000 8 PBA-806010A		TAGGED EQUIPMENT TAGGED EQUIPMENT TAGGED EQUIPMENT TAGGED EQUIPMENT	Active Active Active Commissioned Active Active	DIFFERENTIAL PRESSURE INDICATOR PRESSURE SAFETY VALVE SHUTDOWN VALVE DIAPHRAGM PUMP	

**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.

Project: Training Test AM		হি 🛈 🗕 🗖
EXPORT RECORDS		
	Project loaded	

- 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.

ncheck	k boxes to e	xclude columns from import.		
	I Import	Table Name	Column Name	
•		Element Record	Element Id	
	<b>v</b>	Element Record	Element Type	
	~	Element Record	Element Status	
	•	Element Record	sub type	

- 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.

Info		×
1	Created 0 new record(s) to "Element Record". Updated 2 existing record(s) to "Element Record".	
-	Set 0 hierarchy parents	
	Please review the "Import Summary Report" before publ changes.	ishing
	1	6
		ОК

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
	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	-	-
<ul> <li>Import Summa</li> </ul>	ry Report Import Summary Report Data Sł	neet1		i

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.

<ul> <li>Back to Elements</li> </ul>				Tag-I-TC-0	303-01-ICP-0300-0	01: Engineering Tag								
Element Id Tag-I-TC-0303-01-ICP-0300-01	Element Type Engineering Tag	Location Campus A / Utility B	LD / Level 1 / 1-101		ement Sub Type strument Cable	Discipline Electrical	Description Temperature Instrume	Milestone nt Cable 2020 Q2		WBS 5000.01				
IWP IWP-ELECTRICAL-CABLE-006														
Tag Details														
Project Group Number	Main Project	Project Name	Project Number		Module	Service	Physical Location	Unit						
Demonstration Projects	Demonstration Projects	System Demo	DEMO-001											
Site Number	A Element Record	Element Record	C Element Record	Element Record	Element Record	Element Record	M Hierarchy Parent	Tag Details	Tag Details	Tag Details	Tag Details	R Tag Details	Tag Details	
0	Flement Id	* Element Type	<ul> <li>Description</li> </ul>		Element Sub Type	- IWP	The arcay Patent	* Project Group Number		<ul> <li>Project Name</li> </ul>		<ul> <li>Module</li> </ul>	<ul> <li>Service</li> </ul>	
	Tag-1-TC-0303-01-1CP-0300-01	Engineering Tag	Temperature Instrument Cable	Electrical	Instrument Cable		6 Subsystem-HVAC-0456-01	Demonstration Projects			DEMO-001	moon	<b>U</b> LIVIC	_
	Tag-I-IJB-0001-TC-0010	Engineering Tag	Temperature Instrument Cable	Instrumentatio	r Instrument Cable	IWP-ELECTRICAL-CABLE-00	7 Subsystem-CWS-0456-01	Demonstration Projects	Demonstration P	roj( System Demo	DEMO-001	MOD-001	CW	_
	Tag-I-IJB-0001-TIT-0010	Engineering Tag	Temperature Instrument Cable	Instrumentatio	r Instrument Cable	IWP-ELECTRICAL-CABLE-00	7 Subsystem-CWS-0456-01	Demonstration Projects	Demonstration P	roji System Demo	DEMO-001	MOD-001	CW	
	Tag-I-IJB-0001-TCV-0010	Engineering Tag	Temperature Instrument Cable	Instrumentatio	r Instrument Cable	IWP-ELECTRICAL-CABLE-00	7 Subsystem-CWS-0456-01	Demonstration Projects	Demonstration P	roji System Demo	DEMO-001	MOD-001	CW	
	Tag-I-IJB-0001-CP-0101	Engineering Tag	Temperature Instrument Cable	Instrumentatio	r Instrument Cable	IWP-ELECTRICAL-CABLE-00	7 Subsystem-CWS-0456-01	Demonstration Projects	Demonstration P	roji System Demo	DEMO-001	MOD-001	CW	
	Tag-I-TC-0303-02-ICP-0300-01	Engineering Tag	Temperature Instrument Cable	Electrical	Instrument Cable	IWP-ELECTRICAL-CABLE-00	6 Subsystem-HVAC-0456-01	Demonstration Projects	Demonstration P	roj(System Demo	DEMO-001			
			Temperature Instrument Cable	Instrumentatio	r Instrument Cable	IWP-ELECTRICAL-CABLE-00	7 Subsystem-CWS-0456-01	Demonstration Projects	Demonstration P	roje System Demo	DEMO-001	MOD-001	CW	
	Tag-I-IJB-0001-CR-0001A	Engineering Tag												
	Tag-I-IJB-0001-CR-0001A Tag-I-IJB-0001-CR-0001B Tag-I-IJB-0001-CR-0001C	Engineering Tag Engineering Tag Engineering Tag	Temperature Instrument Cable Temperature Instrument Cable	Instrumentatio	r Instrument Cable		7 Subsystem-CWS-0456-01 7 Subsystem-CWS-0456-01	Demonstration Projects Demonstration Projects			DEMO-001 DEMO-001	MOD-001 MOD-001	CW CW	

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.

Element Record Elemen

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.



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	ITEST-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

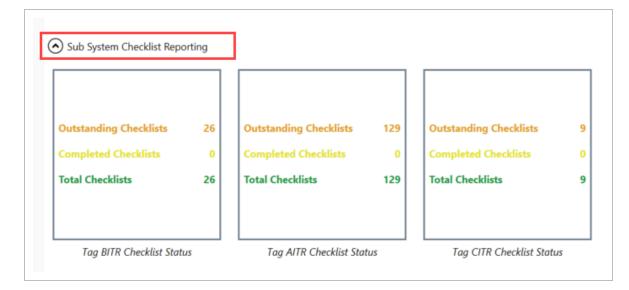
# 6.4.1 Value of Progress Roll-up Reports

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.

E Back to			1P-	1820-01-01: Sub Sys	stem		
lement Id P-1820-01-01	Element Type Sub System	Element Status Active	Location		sub type	Hierarchy Value 1P-1820-01 / 1P-1820-01-01	0 Attachments
	Sab System	70.000					Certificates
							<b>≡</b> _● Checklists
							Comments
System Information							2008 Elements
							Issues
Sub System Checklist Report	ing						
Outstanding Checklists	26 Outstanding Checklis	sts 129 Outstanding Checklists	9				
Completed Checklists	0 Completed Checklist		0				
Total Checklists	26 Total Checklists	129 Total Checklists	9				
Tag BITR Checklist Status	Tag AITR Checkli	st Status Tag CITR Checklist Si	tatus				
Sub System Issue Reporting							
Outstanding PLI Completed PLI	0						
Total PLI	0						
Tag Issue Status							
> Edit							You do not have permission to modi

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.

) Sub System Issue Repor	ting		
Outstanding PLI	0		
Completed PLI	0		
fotal PLI	o		
Tag Issue Status			

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.

				6-TX-4410-937-SCA-01-01				
Element Id GM020-PI-ISO-226-TX-4410-937-	Element Type TAGGED EQUIPMENT	Element Status Commissioned	Location		sub type FLANGE	Hierarchy Value 226-TX-4410-937-SCA-01-01-RF-T1		
							Attachments	
							Certificates	
Tag Detail							<b>≡</b> ₀ Checklists	
System							Comments	
Contractor Details							🔆 Elements	
Drawing Information     Testing Information	HECKLIST(S) LINKED TO GN	1020-PI-ISO-226-TX-441	0-937-SCA-01-01-RF-T1	_ = ×			Issues	
<ul> <li>Engineering Information</li> </ul>			CREATE NE	W LINK EXISTING CHECKLIST(5)				
	Checklist(s) linked directly to GM0	20-PI-ISO-226-TX-4410-937-SC	A-01-01-RF-T1	Hide				
	Status Responsible Team	Id Location	Checklist Template Categor					
	open	Chk-A-31056	P-02A Joint Integrity (Alignment,Tightness,Strain)					
	±•.							

### 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 subsystem 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



# **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**

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# 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.

- Back to Checklists	Chk-0	0008:	
	P-028	Piping Cleaning Restoration	on
Status open	Responsible Team InEight Matthew Macaras@ineight.com	Last Modified By	<b>A</b>
Last Modified Date 11/14/2019 2:18 AM	Description	Location Campus A ( BKD-1 / Level 2 / 1-203	Attachments     Comments
Exiatity	Created By	Created 11/14/2019 2:17 AM	✓ Callers 0
~	A STATE OF COMPANY OF COMPANY OF COMPANY		impections
MORE INFO	Responsible Team  Responsible	000084	1 mm
how Resol	ing) processor cricksor crick	FILE FROM ANO	EVELUMARY ADD ATTACHMENT DOWNLOAD ALL
Category			

# 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**.

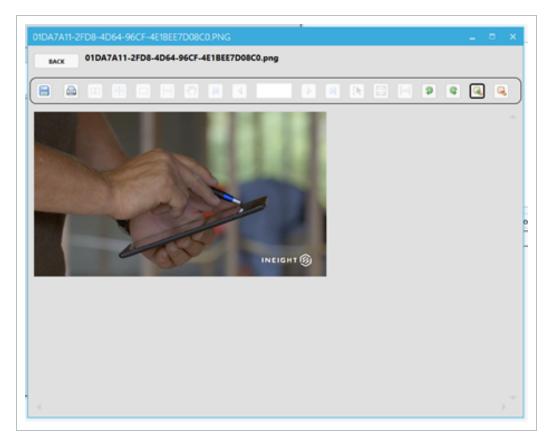
• A new pop-up window reflects the import

Checklist Chk-0000 Imported 1 file.	08		
1D#7A11-2FD8-4D64-96CF-4E18EE7D08C prg	Import complete.	K	0

- 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

×
FILE FROM ARCHIVE LIBRARY ADD ATTACHMENT DOWNLOAD ALL
Karen.Loftus@ineight.com
Checklist Documents

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



#### You can also select multiple images to bring in at once, resulting in multiple attachments NOTE being linked. FILE FROM ARCHIVE LIBRARY ADD ATTACHMENT DOWINLOAD ALL 5 Attachment(s) linked directly to Checklist 'Chk-00008' 01DA7A11-2FD8-4D64-96CF-4E18EE7D08C0 Karen.Loftus@ineight.com VIEW 1.3 MB Downloaded Checklist Documents ACD9875C-A375-4959-B484-D35A8434905 Karen.Loftus@ineight.com VIEW 941.7 KB Downloaded Checklist Documents D5EDDDF4-4ECC-45EC-89F5-0003FCF7A99-Karen.Loftus@ineight.com VIEW 872.6 KB Downloaded Checklist Documents 5 pages of notes.pdf Karen.Loftus@ineight.com VIEW 35.4 KB Downloaded Checklist Documents 5 pages of notes.docx Karen.Loftus@ineight.com . VIEW Checklist Documents 13.3 KB Downloaded

### 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).

Back to Chk-00009: Home / Checklist_Attachments / Chk-00004	Linking Attachment(s) Q Search	× 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0
Checklist_Attachments Chk-00004	06719B58-B42F-4F30-87DF-849FDD0F80C8.png 1.8 MB	Downloaded
Cx_Attachments	7825CB47-6048-4564-AD98-68E0CA9A100E.png 695.6 KB	Downloaded <b>VIEW</b>
I lssue_Attachments	E90F4060-3013-400E-, page 2010-2010-2010-2010-2010-2010-2010-2010	Downloaded VIEW
COR-00002	Oo you want to link 1 Attachment(s)? - 06719858-842F-4F30-87DF-849FDD0F80C8.png	
	Yes No	

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

Back to Checklists		Chk-0000	9: Pipe Installation Chec	klist		
atus	Responsible Team	Last Modified By	Last Modified Date	Descri	iption	
ben	Karen Loftus	Karen Loftus	3/30/2020 10:06 AM			🛛 Attachments 🛛 🛛
cation	Priority	Created By	Created			Comments
mpus B		Karen Loftus	3/2/2020 12:46 PM			✓ Cx Items
						D Inspections
2 AFTACHMEN	NT(S) LINKED TO CHECKLIST 'CHK-00009	)'		_ = ×		
		FILE FROM ARCH	ADD ATTACHMENT	DOWNLOAD ALL		Issues
✓ 2 Attachm	nent(s) linked directly to Checklist 'Chk-00009'					/
	Photo 2019-11-22 04-30-21 PM.jpg		je	nny	Checklist	Questions: EXPAND ALL COLLAPSE
N 🔤			Issue Photos, Checklist Docum			
	B Downloaded					
	B Downloaded 06719B5B-B42F-4F30-87DF-849FDD0F80C8.png		Karen Lo	tus view		

# 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.

Eack to Checklists	P.02	00008: B Piping Cleaning Restoratio	on
Status open	Essponsible Team  Essponsible Team  Essciption  Created By  Essciption  Created By Essciption  Ent(5) LINKED TO CHECKLIST YCHN	Last Modified By Mathew Macaras Dineight con-	<b>A</b>
Last Modified Date 11/14/2019 2:18 AM	Description	Location Campus A. ( ACD-1 / Level 2 / 1-203	Atachments     Comments
Priority	Created By	Created	✓ Grittens 0
	Matthewn acaras Dineight.com		impactions
MORE INFO	and the second		1 mm
0 ATTACHM	ENT(5) LINKED TO CHECKLIST 'CHK	-00008	_ 0 X
ow Resol		FUE FROM ANO	IVE LIBRARY ADD ATTACHMENT DOWNLOAD ALL
Caragony			

### 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**.

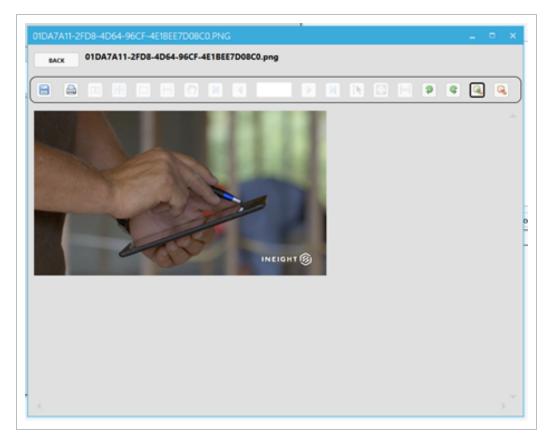
• A new pop-up window reflects the import

	st Chk-00008 ported 1 fie.	•	
01DA7A11-2FD8-4D64-96CF-4E18EE7D08C Gang	import complete.	e	>

- 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

ATTACHMENT(S) LI	NKED TO CHECKLIST 'CHK-00008'			_ 0	×
		FILE FROM ARCHIVE LIBRARY	ADD ATTACHMENT	DOWNLOAD	ALL
1 Attachment(s) li	ked directly to Checklist 'Chk-00008'				
01DA7	A11-2FD8-4D64-96CF-4E1BEE7D08C0	K	aren.Loftus@ineight.e	VIEW	1
1.3 MB Downl	paded		Checklist Docum		1
					_

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



#### You can also select multiple images to bring in at once, resulting in multiple attachments NOTE being linked. FILE FROM ARCHIVE LIBRARY ADD ATTACHMENT DOWINLOAD ALL 5 Attachment(s) linked directly to Checklist 'Chk-00008' 01DA7A11-2FD8-4D64-96CF-4E18EE7D08C0 Karen.Loftus@ineight.com VIEW 1.3 MB Downloaded Checklist Documents ACD9875C-A375-4959-B484-D35A8434905 Karen.Loftus@ineight.com VIEW 941.7 KB Downloaded Checklist Documents D5EDDDF4-4ECC-45EC-89F5-0003FCF7A99-Karen.Loftus@ineight.com VIEW 872.6 KB Downloaded Checklist Documents 5 pages of notes.pdf Karen.Loftus@ineight.com VIEW 35.4 KB Downloaded Checklist Documents 5 pages of notes.docx Karen.Loftus@ineight.com . VIEW Checklist Documents 13.3 KB Downloaded

#### 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 <u>Word or Excel document</u>, a pop-up asks if you would like to launch the file in its default application. Click **Yes** to proceed.

Unsupported file	type			×1
Would you like 6	o launch the fi	ie in its default	application?	·
				_
		Ves	No	-11

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.

- Back to be Insp-00001: Ready for QC Subcontractor Location Campus A / BLD-1 / Level 2 / 1-203 This is my initial impe 11 Inlight Decoil.# Discipline Mechanical CSI Spec Section 80 Drawing # 123 Last Modified Created Submittal # n 8/15/2019 422 PM 8/15/2019 423 PM Cented By 11 Inlight Inspection History: Imp-00001-00-01 8/15/2019 422 PM \$/16/2019 8:00 AM 1t Example GC initial inc B Atlan 1 - -> Update Status > Reassign > Reschedule > Edit

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.

FILE FROM ARCHIVE LIMAARY A		
	INIMO ATTACHMENT	DOWNLOAD ALL

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.

			Archive Library		Q	Search		)				
Home / Checklist_Attachments						ß	$\oslash$	۵	Đ	0	۲	
Checklist Attachments		Chk-00002		991.9 K8							DOWNE	OAD
		Chk-00005		1.8 MB			De	wnloa	led.		DOWNE	DAD

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

Home / Checklist_Attachments		Archive Library	0	Q Search 3 5	
<ul> <li>Checklist_Attachments</li> <li>Cx_Attachments</li> </ul>	Chk-00002		991.9 KB	2 lot Dow 4	DAD
	Chk-00005		1.8 MB	Downloaded	OWNLOAD

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.

	Archive Library	q	Se	arch					×
Home / Cx_Attachments / CWR-0456-02				ß	R	0	۵	0	۲
Checklist Attachments Chk-00002 Chk-00005	Photo 2019-12-13 11-18-43 AMjpg 2.2 MB							DOWN	LOAD
Chk-00008 Chk-00009									
Chk-00010									
CWR-0456-02									

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

Unsupported file type	×
Would you like to launch the file in its default application?	
Yes No	L

### 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.

	le le	sp-00001: Ready for QC	
Subcontractor Inflight jerny	Location Campus A / BLD-1 / Level 2 / 1-200	Note This is my initial inspection	
Fermit, #	Increment	Discipline Mechanical	B Atlaboarts
Drawing # 111-111	CSI Spec Section	RE1 120	Counters
Submittal # 1111	Last Modified 8/15/2019 4/22 PM	Greated 8/15/2019 423 PM	√ canona 0
Constal By LaCight janny		Inspection History:	!
Datus	1d Assigned To	Updated	Scheduled Time
Judated By			
Ready for QC	Imp-00001-IIL-01 <u> at</u> Example GC	8/15/2019 422 PM	8/16/2019 800 AM
	Insp-00001-01-01 the Example GC This is my initial inspection	8/15/2019 422 PM	8/16/2019 BOD AM
Ready for QC the light jerry	11 Example GC		

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

0 ATTACHMENT(S) LINKED TO INSPECTION HISTORY 'INSP-00	001-IR-01		_ 0 X
	FILE FROM ARCHIVE LIBRARY	ADD ATTACHMENT	DOWNLOAD ALL

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.

	FILE FROM ARCHIVE LIBRARY ADD ATTACHMENT DOWNLO
6 Attachment(s) linked directly to Checklist 'Chk-00008'	
01DA7A11-2FD8-4D64-96CF-4E1BEE7D08C0	Karen.Loftus@ineight.com
1.3 MB Downloaded	Checklist Documents
ACD9875C-A375-4959-B484-D35A8434905	Karen.Loftus@ineight.com
941.7 KB Downloaded	Checklist Documents
D5EDDDF4-4ECC-45EC-89F5-0003FCF7A99-	Karen.Loftus@ineight.com
872.6 KB Downloaded	Checklist Documents
5 pages of notes.pdf	Karen.Loftus@ineight.com
35.4 KB Downloaded	Checklist Documents
5 pages of notes.docx	Karen.Loftus@ineight.com
13.3 KB Downloaded	Checklist Documents
VEO_Process-Training_Configuration_Book_	Karen.Loftus@ineight.com
469.3 KB Downloaded	Checklist Documents

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.

		Archive Library	(	۹ اه	arch						×
Home / Checklist_Attachments					B	B	$\oslash$	۵	۵	0	۲
Checklist Attachments	Chik-00002		991.9 KB							DOWN	IOAD
	Chk-00005		1.8 MB			De	wnloa	fed		DOWN	LOAD

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

		Archive Library	0	Q Search 3 5 ×
Home / Checklist_Attachments				BB0 E B0 T 🚺
Checklist_Attachments     Cx_Attachments	Chk-00002		991.9 KB	2 tot Dow 4 6 JAD
	Chk-00005		1.8 MB	Downloaded
L				

### 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.

			Archive Library		q	Search						>
Home / Cx_Attachments / CWR-0	456-02					E	B	Ø	b	٥	0	۲
Checklist_Attachments		Photo 2019-12-13 11-1	8-43 AM.jpg	2.2 MB			N	ot Dow	nloaded		DOWN	LOAD
Chk-00005												
Chk-00008												
Chk-00010												
Cx_Attachments CWR-0456-02												

- 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**

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# 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.

Project: Training Project	t Example - 🛛 🔻			
		Cx Items	Q Search	×
In Progress 2 Not Started	Civil 5 Instrumentation 3 MEF	Room 2 System 1	Showing 23 of 23 i	L
Cx Item Id Location	Description	Responsible Team	Status	CLEAR FILTERS
CTS-0001	Cooling Tower Structural St	eel 🗳	In Progress	
Campus A / BLD-1 / Level	2 / 1-203 Cooling water return		In Progress	
Campus A / BLD-1 / Level	5	<b>*</b> *	5	
CWS-0456-01	Cooling water supply	**	Not Started	
> View Cx Item Detai	ils > Reports			
¢ 1 þ	ns Checklists Archive Library Setting	gs	NO PENDING	UPDATES

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	lssues	Inspections	Checklists	Description
Excel Cx Item Overview	х				This report is consumed by project admins or management. This

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	Х				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	Х				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	Х				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	Х				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)**

### **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		х			This Issues report displays a listing of Issues along with columns such as Status, Summary and Description.
Excel Inspection Overview			Х		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:

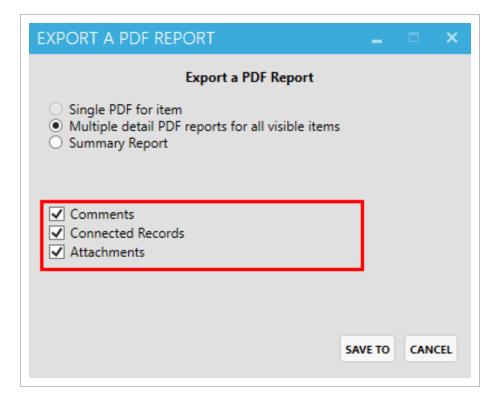
- Output the report so that multiple PDF reports show all visible items
- Output a summary report

EXPORT A PDF REPORT	-		×
Export a PDF Report			
<ul> <li>Single PDF for item</li> <li>Multiple detail PDF reports for all visible items</li> <li>Summary Report</li> </ul>			
<ul> <li>✓ Comments</li> <li>✓ Connected Records</li> <li>✓ Attachments</li> </ul>	VE TO	CANC	EL

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**.

SKIDS-0001 Excel Cx Item Executive Summary Excel Cx Item Executive System Summary	,
TC-0010 Excel Plan vs Actual by Type Excel Issues per Phase Generate PDF Report	

### 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	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		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 v	Main Equipment	Installation v	Design Verification	Quality •	Safety •	Construction Complete	Startup 🔻	Functional Acceptance Testing	Owner Acceptance	Sum of Open COR	Sum of Total COR	Sum o Open PLI
1	1000.01	CAMPUS_A-UTLBLD-	(blank)	7/2/2019	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	
7	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	
2	2000.01	CT-0001	(blank)	2/24/2020	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	3	3	
3	3000.01	CWR-0456-02	7/2/2019	2/27/2020	2/27/2020	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	2	2	
3	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	
3	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	
2	2000.01	HEX-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	0	
7	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	
7	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	
3	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	
1	1000.01	PMP-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	0	
5	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	
2	2000.01	SKID-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	0	0	
4	4000.01	TK-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	
4	4000.01	PMP-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	
4	4000.01	SKID-0001	7/2/2019	(blank)	7/2/2019	(blank)	7/24/2019	(blank)	(blank)	(blank)	0	0	
1	1000.01	TK-0001	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	(blank)	(blank)	(blank)	1	1	
3	3000.01	Cooling System-000	(blank)	7/2/2019	7/2/2019	7/19/2019	7/24/2019	8/6/2019	8/15/2019	8/19/2019	0	0	

### **Excel Cx Item Executive Summary**

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

CREATE EXECUTIVE SU	JMMARY REPORT _		×
	Create Excel Executive Summary Report		
Cx Item Type: (choose at least one)	<ul> <li>✓ Room</li> <li>✓ Element</li> <li>✓ System</li> <li>✓ Subsystem</li> </ul>		
Phase: (choose at least one)	Installation       Startup         Design Verification       Functional Acceptance Testing         Quality       Owner Acceptance         Safety       Construction Complete		
Primary Phase: Issue Types To Summarize:	Installation  COR PLI		
Report as of Date: Options:	3/5/2020 14 WW: 2020 '10 Include Inactive Items		
	ок	CA	NCEL

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 Sur	nmary for Project	"Training Project Exa	mple - MM"			
				Baseline Forecast		Actual to Baseline		1 Week	3 Week	90 Day
Cx Performance		Forecast Week	Actual Week	to Date	Actual to Date	Delta	% Complete	Forecast	Forecast	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 Verification	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 Su	mmary
									Total	
									Not Closed	
									CORs / Insta	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.

CREATE EXECUTIV	E SYSTEM SUMMARY I	REPORT	_ = ×
	Create Excel Exec	utive Summary Report	
Cx Item Type: (choose at least one)	<ul> <li>✓ Room</li> <li>✓ Element</li> <li>✓ Subsystem</li> <li>✓ System</li> </ul>		
Discipline: (choose at least one)	<ul> <li>Architectural</li> <li>Structural</li> <li>Piping</li> </ul>	<ul> <li>Electrical</li> <li>Mechanical</li> <li>Concrete</li> </ul>	✓ Instrumentation
Phase: (choose at least one)	<ul> <li>Installation</li> <li>Design Verification</li> <li>Quality</li> <li>Safety</li> <li>Construction Complete</li> </ul>	Startup Functional Acceptance T Owner Acceptance	Testing
Report as of Date:	3/6/2020	WW: 2020 '10	
Options:	Include Inactive Items		OK CANCEL

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

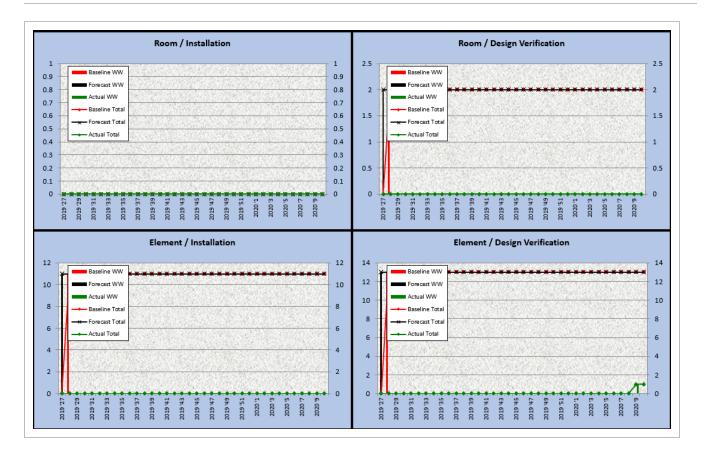
2020 '10							Exec	utive Sy	ystem S	ummar	y for P	roject "1	Training	g Job"						
		Eleme	nt Insta	allation			Roon	n Instal	lation			Subsyst	em Inst	tallatior	ı		Syster	m Insta	llation	
Discipline	Total	Forecast to Date		% Comp	Next 3 Weeks	Total	Forecast to Date		% Comp	Next 3 Weeks	Total	Forecast to Date		% Comp	Next 3 Weeks	Total	Forecast 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.

CREATE PLAN VS	ACTUAL BY TYPE REPORT	-		×
	Create Plan vs Actual by Type Report			
Cx Item Type: (choose at least one)	<ul> <li>✓ Room</li> <li>✓ Element</li> <li>✓ System</li> <li>✓ Subsystem</li> </ul>			
Phase: (choose at least one)	Installation       Startup         Design Verification       Functional Acceptance Testing         Quality       Owner Acceptance         Safety       Construction Complete			
Work Week Range:	Entire Project 🔹			
Options:	Include Inactive Items			
		ок	CAN	CEL

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

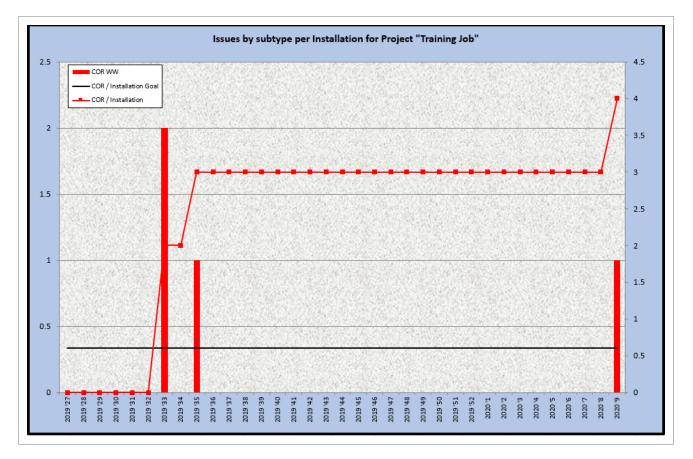


#### **Excel Issues per Phase**

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.

CREATE ISSUES PER PI	HASE REPORT	-		×
	Create Issues	per Phase Report		
Work Week Range:	Entire Project 🔹			
Goal:	0.6 + -			
Select Primary Issue Type:	COR -			
Phase:	Installation •			
Options:	Include Inactive Items			
		0	CAN	CEL

#### 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					or the second
Tem	plate Name			Status	
	MEP			Not Started	
Attachments: 0	Checklists: 1	c	omments: 0	Inspections: 0	Issues: 3
Cx Item Informati	on				
Description	Pump Control Pan	el			
Discipline		Cx Item T	уре	Location	
Electrical		Element		Campus A / B	LD-1 / Level 2 / 1-203
Finish Date Actual		Finish Da	te Estimate	Finish Dat	e Forecast
		8/12/2019 1	2:00 AM	8/19/2019 12:	MA 00
Responsible Perso	n	Subcontr	actor Person	Owner Per	son
Responsible Perso Jack Larry	n	Subcontr Apple Tony	actor Person	Owner Per Bates Sharon	
-	n		actor Person		

### 8.1.2.3 Issues Module reports

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

QViev	v Issue	Details	> Reports	> Create N	ew Issue
	Ĥ	Ŕ	Reports Excel Issue Generate P	Overview PDF Report	Ċ.
Cx Items	Issues	Inspection	ns Checklists	Archive Library	Settings

### **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	<b>Open Status</b>	Category	Summary
					COR	COR-00002	New	Open	Instrumentation	03 - Missing/Incorrect Core Marke
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	<b>Design Verification</b>	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 Ex	xample			
Sul	otype		Status	
C	OR		New	
Attachments: 0	Checklists: 1	Comments: 0	Cx Items: 1	Inspections: 0
ssue Information				
Description	Failed checklist question:	Box is clean and free of con	struciton debris'	
Category		Due D	Date	
Electrical		11/30/2	019 2:00 PM	
Summary		Locat	ions	
07 - Wire Management		Campu	s A / BLD-1 / Level 2 / 1-203	
Resolution Note				
Subcontractor		Resp	onsible Team	
Created By		•	Modified By	
Nicole.Tudor@ineight.com		Nicole.	Tudor@ineight.com	
11/27/2019 2:24 PM		11/27/2	019 2:24 PM	

### 8.1.2.4 Inspections reports

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

QViev	v Inspe	ection Detai	ils	> Rep	orts	> Crea	ate New	Inspection
	n.	ø				ction Ove DF Repoi		
Cx Items	Issues	Inspections	Che	cklists	Archive	Library	Settings	

#### **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.

nstance Id	Id	Inspection Type	Status	Description	Created By	Created	Campus	Building	Level	Room	<b>Responsible Tear</b>
1da91d0-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
ib57ef0b-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						
Insp	ection Type		Status			
Initia	al Inspection		Ready for QC			
Attachments: 0	Checklists: 0	Comments: 0	Cx Items: 1	Issues: 0		
Inspection Inform	ation					
Description:	This is my initial inspect	lion				
Permit #						
Discipline	Mechanical					
Scheduled Time		Locati	ion			
8/16/2019 8:00 AM		Campus	A / BLD-1 / Level 2 / 1-203			
Drawing #		CSI S	pec Section			
111-111						
RFI		Chang	je Order			
123		1111				
Subcontractor		-	onsible Team			
InEight		Example				
Created By jenny		Last N jenny	lodified By			
8/15/2019 4:23 PM			19 4:22 PM			

### 8.1.2.5 Checklists reports

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

QViev	v Chec	klist Details	> Repo	rts > Creat	e New Ch	ecklist
			Gene	erate PDF Report		
		Ó	Ę			
Cx Items	Issues	Inspections	Checklists	Archive Library	Settings	

#### **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-0000	1	
Training Project	t Example			
				eren eren eren eren eren eren eren eren
	Status			
	open			
Attachments: 0	Comments: 0	Cx Items: 1	Inspections: 0	Issues: 0
Checklist Informa	tion		_	
Template Name		x/Control Panel Installation		
Description				
Description				
Priority	Ca	tegory	Location	
	Ele	ctrical	Campus A / Of	fice Complex
		eneneible Teem	Loot M 16	and Pro
		sponsible Team	Last Modifi Alex	ed By
Created By Alex	InF			

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	Subcontractor Person	Owner Person	Finish Date Actual				
<b>0</b> 352890	Architectural							
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	Subcontractor Person	Owner Person	Finish Date Actual				
	Architectural							
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	Subcontractor Person	Owner Person	Finish Date Actual				
	Electrical							

#### Lesson 8 Review

- 1. The ______ report is available for all or most of the tabs:
  - a. Excel Inspection Overview
  - b. Excel Issues per Phase
  - c. Generate PDF
  - d. Excel Issue Overview
- 2. Which report shows items progress in a tabular color-coded view, conditioned by status/date?
  - a. Excel Cx Item Overview
  - b. Excel Inspection Overview
  - c. Excel Item Pivot table
  - d. None of the above
- 3. When using the Generate PDF Report, the selection options for Comments, Connected Records, and Attachments must always be checked?
  - a. True
  - b. False

### Lesson 8 Summary

As a result of this lesson, you can:

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

# **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 Element type Block
<b>نے</b> 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	
E 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.		
<b>D</b> 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		Preservati	ons are managed through the proje	ect 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.

			Certificates		Q Search			>
÷.	Not Ready 6 Mechanical Completion - MC 1	Ready for Commissioning - RFC	Ready for Pre-Commissioning - RFPC 2	Ready for Startup - RFSU 🕕		Showing 6 of 6 records	↓₽	T
CLEAR SELECTION							CLEAR F	LTER
ertificate Id escription	System Number Discipline	Status	Last Modified Date	Last Modified By		Template Name		
MC-00002	System-HVAC-0456	Not Ready	2/2/2021 11:44 AM	Alex Mazepa		Mechanical Completion - MC		
RFC-00003	Subsystem-HVAC-0456-01	Not Ready	2/2/2021 11:44 AM	Alex Mazepa		Ready for Commissioning - RFC		
RFC-00004	Subsystem-HVAC-0456-02	Not Ready	2/2/2021 11:44 AM	Alex Mazepa		Ready for Commissioning - RFC		
RFPC-00003	Subsystem-HVAC-0456-01	Not Ready	2/2/2021 11:44 AM	Alex Mazepa		Ready for Pre-Commissioning - RFPC		
RFPC-00004	Subsystem-HVAC-0456-02	Not Ready	2/2/2021 11:44 AM	Alex Mazepa		Ready for Pre-Commissioning - RFPC		
RFSU-00002	System-HVAC-0456	Not Ready	2/2/2021 11:44 AM	Alex Mazepa		Ready for Startup - RFSU		

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**.

Back to Certificates				RFPC-00003					
ertificate.ld PC-00003	System Number Subsystem-HVAC-0456-01	Template Name Ready for Pre-Commissioning - RFPC	Status Not Ready	Inactive 0	Contractor Person	Cont	tractor Team	Owner Person	Attachments
wner Team	Description		Discipline	Start Date Estimate	Start Date Forecast	Start	Date Actual	Finish Date Estimate	Checklists
nish Date Forecast	Finish Date Actual	Last Modified Date	Last Modified By						Comments
In the second second	LINE CAR PROM	2/2/2021 1:23 PM	Alex Mazepa						Elements
									D Inspections
									I Issues
				Phase List:					
ise Name:	Phase Group Name:		t Date Actual:	Finish Date Actual:	Updated By:	Assigned To:			
Instruction Mechanical	Issuer Mechanical	Not Signed			Alex Mazepa	Alex Ma			
scription:	Signature:						Attachments		
	Signed Date:						Checklists		
						-	Comments		
						_	Issues		
nstruction E&I Authority	Issuer E&d	Not Signed			Alex Mazepa	InEight	t Demo		
mmissioning Mechanical thority	Receiver Mechanical	Not Signed			InEight Demo Alex Mazepa	InEight	t Demo		
mmissioning E&I Authority	Receiver E&d	Not Signed			Alex Mazepa	1nEight	t Demo		
nstruction Manager	Issuer Authority	Not Signed			Alex Mazepa	InEight	t Demo		
mmissioning Manager	Receiver Authority	Not Signed			Alex Mazepa	InEight	t Demo		

### 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

ect phases to reassign:			
PHASE NAME	RESPONSIBLE TEAM	NOTE	WARNING
onstruction Mechanical Authority (Ready for Pre-Commissioning - RFPC)	ee OGC Testing		
onstruction E&I Authority (Ready for Pre-Commissioning - RFPC)	🚉 InEight Demo 🗸		
Commissioning Mechanical Authority (Ready for Pre-Commissioning	L ^{RFPC)}		
	20		

### 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.

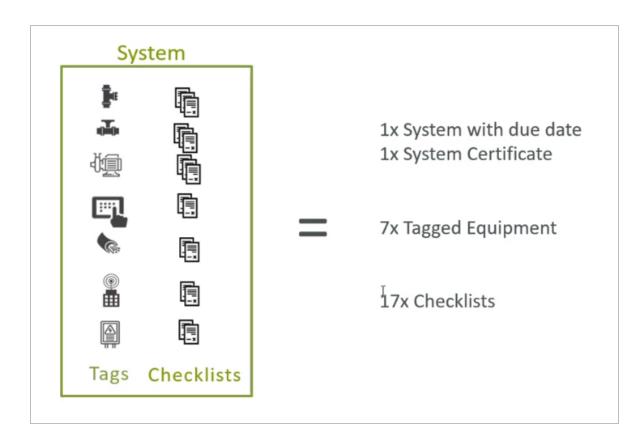
In the example of this certificate:

- 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

Phase Name:	Phase Group Name:	Status:
Construction Mechanical Authority	Issuer Mechanical	Signed
Description:	Signature:	
	Signed Date:	
	-	
Construction E&I Authority	Issuer E&I	Signed
		<i>a</i>
Commissioning Mechanical Authority	Receiver Mechanical	Signed
Commissioning E&I Authority	Receiver E&I	Not Signed
Construction Manager	Issuer Authority	Not Signed
Commissioning Manager	Receiver Authority	Not 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.

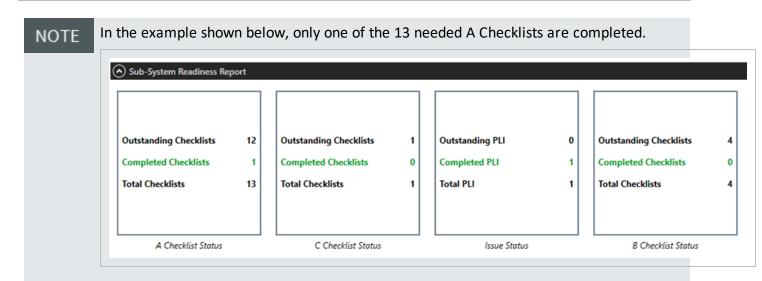


#### 8.1.4.1 Progress Roll-Up Reports

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.



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.

	System Position			Attachments
OUT OF 2 CERTIFICATI	E(S) LINKED TO SUBSYSTEM-HVAG	2-0456-01	- 🗆 ×	Certificates
		ADD CERTIFICATE	LINK EXISTING CERTIFICATE(S)	= Checklists
2 out of 2 Certificate linked d	lirectly to Subsystem-HVAC-0456-01		Hide	Comments
Certificate Id	System Number	Status		
Last Modified Date Description	Last Modified By Discipline	Template Name		Elements
RFC-00005	Subsystem-HVAC-0456-01	Not Ready		D Inspections
2/2/2021 2:08 PM	Alex Mazepa	Ready for Commissioning - RFC		Issues
RFPC-00005	Subsystem-HVAC-0456-01	Issuer Signed		
2/2/2021 3:41 PM	Alex Mazepa	Ready for Pre-Commissioning - RFPC		

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.

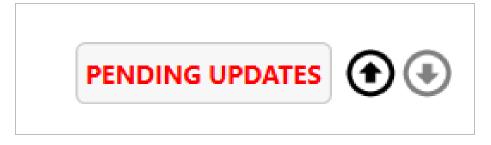
#### 8.1.4.2 Role of Pending Update

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

TIP

#### 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.

ate New Certif	icate 🔉	Reports		
	8	Generate PI	OF Report	
Archive Library	Elements	Certificates	Admin	Settings

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

EXPORT A PDF REPORT	-		×
Export a PDF Report			
<ul> <li>Single PDF for item -00025</li> <li>Multiple detail PDF reports for all visible items</li> <li>Summary Report</li> </ul>			
<ul> <li>✓ Comments</li> <li>✓ Connected Records</li> <li>✓ Attachments</li> </ul>			
SA	VE TO	CAN	CEL

- 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

		-00	025			
nstruction		Cinace T	No	Certifica -00025	tes	
Construc No	N0 UAT Testing 2	2 Diate Name CC		_	Status Not Ready	
missionin	Attachments: 0	Checklists: 0	8	ements: 1	Issues: 0	
No	Certificates Inform					
						CC
commissio	Finish Date Actual		Finish Da	te Estimate	Finish Date	
T NC	Description					
onstructio						
No						
nmissioni						
No						
September 23, 202	Responsible	Person			Owner Pers	ion .

# **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**

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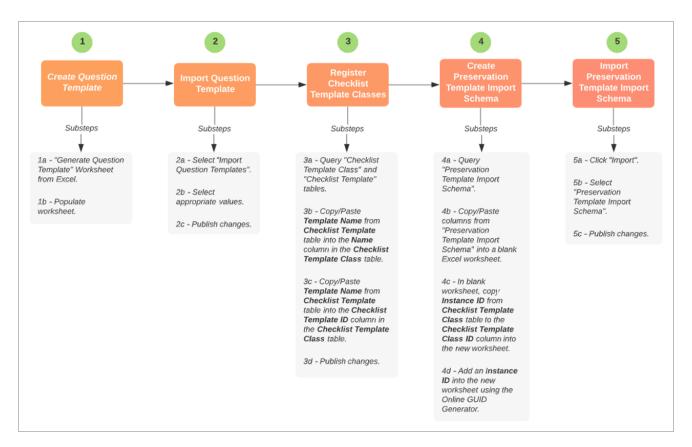
# 8.1 PRESERVATION PLAN SETUP OVERVIEW

### 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.

File	Home Insert Pa	ge Layout Fo	ormulas Data	Review View	Help	InEight [™]	Debug Act	robat
Log		Table Import	Set ID Tag <none> Set ID Tag <none> Bulk Assign Tags</none></none>	Auto Select	Audit Tags	Set ID Tag <none> Set Color <none> Show in Model</none></none>	Pending Changes Settings Team Info Define Spaces Mark Editable Fields	Generate Question Template Worksheet Import Question Templates
	Project	Data	Actions	Modifiers		Visual Reporting	Settings	Question Template Tool

- 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 dropdown menu.

Δ	В	С	D	E	F	G	н	1
Туре	Ten plate Category	Template Name	Question Category	Question Subcategory	Question Text	Question Type	Input Range	<b>Resolution Criteria</b>
	¥							
checklist								
preservation	on							

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

^	В	С	D	E	F	G	н	1
Туре	Template Category	Template Name	Question Category	Question Subcategory	Question Text	Question Type	Input Range	Resolution Criteria
	<b>•</b>							
checklist								

- 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.

Туре	Checklist Template Category	Name of the Checklist *Required	Parent Category	Name of the Category for the Question *Required	The Text of the Question *Required
	3				
reservation	Preservation	Shaft Rotation R00	General	Activity	Rotate Shaft clockwise 3 times
reservation	Preservation	Shaft Rotation R00	General	Signature	Technician Signature
reservation	Preservation	Equipment Storage R00	General	Activity	Ensure equipment is stored in a dry location and sheltered from the elements
reservation	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
reservation	Preservation	Preservation Oil R00	General	Signature	Technician Signature
reservation	Preservation	Pause Perservation	General	Activity	Reason for Pausing the Preservation
reservation	Preservation	Pause Perservation	General	Signature	Authorized Signature
reservation	Preservation	Check for Leaks R00	General	Activity	Inspect equipment for fluid leaks
reservation	Preservation	Check for Leaks R00	General	Activity	Inspect Equipment for decrease in Nitrogen purge pressure
reservation	Preservation	Check for Leaks R00	General	Activity	Nitrogen purge pressure value (psi)
reservation	Preservation	Check for Leaks R00	General	Signature	Technician Signature
reservation	Preservation	Temperature Storage	General	Activity	Confirm the temperature of the area the equipment is stored in has not dropped be degree celcius
reservation	Preservation	Temperature Storage	General	Activity	Temperature Recorder Lowest temperature reading
reservation	Preservation	Temperature Storage	General	Signature	Technician Signature
	Flow Issue Categories	Issue Template Spatial Hierarchy	Preservation Document	ation Target Noun Matri	x Checklist Workflow Context Path Documentation Checklist Template

# 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

File Home Insert Page	Layout Forn	nulas Data F	Review View I	Help	InEight™		Debug Acrobat
Acct:	Table Import	et ID Tag <none> ≫ Bulk Assign Tags ≫ Select Tag</none>	Auto Select	Audit Tags	Set ID Tag <none> Set Color <none> Show in Model</none></none>	Pending Changes Settings Team Info Define Spaces Mark Editable Fields	Generate Question Template Worksheet
Project	Data	Actions	Modifiers		Visual Reporting	Settings	Question Template Tool

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



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

Type Template Category	Template Name	Question Category	Question Subcategory		Question Type	Input Range	Resolution Crite
				Rotate Shaft			
				clockwise 3			
Prese Preservation	Shaft Rotation RC	General	Activity	times	choice	Pass,Fail	Pass
				Technician			
Prese Preservation	Shaft Rotation RC	General	Signature	Signature	signature		
				Ensure			
				equipment is			
				stored in a dry			
				location and			
				sheltered			
				from the			
Prese Preservation	Equipment Stora	General	Activity	elements	choice	Pass,Fail	Pass
				🖳 Questi	on Templates Tool	_	• x
				Туре		Туре	~
				1,120			
				Template			
				Choose Ca	ategory	Template Cate	egory ~
				Choose Te	emplate	Template Nam	ie v
				Question C	ategory		
				Choose Pa	rent Category	Question Category ~	
				Choose Ca	ategory	Question Subcategory $\sim$	
				Question			
				Choose Question Text Choose Question Type Choose Input Range		Question Text ~	
						Question Type V	
						Input Range	~
					solution Criteria	Resolution Crit	eria 🗸
				Choose he	or a contraction of the first	1 ISSNULUTI CI	
						OK	Cancel

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
2e4f970-3a9c-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	-
ae5413e-c0af-451e-acbb-32550b9506d5	6/8/2021 8:20 AM		6/8/2021 8:24 AM		P-01C Gross Leak Test	E-001A-Motor Control Center Equipment Storage R00	~ ~
bb53056-b5a5-4580-9573-ce18b62d8018	6/8/2021 8:20 AM		6/8/2021 8:24 AM		M-005A-Pump Alignment	Exchanger System Commissioning Procedure	
dc95278-1ca2-41b2-8449-7380ed0da27a	6/8/2021 8:20 AM		6/8/2021 8:24 AM		P-02B Piping Cleaning Restoration	H-01B Skid Check I-001A-Instrument Installation	
04659a9-99aa-4a8b-8bb3-1403e4893cad	6/8/2021 8:20 AM		6/8/2021 8:24 AM		I-01B Instrument Calibration	I-01B Instrument Calibration	
058941a-5ca2-4cb6-b9ec-d40296680fdb	6/8/2021 8:20 AM		6/8/2021 8:24 AM		I-02B Loop Check	I-02B Loop Check M-001A-Equipment Setting	~
4ba446f-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.

12137d17-ab16-dd0-864c-dd9324b9a333 1656la0e-db4e-4156-b051-f5911976e079 193ec575-8103-4fdd 9092-c0545650987d 1dd932cb-b360-42b9-bf4f-96df1731e9a 1754c50-d23-4559-4754-4363da2ecc17 1746c0-d23-4559-4754-4363da2ecc17 1430a6a6-3c25-4c7f-a342-f494b1dad9f3	6/7/2021 1:10 PM u 6/7/2021 1:10 PM	sername	Last Modified Date Last Modifie §/17/2021 10.15 AM usemame §/17/2021 10.53 AM §/17/2021 10.53 AM §/17/2021 10.53 AM §/17/2021 10.53 AM §/17/2021 10.53 AM §/17/2021 10.53 AM	Temperature Stor. M-02B Reservoir.r M-001A-Equipmen M-03A Equipment Pause Perservation P-02A Pipe Test Pa	o nt Settr0 Closur	Inactive Categori O Preserva O Mechan O Mechan O Preserva O Piping O System	ical		mplate Nam d current T			
Checklist	Femplate	e tabl	e	7e7047e6-7c f2b7dfe1-98 14ba446f-31 3e06fb53-59 a8642871-2c	86-4ee4-8[36-b1bd39bd9fef 74-4951-b2e5-e375eccma56] 64-48ce-b04a-3cd303696d30 d2-4f10-b4ee-2fd026216827 53-64b0-bb1b-a0aef159c875 2e-4751-89[3-bb46f57c20ab	Created Date 6/8/2021 8:20 AM 6/8/2021 8:20 AM 6/8/2021 8:20 AM 6/8/2021 8:20 AM 6/8/2021 8:20 AM 6/8/2021 8:20 AM		Last Modified Date 6/17/2021 10:57 AM 6/17/2021 10:58 AM 6/8/2021 8:24 AM 6/8/2021 8:24 AM 6/8/2021 8:24 AM 6/8/2021 8:24 AM 6/8/2021 8:24 AM		Name Temperature Storage M-03B Reservoir M-03A Equipment Setting M-03A Equipment Closure Paule Penservoitain P.02A Ripe Test Package Record Exchanger System Commissioning Procedure	Current Template Id Temperature Storage.rd M 03D Reserved. Settl M 04D Reserved. Settl Pause Preserved. Pause Preserved. Peaker Preserved. Exchanger System Commissioning Procedure.r0	Noun Typ
							1	Checklist	Templa	ate Class table		
Checklist Template Class     Check	dist Template Sho	x1   ⊙										
				• 0	ecklist Template Class Chec	klist Template Sh	eet1 🤆	)				

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.

Сору	From	То
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.

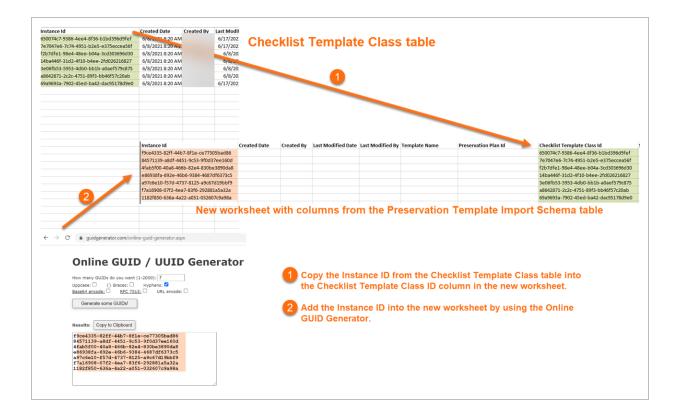
#### 8.4 Step by Step 1 — Create the Preservation Template Import Schema

- 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 Desc	ription
	NOTE	The Schedule Value <b>MUST</b> 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.

l		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	Dave	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.

← Tag-12-VN-1710				Edit Element	
Element Id	I	ype		Sub Type	
Tag-12-VN-1710		Engineering Tag	•	Vessel	
<u>Location</u> Transport-400 / CWA-01				System Position .LARE-1200-1710 / Tag-12	2-VN-1710
Tag Classification <u>Vendor</u> PLD		Vendor Installed		<u>ls Maintainable</u> N/A	1
Preservation Pause Yes		<u>Commissionable</u> No	/	Production Critical No	1
Function Description Mechanical Vessel		Area Classification Hazardous	1	Zone None	

# **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

User: Acct: Log out Project: Preserv	Tabl	le Import	Set ID Tag Bulk A Select	ssign Tags	Auto Se	Selected	ludit Tags	Set ID Tag < Set Color <			ding Advanced		Generate Question mport Question Te
Project		Data	Act	ions	N	lodifiers		Visual	Reporting		Setting	IS	Question Te
<b>19 </b> ▼ :	× √ f	e 0a2	65c00-9f8a-4	886-8a6c-d	5a1953fb47	d							
	A	_				D							
Instance Id		- (	reated Da	Created	Last Mod	ified Da	Last M	odified ( 💌	Template Na	me	<ul> <li>Preservation</li> </ul>	Plan Id	T Checklist Ten
6175da55-c692-417	3-aa7c-9d9111c4	7401							Temperature	Storage	AHU Constru	ction Preservation	69b440e7-bc
5e5591e5-95df-4ad	e-ac60-6dac02d	95aba							Equipment St	torage F	00 AHU Constru	ction Preservation	8ebdf22e-fba
ecdcd09b-4f1e-467	F.9540-0006-220	2967							Chack for Los	ke RAA	AHUConstru	tion Preservation	6b0e12d5-56
bf69c11d-ce44-43	Import Records											d Preservation	6b0e12d5-56
1b6f3182-1e65-42												on Preservation	69b440e7-bc
09d62d2c-2008-4d	Schema	Preservatio	on Template Imp	ort Scher V								on Preservation	8ebdf22e-fba
f457e526-7c3b-4d												on Preservation	6b0e12d5-56
0a265c00-9f8a-488	Worksheet Column Headers	Instance	ld Create	d Date Cr	eated By	Last Modifie	d Date	Last Modified	By Template	Name	Preservation Plan Id	ration	9edb4ae6-e7
64ac3c31-f320-477	Schema Fields	Instance I			ated By			Last Modifie	-/		ignore> *	ioning Preservation	e6326c18-92b
99acb35f-b6d1-42	Schema Fields	Instance I	Created		sated by .	Last modified	· ·	Last modifie	· agnore>	-   -	ignore>	ioning Preservation	6b0e12d5-56
0c0778da-1c09-49a										-	-	atter Deservation	COL 440-7 L
9b4348e7-8ccf-4ff										Info			>
cfc5f7b2-55c8-443									L	-			
e6ab2c6e-d554-4f5	5-8868-b1f3e8fd	3b73			1				Shaft Rotatio			ble already exists with th	
89b83201-f997-4a9	1-a80a-32ab0223	4c08							Check for Lea	aks	orted data will be ac	Ided to the existing data	base table.
					-					-			OK

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			
Itemestion Number       Status open       Element Id Tag-AHU-0304       Element Description         reservation Template Name quipment Storage R00       Creating Instance Type preservation_plan       Preservation Plan Id       Category Preservation         Nexcription       Preservation Checklist       Preservation Template By       Preservation Date         Schedule Information       PRES-00018       Resolution Date       Image: Complete Date         Preservation Information       Preservation Date       Image: Complete Date       Image: Complete Date         wr Resolved:       Constions: 2 quest       Resolution Date       Image: Complete Date       Image: Complete Date         Insure equipment is stored in       Resolution Note       Resolution Note       Image: Complete Date       Image: Complete Date	oject: Preservation Demo	•		
RES-00018       open       Tag-AHU-0304         Inservation Template Name quipment Storage R00       Creating Instance Type preservation_plan       Preservation Plan Id       Category Preservation         Association Checklist       Preservation Plan Id       Category Preservation Date       Preservation Date         Schedule Information       Presolution Date       6/15/2021 2:13 PM       PM         Own Resolved:       Questions: 2 quest       Resolution Nate       Resolution Nate         Category: General       Resolution Nate       (0 out of 750 characters)       OK       ANCEL	Back to Preservations			
Preservation Template Name Creating Instance Type Preservation Plan Id Category   preservation Storage R00 Priority Resolution Date   Preservation checklist Preservation Checklist   ast Modified By PRES-00018   Schedule Information Preservation Date   Preservation Information Complete Date   Over Resolved: Question: 2 quest   Category: General Resolution Note   Category: Signature (0 out of 750 characters)				Element Description
A preservation checklist  A preservation checklist UPDATE CHECKLIST RESOLUTION  PRES-00018  Resolved By  Resolution Date 6/15/2021 2:13 PM  Complete Date 6/15/2021 2:13 PM  Resolution Tate Complete Date 6/15/2021 2:13 PM  Resolution Note  (0 out of 750 characters) OK CANCEL	Preservation Template Name Equipment Storage R00	Creating Instance Type	-	
Last Modified By   Schedule Information   Preservation Information   Preservation Information   Resolution Date   6/15/2021 2:13 PM   Complete Date   6/15/2021 2:13 PM   Category: General   Category: General   Category: Activity   Ensure equipment is stored in   (0 out of 750 characters)   OK		UPDATE CHECKLIST F		
Schedule Information     Preservation Information     Resolution Date     6/15/2021 2:13 PM     Complete Date     6/15/2021 2:13 PM     Category: General     Category: Activity     Ensure equipment is stored in     Resolution Note     (0 out of 750 characters)     OK     CANCEL	ast Modified By	PRES-00018	_	
Implementation   Category: General   Category: Activity   Ensure equipment is stored in   (0 out of 750 characters)   OK   CANCEL	-	Resolved By		
ow Resolved: <ul> <li>Questions: 2 question</li> <li>Category: General</li> </ul> <ul> <li>Category: Activity</li> <li>Ensure equipment is stored in</li> </ul> <ul> <li>Category: Signature</li> </ul> (0 out of 750 characters) OK CANCEL	<ul> <li>Preservation Information</li> </ul>	Resolution Date		
Category: General Category: Activity Ensure equipment is stored in Category: Signature (0 out of 750 characters) OK CANCEL		Complete Date	2021 2:13 PM	
Category: Activity     Ensure equipment is stored in     Category: Signature     (0 out of 750 characters)     OK CANCEL		questi		
Category: Signature     (0 out of 750 characters)     OK CANCEL				
OK CANCEL	Ensure equipment is sto	red in Resolution Note		
OK CANCEL				
OK CANCEL				
Technician Signature	Category: Signature	(0 o	ut of 750 characters)	OK CANCEL
	Technician Signature			
	> Update Status > Reassi	an > Reschedule > Edit	Reports	
> Update Status > Reassion > Reschedule > Edit > Reports				
> Update Status > Reassign > Reschedule > Edit > Reports	ments Checklists Issues Inspe	ctions Archive Library Certificat	es 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.

<ul> <li>Back to Preservations</li> </ul>				PRES-00001: Equipment	Storage R00
Preservation Number RES-00001	<u>Status</u> open	Element Id Tag-HEX-0001	Element Description	Tag Type	Element Type
Preservation Template Name quipment Storage R00	Creating Instance Type preservation_plan	Preservation Plan Id	Category Preservation	Responsible Person	Responsible Tea
Description A preservation checklist		Priority Normal	Resolution Date	Resolved By	Resolution Note
ast Modified By n6admin	<u>Created By</u> m6admin	Created Date 6/9/2021 9:33 AM			
Schedule Information					
Planned Date 6/10/2021 9:33 AM	Scheduled Date 6/10/2021 9:33 AM	Complete Date	Days Overdue 0 days remaining		
Preservation Information					
Frequency 1 Week W M 1 Week St <u>an</u> M 1 Week st ctions for the	Element ID Tag-HEX-0001	<u>Element Sub Type</u> Heat Exchanger	<u>Manufacturer</u>	<u>WBS</u> 6200.3	<u>Vendor Require</u> No

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.

E COMPLETIONS HQ				
Project: Preservation Demo	•			
← PRE5-00002				Edit Preservation
Preservation Number PRES-00002	<u>Status</u> open	<u>Element Id</u> Tag-PMP-0001	Element Description	<u>Тад Туре</u>
Creating Instance Type preservation_plan	Preservation Plan Id	<u>Category</u> Preservation	Responsible Person	Responsible Team
Priority •	Resolution Date       Select a date	Resolved By	Resolution Note	
Schedule Information				
Planned Date 6/16/2021 8:38 AM ↔ Preservation Information	Scheduled Date           6/16/2021 8:38 AM         114	Complete Date Select a date	0 DAYS	

# 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**.

Back to Elements			-	Tag-12-VN-1710 Engineering Tag
Element Id Tag-12-VN-1710	Type Engineering Tag	<u>Sub Type</u> Vessel	<u>Location</u> Transport-400 / CWA-01	Syste LARE
Tag Classification				
<ul> <li>Tag Details</li> <li>Mechanical Details</li> </ul>				
AWP Details				
Material				

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

Project: Preservation C	Demo 👻							
ag-12-VN-1710	Type Engineering Tag	Sub Type  Vessel	Location Transport-400 / CWA-01	Edit Eleme	System Position LARE-1200-1710 / Tag-12-VN-1710			
Tag Classification <u>/endor</u> LD	Vendor Installed N/A	Is Maintainable	Preservations Required	Preservation Pause Yes	No / No		Safety Critical Yes	Eunction Description     Mechanical Vessel
Area Classification lazardous	Zone None	Safety Plan TQE065	Sequence Number SQ:032007	Engineering Tag Status Designed	Select item Q Search X Selection summary: • Yes	•		
) Tag Details ) Mechanical Details ) Drawings					Ves or No:			
) Drawings AWP Details Material					2			
								6

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.

oject: Preservation Demo	•							
Back to Elements				Tag-12-VN-1710: Engin	eering Tag			
<u>ement Id</u> g-12-VN-1710	Type Engineering Tag	<u>Sub Type</u> Vessel	Location Transport-400 / CWA-01		System Position LARE-1200-1710 / Tag-12-VN-1710	D		
								Attachments
								Certificates
								<b>≡</b> _© Checklists
) Tag Classification								Comments
endor D	Vendor Installed N/A	<u>Is Maintainable</u> N/A	Preservations Required Yes	Preservation Pause Yes	Commissionable No	Production Critical No	Safety Critical Yes	<b>Elements</b>
unction Description lechanical Vessel	Area Classification Hazardous	Zone	Safety Plan TQI:065	Sequence Number SQ:032007	Engineering Tag Status Designed			D Inspections
) Tag Details					ATION(S) LINKED TO TAG-12-VN-1	1710	- 🗆 ×	Issues
) Tag Details ) Mechanical Details					Show closer	d Preservations ADD P	RESERVATION LINK EXISTING PRESERVATION(S)	<b>₽</b> ₀ Preservations
) Drawings				1 out of 1 Preservation	inked directly to Tag-12-VN-1710		Hide	
) AWP Details ) Material				Status Element Tune	Preservation Number	Element Id	-	
material				open	Pres-00022 Pause Perservation	Tag-12-VN-1710		

## 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.

Back to Elements			Tag-I	PMP-0001: Engineerin	ig Tag			
<u>ement ld</u> g-PMP-0001	<u>Type</u> Engineering Tag	Sub Type Circulation Pump	Location Plant-200 / CWA-01 / Module-211		System Position tem-CWS-0456-01 / Tag-PMP-0001			Attachments
								<ul> <li>Certificates</li> <li>Checklists</li> </ul>
) Tag Classification								Comments
) Tag Details ) Mechanical Details				- 5 OUT OF 15 PRESERVA	ATION(S) LINKED TO TAG-PMP-00	01	×	Inspections
Drawings AWP Details					Show closed F	Preservations ADD PRESERVATION		Preservations
Material				5 out of 15 Preservation lin Status Element Type	ked directly to Tag-PMP-0001 Preservation Number Template Name	Doment Id	Hide	
				open	PRES-00019 Pause Perservation	Tag-PMP-0001		
				open	PRES-00003 Preservation Oil R00	Tag-PMP-0001		
				open	PRES-00002 Shaft Rotation R00	Tag-PMP-0001		
				open	PRES-00015 Check for Leaks R00	Tag-PMP-0001		
				open	PRES-00014 Preservation Oil R00	Tag-PMP-0001		

- 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**

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# **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

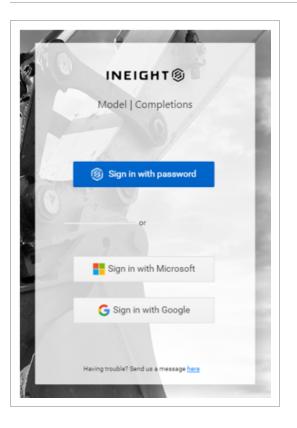
Single sign-on (SSO) reduces the need to maintain separate credentials to access Admin Tools. You can use existing credentials to open Admin Tools.

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.

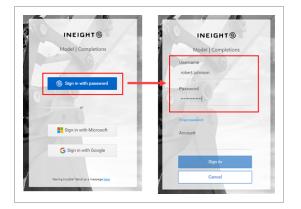


User organizations can integrate with the Excel Plugin authentication service with their own existing authentication servers, which eliminates the need for standalone Excel Plugin user credentials.

Single sign-on recognizes which accounts users have access to, and presents a helpful account dropdown 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

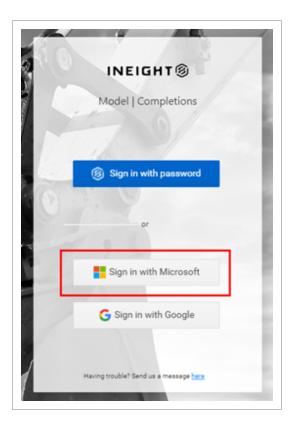


#### Reset password

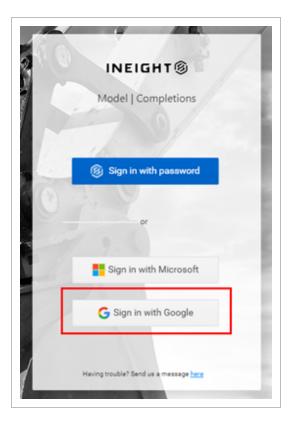
If you forget your password when signing in via your username and password, click Forgot Password. Enter your user name, account, and email address, and then click Submit. If your request is successful, an email is sent to you with instructions to complete your password reset. Return to the login page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

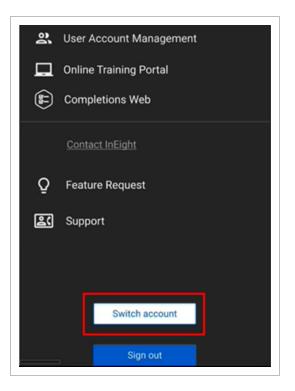


#### 8.2.1.3 SSO by Google



### 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.

E Sh	ow apps uu Projects
	paul.trippi@ineight.com _{АДМIN}
	Quick Links
<b>2</b> U	lser Account Management
<b></b> 0	Inline Training Portal
C 🕀	completions Web
	Contact InEight
Q F	eature Request
ec s	upport
	Switch Account
	Log Out

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.

	Search Q
Created	Created by
4/28/21	Jay
4/28/21	Jay
7/26/19	and a
1/25/17	Minus .
1/22/18	Vickie
3/28/18	and a
3/29/18	in the second
	4/28/21 4/28/21 7/26/19 1/25/17 1/22/18 3/28/18

# **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.

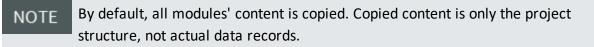
The following Step by Step walks through how to duplicate a project using the Duplicate button.

#### 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.

	Projec	ot name	
Modules		Required	
Cx Cx Item Templates and Phases Issues		Roles Picklists	•
Category Summary Checklists Checklist Templates		Optional	
Preservations Preservation Templates Inspections		PDF Templates Email Notifications Archive Folders	
Elements Certificates		Locations	
Certificate Templates and Phases	•	This will create a duplicate propression of the second sec	iect, which cannot be
			Cancel Create

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.



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.

☰ û Configuration		!Duplicateeddemo			
All	Project Configurations				
Elements	Project Roles Assignment	User Account Management			
<ol> <li>Issues</li> <li>Inspections</li> </ol>	Define roles and assign them to Teams and Individuals	Manage Users, Groups, and Project Access			
E Checklists					
Preservations	Open	Open			
	Excel Tasks				
	Locations Excel				
	Use the Excel Plugin to Define Spaces and configure the Spatial Hierarchy				
	Help				

# 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.

rs & Groups P	roject Permissions							Ŀ
Users			Search	Q		Groups	Search	Q
⊕ Ľ						$\oplus$		
Туре	User Name	Email	Status	SSO		≫ Name		
Admin	‼aditi	testsso030@gmail.com	Activated	*		12 ITEST		
Admin	!!aditi_g1	i@gmail.com	Activated			VII lattest		
Admin	‼aditi_g2	testssoflow222@gmail.com	Activated	~		12 !Steve SSO Test		
Admin	!!aditi_google	testssoflow111@gmail.com	Activated	~		V 12 !Test Read Only		
Admin	‼aditi_ms	i@ineight.com	Activated	~		V 12 !Testers		
Read_only	!aditi_ro	test	Activated			V 😫 ITLC Test 1		
Admin	lalina	>@ineight.com	Activated			✓ 12 0_miscreants		
Admin	1000	)@ineight.com	Pending		Add >	V 1274 AZTRIO - E	DESIGN	
Admin	Lanother	t	Activated			V 1274 AZTRIO - E	HS	
Standard	!alina_ext	pw	Activated		← Remove	V 12 1274 AZTRIO - 0	3C	
Admin	_google	letustest2021@gmail.com	Activated	~		V 1274 AZTRIO - 0	WNER	
Admin	!alina_google1	ineight.testing@gmail.com	Activated			V 1274 AZTRIO - S		
Read_only	!alina_guest	a	Activated			ABEL		
Admin	!alina_ms	>@ineight.com	Activated	~				
Admin	!alina_ms_2	letustest2021@outlook.com	Activated					
Admin	lalina_multiple	multiplesso@gmail.com	Activated	~		ABM CX		
Standard	!alina_read_only	d	Activated					
Admin	la_g1	ssotesting7@gmail.com	Activated	~				
Standard	!Billy	@gmail.com	Activated	~		AERO CX		
Admin	lcolin	test-mail@m-six.com	Activated			AES		
Admin	!colin2	test-mail@m-six.com	Activated	•		~ 12		

#### 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.

SSO On * Confirm Email	SSO C	Off (
* Confirm Email	_	
* User Type		
STANDARD	•	
* Last Name		
Mobile Phone Number		
Title		
	* Last Name Mobile Phone Number	STANDARD     ▼     Asst Name     Mobile Phone Number

#### 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.

User Details	SSO On 🤁
* Email	* Confirm Email
* User Name	* User Type
	STANDARD 🔻
* First Name Work Phone Number	* Last Name Mobile Phone Number
Address	Title

#### 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.



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.



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.

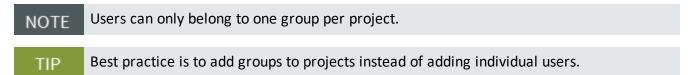
#### Rename a Group

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.



Groups	۹		Projects		Q
✓ Name			Project name	Read Only	Write
V 12 All Users -	<u>^</u>		× 11	,	
	- 11		∨ !2		
✓ 12 lattest	- 11		∨ !3		
SSO Test			~ 14		
✓ 12 ITest Read Only			✓ !copyElementsTest		
✓ 12 ITesters			✓ !copyElementsTest2		
V 12 ITLC Test 1			✓ !duplicateEdDemo		
V 12 0_miscreants			✓ !duplicateEdDemo		
V 1274 AZTRIO - DESIGN		Add →	✓ !Elements_Test_Preservations_Demo		
2 1274 AZTRIO - EHS			✓ !Steve_Preservation_Test		
1274 AZTRIO - GC		← Remove	✓ !TestCopy		
1274 AZTRIO - OWNER			×		
1274 AZTRIO - SUB			×		
12 ABEL			V !Test_FSB_TWR_Cx		
✓ 12 ABM			✓ !This is a Test		
			∨ DacadB		
			V Difc8		
			V Difc9		
			✓ Difc9-a		
AEN CA			V DifcA		
A AEO			SZ Dmiv		

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.

Groups Search Q		Roles Search Q	
≫ Name		➢ Role name	
V 12 All Users		Archive Only	
~ 12		∽ Beta Tester	
		Checklist Admin	
		✓ Cx Coordinator	
		Cx Lead Coordinator	
		Cx Manager	
		~	
		×	
		~	
	← bbA	V Project Admin	
	- Remove	×	
		×	
		~	

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** 

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## 9.1 LAUNCH COMPLETIONS MOBILE

Completions mobile is an iOS iPad 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 Completions mobile application. The Completions project administrators are also the first to contact for any sign-in or account access issues.

### 9.1.1 Install Completions Mobile

Completions mobile should only be installed if instructed by your project administrator. The InEight Completions application is available for installation in the Apple App Store.

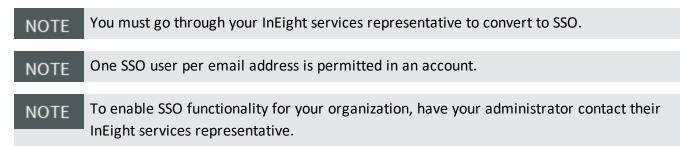
### 9.1.2 Launch Completions Mobile

When you open Completions Mobile, the sign-in page has multiple sign-in options:

- Sign in with Password
- Sign in with Microsoft
- Sign in with Google

### 9.1.2.1 Single sign-on

Microsoft and Google are single sign-on (SSO) options. SSO reduces the need to maintain separate credentials to access Completions Mobile.



When you tap on **Sign in with Microsoft**, you are redirected to the default browser. When you tap on **Sign in with Google**, you are redirected to accounts.google.com.

	Microsoft	
SI	gn in	
Em	ail, phone, or Skype	
No	account? Create one!	
Can	't access your account?	
	Next	
	NOAL STREET	
	Sign-in options	
Terms of us	e Privacy & cookies	

If it is your first time signing in, enter the Microsoft email or Gmail linked to the project and you are directed to the company sign-in page. After you successfully authenticate and you have a single account, the Project selection page opens.

If you have multiple accounts, a new account selection page opens before the Project selection page opens. If the email address is not valid, an error message is shown.

Projects	
Q	
12/06/2021 16:27 PM Not Loaded 12/03/2021 08:59 AM Not Loaded	
Cancel	

If you are a returning user, select your Microsoft or Gmail account. If the authentication token is valid, the Project selection page opens.

If you have multiple accounts, a new account selection page opens before the Project selection page opens.

#### SSO in Offline Mode

You can sign in in offline mode, but you should sign in to the Completions app at least once with internet connectivity so that all projects you have access to are loaded.

You can sign in with password in offline mode if you have already logged in with SSO and the authentication token is not expired.

You can sign in with Microsoft or Google in offline mode if you have already logged in with SSO within 24 hours of authentication token expiration. When the Project selection page opens, you can select highlighted projects in offline mode that are already loaded. Unloaded projects are dimmed.

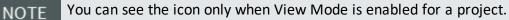
If you have exceeded the authentication token timeout by more than 24 hours, then you are prompted to sign in online.

## 9.2 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.

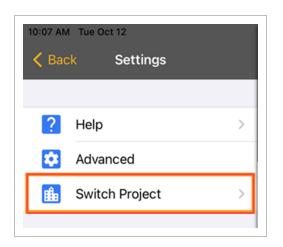
To see available views, in the Projects list, tap the **Views** binoculars icon. The list of available views opens.



Cancel	Projects	
Q Search		
Client OGC Marke 09/16/2021 19:06 PM Not Loaded	et Template	Ĩ
Notice For Inspecti	ion / Witness and Hold Inspections	
All Assigned to Me		
Punch List Item Iss	ues	
All Open Records		
Due in Two Weeks		
All Assigned to My	Team	
Final Walkdown Ins	pections	
Due in a Week		
Notice For Inspect	ion Inspections	
Completions Dem 10/06/2021 11:47 AM Not Loaded	10	
Low Valley Oil De	mo	

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.



## 9.3 CHECKLISTS

### 9.3.1 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.

### 9.3.2 Links

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

## 9.4 CREATE A STANDALONE CHECKLIST

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

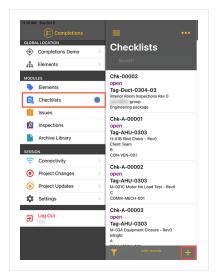
### 9.4.1 Considerations

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.

### 9.4 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.

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Cancel		С	reate		Done
		Chl	k-TBD		
		c	pen		
0 Attachments	Comments	New! Cx Items	New! Elements	New! Inspections	New! Issues
Select Template					
ld Chk-TBD					
Status open					

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

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

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

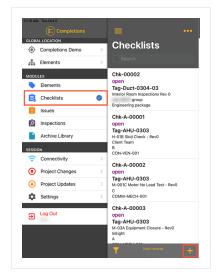
## 9.5 VIEW A CHECKLIST TEMPLATE

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

### 9.5 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.

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		* Selec	t Template		
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Status open					

- 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.

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Q Search	
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## 9.6 ANSWER A CHECKLIST

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

When answering checklist questions, you can do the following:

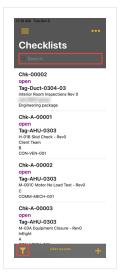
- Select options for Pass, Fail, or NA.
- Add attachments, comments, and link issues related to the checklist.
- See the last updated or resolved time stamp for each question in the checklist questions.

NOTE You cannot answer checklist questions for a checklist placeholder.

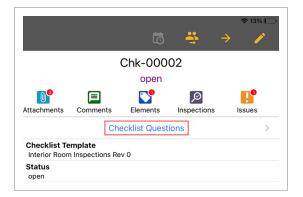
### 9.6 Step by Step 1 — Answer a Checklist

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.



## 9.7 BULK ANSWER A CHECKLIST

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

Bulk answering supports all question types.

### 9.7.1 Considerations

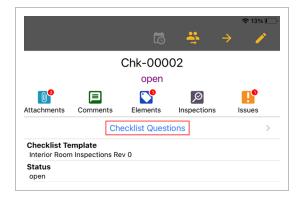
- The ability to bulk answer is based on permissions. If you do not have permission to answer checklist questions in bulk, the buttons and action items that initiate a bulk operation are disabled.
- If an entire set of questions contains distinct types and input ranges, an alert is shown instead of the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

### 9.7 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.

2 38 PM Wed Sep 28	•••• < Back	ć
Checklists	∨ General	Ľ
0. Bearch	Cancel   Inspection Test	Ľ
Chk-00001 open Check for Leaks R00 M-SX Electrical Test	Components are undamaged, have no defects & are not corroded	
Chk-00002 open H-018 Skid Check M-SIX	Ductwork Leak Test complete Pass Fail	•
	Control Valves/actuators installed and operable Pass Fail	
	Dampers/Actuators installed and operable Pass Fail	

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

Cancel	Bulk Answer Questions	ce.
MULTIPLE CHOI		
6 questions i	n this category	>

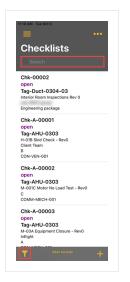
## 9.8 REASSIGN A CHECKLIST

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

#### 9.8 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.

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Attachments	Comments	Elements	Dinspections	Issues				
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Status open								

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

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odified unless the checklis	st is moving from
	odified unless the checklis

## 9.9 UPDATE THE STATUS OF A CHECKLIST

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

### 9.9 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**.

< Assign Team	Save
Status:	
closed	
Note:	