

QUICK GUIDE **ENGINEERING** SCOPE ITEM



SCOPE ITEM

Engineering deliverables are tracked as “Scope Items” and a claiming scheme is associated to each scope item.

Claiming Scheme

A claiming scheme must be assigned to a scope item

Resources

A WBS, Account Code, UoM, Design Element, Role, Planned Team, and Assigned User can be assigned to each distinct Resource Type on a Scope Item.

User defined

These fields are free form text fields, which support up to 250 characters each.

Dates

You can add planned, current and actual dates. Dates need to be enabled in project settings.

Edit scope item

a 0%

Summary

ID	1717	* Description	Elec: Calcs - Relay Coordination Study -	* Claiming scheme	2016
Scope item qty	1.00	* Scope item UoM	Ea	Lead Discipline	Electrical
OB qty	1.00	Deliverable qty	0.00	Deliverable UoM	Sht
Construction work area	GEN	Work classification	GEN	Deliverable package	Select one
Engineering work package	Select one				

Resources

Resource type	WBS phase code	Account code	UoM	Design element	Role
Electrical Engineer	1370		Ea	STUDY/REPORT	

Cancel Save Save and Close

% Complete

Shows % complete when scope item steps are claimed.

Description

Title for the scope item. It must be unique.

Scope Item UoM

This will come from the core UoM list. There's a validation warning on the slideout under **Resources > WBS phase code**

WBS phase code

2230



WBS UoM of Ea does not align with the scope item UoM. Please resolve to enable claiming

Resource type

This field will auto-populate from the associated Claiming Scheme's steps.

WBS phase code

A code must be assigned to all Resource Types for a scope item to enable claiming. The assignment of the WBS will auto-populate an account code and the CE MHR/Unit rate.

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SCOPE ITEMS GRID



SCOPE ITEMS GRID

A Actions Menu

B Audit Log

C User Preferences and Help

D WBS Rollup

E Assigned Team

F Assigned to Me

Main Menu

Add Edit Delete

SCOPE ITEMS AUDIT LOG

Save view as

View: Unsaved (Default)

Create Query Filter

Import Export Find

ID	*Description	*Claiming scheme	Claiming scheme description	% Complete	Lead discipline	Import type	Export	Find
WBS Rollup	Elec: Cables - Power a...	2013	2013. Elec - Circuit Writi...	0.00	Electrical	239.00		
Assigned Team	Elec: Cables - Power a...	2013	2013. Elec - Circuit Writi...	0.00	Electrical	78.00		
Assigned to Me	Elec: Cables - Power a...	2013	2013. Elec - Circuit Writi...	0.00	Electrical	59.00		

A ACTIONS MENU

Allows users with permissions to perform a variety of actions on the project.

- Configure claiming schemes
- Configure engineering work packages
- Configure project values
- Unlock Budget
- Role assignment

B AUDIT LOG

Gives users visibility to changes on a project.

- Scope item
- Claiming history
- Import history
- Scope item quantity history

C HELP, USER PREFERENCES & NOTIFICATIONS

Get help, see notifications and manage user preferences with these menu items.

D WBS ROLLUP

Displays all the available WBS Phase Codes on the project from InEight Control with the ability to expand on each to see the associated scope items.

E ASSIGNED TEAM

View claiming steps assigned to each team on a scope item.

F ASSIGNED TO ME

View each claiming step assigned to you on a scope item.