

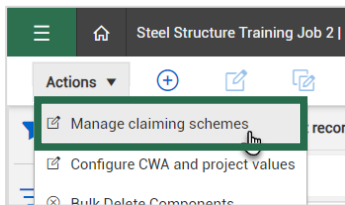
QUICK GUIDE – QUANTITY TRACKING

CLAIMING SCHEMES

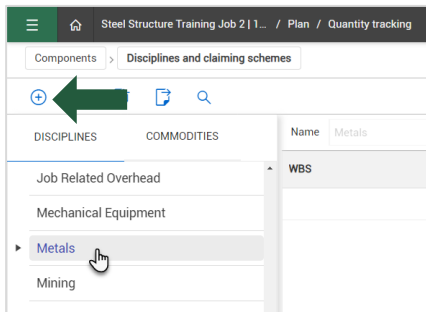


BUILD A CLAIMING SCHEME

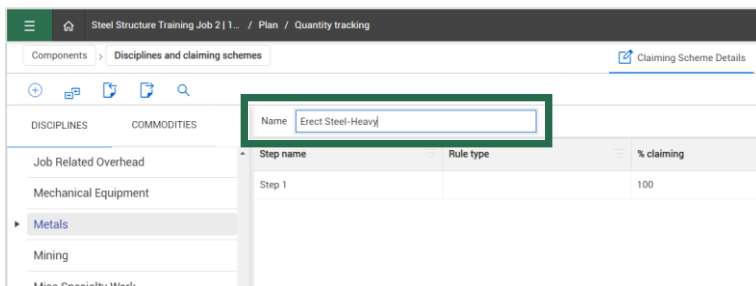
- From the Actions drop-down menu, select **Manage claiming schemes**.



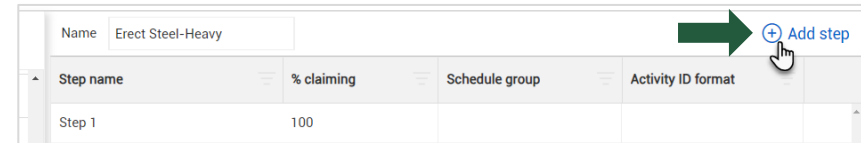
- Select a discipline or commodity from the left menu.
- Click the **Add** icon on the left toolbar.



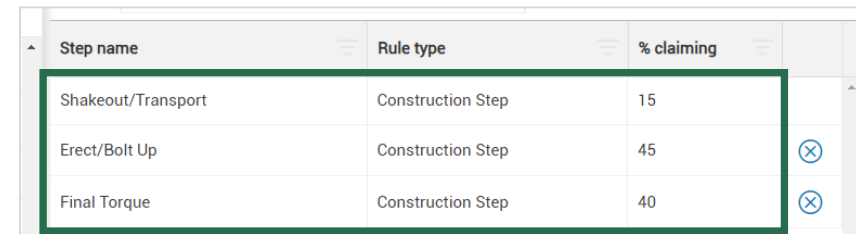
- In the **Name** field, name your new claiming scheme.



- To add steps to your claiming scheme, click **Add Steps**.



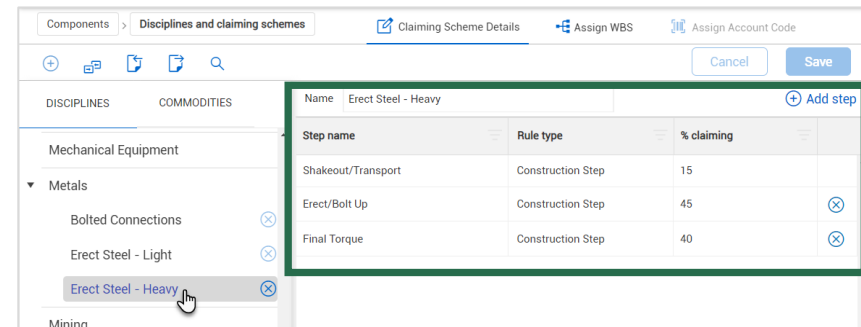
- Rename the new steps and add rule types and percentages.



- Click **Save**.

EDIT CLAIMING SCHEMES

- From the Actions drop-down menu, select **Manage claiming schemes** to return to the Disciplines and claiming schemes page.
- Select a claiming scheme from the left menu.
- In the center panel, select a field to make changes.



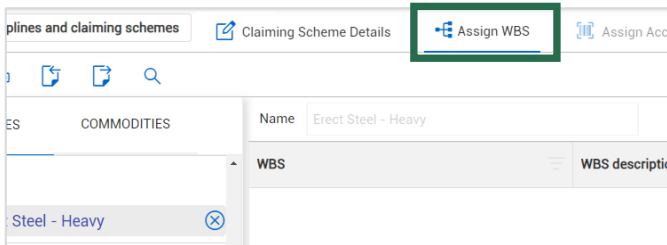
QUICK GUIDE – QUANTITY TRACKING

CLAIMING SCHEMES

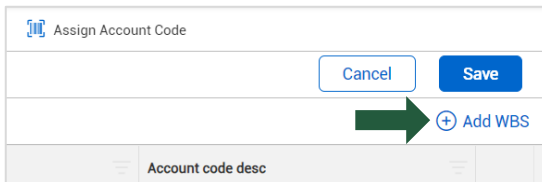


ASSIGN WBS TO CLAIMING SCHEME

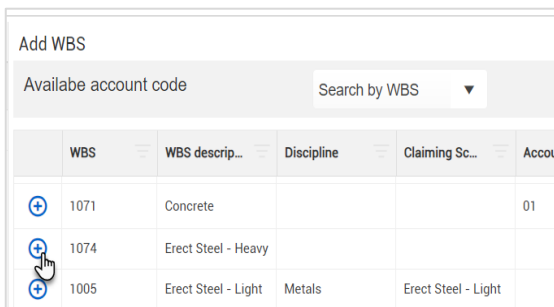
1. From the **Disciplines and claiming schemes** page, select a claiming scheme from the left menu.
2. Select the **Assign WBS** tab from the top menu.



3. Click **Add WBS**.



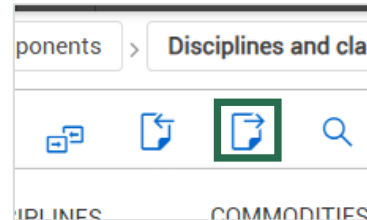
4. Click the **Add icon** to select a WBS.



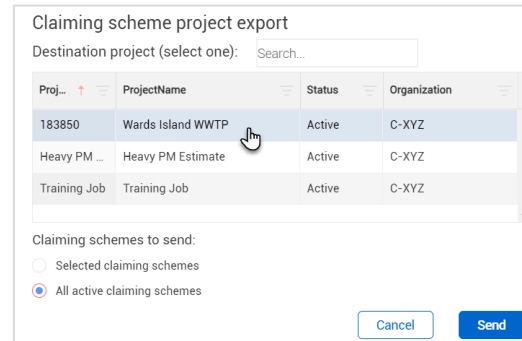
5. When finished, click **Done** at the bottom of the slide-out panel.

EXPORT CLAIMING SCHEMES

1. Click the **Export** icon from the top left menu.



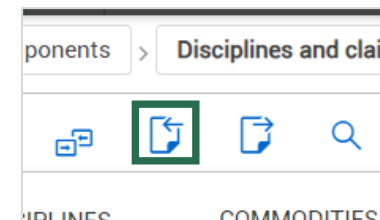
3. Select a destination project from the list.



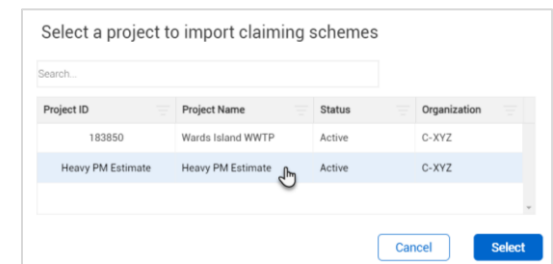
4. Click **Send**.

IMPORT CLAIMING SCHEMES

1. Click the **Import** icon from the top left menu.



2. Select a project from the list.



4. Click **Select**.

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