QUICK GUIDE PROJECT SETUP (CLOUD)



PROJECT PERMISSIONS

Estimators can create new projects within the assigned root or sub-organizations in InEight Platform with a Level 2- Organization Admin role or a Level 1 – Project Admin role.

This allows you to create new project in a node of the organization dedicated to estimating.

| Ξ | permissions | | | | 0 | 4 ⁸ ® |
|----------------------------------|--------------|----------------------------|------------------------------|--|--------|------------------|
| Roles and permissions > Add role | | | | | Car | icel Save |
| * Name | Description | | * Administrator level | | | |
| Estimator | | | Level 1 - Project Admin | • (i) | | |
| | | | Level 0 - Base | | | |
| D | | | Level 1 - Project Admin | | | |
| Permissions | | | Level 2 - Organization Admin | | | |
| | | | Level 3 - Account Admin | | | |
| Suite administration | | | | | | ~ |
| Organization and project | | | | | | ^ |
| Select all | | | | | Search | |
| Organizations | ✓ Select all | Projects | Select all | General settings | | Select all |
| 🖉 low organizations 👔 | | 🖉 @ View active projects 🚺 | A | O View home page | | A |
| | | 🗹 🐵 View new projects | | 🔲 📑 Edit home page | | |
| | | 🗹 🕀 Add projects | | @ View global options | | |
| | | 🗌 Activate projects 🔬 | | Wiew fiscal calendar | | |
| | | View closed projects | | 🔲 🛃 Edit fiscal calendar | | |
| | | Reactivate closed pro | iects A | O View fuel types | | |

CREATE A NEW JOB

- Go to the InEight Estimate Backstage view, under Create a new Job from... ► select Scratch. Or from the left sidebar menu, click New ► select Scratch.
- 2. On the New Job dialog, select a Core Project from Platform.
- 3. Update the **Code** field.
- 4. Type in a description in the Description field.

| 6 | | New Job |
|---------------|---|--|
| Core Project: | * | 104387 |
| Code: | * | 104387 - Anchor |
| Description: | | Anchor Topsides |
| | | ~ |
| | | Auto-Update Job in Connected Analytics |
| | | OK Cancel |

5. Click **OK** to create the new project.

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SHIFT RATE CALCULATOR

1. Click on Job Properties ► Cost Basis tab, select the Shift Rate Calculator button.



2. For Shift 1, type a **number value** of hours in the **Work Hours** fields as needed.

| | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday | TOTAL |
|------------|--------|---------|-----------|----------|--------|----------|--------|-------|
| Shift 1 | | | | | | | | |
| Work Hours | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Scale 1 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Scale 2 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Scale 3 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

- 3. Designate how many of your work hours will be in Scales 1, 2 (overtime) and 3 (double-time) for each of your days.
- 4. Click OK.

• IMPORT FILTERED RESOURCES

1. Click on Job Properties ► Cost Basis tab, select the Labor Rate resource type.

| Resource / Assembly Filter | | | | |
|----------------------------|----------|---|--|--|
| Resource / Assem | bly Type | ^ | | |
| Labor Rate | | | | |
| Construction Equi | pment R | | | |
| Rented Construction Equi | | | | |
| Installed Material Rate | | | | |
| Installed Equipme | nt Rate | ¥ | | |
| Installed Equipme | nt Rate | ~ | | |

- 2. Select the Resource / Assembly File Description.
- 3. Select the Geographic Area.
- 4. Select the Wage Zone (Work Center).
- 5. Select the Organizational Category.
- 6. Select the other resource types to apply filters as needed.



7. Select the **Import Filtered Resources** button to bring your selected resources into the job.



- CREATE A PAY ITEM
- 1. Select Setup tab ► Pay Item & Proposal.
- 2. In the Pay Item Number column, in the first blank row, type a **number value**.



- 3. In the Description column, type a **description**.
- 4. Add a pay quantity and unit of measure.

