


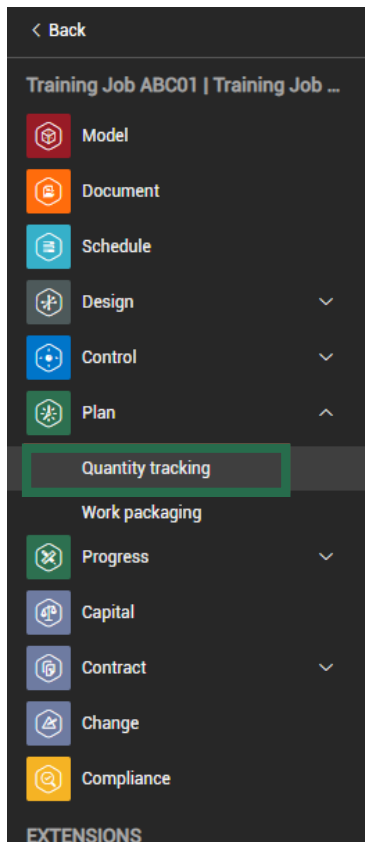
QUICK GUIDE – QUANTITY TRACKING

GENERAL NAVIGATION



LAUNCH QUANTITY TRACKING

1. From the Home Landing Page, select the **Menu**  icon.
2. Select **Plan** from the slide out menu.
3. Select **Quantity Tracking** from the menu.



MOVE A COLUMN

1. In the **Standard Grid** view of the Quantity Tracking module, click on and hold a **column header**.
2. Drag and drop the column in a new location.

Assembly	+ WBS	Type	Discipline / Commod...	C...	WBS
		Material	Pipe		
Contract Sub		Assembly			
		Activity	Electrical	Inst...	1054
		Activity	Electrical	Inst...	1054
		Activity	Electrical	Inst...	1054

SORT A COLUMN

1. In the Standard Grid view of the Components page, click on any **column header** to sort the column in ascending order.
2. Click on a **column header** again (a second time) and the column will filter in descending order.

Name
1002
1003

Ascending order

Name
Sand
Contract Sub

Descending order

FILTER A COLUMN

1. Enter filter terms directly in the box under the column name, then press the **Enter** key.

Name
Module 15
Module 15 - F22: Cross Brace Assembly
Module 15 - E24: Beam Assembly
Module 15 - E23: Cross Brace Assembly
Module 15 - E22: Horizontal Brace Assembly
Module 15 - D23: Cross Brace Assembly
Module 15 - C24: Cross Brace Assembly

2. Click the **Filter** icon to change the operator.
3. Click the **Clear** icon to remove your filter.

Name	Claiming
Module 15	
Module 15 - F22: Cross Brace Assembly	
Module 15 - E24: Beam Assembly	
Module 15 - E23: Cross Brace Assembly	
Module 15 - E22: Horizontal Brace Assen	
Module 15 - D23: Cross Brace Assembly	
Module 15 - C24: Cross Brace Assembly	
Module 15 - C23: Cross Brace Assembly	

Filter dropdown menu options: Is equal to, Is not equal to, Starts with, Contains, Does not contain, Ends with, Is null, Is not null

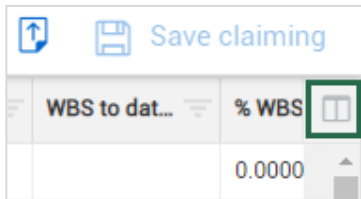
QUICK GUIDE – QUANTITY TRACKING

GENERAL NAVIGATION

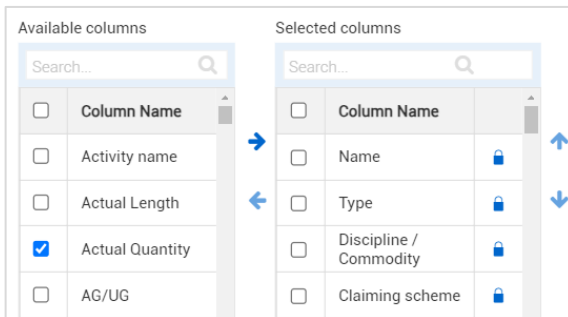


ADDING/REMOVING COLUMNS

1. In the Standard Grid view, select the **Column Chooser** icon.



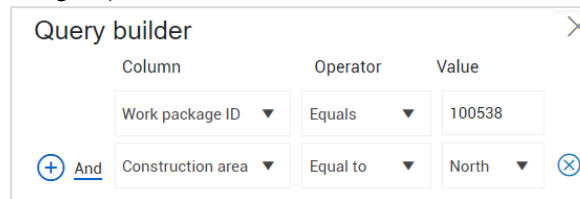
2. **Available columns** appear in the list on the left. Columns currently displayed in the Standard Grid view appear in the **Selected columns** list on the right.
3. Select a column. Use the right arrow to move the column to the **Selected columns** list and add it to the register. Use the left arrow to move the column to the **Available columns** list and remove it from the register.



4. Click **Save**.


CREATING A QUERY

1. Click the **Query** icon.
2. Click the **Add** icon.
3. Select a column and operator from the drop-down lists.
4. Enter a value that you want to filter the column for.
5. Optionally, click the **Add** icon to add more conditions, and then click **And** or **Or** to change how the conditions are grouped.



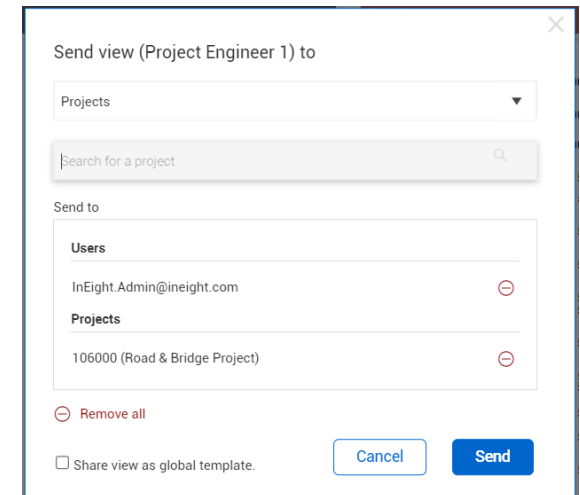
6. Click **Apply** to update results immediately.
7. Click **Save query** to add the query to your saved queries.

CREATE A VIEWSET

1. Select the **View** drop-down arrow.
- 
2. Select **Save current viewset as** from the viewset drop-down list.
 3. In the resulting window, name your preferred view.
 4. Click **Save**.

SEND A VIEWSET

1. Select the **View** drop-down arrow.
2. Select **Send current view**.
3. Select the users and/or projects to send the view to.
4. Click **Send**.



NOTE Each viewset is user specific. However, viewsets do not carry over from the Standard Grid view to the Data Block view. You have to create your viewsets for both the Standard Grid and Data Block views.