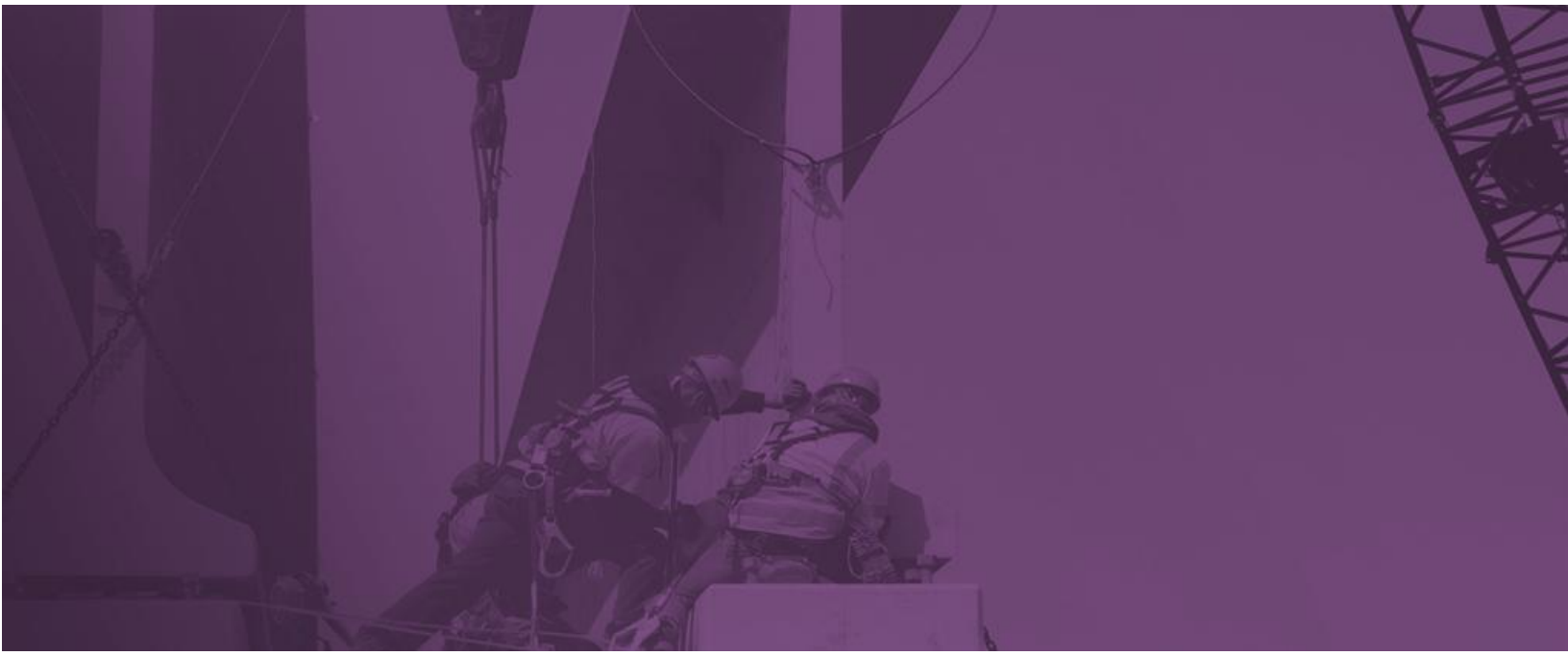
INEIGHT



Transitioning to the Design Dashboard

User Guide for Replacing Legacy Design Dashboards with the Enhanced Design Dashboard

InEight® EXPLORE

Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Revision	Change Date	Description	Author
0	19-JUN-2026	Original Draft (per Platform Release 26.7)	Andy Toraman

Contents

Introduction 4

Legacy Design Dashboards 4

The New Design Dashboard 5

Preparing Design Data for Reporting 6

Design Overview 8

Productivity 9

Gantt 10

Resource Planning 11

Quantity Analysis 12

Package Summary 13

Quantity Forecasting 14

Introduction

This guide supports the transition from the legacy Design dashboards to the new Design Dashboard first introduced as preview in Platform Release 26.3.

The new dashboard replaces the following legacy reports:

- Design Project Delivery
- Design Deliverables Tracker
- Design Quantity Forecasting

The new Design Dashboard is **not** intended to provide a direct one-to-one replacement for every legacy page, visual, or metric. Instead, it consolidates the primary engineering reporting capabilities into a single report and introduces a more flexible and analytical approach to reviewing design progress, schedule performance, productivity, resource demand, quantities, and work-package performance.

The guide provides a high-level overview of the new dashboard and explains how key reporting activities previously performed across the legacy dashboards are now supported. It is intended to help existing users understand the revised reporting approach and adopt the new dashboard efficiently.

Legacy Design Dashboards

The legacy Design reporting experience was distributed across three separate dashboards, each focused on a specific area of design delivery.

Design Project Delivery

The Design Project Delivery dashboard focused primarily on engineering progress, task scheduling, package performance, planned and earned manhours, and resource loading.

Its pages provided views such as:

- Project and task-level progress
- Gantt analysis
- Planned and earned curves
- Cost-item-level hour analysis
- Package summaries
- Staff and assigned-user loading

Although the dashboard provided useful operational information, users often needed to move between multiple pages to understand the overall design-delivery position.

Design Deliverables Tracker

The Design Deliverables Tracker focused on the status and timing of design deliverables.

It provided summary and trend information relating to:

- Planned deliverables

- Actual and forecast dates
- Deliverable counts
- Weekly delivery movement
- Cumulative delivery performance

The dashboard was primarily designed as a tracking tool and provided a relatively high-level view of deliverable status.

The New Design Dashboard

The new Design Dashboard consolidates the primary reporting capabilities of the legacy dashboards into a single analytical experience.

The dashboard comprises the following six pages:

- Design Overview
- Productivity
- Gantt
- Resource Planning
- Quantity Analysis
- Package Summary

Rather than organizing the report around a series of fixed legacy views, the new dashboard allows users to analyze the same design data from multiple perspectives.

A key feature of the dashboard is the ability to configure how information is grouped and displayed. Depending on the page, users can analyze data by dimensions such as:

- Project
- Area
- WBS
- Lead Discipline
- Scope Item
- Claiming Scheme Step

The order in which dimensions are selected determines the hierarchy used in the relevant visual. This allows users to move between summary and detailed analysis without relying on a single predefined reporting structure.

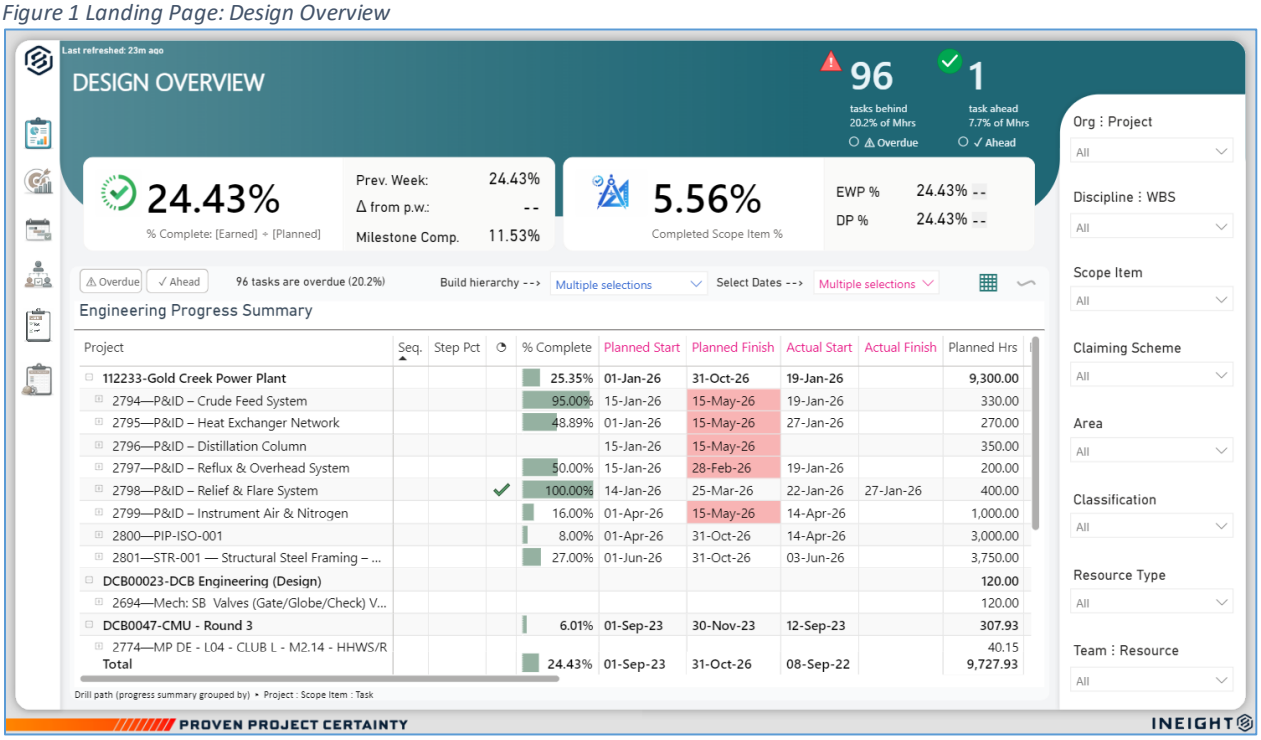
The dashboard also places greater emphasis on actionable information. In addition to showing overall progress, users can identify:

- Work that is overdue
- Changes in progress since the previous week
- Productivity trends
- Forecast resource demand
- Milestone progress
- Scope Items and Claiming Scheme Steps requiring attention

Within the dashboard, a Claiming Scheme Step may be displayed as a **Task**. In this guide, the term **Claiming Scheme Step** is used consistently unless referring directly to a label shown in the report.

The new Design Dashboard should therefore be viewed as a consolidated and enhanced reporting solution rather than a direct reproduction of the legacy dashboards.

Figure 1 Landing Page: Design Overview



Preparing Design Data for Reporting

The quality and completeness of the underlying Design data directly affect the insights available in the new Design Dashboard.

Although some fields are not mandatory within InEight Design, users will obtain substantially more value from the dashboard when key planning, progress, resource, and forecast information is maintained consistently.

The following data should be reviewed before relying on the dashboard for analysis:

- Planned Start and Planned Finish dates
- Current dates
- Actual dates
- WBS assignments
- Resource Type
- Assigned User, where applicable
- Unit rates
- Forecast Remaining Manhours
- Quantity claims

Dates

Planned Start and Planned Finish dates are particularly important because they support:

- Planned quantity and manhour phasing
- Overdue and ahead-of-schedule identification
- Gantt analysis
- Progress curves
- Resource-demand forecasting

Where date information is incomplete, users may still review progress information, but schedule-based visuals and curves may provide a less complete view.

Current and Actual dates provide additional context when comparing the original plan with the latest expected or completed position.

WBS Assignments and Unit Rates

WBS assignments connect Design scope to the corresponding cost items.

This enables the dashboard to incorporate information such as:

- Earned manhours
- Actual manhours
- Productivity
- Forecast Remaining Manhours
- WBS-level analysis

Unit rates are used with claimed quantities to calculate earned manhours. Incomplete assignments or unit rates may therefore affect productivity and hours-based analysis.

Resource Information

Resource Type is used to analyze planned and forecast work by resource category and is particularly important for the Resource Planning page.

Assigned User provides an additional level of analysis where named resources are maintained. It is optional and may not be used by every project.

Forecast Remaining Manhours

Forecast Remaining Manhours support the forecast portions of the dashboard's curves and resource-planning views.

Users transitioning from the legacy dashboards should ensure that this information is refreshed and maintained where forecast analysis is required.

Quantity Claims

Quantity claims recorded against Claiming Scheme Steps generate the earned progress shown throughout the dashboard.

They support:

- Percent complete
- Earned quantities and manhours
- Milestone progress
- Previous-week progress
- Productivity analysis

Transition Guidance

Before comparing results from the new and legacy dashboards, users should first confirm that the relevant Design records contain complete dates, WBS assignments, quantity claims, resource information, unit rates, and forecast data.

Differences between the legacy and new dashboards may reflect differences in the underlying data used by the new analytical views rather than a reporting issue.

Design Overview

The Design Overview page is the main starting point for reviewing engineering progress. It brings together progress, milestones, overdue work, package status, and manhour curves in a single page.

Users can define how the data is grouped by selecting dimensions such as Project, WBS, Lead Discipline, Deliverable Package, Engineering Work Package, Scope Item, and Claiming Scheme Step. The order of selection determines the hierarchy shown in the visual.

Key capabilities include:

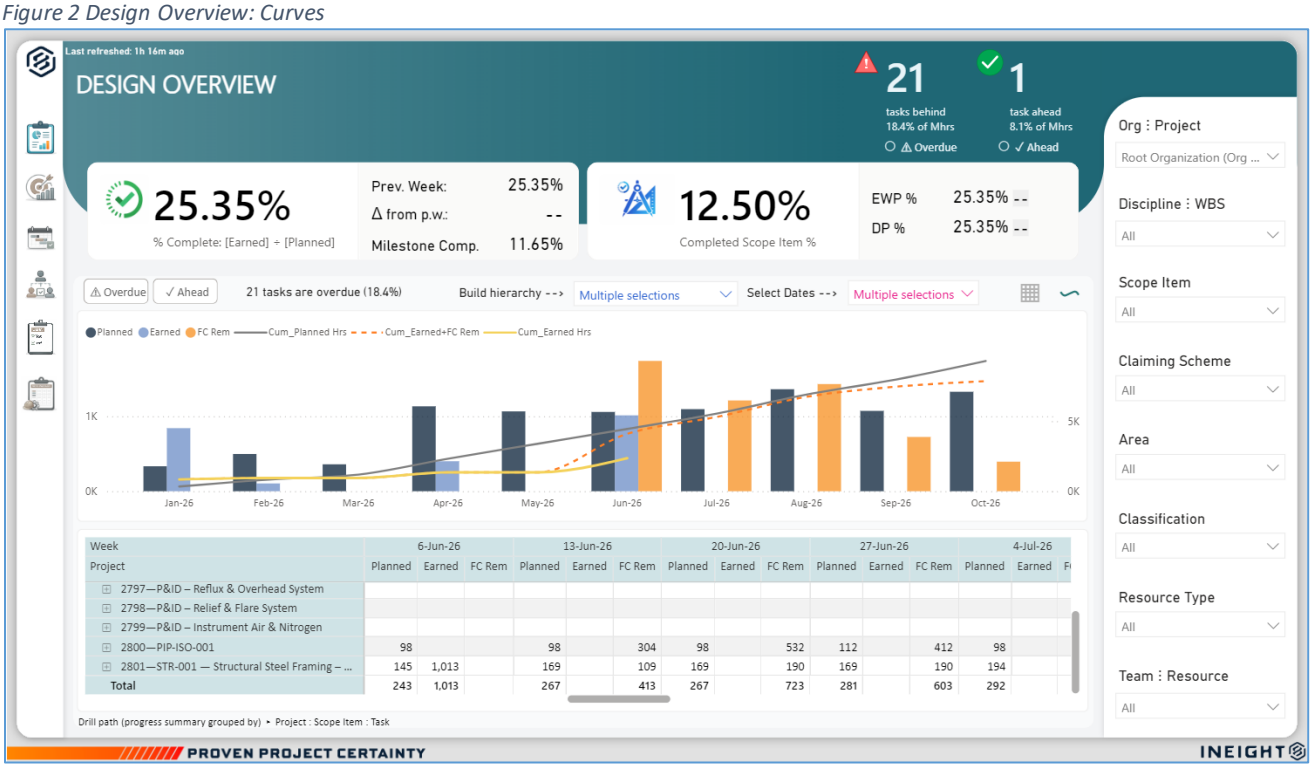
- Overall and previous-week progress
- Milestone progress
- Overdue and ahead-of-schedule work
- Progress by package, WBS, discipline, Scope Item, or Claiming Scheme Step
- Planned, earned, and Forecast Remaining Manhour curves

Transition Guidance

Users who previously relied on the Design Project Delivery and Design Deliverables Tracker dashboards should begin here.

Rather than navigating between separate legacy pages, select the hierarchy that best matches the question being investigated, then use the overdue and ahead-of-schedule options to identify work requiring attention.

Figure 2 Design Overview: Curves



Productivity

The Productivity page shows how effectively engineering hours are being converted into earned progress.

It compares earned manhours with actual manhours and presents performance trends over time, including recent weekly movement.

Key capabilities include:

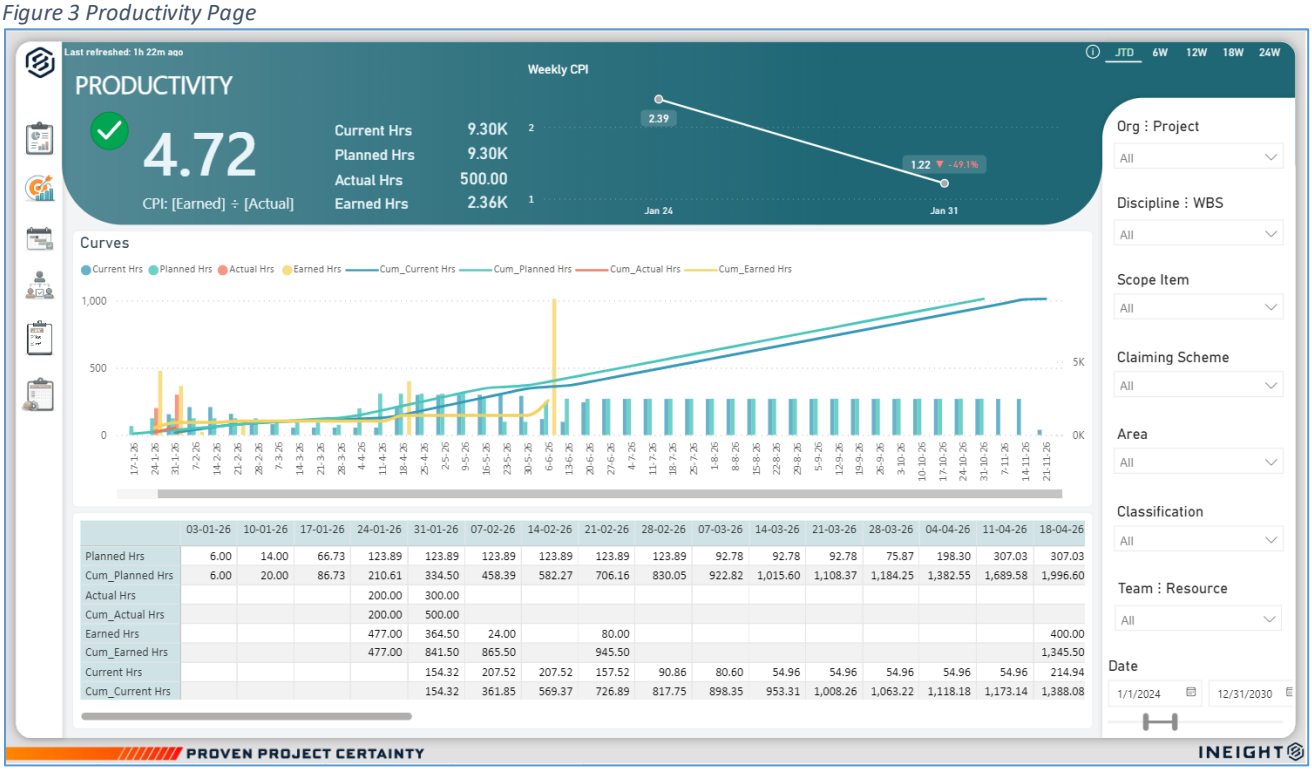
- Job-to-date productivity
- Weekly productivity trends
- Recent-period analysis
- Planned, current, earned, and actual manhour context
- Improvement or decline compared with previous weeks

Transition Guidance

Users who previously reviewed earned and actual hours through the Design Project Delivery dashboard should use this page for a more focused view of engineering performance.

Because actual hours are available at the WBS level, productivity analysis should generally be reviewed by project, WBS, or other higher-level groupings rather than by individual Scope Item or Claiming Scheme Step.

Figure 3 Productivity Page



	03-01-26	10-01-26	17-01-26	24-01-26	31-01-26	07-02-26	14-02-26	21-02-26	28-02-26	07-03-26	14-03-26	21-03-26	28-03-26	04-04-26	11-04-26	18-04-26
Planned Hrs	6.00	14.00	66.73	123.89	123.89	123.89	123.89	123.89	123.89	92.78	92.78	92.78	75.87	198.30	307.03	307.03
Cum_Planned Hrs	6.00	20.00	86.73	210.61	334.50	458.39	582.27	706.16	830.05	922.82	1,015.60	1,108.37	1,184.25	1,382.55	1,689.58	1,996.60
Actual Hrs				200.00	300.00											
Cum_Actual Hrs				200.00	500.00											
Earned Hrs				477.00	364.50	24.00		80.00								400.00
Cum_Earned Hrs				477.00	841.50	865.50		945.50								1,345.50
Current Hrs					154.32	207.52	207.52	157.52	90.86	80.60	54.96	54.96	54.96	54.96	54.96	214.94
Cum_Current Hrs					154.32	361.85	569.37	726.89	817.75	898.35	953.31	1,008.26	1,063.22	1,118.18	1,173.14	1,388.08

Gantt

The Gantt page provides a timeline view of Scope Items and Claiming Scheme Steps, helping users understand when work is planned and how it is progressing.

Key capabilities include:

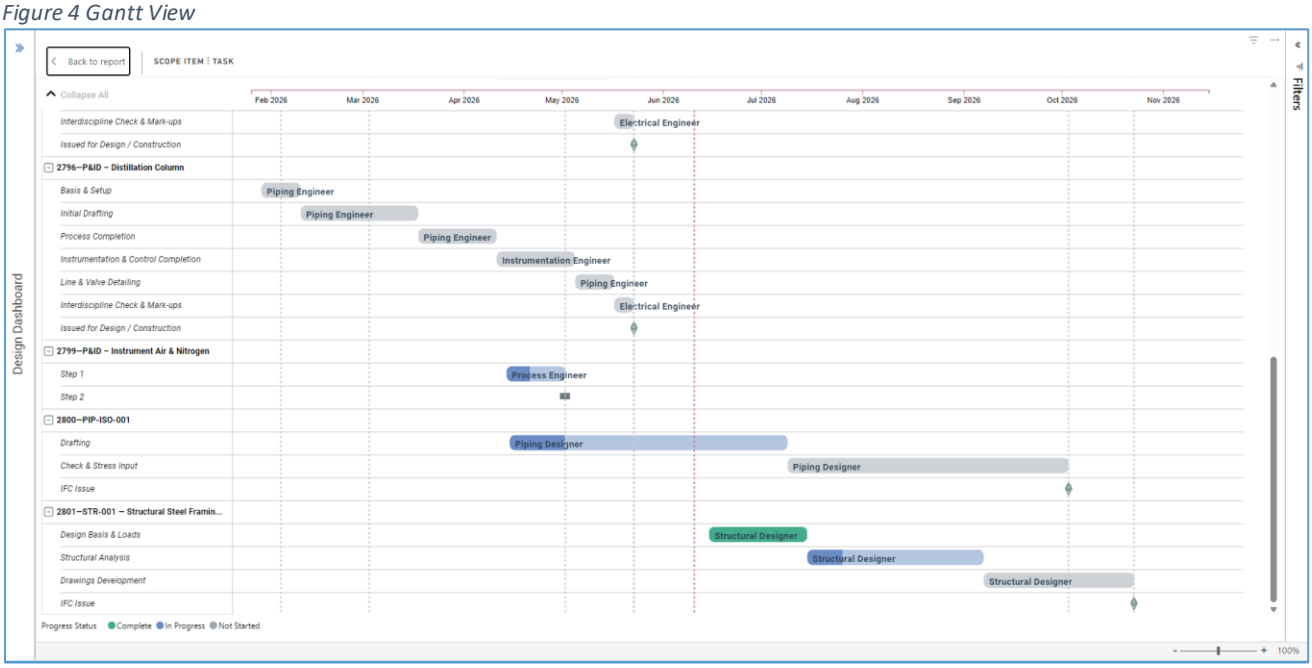
- Scope Item and Claiming Scheme Step views
- Planned timing
- Completion status
- Current-date reference
- Resource Type context

Transition Guidance

Users who previously used the Gantt page in the Design Project Delivery dashboard can continue to review design work in a familiar timeline format.

The main difference is that the Gantt now sits within the broader Design Dashboard, allowing users to move between schedule, progress, productivity, resource, quantity, and package analysis without switching reports.

Figure 4 Gantt View



Resource Planning

The Resource Planning page shows how engineering workload is distributed across Resource Types, Assigned Users, and Resource Disciplines over time.

It combines planned, earned, and Forecast Remaining Manhours to help users identify periods of high demand and potential resource constraints.

Key capabilities include:

- Weekly resource demand
- Analysis by Resource Type, Assigned User, or Resource Discipline
- Planned, earned, and Forecast Remaining Manhours
- Configurable upper and lower workload thresholds
- Visual identification of overloaded or underutilized resources
- Dynamic summary insights

Transition Guidance

Users who previously relied on the **Schedule by People** page in the Design Project Delivery dashboard should use this page for a broader resource-planning view.

In addition to reviewing weekly staff loading, users can now include forecast work, adjust workload thresholds, and analyze resource demand at project or portfolio level.

Figure 5 Resource Planning View

Quantity Analysis

The Quantity Analysis page provides a focused view of planned, claimed, and installed quantities across the selected design hierarchy.

It allows users to review quantity progress by Project, Lead Discipline, Deliverable Package, Engineering Work Package, Scope Item, or Claiming Scheme Step.

Key capabilities include:

- Planned, claimed, and installed quantities
- Quantity-based percent complete
- Previous-week progress
- Milestone progress
- Analysis by configurable hierarchy
- Drill-down to Scope Item and Claiming Scheme Step level

Transition Guidance

The Quantity Analysis page should be used to review quantity-based progress within the new Design Dashboard, particularly where progress is driven by quantity claims against Scope Items and Claiming Scheme Steps.

This page supports analysis of planned, claimed, and installed quantities, as well as milestone progress,

Figure 6 Quantity Analysis View

Package Summary

The Package Summary page provides a consolidated view of Deliverable Packages and Engineering Work Packages across projects.

It allows users to compare package progress, dates, manhours, milestones, and overdue work without reviewing each package individually.

Key capabilities include:

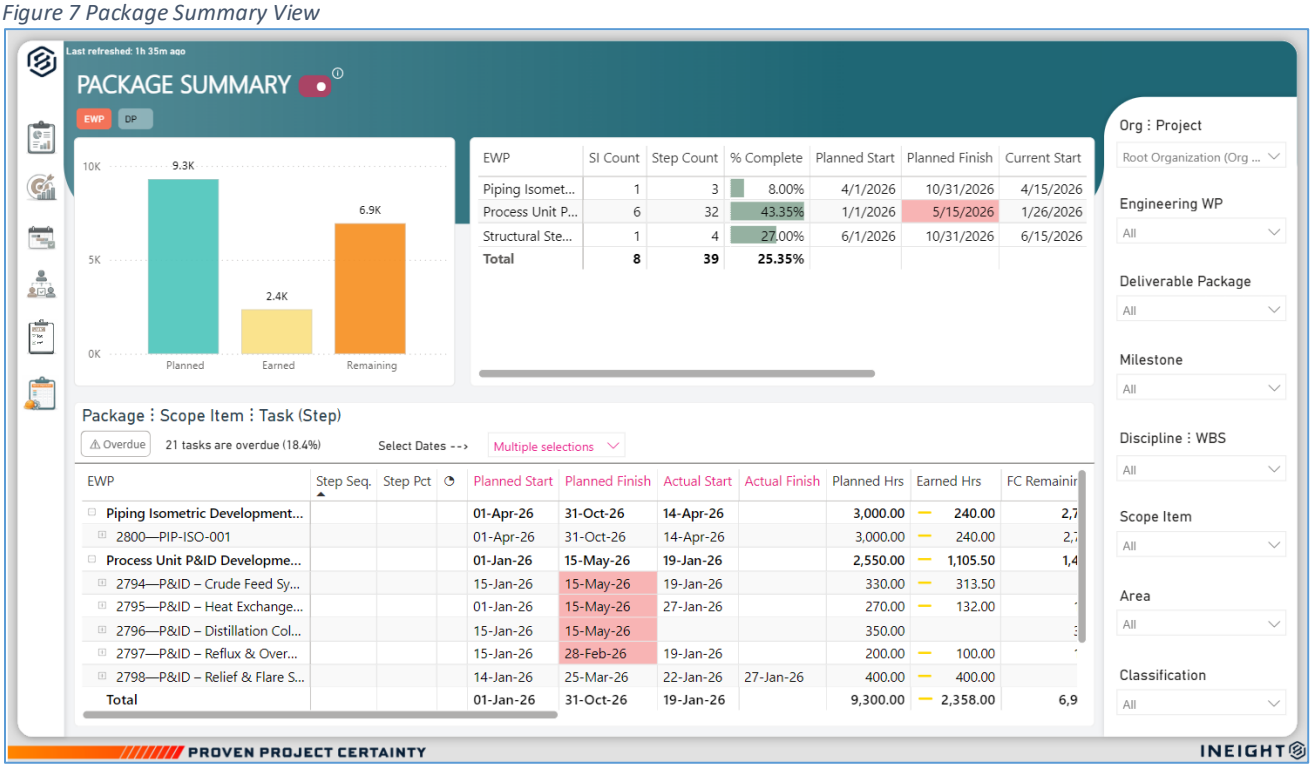
- Package-level percent complete
- Planned, earned, and Forecast Remaining Manhours
- Scope Item and Claiming Scheme Step counts
- Milestone progress
- Planned, Current, and Actual dates
- Overdue work within packages
- Package comparison and portfolio-level analysis

Transition Guidance

Users who previously relied on the Package Summary page in the Design Project Delivery dashboard should use this page for a broader and more comparative view.

Rather than reviewing one package at a time, users can compare packages across projects, identify those with significant remaining effort or overdue work, and drill into the related Scope Items and Claiming Scheme Steps.

Figure 7 Package Summary View



Quantity Forecasting

It brings the key quantity forecasting measures, quantity item details, engineered commodity analysis, and exception indicators into the new Design Dashboard experience.

Key capabilities include:

- Flexible hierarchy-based aggregation using Project, Discipline, Design Element, WBS Phase Code, and Quantity Item
- Summary-grid analysis of quantity, manhour, and cost forecasting measures
- Comparison of budget, current estimate, and forecast values
- Quantity and manhour variance analysis
- Identification of quantity items or components requiring review, including missing manhours, unassigned components, WBS conflicts, and deleted attributes
- Engineered Commodity analysis by quantity stage

Transition Guidance

Users who previously relied on the legacy Design Quantity Forecasting dashboard should use this page for quantity forecasting analysis in the new Design Dashboard.

The page is designed to support the key forecasting and reconciliation activities previously performed in the legacy dashboard, including reviewing quantity items, comparing Current Budget and Current Estimate values, identifying missing or incomplete quantity-related data, and analyzing engineered commodity quantities by stage.

This page should be used alongside the Quantity Analysis page. Quantity Analysis focuses on progress through planned, claimed, and installed quantities, while Qty Forecasting focuses on forecasting, quantity item coverage, Current Budget versus Current Estimate comparison, and related quantity-data exceptions.

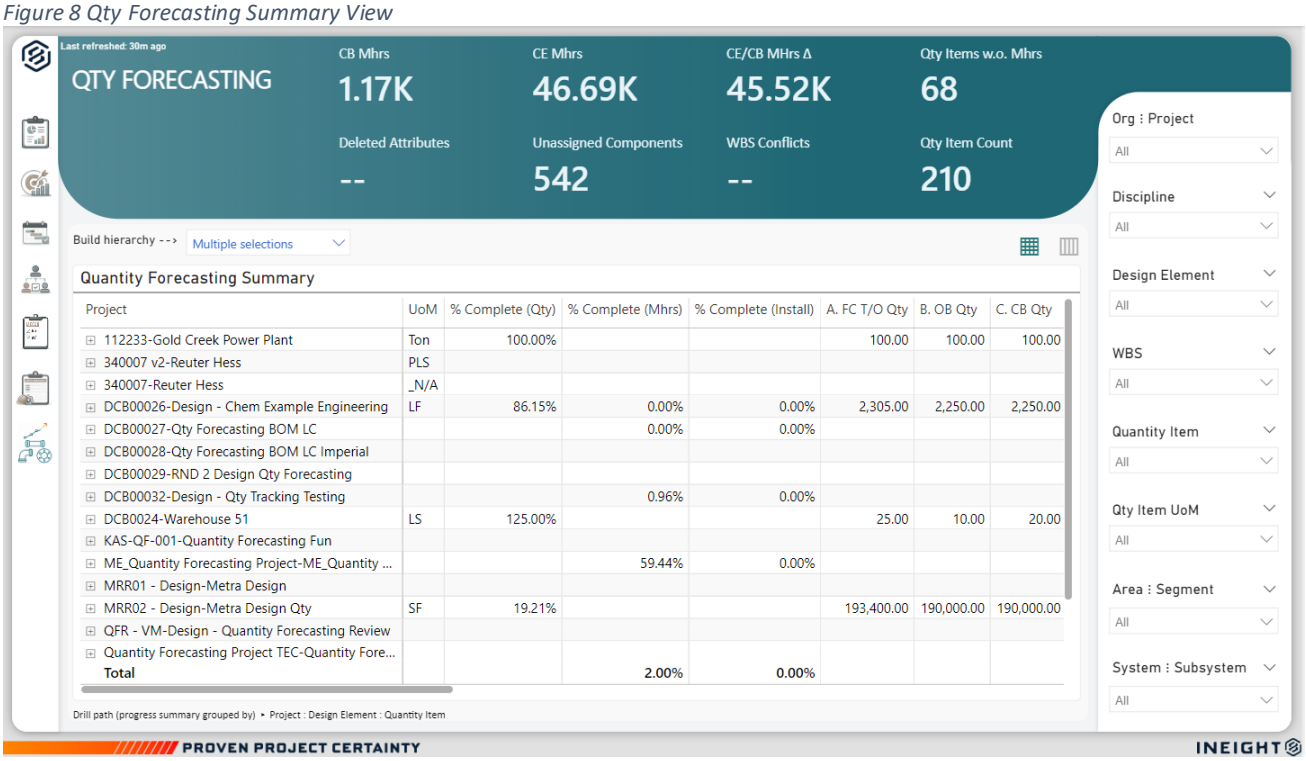



Figure 8 Qty Forecasting Summary View