INEIGHT

PLATFORM USER GUIDE

PLATFORM

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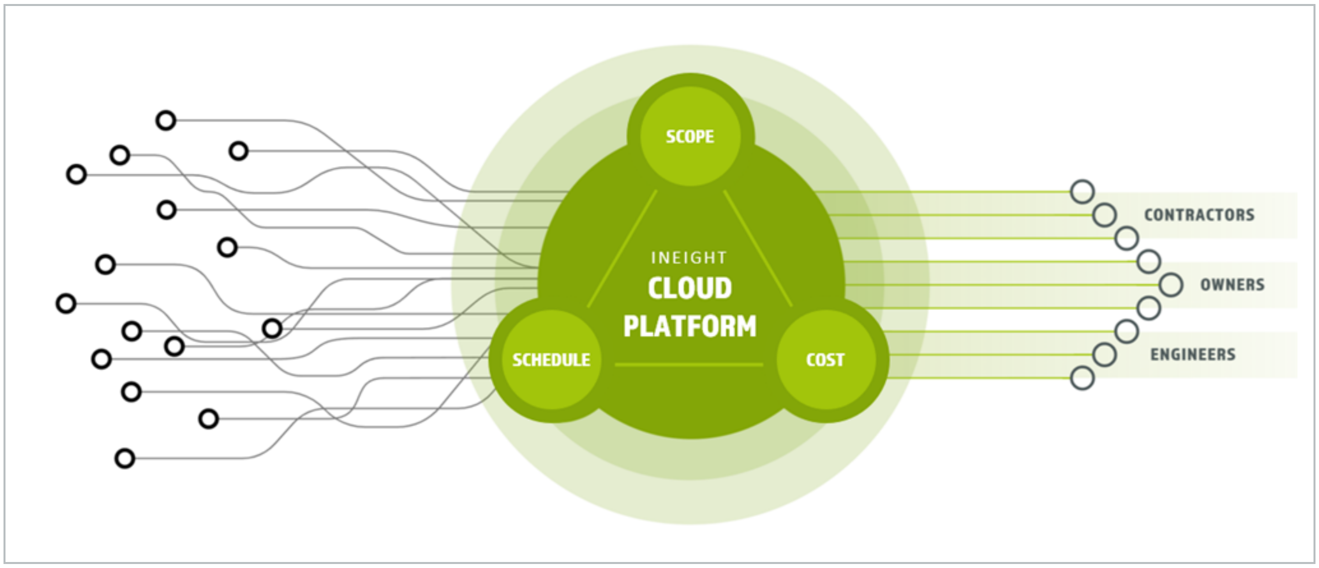
CONTENTS

STEP-BY-STEP PROCEDURES

EXERCISES

CHAPTER 1 – INEIGHT PLATFORM OVERVIEW

1.1 OVERVIEW

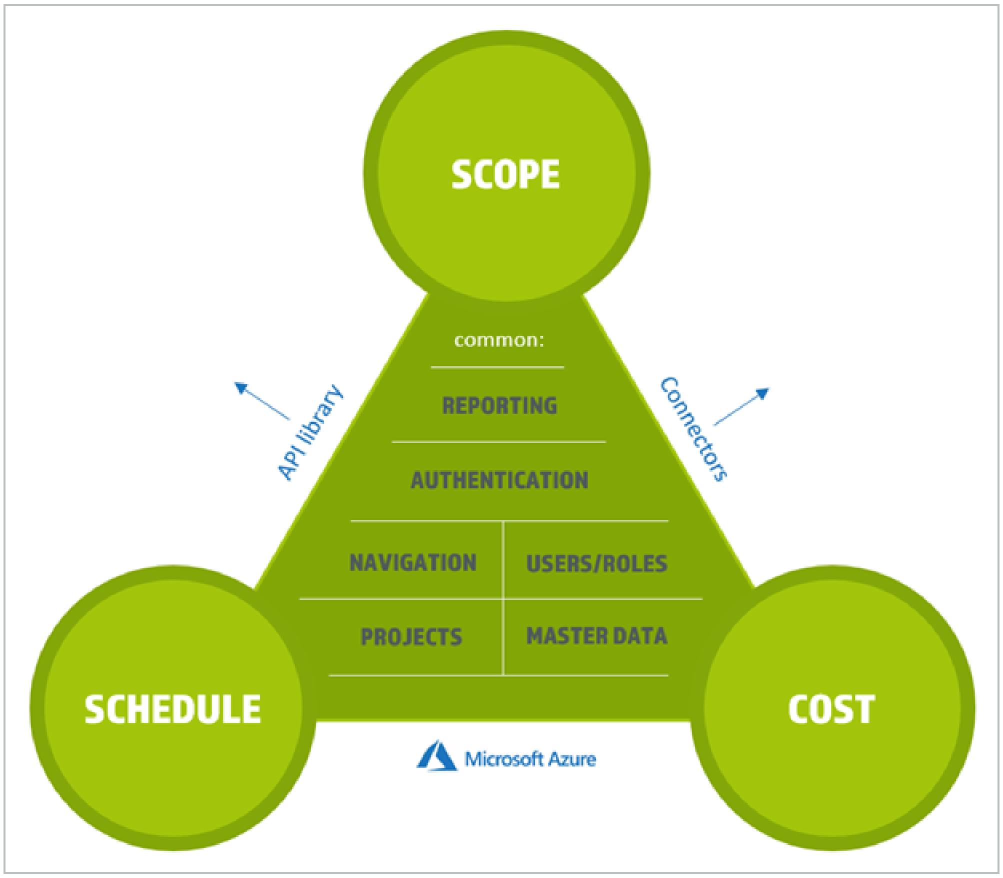


1.1.1 Integration of Applications and Processes

The InEight Cloud Platform performs the primary function of turning disparate data into connected data through a common data environment. Companies using InEight's integrated solutions gain improved ability to collect, manage and report against data, which drives efficiencies in execution.

Connecting and sharing data between all InEight applications involved in managing a project allows project management workflows to pass between jobsite, field office, and front office seamlessly within a consistent and standardized user interface.

The InEight portfolio of products run on the Microsoft Azure platform, which has data centers throughout the world.



Key project information can also be exchanged with 3rd-party applications such as ERP systems (*i.e.,* SAP, Oracle), scheduling applications (*i.e.,* Primavera), and document management applications (*i.e.,* SharePoint) via configurable integration points.

Along with connecting applications, InEight Platform is the underlying administrative system for the InEight product applications. When you first launch the InEight suite of applications, you start out in Platform. From here you can navigate to the other InEight applications that your company has purchased, and have been given permissions to access.

1.1.2 Data Management

InEight Platform is so named because all InEight applications use it as the storage area for master data to be retrieved by all applications. Master data for user management, roles and permissions, application integrations, organization and project settings, and more is located and managed in Platform, and made available to other applications as necessary.

This data used by the InEight applications is organized and stored under Suite administration, Master data libraries, Organization settings, and Project settings that can be accessed from the Main menu.

1.1.3 Cross-Platform Functionality

If you work in more than one of InEight applications, you will find some common functionality that exists regardless of the application you are using.

Cross-Platform Functions	
Communications	Some tasks performed in the InEight applications will trigger notifications to occur, either in the application itself or sent via email.
Document Management	This includes internal document management with InEight Document, as well as integrations with 3rd-party document management solutions such as SharePoint.
Log Management	Within various InEight applications, you will find audit logs that provide an audit trail of user activity and transactions performed.

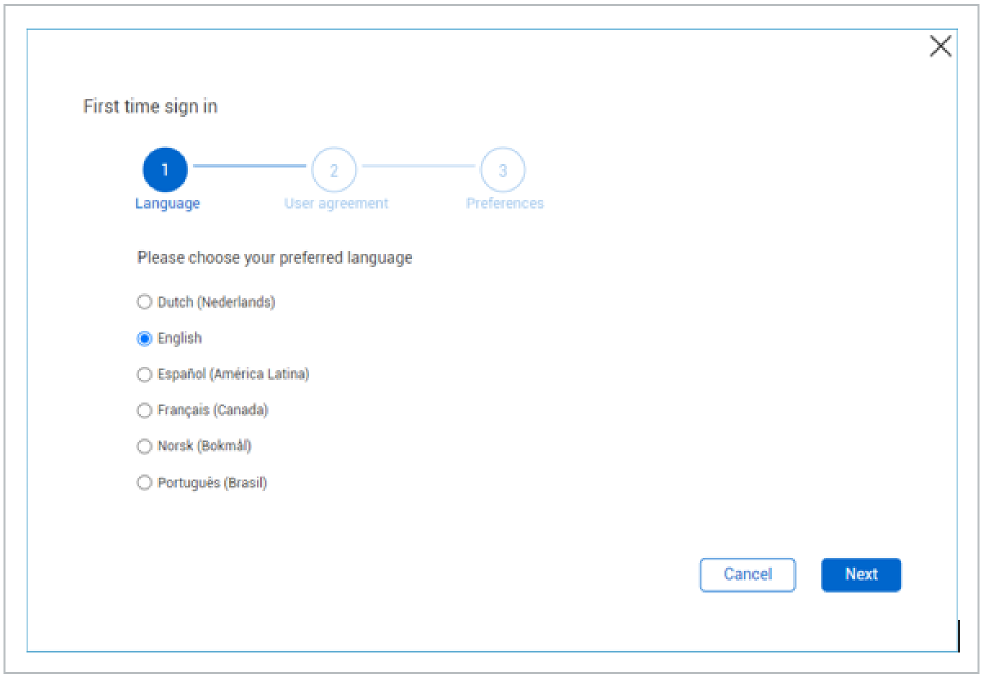
1.2 FIRST TIME SIGN IN

As a new user to the InEight suite of products, the First-time sign in dialog boxes show when you first sign into InEight Platform, which present you with a series of questions about your working environment in the InEight applications. Preferences are set for language, date and number formats, and the User Agreement, which you must accept before you can continue.

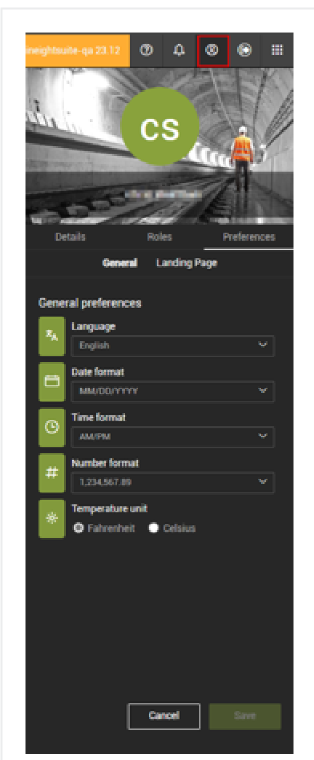
The First-time sign in dialog boxes only show for the initial sign-in to any of the InEight products.

1.2.1 Language

Choose your preferred system language to be shown throughout the application.

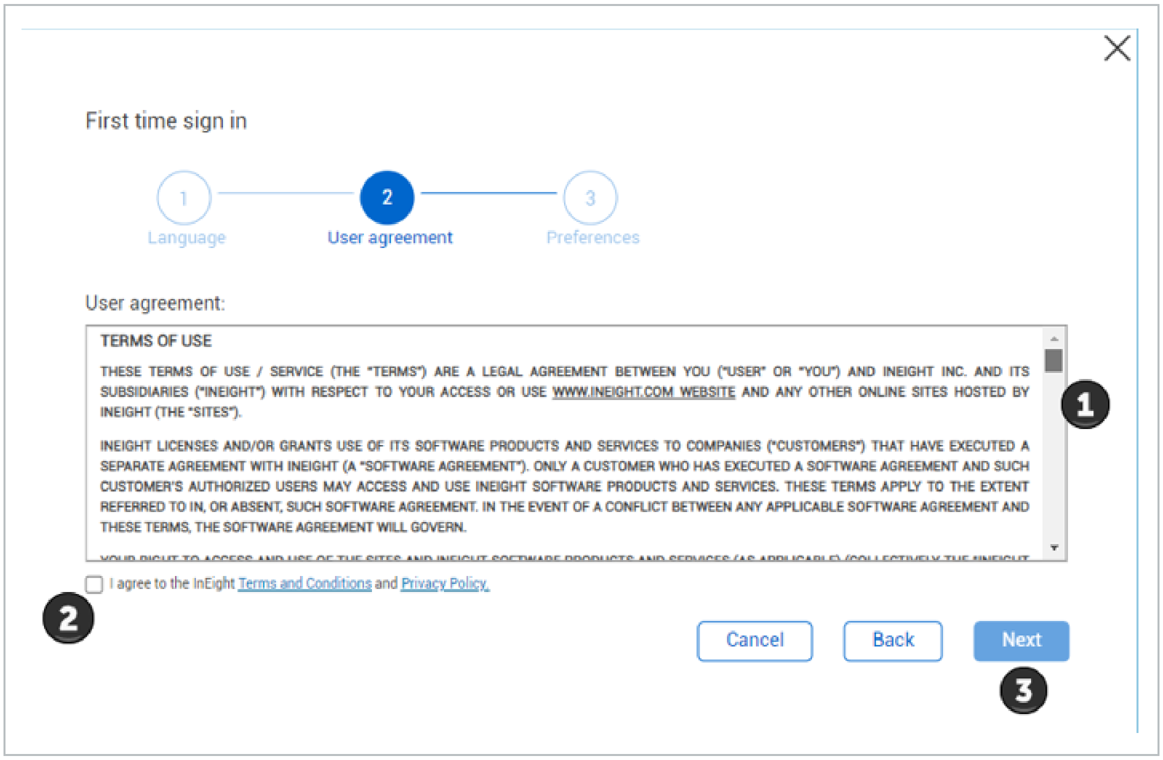


If needed, you can change your selected preferences later in your profile Preferences > **General**.



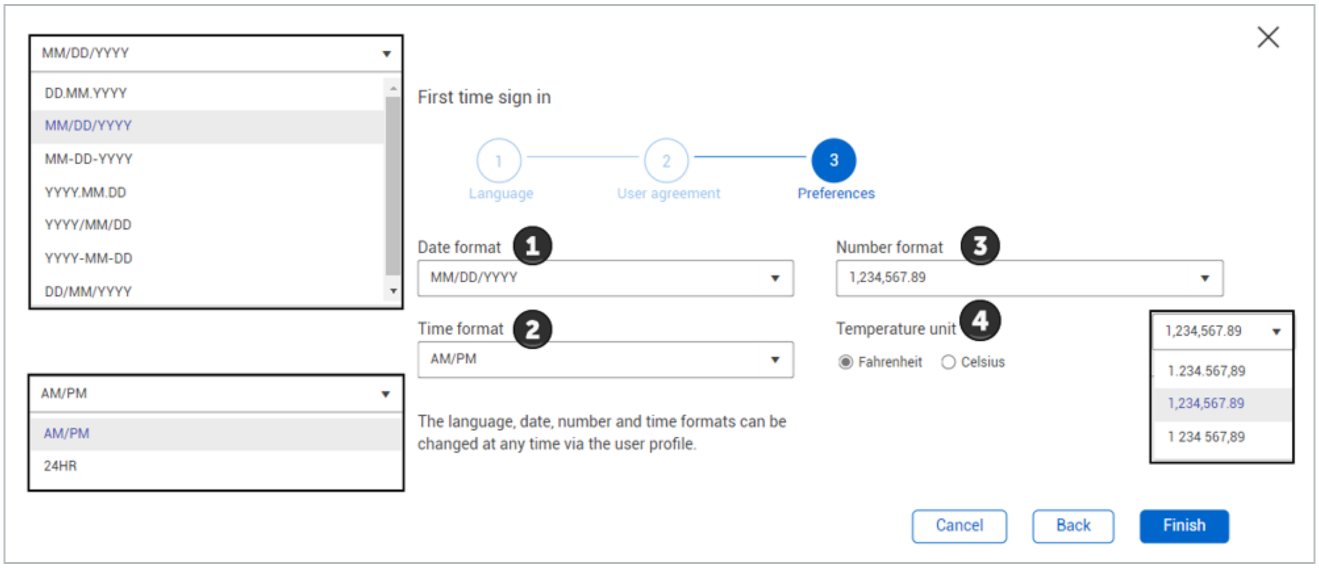
1.2.2 User Agreement

Use the **scroll bar** to read through the entire user agreement. Select the **check box** to agree with the terms and conditions and privacy policy. Click **Next**.



1.2.3 Preferences

Title		Description
1	Date Format	Select the date format that you want to show in all the applications.
2	Time Format	Select either the AM/PM 12-hour format or the 24-hour format.
3	Number Format	Select a numbering format that you want to show in all the applications
4	Temperature Unit	Select either Fahrenheit or Celsius for the temperature unit.



Click **Finish** when you are done selecting preferences.

1.3 NAVIGATION

The top navigation bar can be accessed from any of the InEight applications which gives you the ability to access and visibility to all areas of your daily responsibilities.

Title		Description
1	Main menu	Provides menu type navigation to projects and organizations, and access to all InEight applications in a single location.
2	Home	Returns to your user landing page, organization home page or the project home page that you were last working in.
3	Page	Shows the current site location (breadcrumbs) within the InEight cloud platform.
4	Help	Provides tutorials and other help content.
5	Notifications	Shows communications from administrators when an action is necessary, changes have been made, or other application information.

	Title	Description
6	User profile	Provides access to general settings and other user specific information that includes roles and custom landing page views
7	Sign out	Signs you out of your InEight cloud platform account.
8	Applications	Provides an alternate way to access InEight applications.

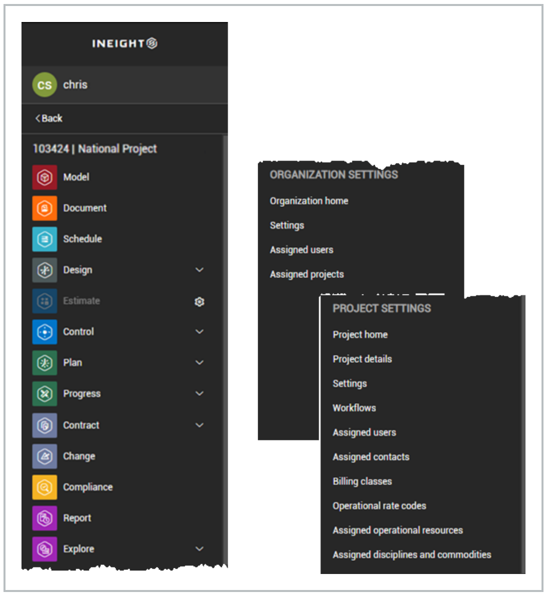
1.3.1 Main Menu

The Main menu navigation dynamically changes based on the selection of a project or an organization, your level of permissions, and the application you choose. The Main menu icon () also changes to match the color associated with the application group you are working in. The Main menu is separated into three major areas of functionality that are accessible at any time, depending on your access and business process. Main menu is separated into three primary sections: Favorites, Settings, and InEight Online.

1.3.1.1 Favorites

In the Favorites section of the Main menu, you can bookmark projects and organizations that you access most frequently. After saving favorites, the Main menu shows a combination of the first five organizations or projects that you selected. If you have more than five favorites saved, click **Show more +** to expand the list and show the additional organizations or projects.

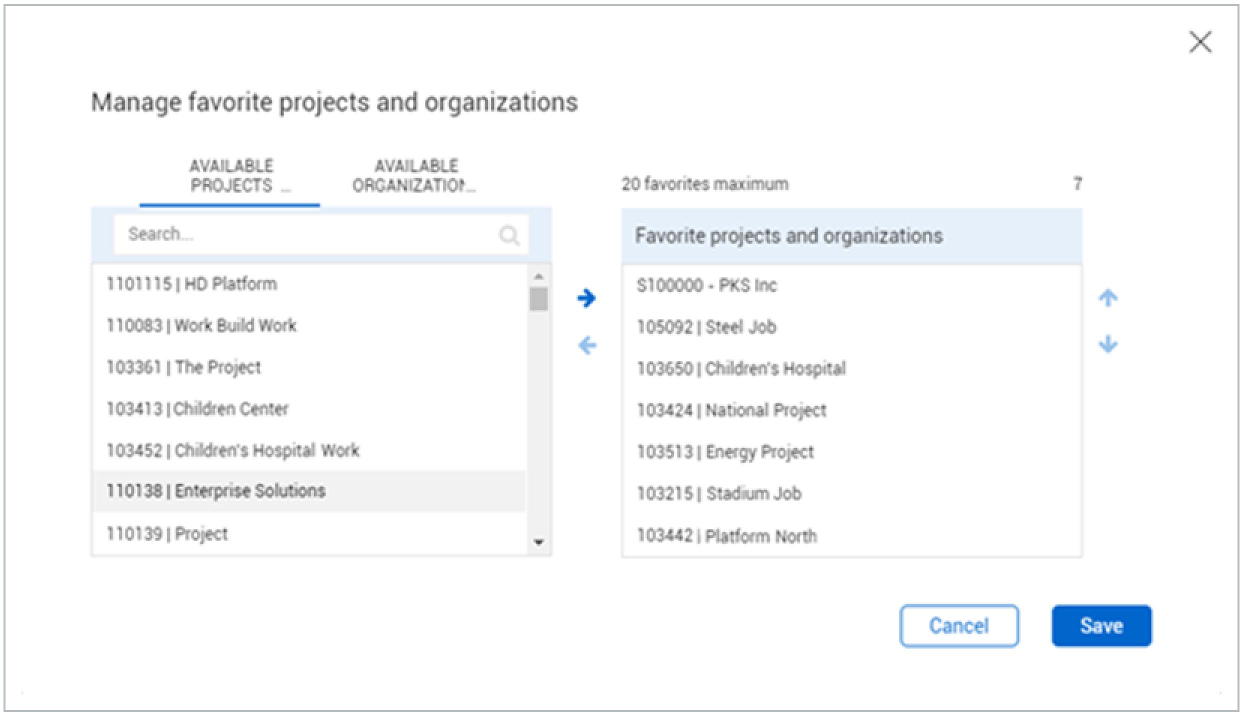
When you select a project or organization from your favorites, the menu updates to show the available applications. From this menu view, you can select and open an application or module, or access project settings or organization settings. Click the project or organization name to open the home page.



Add a project or organization to Favorites

The Main menu provides you with the option to make favorites of those projects and organizations most frequently accessed. The maximum number of organizations and projects that you can included in your favorites list is 20.

1. Click the **Manage favorites** () icon in the Main menu to add favorites or make changes to your current list.
2. Click to include new projects and organizations or click to remove projects and organizations from your list.



3. Click the up and down arrows to change the Favorites list order.
4. Click **Save** to keep the changes.

1.3.1.2 Settings

The Main menu dynamically updates to show access to Master data libraries, Suite administration, and Profile functions if you have the required administrative roles and permissions. If you do not have permissions to access Master data libraries or Suite administration, these items are hidden in the menu.

> The actions you can perform in the InEight platform and portfolio of products are based on the roles and permissions assigned to your user profile.

All projects & organizations

From the Main menu under Settings, click **All projects & organizations**. The page opens to the Projects tab that shows a list of all available projects, where you can select the project to work in. Select the Organizations tab to see the list of organizations available in the InEight cloud platform and the organization breakdown structure. From these tabs you can view project/organization information, add a new project/organization, change the list order, add or remove columns, and edit certain project/organization information.

For more details and additional information, see All Projects & Organizations.

Master data libraries

Master data libraries can be accessed if you have view permissions for any of the entities at the account level of your environment. When you select an item from Master data libraries, the name of the area shows in the top navigation bar next to the Home icon.

For more details and additional information, see Master data libraries.

Suite administration

Suite administration can be accessed if you have view permissions for any of the administration areas such as User management or Roles and permissions at the account level in your environment. When you select an item from Suite administration, the name of the area shows in the top navigation bar next to the Home icon.

Profile

Profile provides an alternate navigation path to the User Profile, Notifications, and Sign out icons that are located on the right side of the top navigation bar. This functionality ensures you can access user specific areas when your screen resolution or device limits visibility of the top navigation bar.

1.3.1.3 Connected analytics

Quick access links to InEight Report and InEight Explore applications, which are available to all users in an organization that have been assigned the applicable role or permissions.

1.3.1.4 InEight online

The InEight Online navigation provides links to InEight product overviews and solutions, training and support services, and up-to-date information available on the InEight website.

- From the Explore products menu, you can get information on all the InEight product solutions available in the construction project management software offerings. This lets you quickly browse and learn more about each individual product solution.
- From the InEight Learning and Support menu, you can access the InEight Knowledge Library for online help including topics, videos, and release notes. Online training provides a link to InEight U for e-learning courses and certifications, and Contact support provides technical assistance such as creating a support ticket.

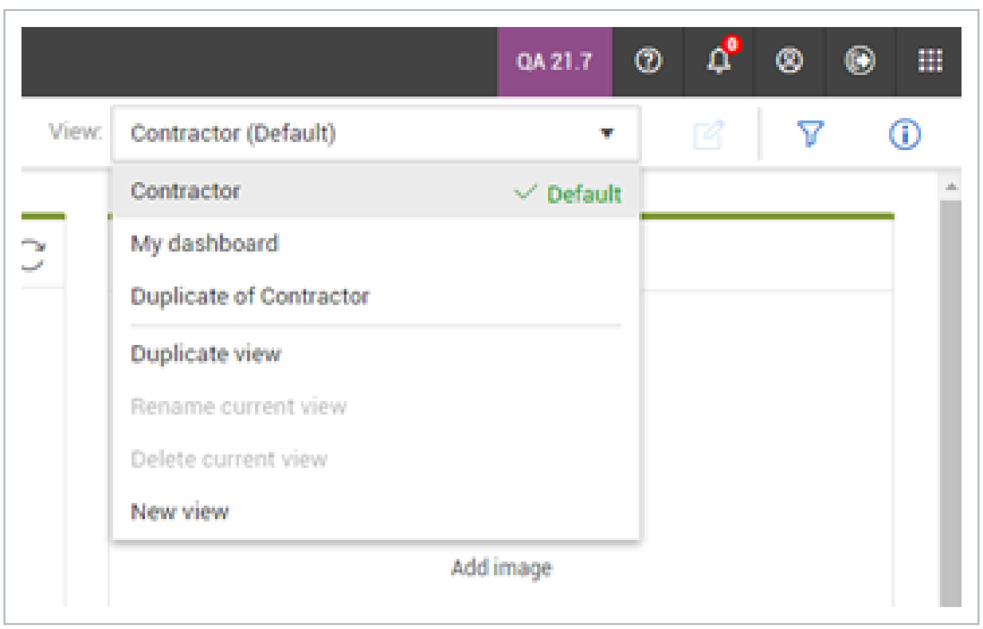
- InEight.com gives you quick access to the website for customer stories, blogs, industry events, webinars, partners and integrations, and the product finder page.

1.4 LANDING PAGE

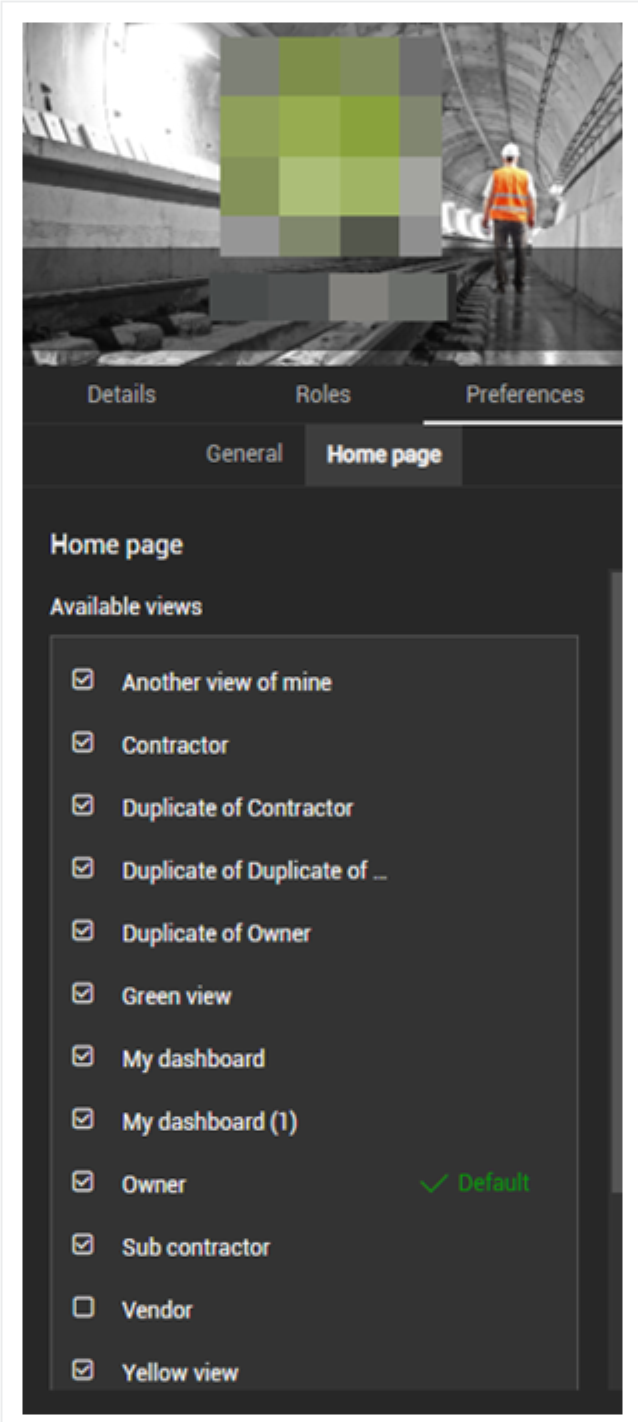
When you sign in to the InEight cloud platform, the view opens to a user-specific landing page. Initially, the page opens to a predefined view (Owner, Contractor, Subcontractor, Vendor) depending on your assigned role. Landing pages can be customized to focus on your day-to-day tasks and areas specific to your role on projects. You can modify a view or create your own view based on available widgets for those applications you permission to access. There are standard default widgets available across InEight applications that can be filtered to include all your projects or several specific projects. The purpose of these widgets show as tiles in the view that is to give you visibility to high level information and in some instances they can be expanded in the application to show for more details.

1.4.1 Views list

Landing page views are a collection of tiles with widgets that are organized on the page. The landing page can have one or more views depending on your roles or the customizations you make. Click the **View** list drop-down to select from the available views. From the View list, you can select a different view or change the default view. To change your default view from the View list, hover over a view and then click **Set as default** to select the view as your new default.



Open your user profile to select the landing page views that you want to show in the View list. Click the **User Profile** icon in the top navigation bar, and then click Preferences > **Home page**. The list shows all your available views for the landing page. You can save up to a maximum of 50 views in your user profile list and all available views will show here. However, to keep the landing page View list manageable, you can have a maximum of 15 views that show in the Views list. If you have more than 15 views in your user profile, you must select the views that you want to show in the View list.



You can change your default view from the Home page tab. In Available views, hover over a view, and then click **Set as default**. Click **Save** to select the view as your new default.

> If you make changes to your user profile list, you must refresh the landing page to see the changes in the View list.

1.4.1.1 View types

There are three types of views available on the landing page, system, default, and custom.

- The Owner, Contractor, Subcontractor and Vendor views are system views included out-of-the-box from InEight. System views provide examples of some suggested widgets and functionality for each of these views, so you can create your own views based on these system views. System views can be duplicated but cannot be modified or deleted.
- A default view is always loaded when you sign into your account or when you click the Home icon. The default view can be selected for your profile by using the global default setting, from the View list on the landing page, or in your user profile.

  An administrator sets the global default and selects one of the system views that is the initial default view for all users on their landing page. This option is set at the account level in Organization > Settings > General > Global Options > **Landing page default view**. By default, the view is set to the Owner view. Access to this setting requires that you to have a role assigned at the Root Org level with the permission View general settings. To update the default view for all users requires the permission View general settings and Edit general settings.
- You can create custom views, which are saved in your user profile and available for you to use. There are two options you can choose from to create views, Duplicate view and New view.
  - A duplicate view is created using an existing view as a template. A duplicate view starts with the configuration of a selected view that you can modify the contents of into another view by adding and removing widgets, rearranging tiles, and then giving the view a new name.
  - A new view starts as a blank view that you can add any widgets and arrange tiles from scratch. A new view should be created when the view you want to use does not conform to any existing views. You will have the option of giving this view a name when complete.

1.4.1.2 Assign views to a role

To assign views to a user role, a new section, View assignments, in roles and permissions has been added to allow up to five system views to be assigned to a single user role. Users inherit any system view that has been assigned to their role.

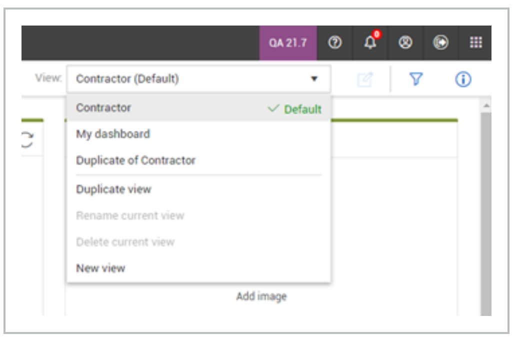
To view or configure (add, edit) the system views assigned to a role, go to Suite Administration > Roles and permissions. Select either Add role or Edit role. This requires the permissions View roles and permissions, Add roles and permissions, or Edit roles and permissions (respectively).

In View assignments, you can assign or unassign system views to that role. Every user assigned to that role will have access to the system views associated with that role.

1.5 CUSTOM VIEWS

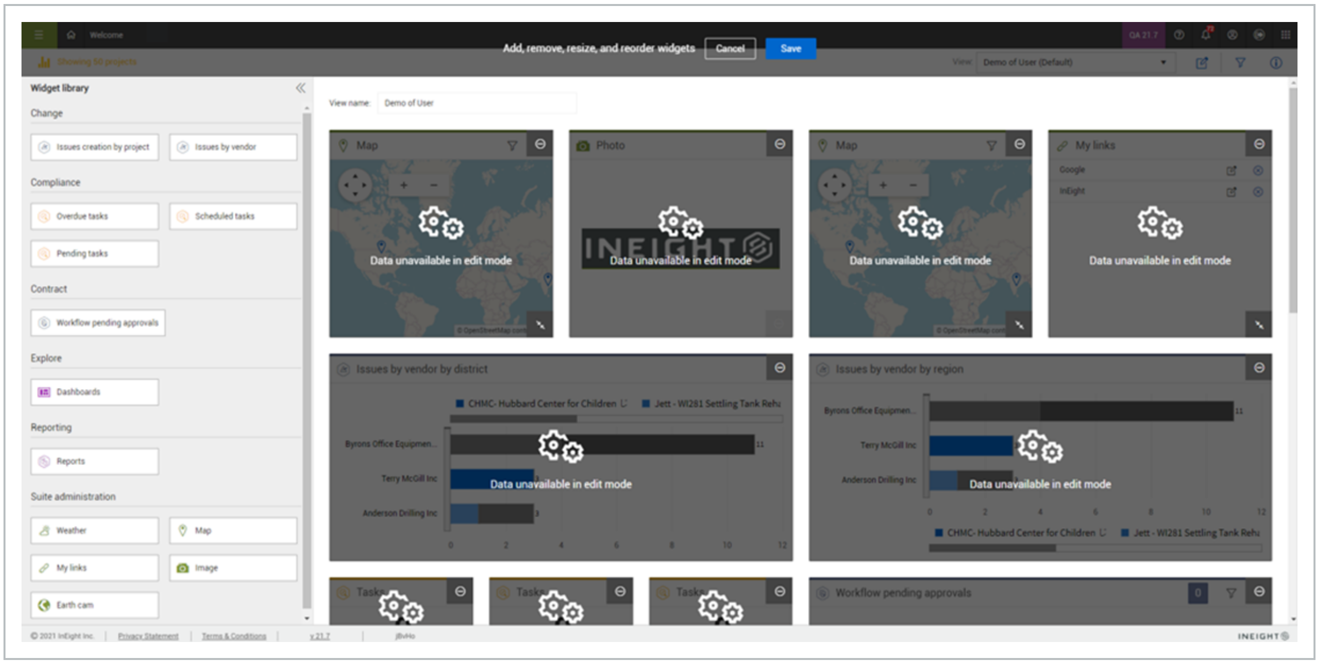
> Custom views are only show in a user profile and available to the user that created it. Custom views cannot be assigned to a role.

You can create custom views as needed across projects and applications for your area of responsibility. To create a custom view, click the View list, and then select either **Duplicate view** or **New view**.



A duplicate view is a new view based on the current system or custom view open, and it is an exact copy, which includes widget selection and tile configuration. A new view starts as a blank page that allows you to add any applicable widgets you want and configure the layout as needed.

When choose to create a custom view, the page opens to the staging area (edit view mode). The staging area lets you add and remove widgets, arrange and resize tiles, and modify the view name.



After your custom view is created and saved, you can click the Edit icon in the View toolbar at any time to make changes.

1.5.1 Save and delete a custom view

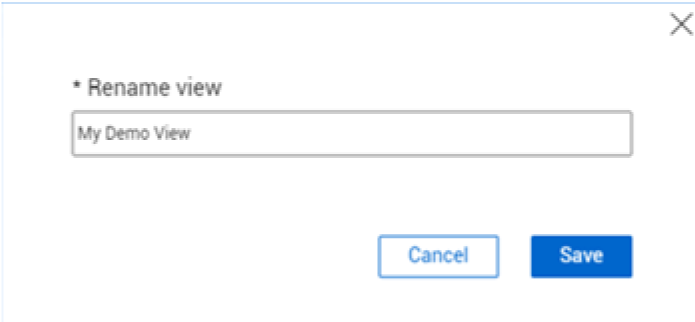
Click **Save** after you have completed creating your new view or making modifications to an existing view. After the view is saved, it opens to the live version of the view, and all widgets will fetch the applicable data.

You can delete a custom view at any time from the View list. To delete a view, select the view, and then click **Delete current view**. A confirmation dialog box opens before the view is deleted. Deleted views cannot be restored.

1.5.2 Change view name

By default, the system assigns the name My dashboard to the view. If there are already instances of the My dashboard view, the system appends a copy number following the name for example, My dashboard (2). To change the view name, click in the View name box and enter the new name. Click **Save** and the view will show in the View list.

You can also change the name of any existing custom view at any time. Open the view, and then select **Rename current view** in the View drop-down list. The Rename view dialog box opens for you to enter the new name, and then click **Save**.



1.6 WIDGETS AND TILES

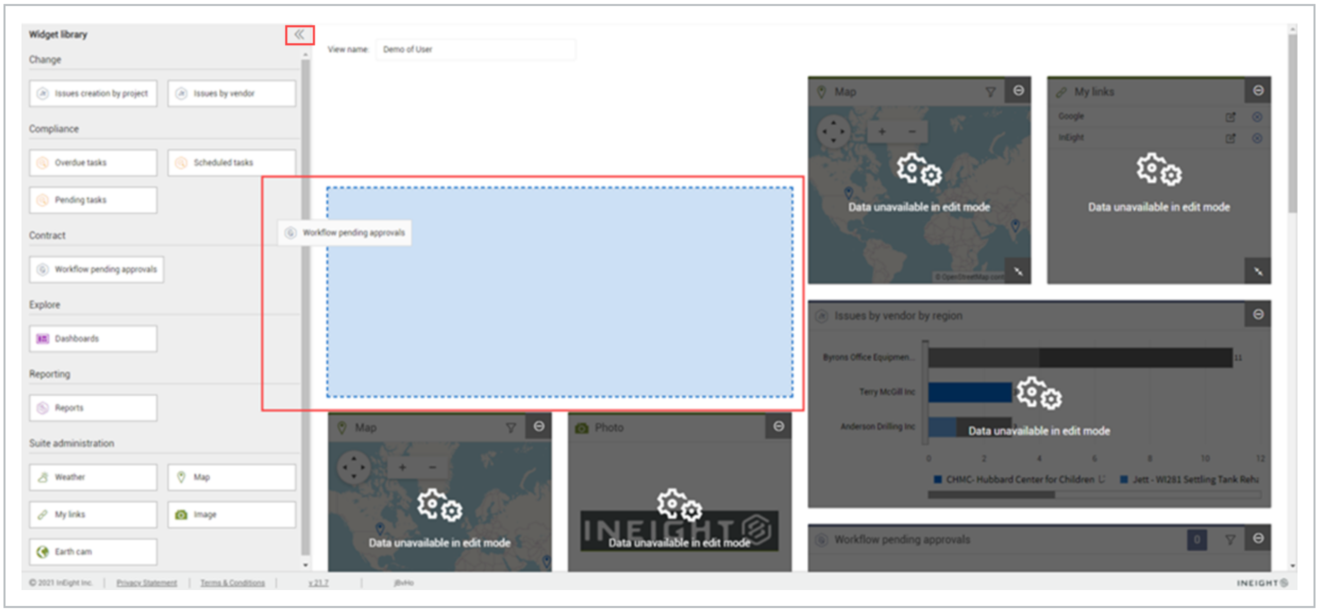
The staging area of the edit screen allows you to add or remove widgets as needed. All the available widgets that you can add are shown in the Widget library on the right side of the staging area page.

> The Widget library contents are based on the applications that are available to you through permissions and licensing.

To add a widget to your view, click and drag the widget from the Widget library into position in the staging area. The widgets in the staging area adjust to allow placement of the new widget. You can add multiple instances of the same widget to the view as needed. Click the arrows to minimize or expand the Widget library.

> Background data fetches might occur when widgets are added to the staging area, but the data is unavailable until you save the view and return to the live mode.

To remove a widget from a view, click the **Remove icon** () of a widget in the staging area. If you remove a widget unintentionally, you can add the widget back in the view by from the widget library.



1.6.1 Arrange widgets

After you move the widgets you want into the staging area, you can click and drag them into place where you want the widget to show in the view. Existing widgets will move to the closest available area according to the size of the widget. There is no restriction on how you use the available space and whether to fill empty areas or leave them open.

1.6.2 Resize widgets

There are some widgets that can be resized and adjusted in the staging area. To resize a widget, click the **Resize** icon () and adjust to the size as needed. The other widgets around it will move to the closest available area.

1.6.3 Widget details by application

- Map (InEight Platform): Shows project markers on a map determined by the locations of the projects. Projects must have longitude and latitude data entered to show on the map.
- Weather (InEight Platform): View various weather metrics of any configurable location.
- My links (InEight Platform): Configure quick access links.
- Image (InEight Platform): Configure custom image.

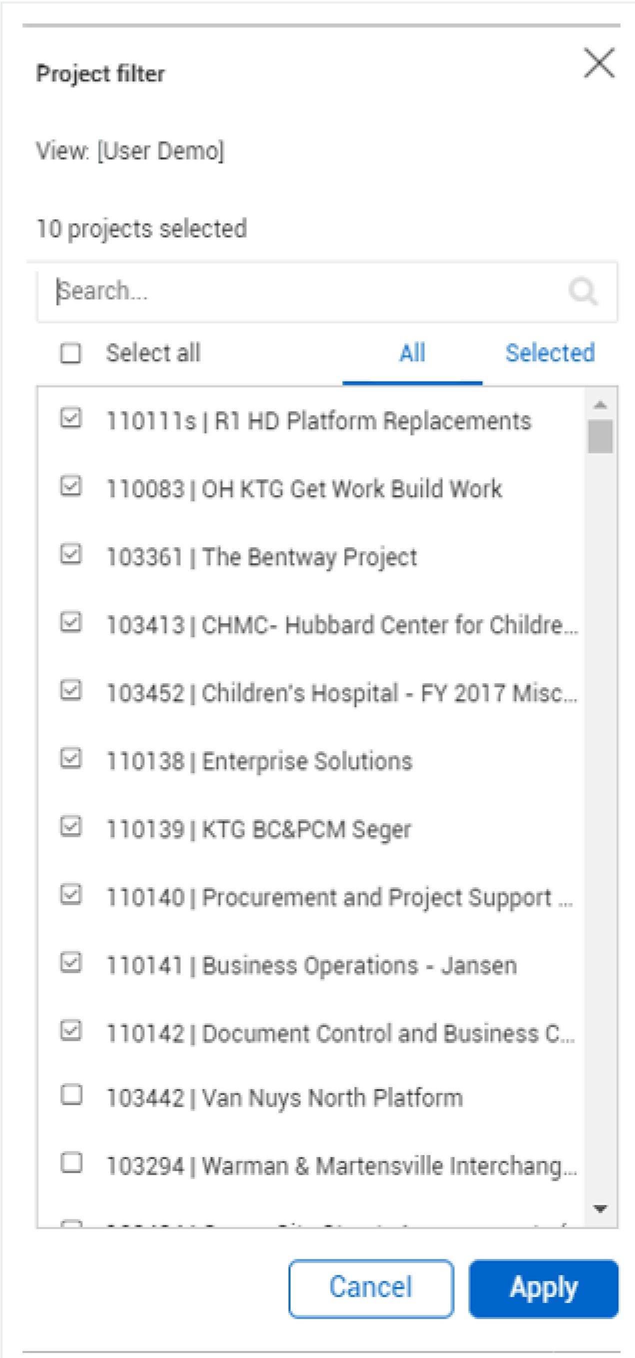
- EarthCam (InEight Platform): Configure a live EarthCam video stream on the widget area.
- Overdue tasks (InEight Compliance): Shows a count of overdue tasks, which could be clicked to take you to that page.
- Pending tasks (InEight Compliance): Shows a count of pending tasks, which could be clicked to take you to that page.
- Scheduled tasks (InEight Compliance): Shows a count of scheduled tasks, which could be clicked to take you to that page.
- Workflow pending approvals (InEight Contract): Shows a summary of project specific workflows pending approval.
- Issues by vendor (InEight Change): Shows a count of issues on selected projects for all the vendors on the projects.
- Issue creation by project (InEight Change): Shows a count of all issues on selected projects, including information of when they were created.
- Dashboard (InEight Explore): Shows the selected dashboard from explore in the widget area.
- Reports (InEight Report): Shows a list of reports which could be selected to navigate you to the corresponding report.
- Time phased distribution (InEight Control): Shows a single project specific Control metrics including past and future metrics like Actuals, Earned budget, Time phased budget and Time phased forecast in a graph.
- Value change over time (InEight Control): Shows a single project specific Control metrics including past and future metrics like Current estimate, Current budget, Forecast in a graph.

1.6.4 Widgets in system views

- Owner view: All Platform widgets, all Compliance widgets, all Contract widgets, all Report widgets, all Control widgets.
- Vendor view: All Platform widgets, all Compliance widgets, all Report widgets.
- Contractor view: All Platform widgets, all Compliance widgets, all Report widgets, all Control widgets, all Contract widgets.
- Sub-Contractor view: All Platform widgets, all Compliance widgets, all Report widgets.

1.6.5 Project filter

You can select and filter a set of projects to show as a collection of tiles using data from those projects in the view. Click the **Filter projects** icon in the top toolbar to include a subset (up to 50 maximum) of your available projects in a view.



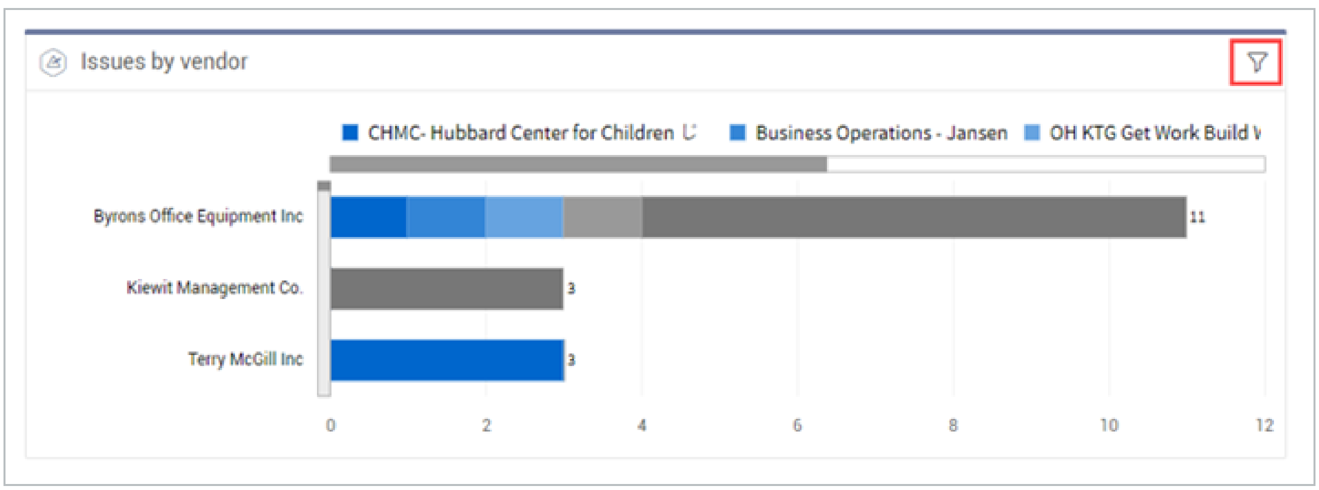
The Project filter slide-out panel shows the following:

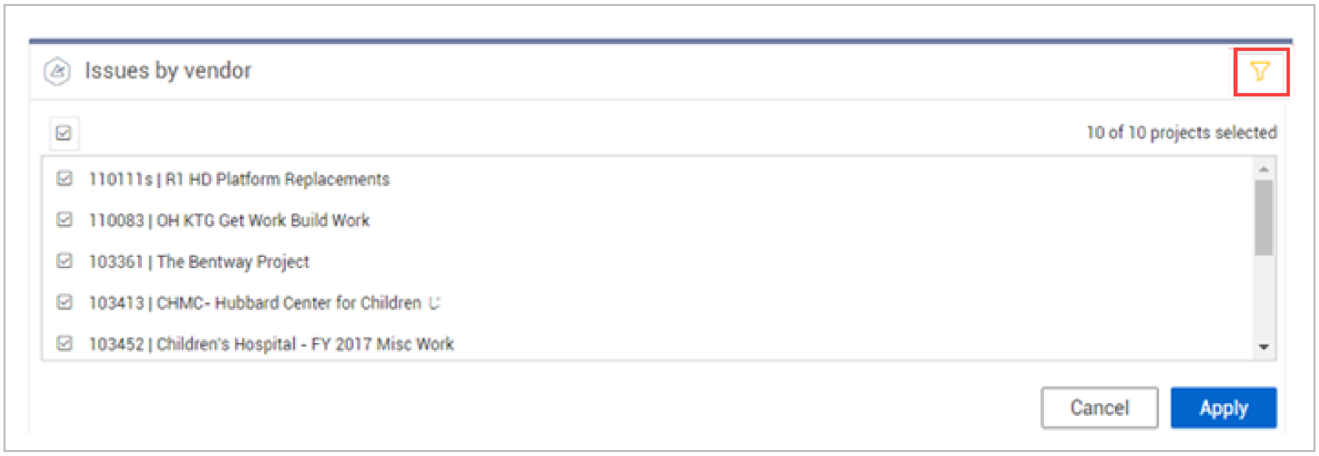
- View: The name of the view currently selected.
- Number of projects selected: Indicates the number of projects currently selected.
- Search: Provides the function to search your list of available projects.
- All or Selected: Toggles to show all projects or to show only selected projects.
- Cancel/Apply: Discards or saves your selection of projects.

The project filters are saved with the current view in your user profile so, every time you open the view your project selection shows. The number of projects, either filtered or total, is shown below the Home icon. If you do not have any projects selected for the view, it shows a prompt to select a project to update your project filter. Some tiles will not show any data if there are no projects selected. A maximum of 1500 projects can be selected in a filtered view.

1.6.6 Tile filters

When you have multiple projects in the selected view, depending on the widget used, some tiles show data from all those projects. If the tile shows data for multiple projects, the Filter icon allows you to filter to show only a specific project or projects.

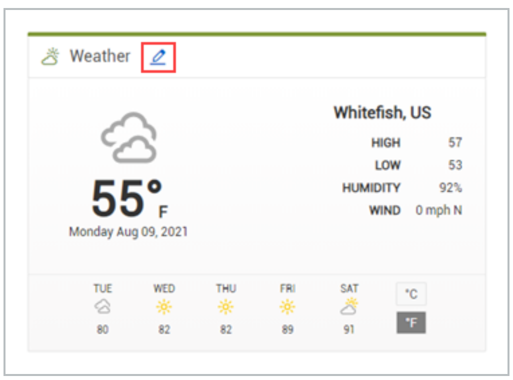




When you duplicate a view, the view level or tile level projects are also copied. The configurations can then be updated in the duplicated view.

1.6.7 Tile names

Hover over a tile name to rename it. Click the **Edit** icon, change the name, and then click the **Save** icon. This customization is useful to differentiate between tiles if you have multiple copies of the same tile in the view.



There are some additional options for specific widgets that allow for individual configurations, such as specifying the location for the weather, or adding new links to the My links tile. Other widgets could have additional options to configure that are not detailed in these release notes.

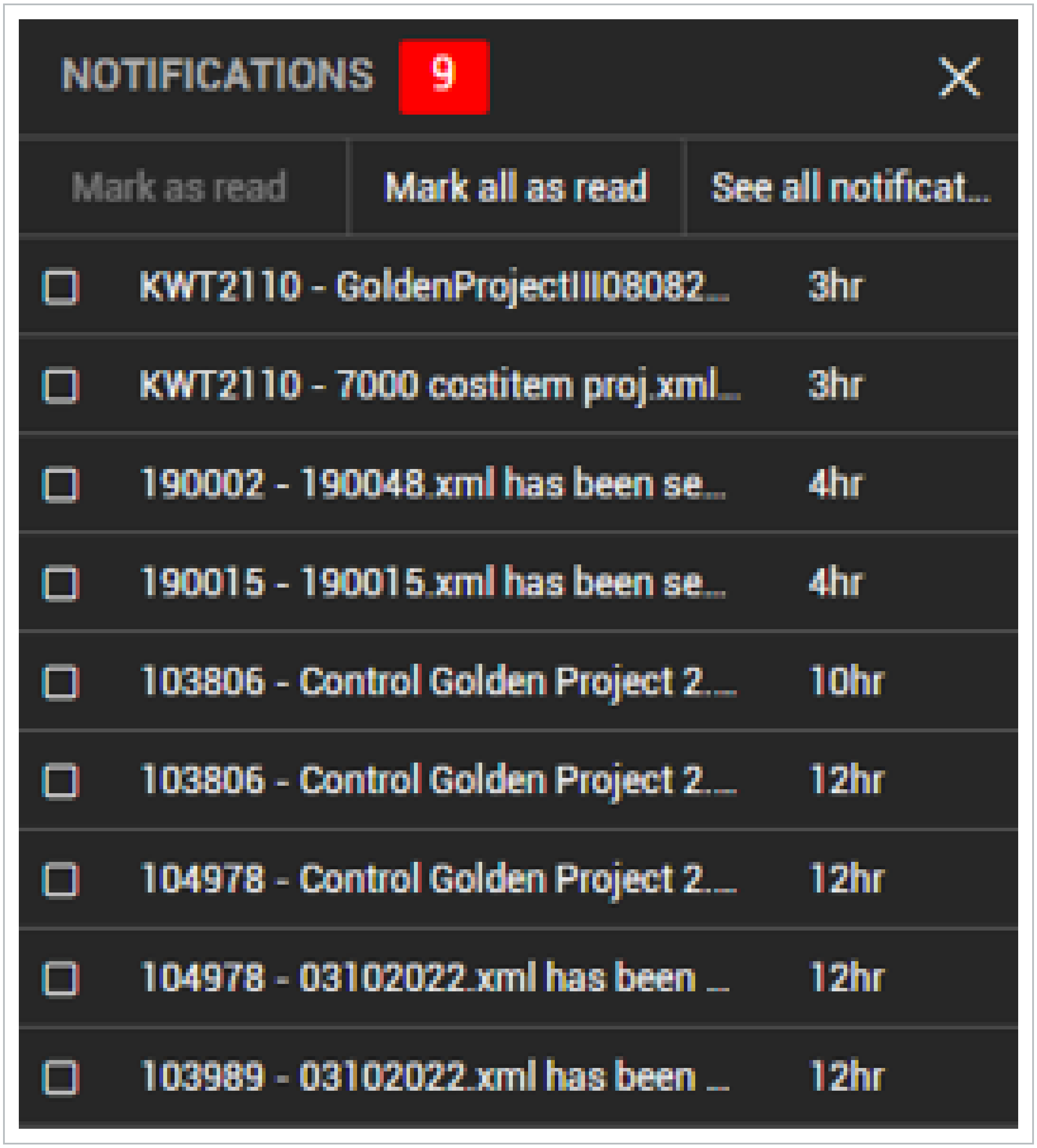
1.7 NOTIFICATIONS

System notifications can be transmitted via in-app messaging from InEight Platform for assigned projects. These notification messages are a means to communicate information to users about certain system activities. Message content can range from a notification informing you of a failed import process, to notification about a planned system outage.

The Notification icon is on the right side of the top navigation bar. The number of unread notifications is indicated by the number shown in red, on the Notifications icon.

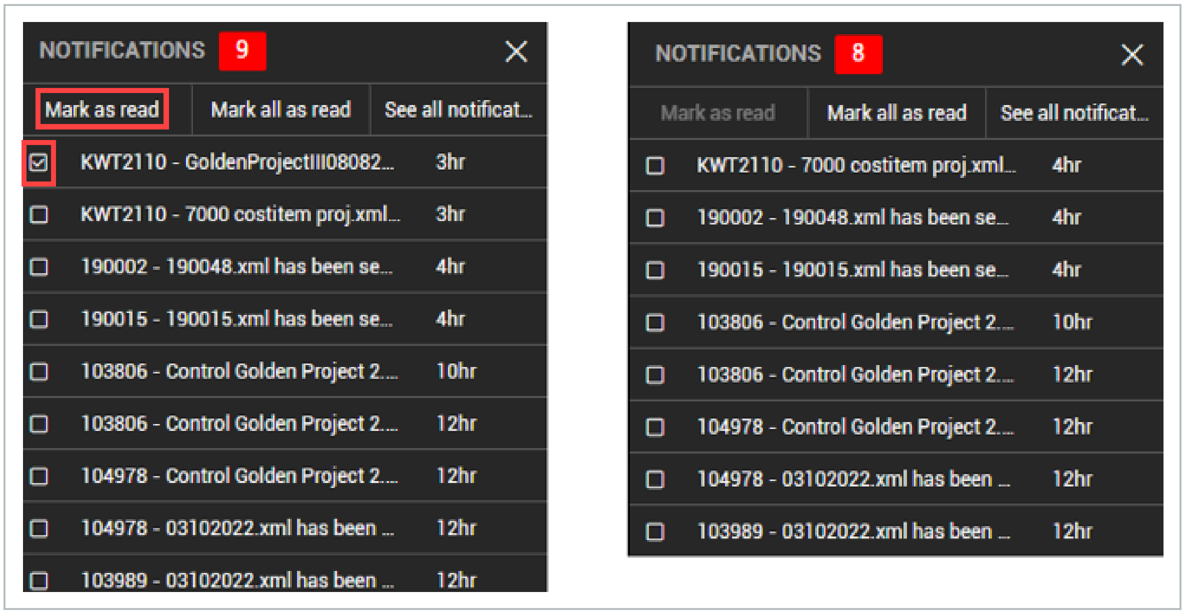
1.7.1 Notifications slide-out panel

When the Notifications icon is selected, a slide-out panel shows all the unread notifications.

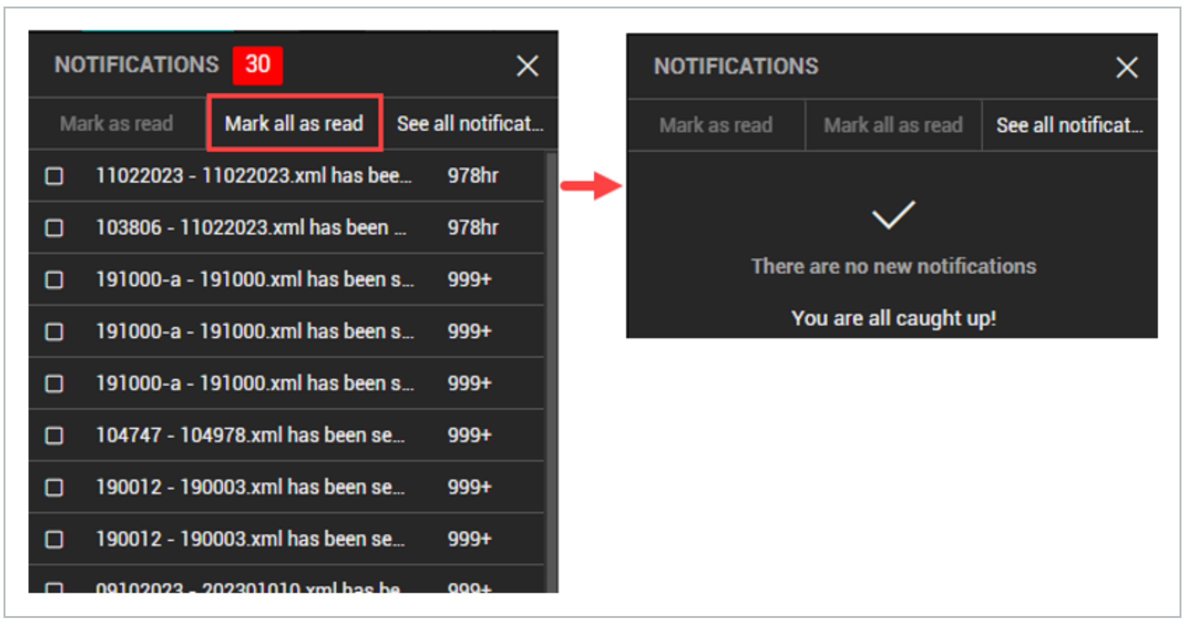


1.7.1.1 Mark as Read

Click the **check box** to the left of a notification, and then select **Mark as read**, which removes the selected notification from the slide-out panel.



Select the **Mark all as read** button to clear the slide-out panel of all unread messages.

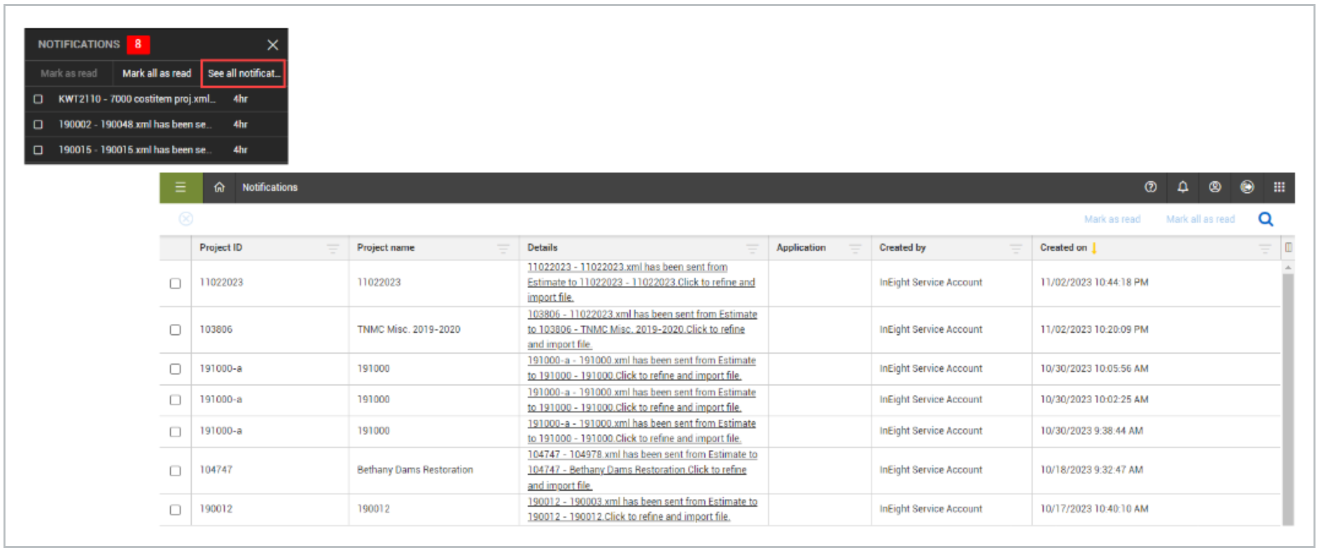


1.7.1.2 See all notifications

Click **See all notifications** to open a new window, which shows all read and unread notifications. Note the text is bolded in an unread message. In the Notifications window you can do any of the following:

- Select and delete one or more notifications.
- Mark notifications as read.

- Mark all notifications are read.



Review in app notifications

1. Click the **Notification** icon to open the notifications slide-out panel.

   The list shows all unread notifications. Click **See all notifications** to open the Notifications page and view the list of all read and unread notifications. From this page you can delete, mark as read, and search notifications. In the Details column, select a notification to see more information, such as opening the audit log.

2. In the notifications list, select a notification, and then click **Mark as read**.

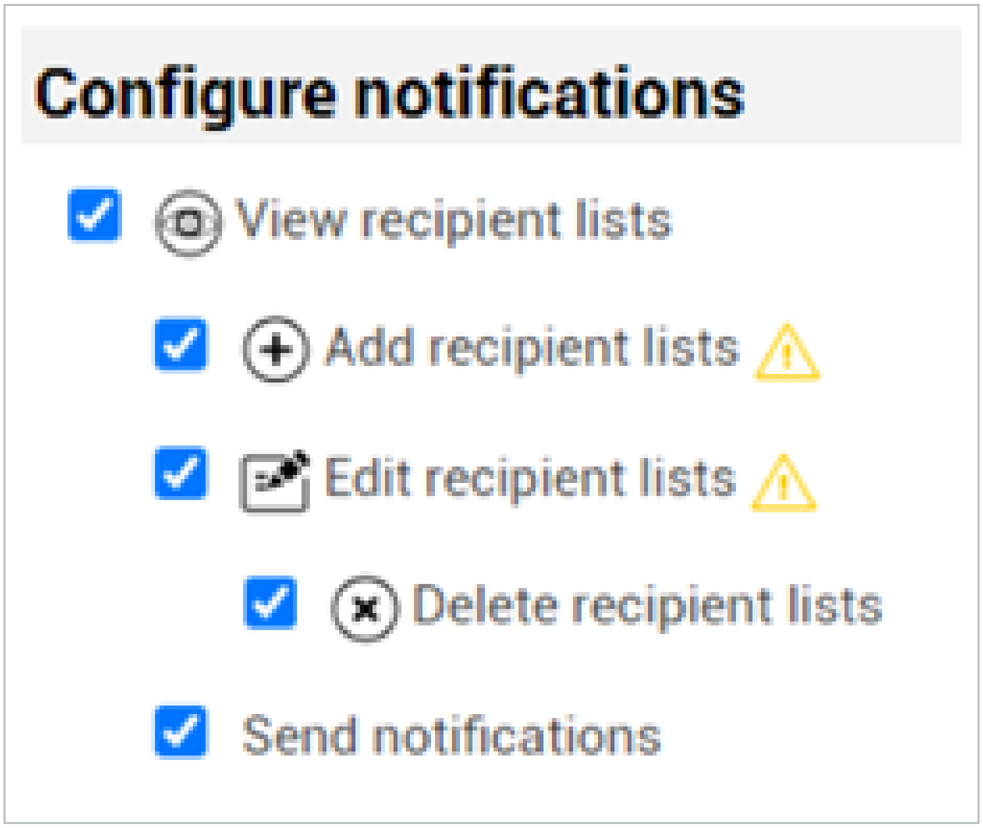
   When you click **Mark all as read**, it clears the list and the Notification icon does not show.

3. Select a notification, and then click the description to view details about it.

1.7.2 Notifications configuration

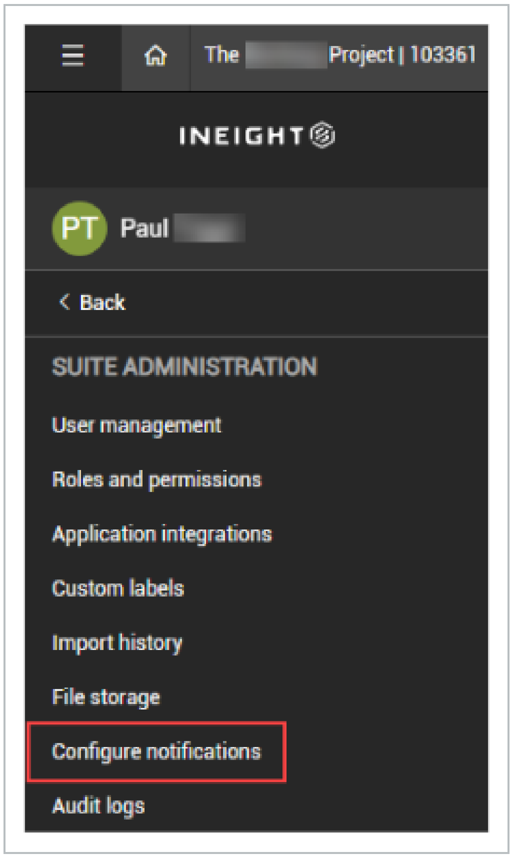
> The configuration for notifications is generally a task to be performed by and admin.

Permissions for notification settings are configured in Suite Administration > Roles and permissions > Suite Administration > **Configure notification**s. With the applicable permissions a user in an admin role can customize the notification preferences for other users.

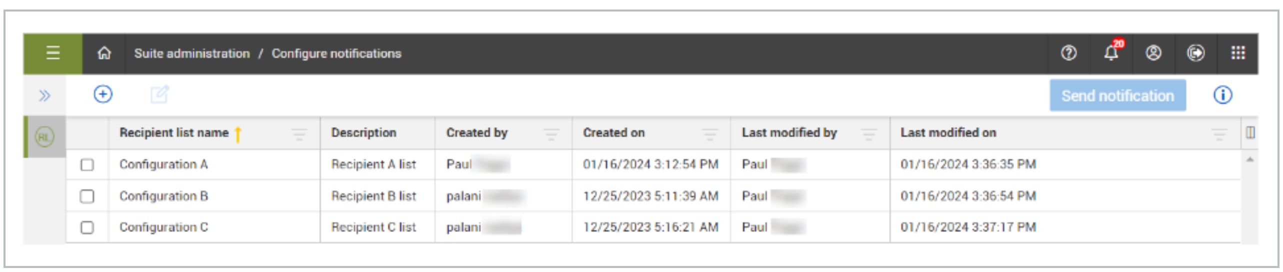


Configuring notifications triggers the mechanism for sending communications via notifications, either in the InEight application or via email. This allows users to stay informed and engaged with the InEight application's activities and updates.

To access Configure Notifications, click Suite Administration > **Configure Notifications**.



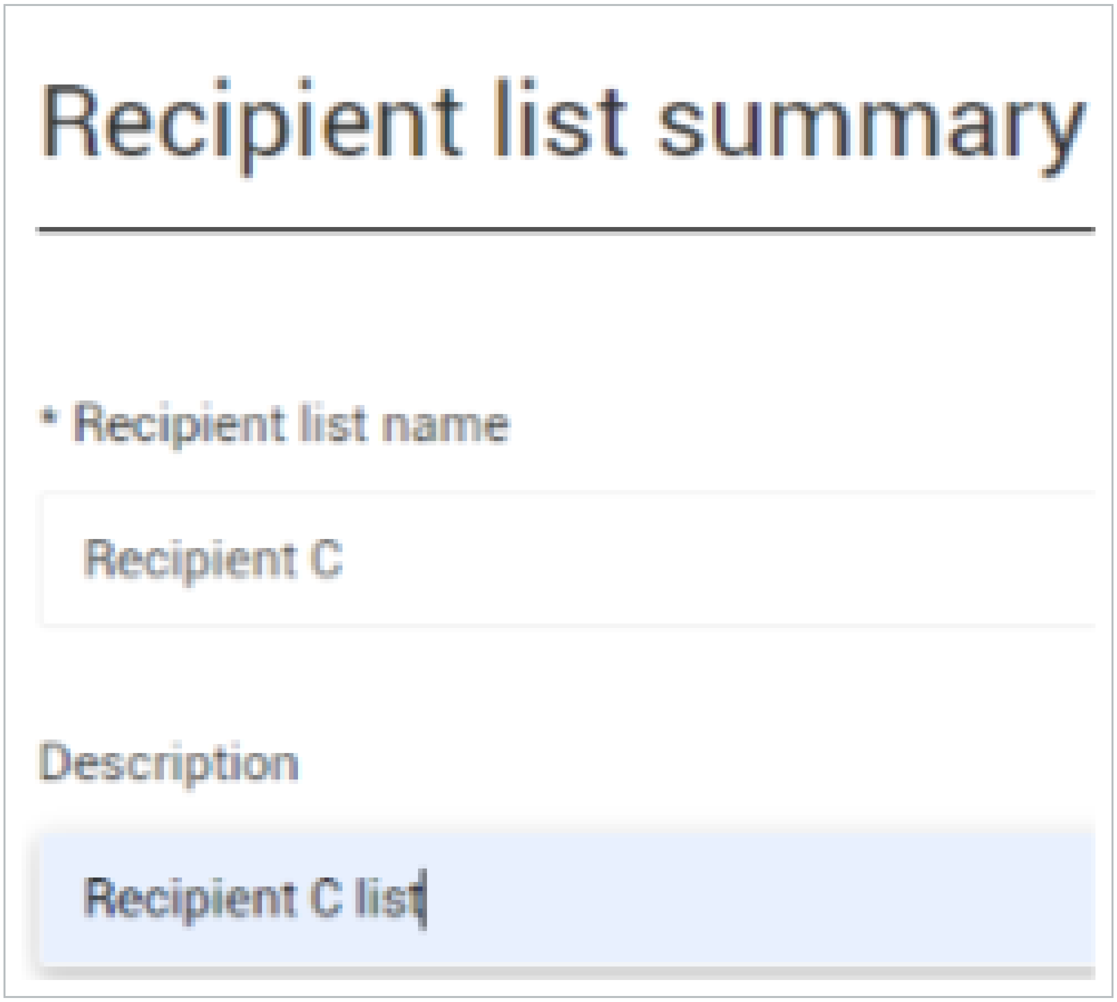
The Configure notifications page shows a list of notification recipients.



Add a recipient list

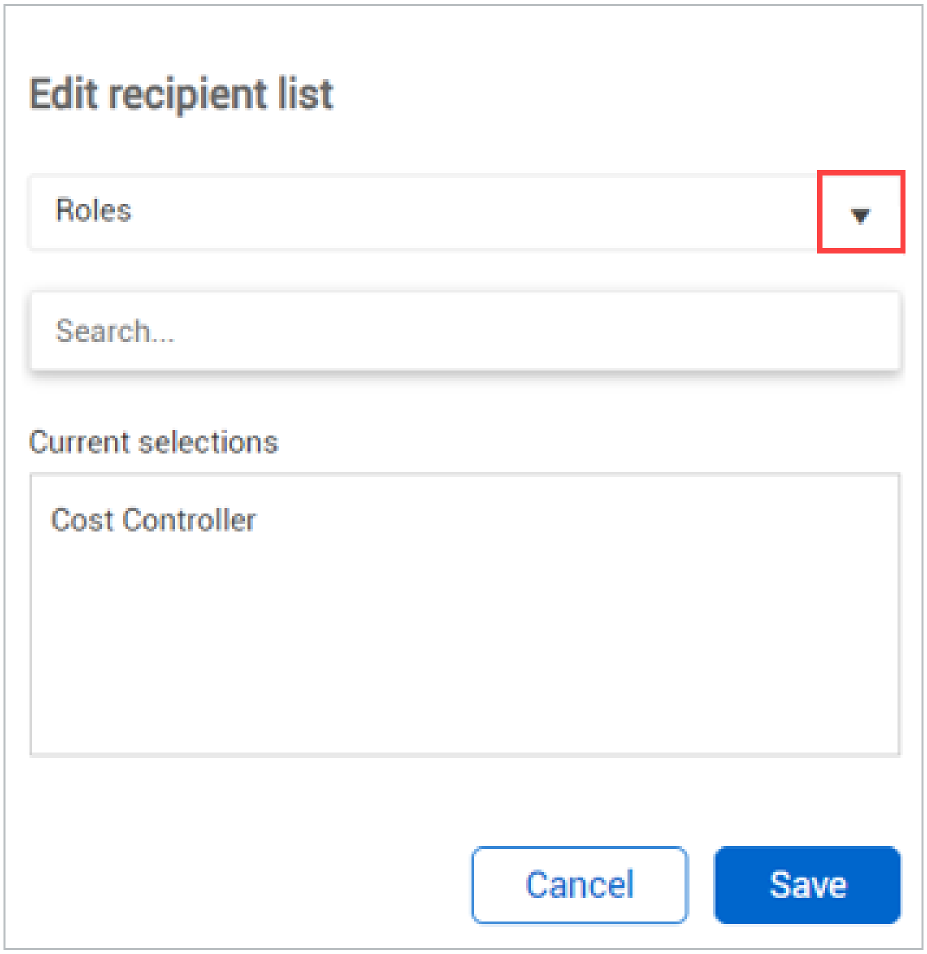
You are a Cost Control Manager, and you want to remind Cost Controllers to submit their forecast before the end of the month for review. You can add a new list and then select your recipient list based on their project roles as Cost Controller. You will want to ensure the applicable roles are already created. in this example, the Cost Controller role will need to be added.

1. Click the **Add** icon to open Add/Edit recipient list page.
2. In the Recipient list name field, add a list name and description. The Description field has a maximum length of 50 characters.



3. Select **Add recipients**.
4. The Edit recipient list dialog box opens. Select a recipient list type from the drop-down list, and then search for the Cost Controller role.

   The Cost Controller role was previously created. If this role doesn't exist, you can either create a new role or select a different one.

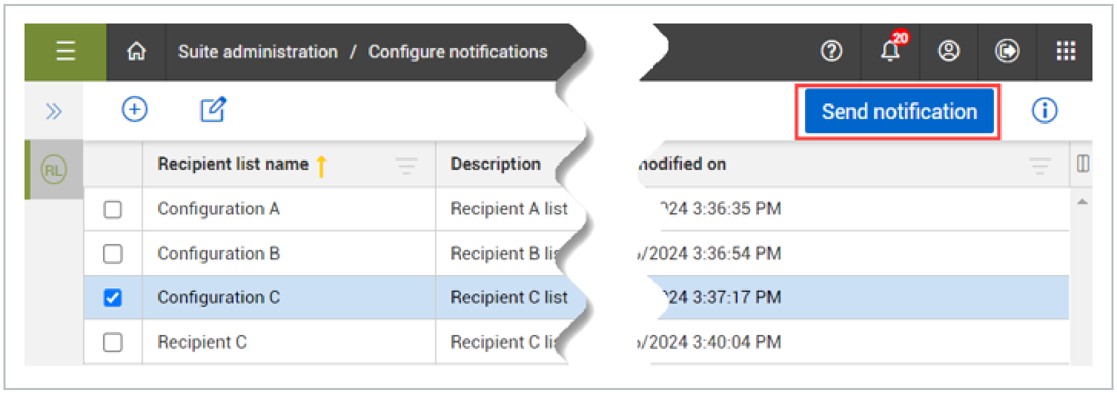


5. Click **Save** to add the new entry to the list of recipients.

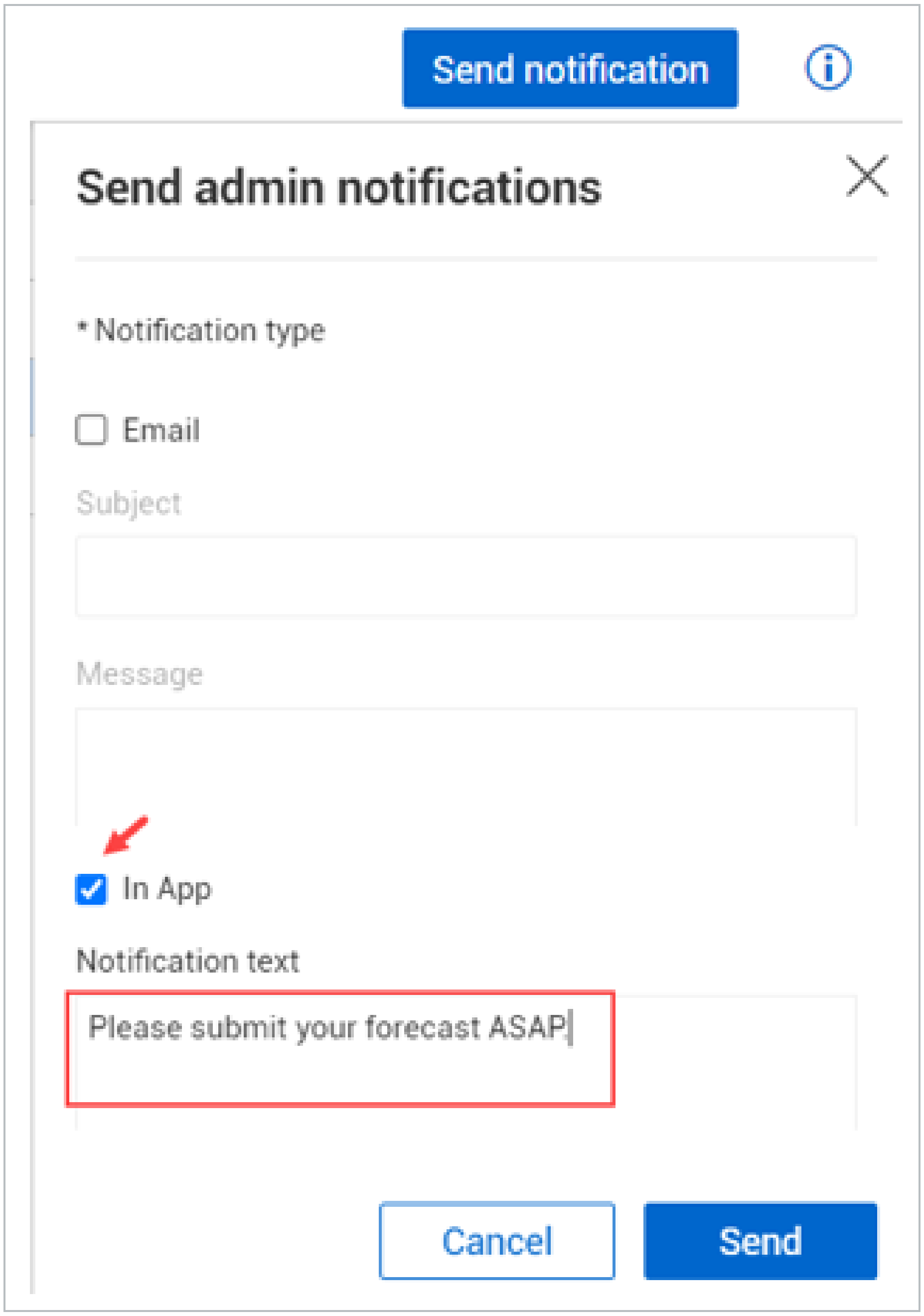
Send Notifications

Once the recipient list is prepared with the desired notification recipients, you can send out notifications via email, in the application, or both.

1. In the Recipient List register, select a Recipient list name and then select **Send Notification**.



2. In the Send Notification slide-out window, select **In App**, and then type a message description. The In App notification type has a maximum text length of 35 characters.



3. Select **Send.**

1.8 COLUMN MANAGEMENT

Pages in Platform with a column and row grid layout give you the flexibility to customize how you want to view the information. You can drag-and-drop a column to change the order of columns, and show or hide columns depending on if it is relevant or not to what you want to see. You can also sort, filter, and search to find the specific information you need.

1.8.1 Move columns

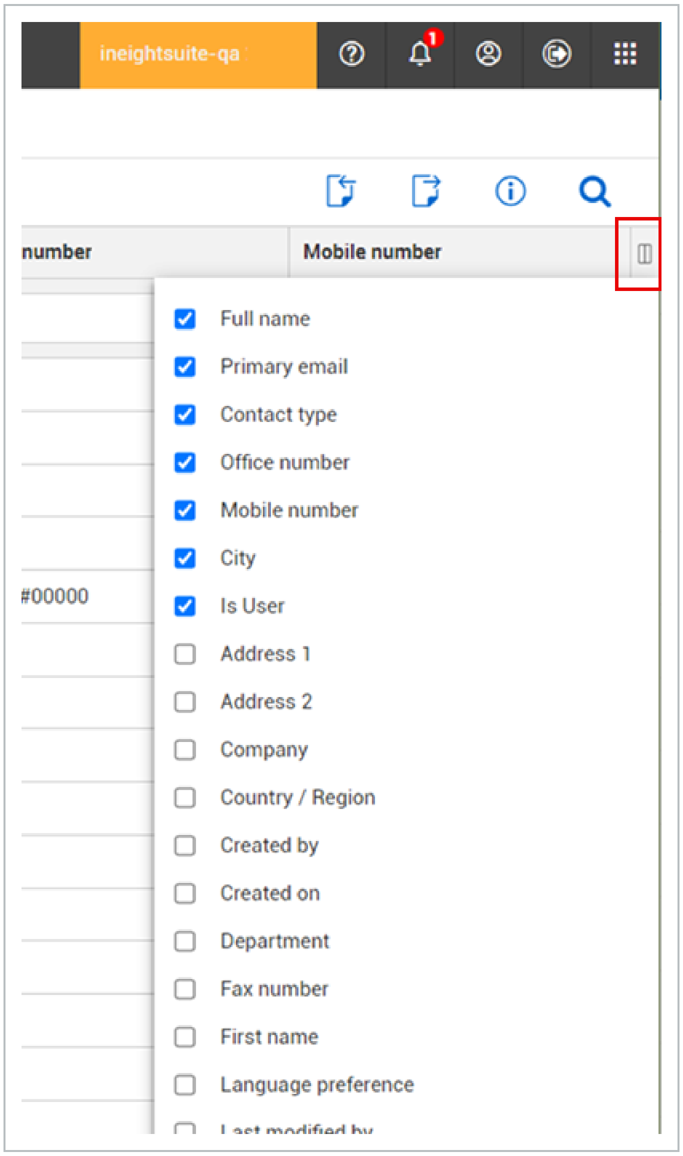
Click in the column header and drag it to another location in the grid to change the order of the column sequence.

1.8.2 Show and hide columns

The default columns are shown on each page, but you can add or remove columns to show in the view.

Show or hide columns

1. To show or hide columns, click the **Column Chooser** icon located on the right side of the page to open the list of available fields.



2. Select the check box next to column name to show it or clear the check box to hide it. The view updates when you select or clear a check box.

Click anywhere outside of the list to exit the Column Chooser.

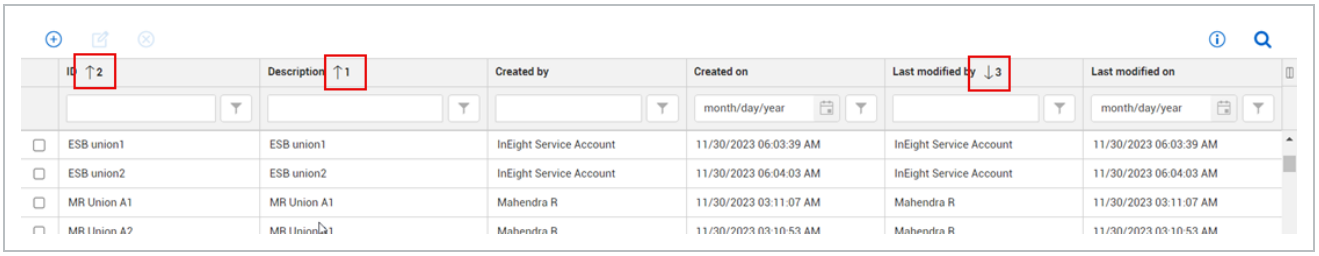
1.8.3 Sort and filter columns

You can use the columns to sort and filter information specific to your needs. Click in a column header. An arrow shows in the header pointing up and the information is sorted in ascending order.

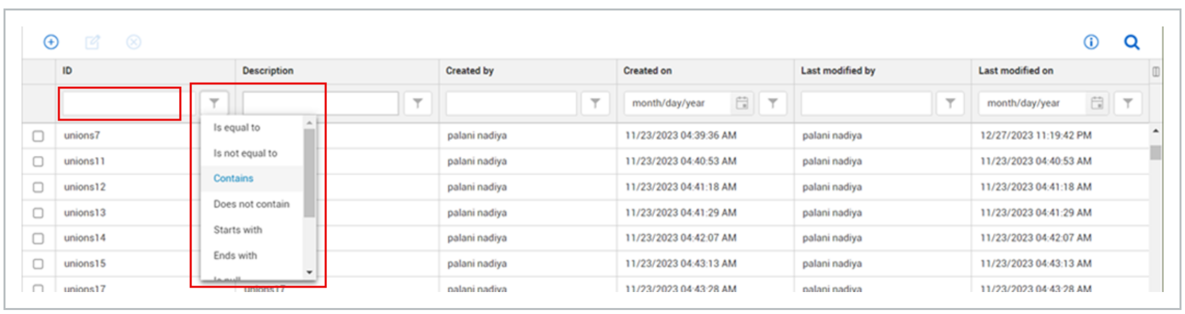
- Click in the same column header again and the arrow shows pointing down indicating the information is sorted in descending order.
- Click in the same column header again to remove the sorting.

You can use the sort functionality on multiple columns at the same time. Click in a column header to sort the information, and then click in a second column header.

- Click in the column header to change the sorting from ascending to descending.
- Click in the same column header again to remove the sorting.



You can filter columns based on the text content to focus on specific information in the records. Enter text in the box that you want to filter on, and then click the Filter icon to select additional the filter criteria. Note that records will start to be filtered as you type in the text box. Click the **Clear** (filter) icon to reset the filtering.



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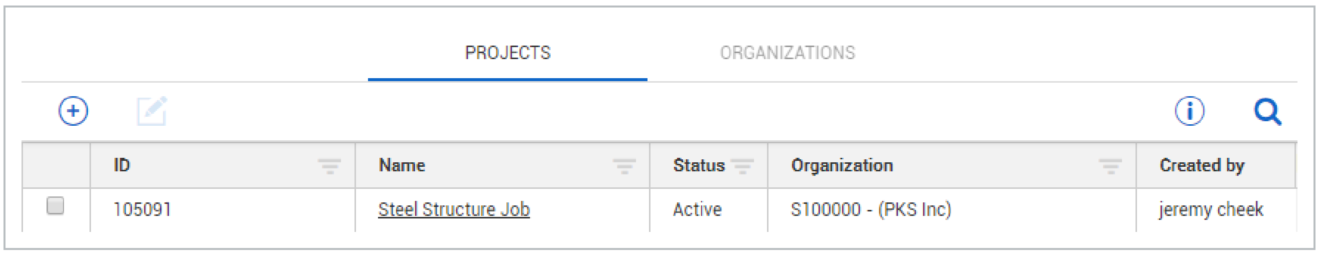
CHAPTER 2 – ALL PROJECTS AND ORGANIZATIONS

2.1 ALL PROJECTS AND ORGANIZATIONS

The All projects & organizations page lets you access your organizational breakdown structure (OBS) and all projects within the organization. The page opens to the Projects tab that shows a list of all projects available to you. You can also use the search function to find a specific project or edit an existing project from this page.

2.1.1 Projects

The Projects tab that shows a list of all projects available to you. On this page you can add a new project, edit an existing project, or use the Search function to find a specific project. Click the link in the Name column, to open the home page for the project.



Select the check box for a project from the list, and then click the **Show information details** icon. The project slide-out panel opens, which provides a summary at a glance of project information you can find on the Project details tab and Project home page, as well as links to those pages.

2.1.2 Organizations

The Organizations tab shows the OBS, which represents the hierarchical company structure. On this page you can add a new organization, edit or delete an existing organization, or use the Search function to find a specific organization. In the Organization column, click the link to open the Organization home page.

Select the check box for an organization from the list, and then click the **Show information details** icon. The organization slide-out panel opens, which provides a summary at a glance of organization information. The slide-out panel includes a quick link to the Organization and application settings page.

2.2 ORGANIZATIONAL BREAKDOWN STRUCTURE

The Organizational Breakdown Structure (OBS) represents the hierarchical company structure. It can have regions, such as Eastern and Western, and within those regions, the company can have also divisions, such as Electrical, Paving, and Masonry. The organization can continue to be more refined to the level such as states, cities, districts. Projects are at the lowest level of the structure but they do not show in the OBS.

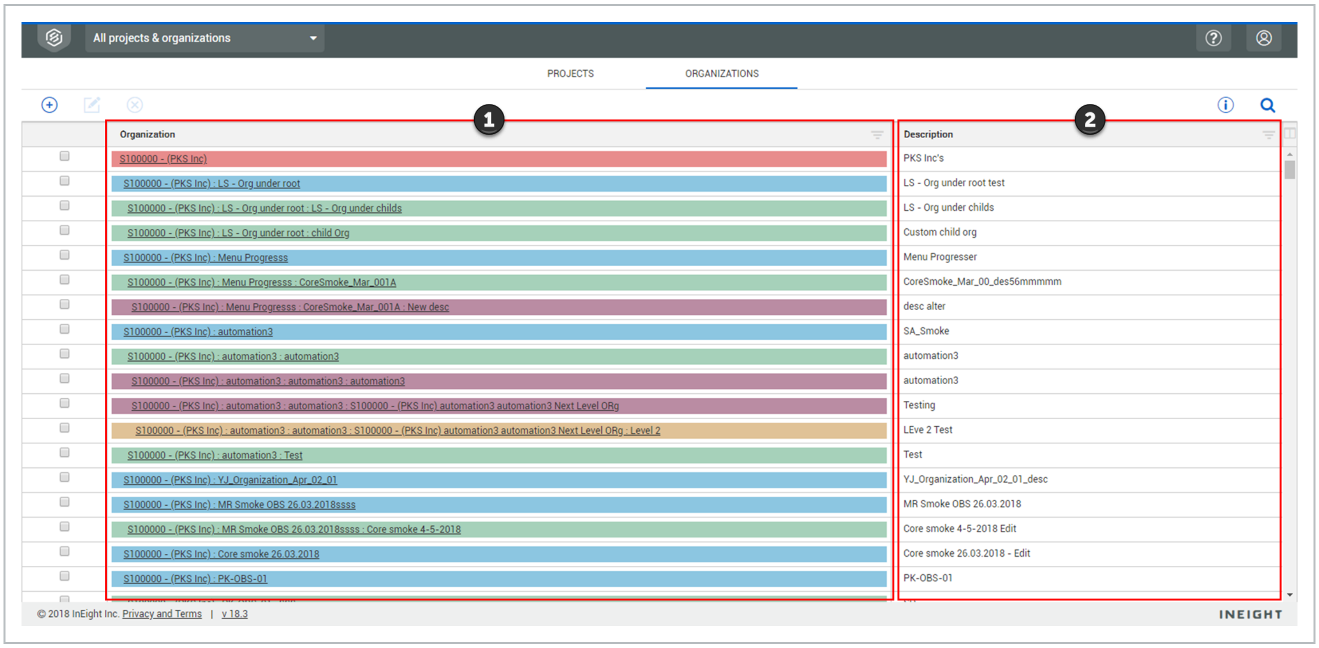
The OBS controls user access. Where users are assigned in the organization determines what access they inherit and the visibility they have to other areas of the OBS. The higher the level a user is placed on the OBS, the more actions they can perform, and the more organizations and projects they can view. A user assigned at only the project level has no visibility to an organization, any other projects, or administrative pages.

Roles and permissions further control access and actions that can be performed in the InEight cloud platform and the individual applications. The OBS can be manually maintained, but most often it is maintained automatically through integrations with the company ERP systems.

To access the OBS, in the Main menu go to All projects & organizations > **Organization**.

Overview - Organizations Tab

Title		Description
1	Organization	Identifies your company’s applicable organization level (*e.g.*, region, division, city). You can expand or collapse levels of the structure as needed.
2	Description	Used with the Organization Name to provide more detail about the structure entity.



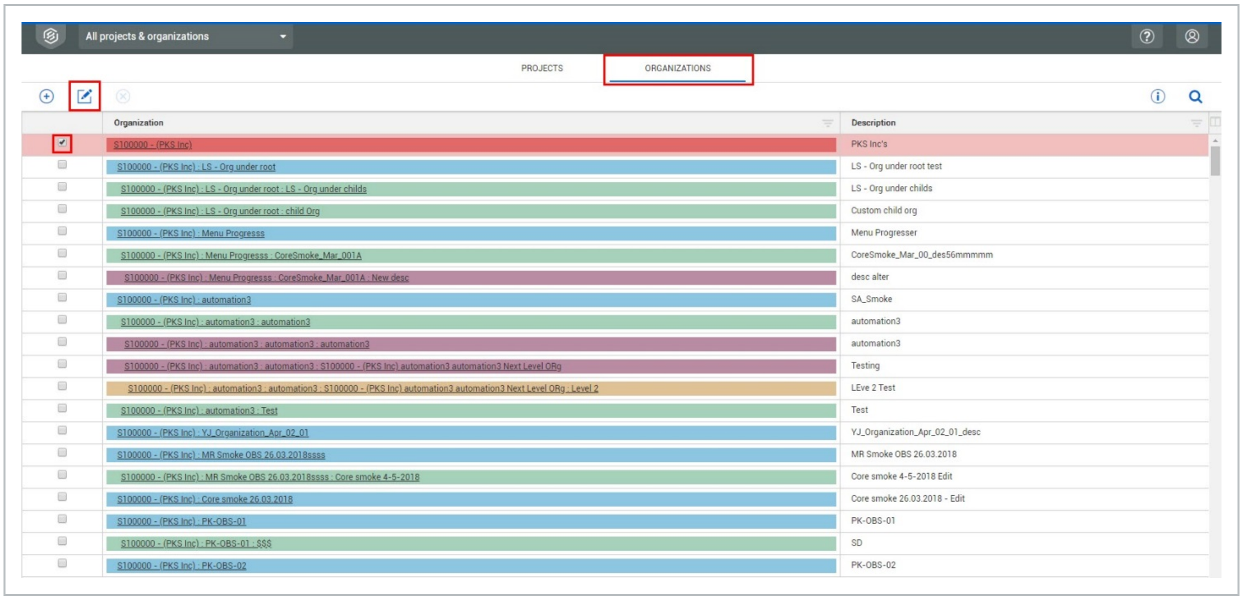
> You can use the column chooser to show or hide OBS information such as created by, created on, last modified by, last modified, and external organization ID.

2.3 EDIT THE ORGANIZATIONAL BREAKDOWN STRUCTURE (OBS)

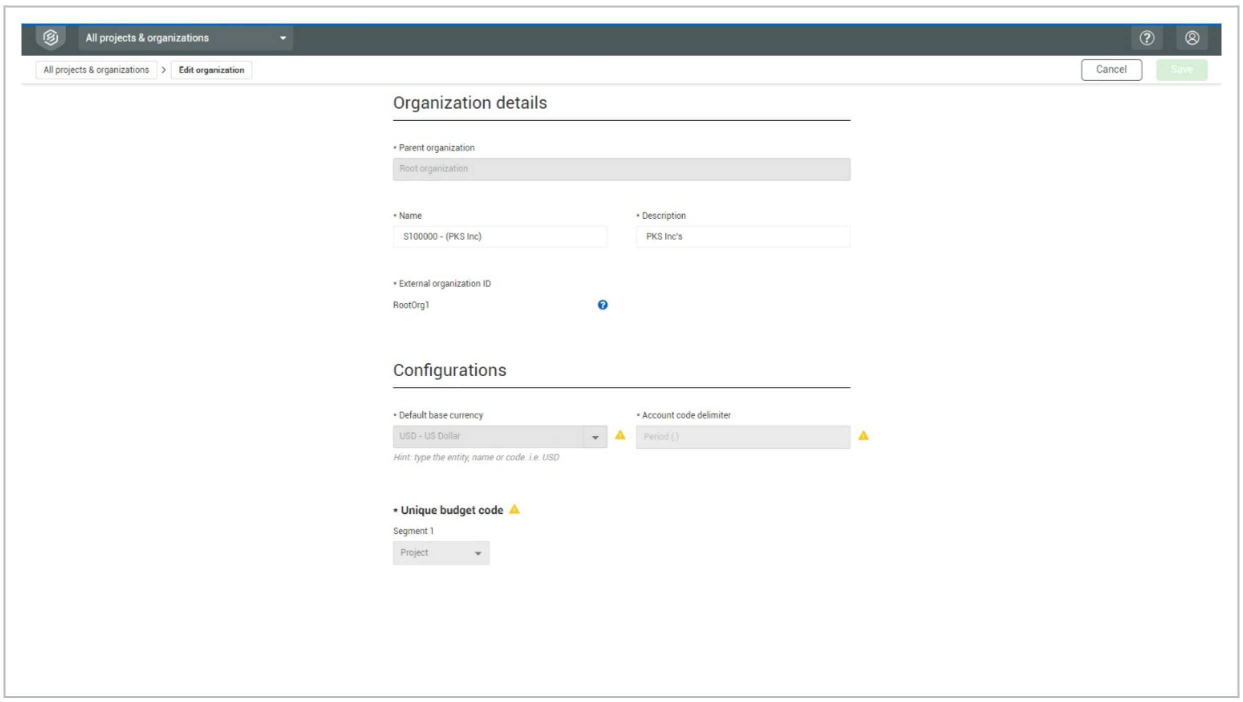
The Organizational Breakdown Structure (OBS) can be edited only if an entity has changed, moved, a re-organization has occurred, or an acquisition has taken place.

Edit the OBS

1. From the Main menu, click All projects & organizations > **Organizations**.
2. Select an organization from the list, and then click the **Edit** icon. The Edit OBS window opens.



3. Make the necessary changes to the OBS, and then click **Save**.



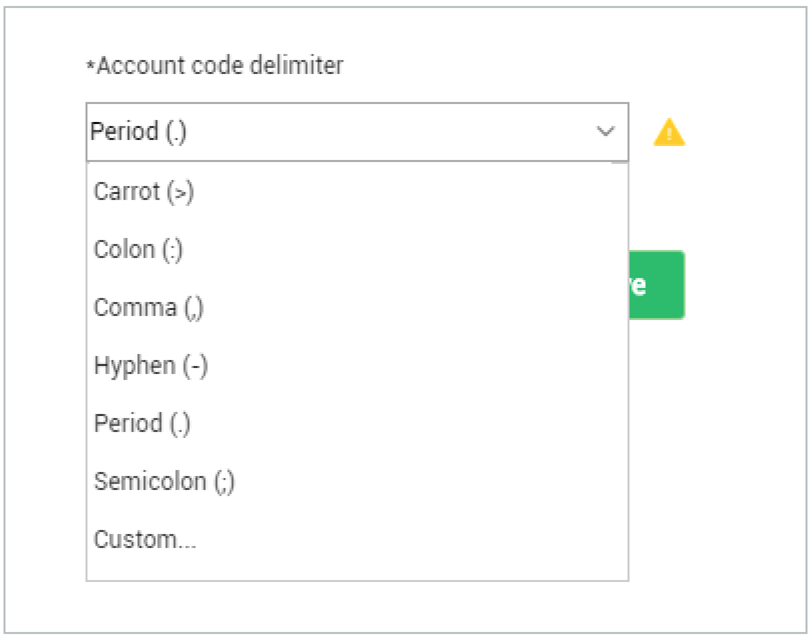
Note on this page you can manage your organization's **Unique Budget Code**. Budget Code Segments have been added to allow creation of more meaningful accounting strings to dentify a Cost Item which can then be utilized throughout the InEight portfolio of products.

2.3.1 Account Code Delimiters

The account code delimiter is the symbol used to separate the nomenclature of the account code levels within an account code. For example, the account code 10.27.02 represents three account code levels and the account code delimiter is a period (.).

An administrator can define the symbol that separates the account codes for a particular organization level by right clicking on the organization level and selecting **Edit organization**.

Under the Configurations section, the administrator can select a symbol from the list or add a custom symbol.



You can only edit the account code delimiter at the root organization level and when no account codes have yet been created.

2.4 ALTERNATE ORGANIZATION HIERARCHIES

You can group projects into alternate hierarchies as needed for individual applications or customers. Project attributes with *Organization* as the data source are used to indicate an alternate organization node from the OBS are associated to a project for restructuring the OBS.

In its current form, the OBS in InEight Platform is a fixed structure that is completely defined by each customer. Because each branch and level have no defined context within the system, it is not possible to automatically redefine the structure or pivot projects based on specific parameters.

In the OBS, each project is specifically assigned to a node within the hierarchy. A project can be reassigned to a different organization, but each change must be performed manually or through the Project_Import API, and cannot be done as part of application functionality.

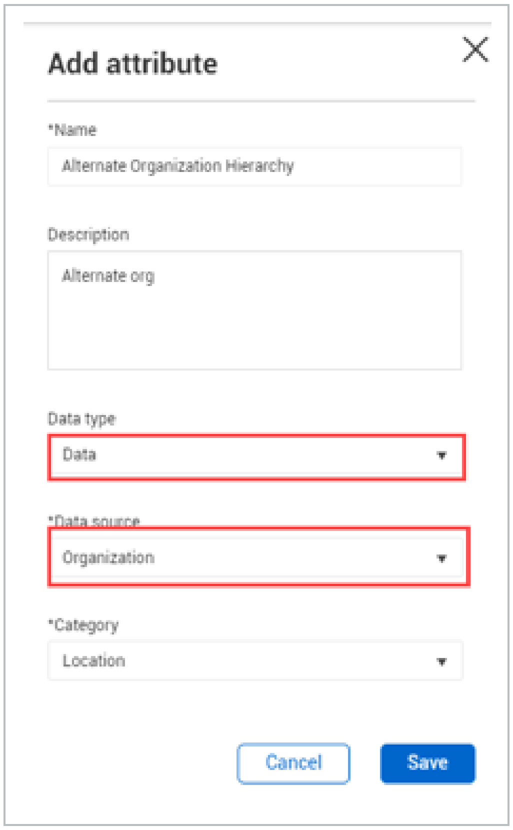
The Alternate Organization Parent feature allows you to define one or more alternate assignment options at the account level and to give each option a specific name. These options appear as attributes of all Projects where an alternate organization node from the OBS can be selected. For example, you can define an alternate assignment option called Region. Within all projects, the Region option shows and an alternate node from the existing OBS can be selected.

Within InEight cloud applications, each user defined alternate assignment option can be surfaced and used to redefine the existing OBS based on the organization selected for that option in all projects. As an example, if you choose to redefine the OBS by region, the entire OBS will be redrawn and all projects will show under the organization node that they were associated in the alternate assignment of Region.

2.5 DEFINE PROJECT ATTRIBUTES FOR ALTERNATE ORGANIZATION PARENTING

To define a project attribute for Alternate Organization Parenting, you must select the following options when creating a new entry on the Attributes definition page (project > Project details > **Attributes**).

- Data type = Data
- Data source = Organization



When these options are specified, the system will enforce selection of a value from the OBS when setting the attribute value at the project level.

You can create as many attributes as needed for this purpose, but the names must be unique. For example, you can choose to create attributes with names such as District, Region, Market, and Sponsoring District. Attributes defined for this purpose can exist with any other project attribute defined for other purposes.

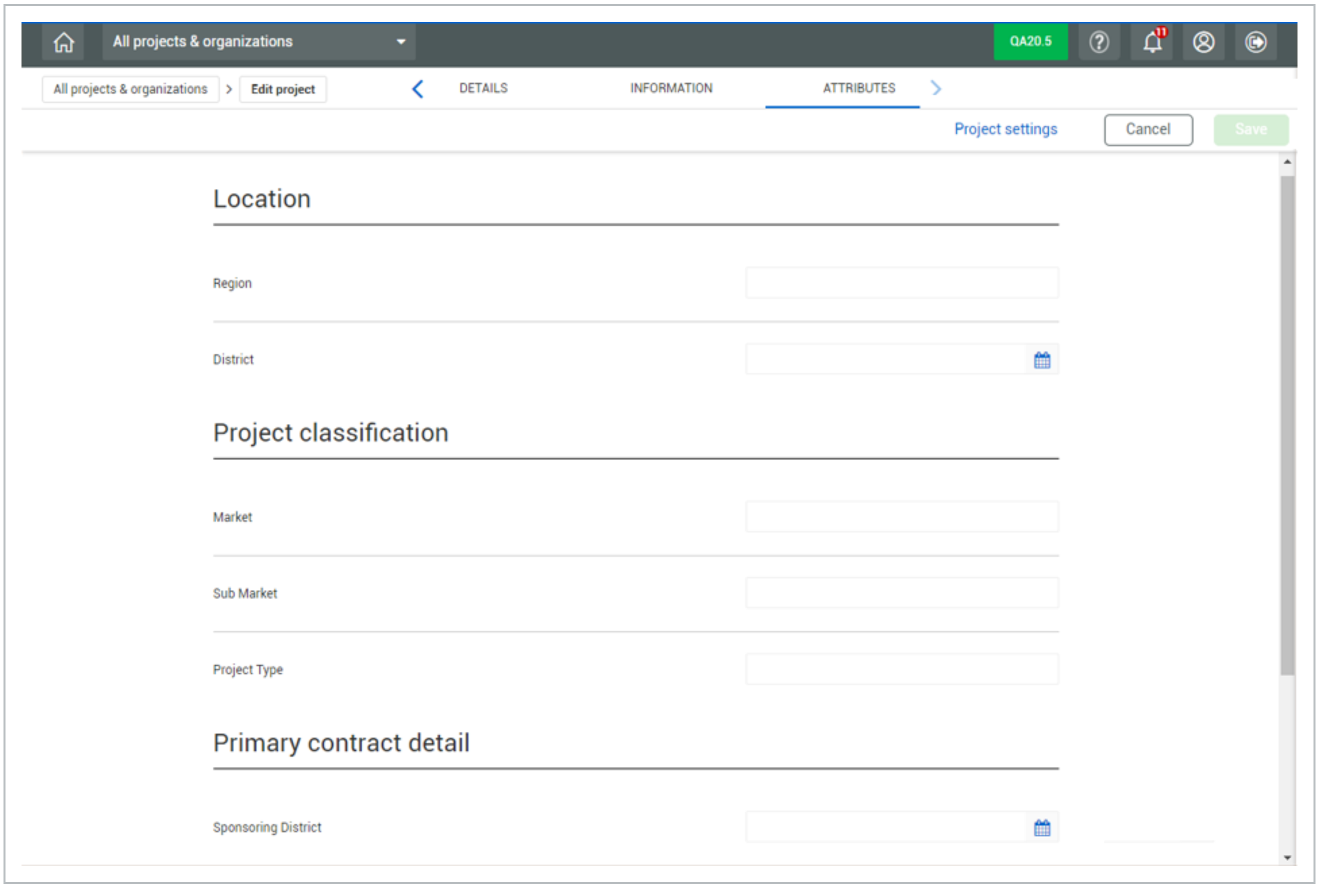
> The system does not make any project attribute a mandatory field within a project. It is up to you to enforce this as needed.

2.5.1 Alternate organization parents within a project

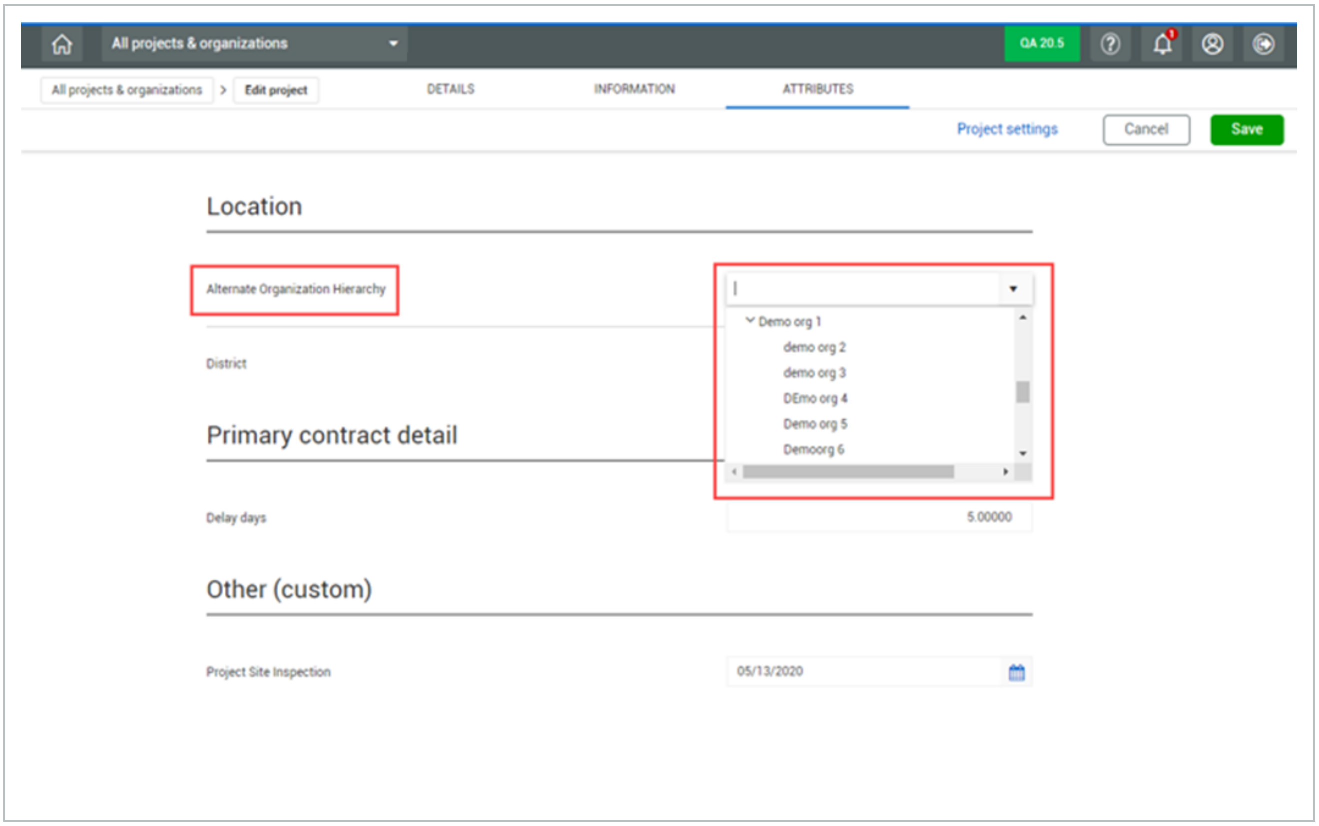
There are two methods that are available to assign values to a defined attribute, using the UI or Project_Import API.

2.5.1.1 User Interface (UI)

You can assign values for each project, go to project > Project details > **Attributes**.



When a project attribute has a data source of *Organization*, the system shows the OBS as a list for you to select a value.



2.5.1.2 Project_Import API

An optional array ProjectAttributes has been added to the Project_Import external API. The array contains the following fields:

- **AttributeName** – Provide a valid Name of a Project Attribute defined in the system. If a value is provided for this field, do not include the AttributeSourceSystemId field.
- **AttributeSourceSystemId** – Provide a valid SourceSystemId of a Project Attribute defined in the system. If a value is provided for this field, do not include the AttributeName field.
- **AttributeValue** – Provide the value for the Attribute specified by either the AttributeName or AttributeSourceSystemId fields. The entry provided in this field must match the expected Data Type of the Project Attribute. For example, if the Project Attribute expects a date value, this field should contain a date. If the Data Type of the Project Attribute is specified as 'Data' then the entry provided in this field must match a valid option for the Project Attributes Data Source. For example, the Data Source of the Project Attribute is specified as 'Organization' then the entry in this field must match a valid Organization Name or SourceSystemId.

Refer to *"InEight Project Initiation and Maintenance Integration Specification"* for more information.

2.5.1.3 Restructuring the OBS by Project Attribute

When a value for a project attribute with a data source of *Organization* is set, the system creates or updates specific records that provide information about the association of the project to alternate parents.

> This association happens when values are assigned to projects in Project Attributes, and not when the Project Attribute is defined at the account level. This timing is important, for applications it means that a list of Project Attributes that are used for Alternate Organization Parents will not include any Project attributes that do not have at least one project associated with it.

2.5.1.4 Assignment rules

When a project attribute is defined with the data source of Organization, and there is no previous association with the same name and type, and a record does not exist that matches the same project attribute name, then the system will create the necessary records to provide information to the project attribute to enable the actual association of a project to the Alternate Organization Parent.

Example: An association is made between the Civic Center project and a Project Attribute called Region. For this association, Civic Center project can be set to SW Region.

A project cannot be associated to more than one Alternate Parent Organization within the same Project Attribute type.

Example: The Civic Center project in the above example cannot be assigned to multiple project attributes of Region. Within the UI, this is not a possible scenario because of how project attributes are managed, however an error could occur if you attempted it via an import or an API request.

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CHAPTER 3 – SUITE ADMINISTRATION

3.1 USER MANAGEMENT

3.1.1 Overview

To access user information from the Main menu, click Suite Administration > **User Management**.

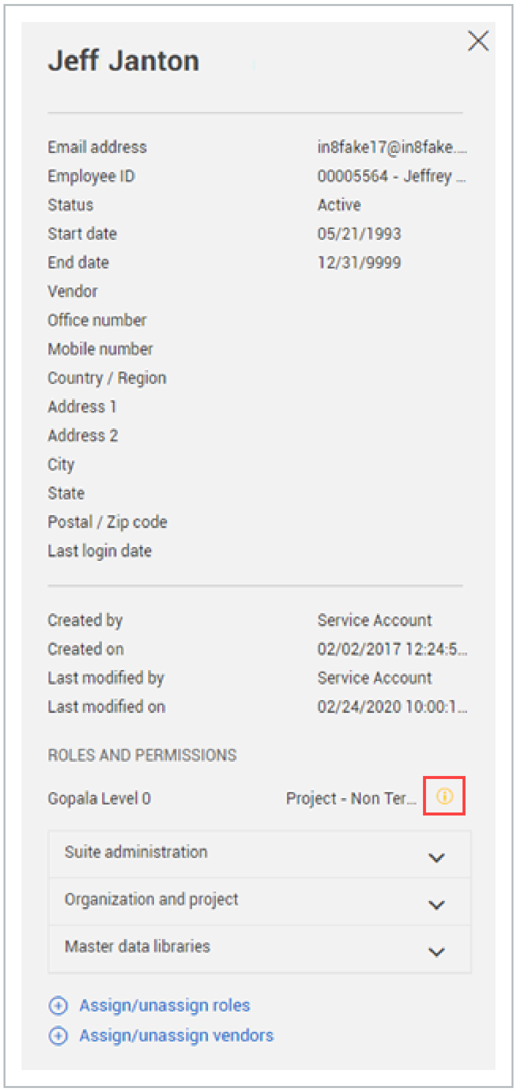
It is important to understand the difference between organization user management and project user management. Organization user management is performed at the organization level. Changes made for users at the highest organization level apply to every project in that organization. If someone is made a Project Administrator at the organizational level, they can act as a project administrator on every company project within that organization level. Changes made at the project level, for example the Steel Structure Job (105091), only apply to the project.

3.1.2 Edit User Information

On the User management page, you can view, add, and edit user information. The following steps walk you through how to view and edit user information.

View User Information

1. To access user information go to the Main menu, and then click Suite Administration > **User Management**.
2. Select a user account, and then click the **Show information details** icon at the top right side of the page. The User information details slide-out panel opens.

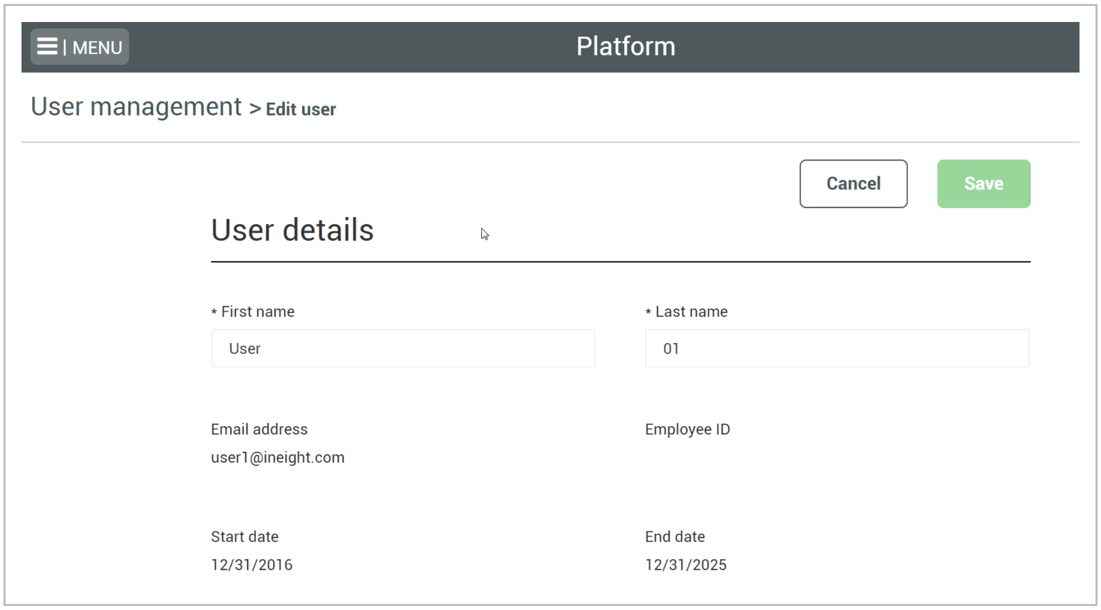


- To see the user's roles and permissions, click the information icon.

3. Click another name.
   - The details for the other user shows

Edit User Information

1. Select a user account, and then click the **Edit user** icon at the top left side of the page. The Edit user page opens.



2. Change the Country/Region to **United States of America**.
3. Change the city to **Scottsdale**.
4. Change the state to **Arizona**.
5. Click **Save** to close the page.

Notifications

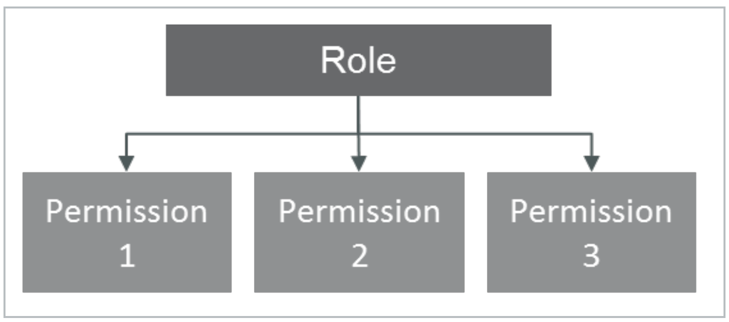
1. Click the **Notification** icon to open the notifications slide-out panel.
   - The list shows all unread notifications, click **See all notifications** to open the Notifications page to see all read and unread notifications. From this page you can delete, mark as read, and search notifications. In the Details column, click a notification to see more information about it, such as in the audit log.
2. In the notifications list, select a notification, an then click **Mark as read**.
   - When you click **Mark all as read**, it clears the list and the resets notification icon to show zero.
3. To view details, select a notification, and then click the description.

User Profile

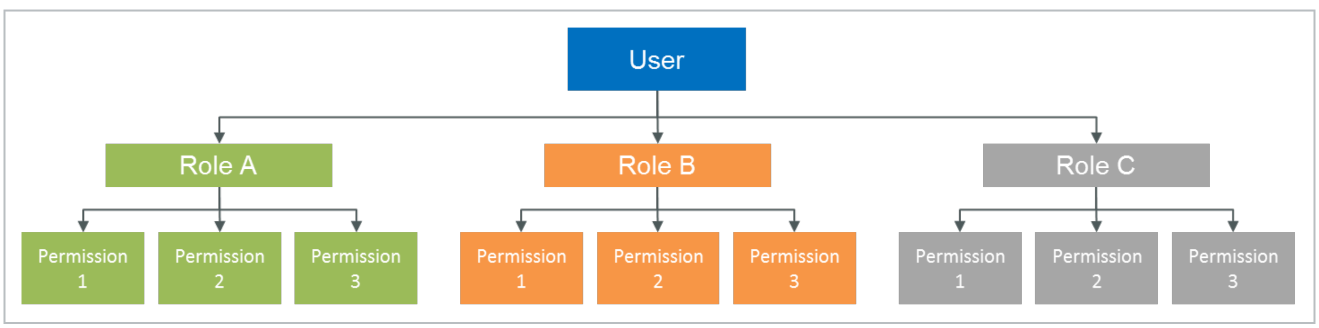
1. Click the **User** icon to open the User profile slide-out panel.
   - This opens to the Details tab and shows your user name and email. Your roles are shown on the Roles tab.
2. Click the Preference tab to change your user preferences.
   - You can change your preferences for language, date format, and number format.

3.2 ROLES AND PERMISSIONS

The InEight cloud platform allows you to create roles with assigned permissions, as shown below:



You can then assign roles to users as needed:

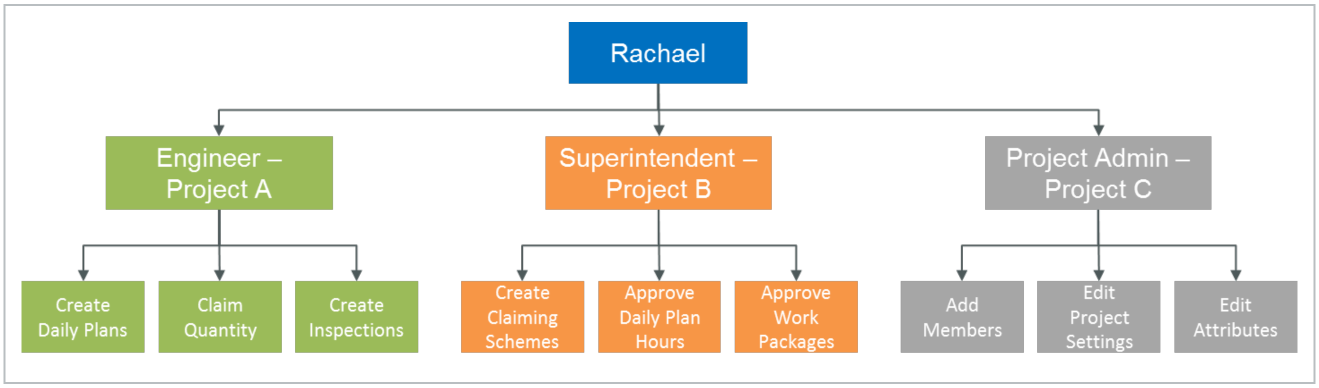


Users with the same role will have the same permissions.

You or the user being assigned to the project will only have the permissions granted for that project. Users would not have the same permissions on another project unless those same permissions are granted on another project.

Some InEight applications require specific roles to be assigned to perform their functions. Even if you have administrative access, you may need to be assigned a specific role to perform a function.

For example, your set up of roles and permissions for your project engineer might look something like this:

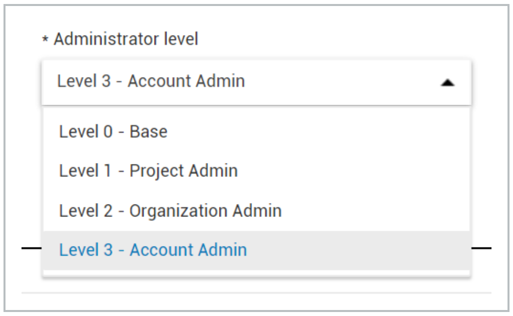


3.2.1 Role Creation

Roles are organized into four levels. These levels determine the available permissions you can grant to a new role or custom role. It is a way to filter permission options.

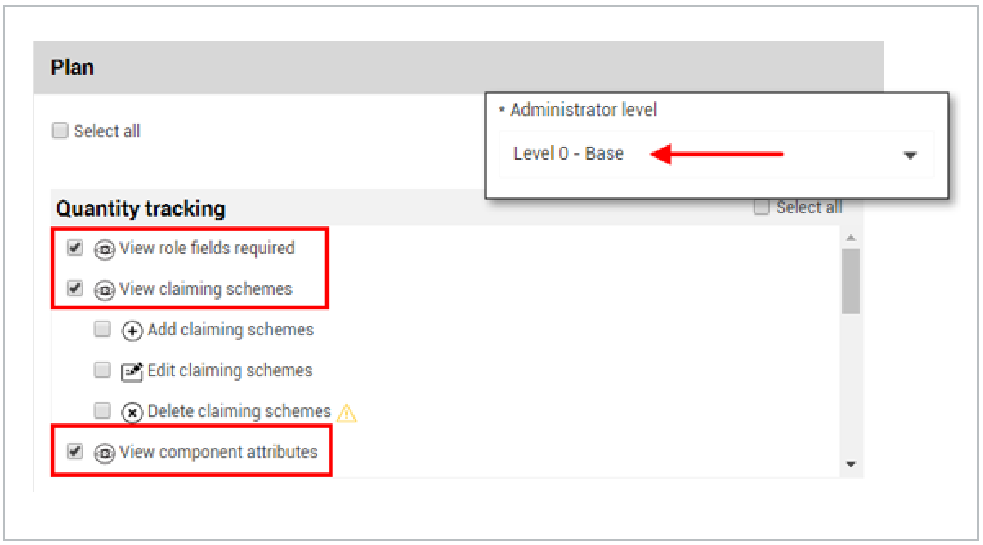
Level	Descriptor	Available Permissions
0	Base	View access only.
1	Project Admin	Edit information for a project.
2	Organization Admin	Edit User information and create new projects.
3	Account Admin	All the available permissions including adding users and editing roles and permissions.

You can change the available permissions by choosing the applicable administrative level.

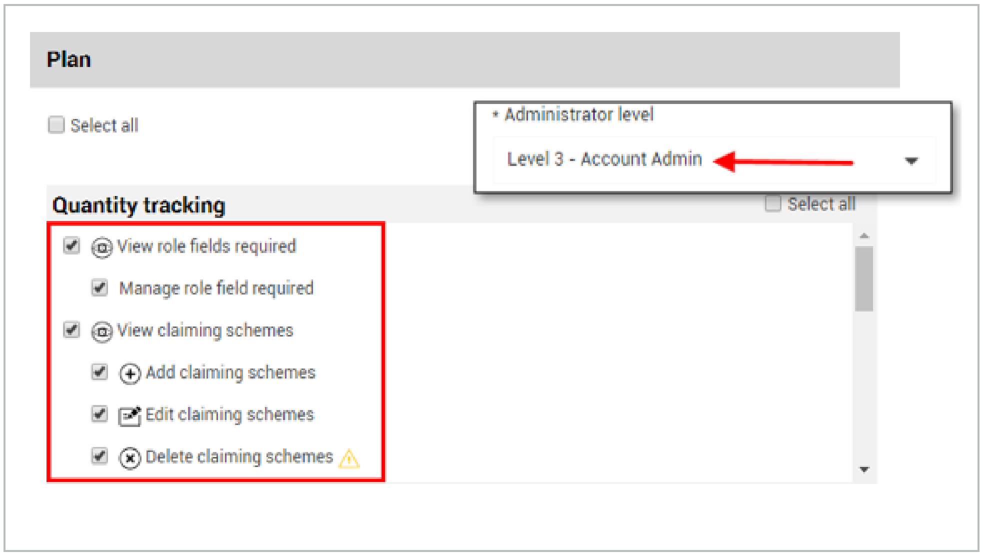


In this example, it shows how the permissions are filtered based on the level that is selected.

For an administrator of Level 0 – Base, in the Plan application for Quantity Tracking, this role would only be able to view items.

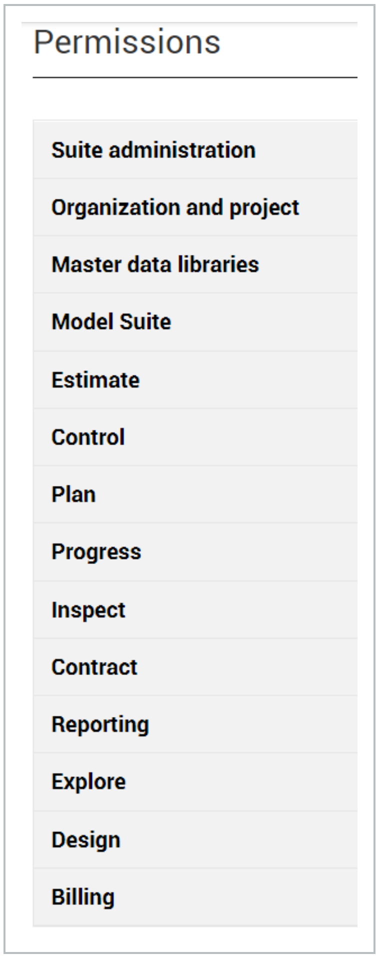


For an Administrator level of Level 3 – Account Admin in the Plan application for Quantity Tracking, this role would only be able to view, manage, create, edit, and delete.

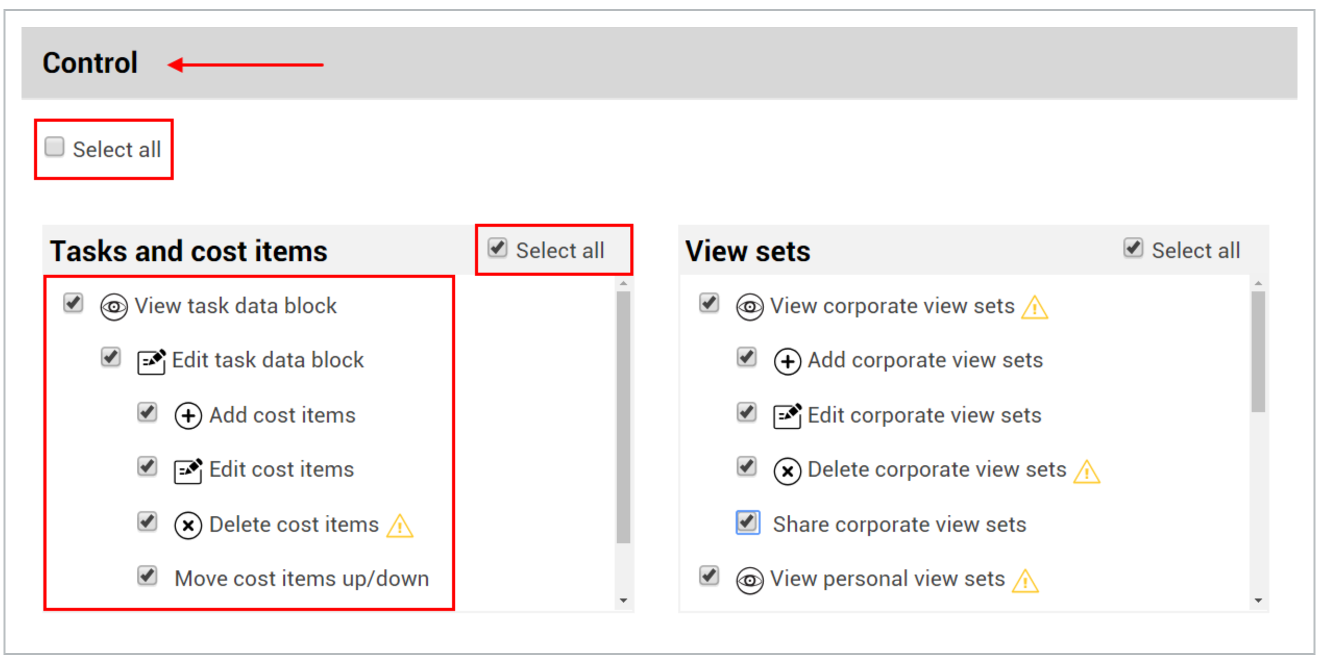


> Only Levels 0 and 1 roles can be assigned to a project. Levels 2 and 3 must be assigned at the Organizational level.

The permissions available for each role are grouped by the applicable InEight application. Each application has its own set of permissions.



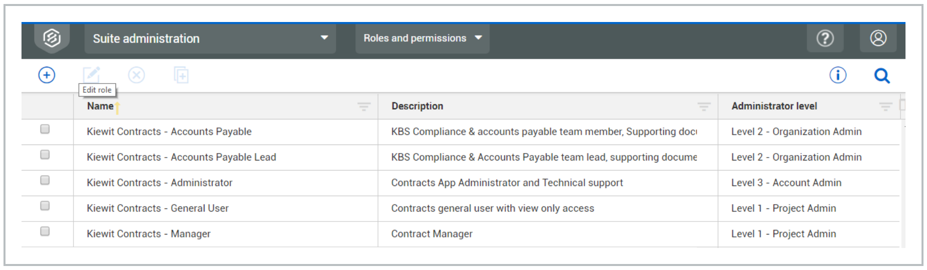
Click the product line to expand the view and show the available permissions.



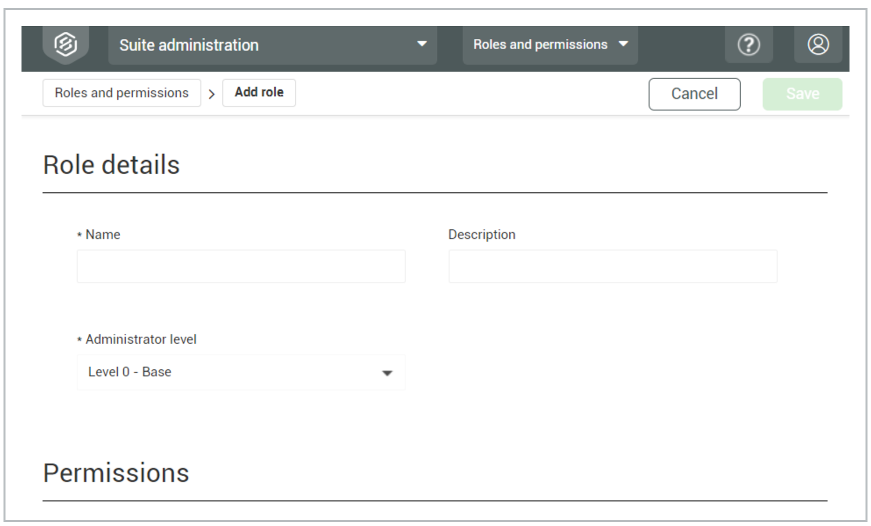
You can choose to select all the available permissions, or you can define the permissions individually based on the level selected.

Create a Role

1. From the Main menu, click Suite Administration > **Roles and Permissions**. The Roles and permissions page opens.



2. Click the **Add role** icon to add a new role.
   - The Add role page opens



3. Name the role **Engineer 2 – [your initials]**.
4. Define the description as **Role for Field Engineers**.
5. Click the **Save** button.

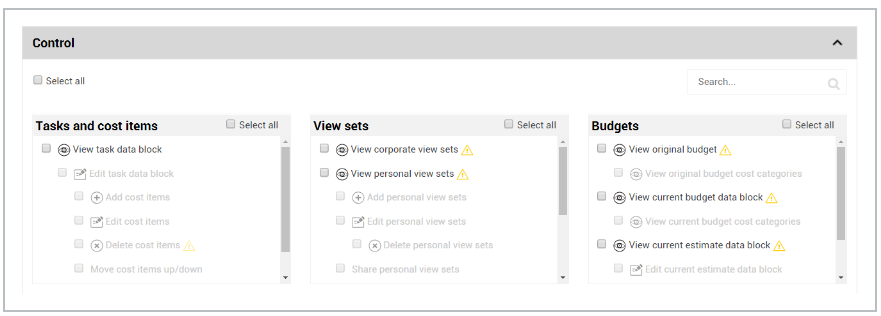
> Roles cannot be deleted but you can change the status, which lets you determine whether the role is available or unavailable to be assigned to a user. If an existing user is assigned a role that was later changed to *Unavailable*, a notification will indicate it in the Edit user dialog box for the user's roles. This is a prompt to delete or assign a different role for the user.

3.2.2 Permissions

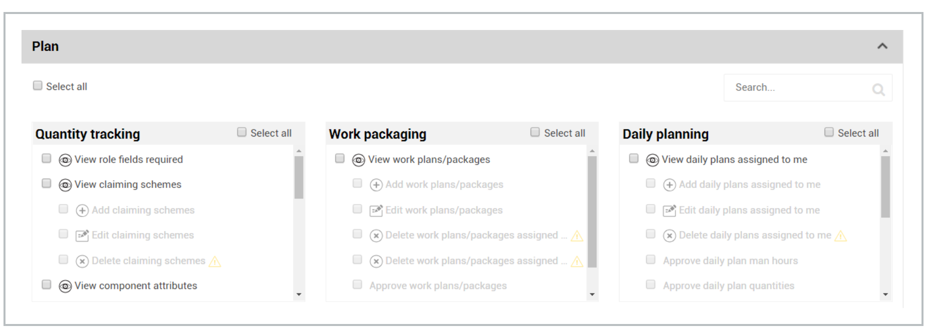
After you create a role, you can edit the role to define its permissions.

Define Permissions

1. From the Roles and Permissions page, select your Engineer 2 role.
2. Click the **Edit role** icon.
    - Notice that under the Permissions section, none of the permission boxes are checked.



3. Expand a product section, for example the Plan section.



4. Click on **Select all**.

5. Click **Save.**

3.2.3 Role Assignment

After you define the permissions for a role, you can assign the role to a user.

Assign a Role to a User

1. From the Main menu, click Suite Administration > **User Management**.
2. Select a name from the list.
3. Click the **Show information details** icon.
4. Click **Assign/unassign roles**.
5. In the Roles section, click **Add role**.
6. In the Role drop-down list, select **Engineer**.
7. In the Organization/Project field, select **C-XYZ**.
    - C-XYZ is the organization that you are providing permissions for.

8. Click the **Save** button.

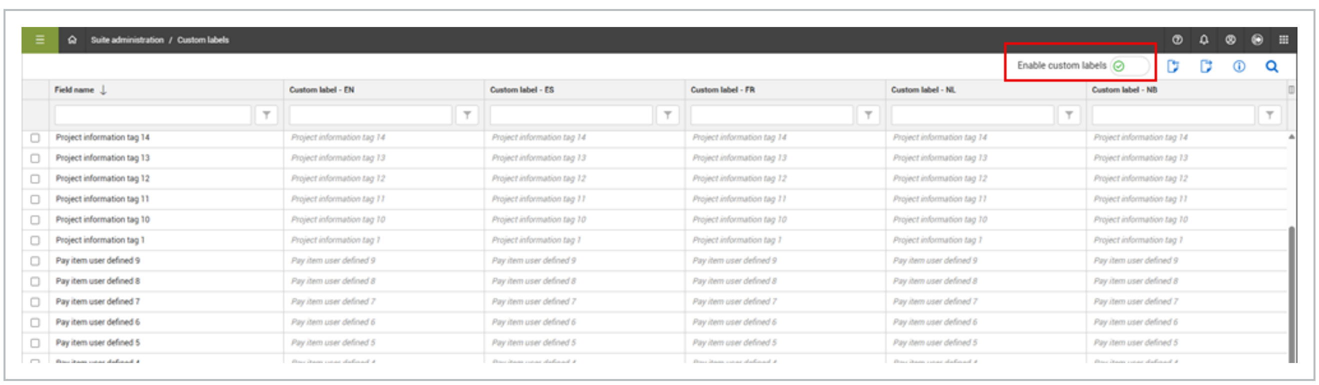
3.3 CUSTOM LABELS

To access and view custom labels, go to Suite administration > **Custom labels**. With the applicable permissions, you can view and edit custom labels. Permissions are configured in Roles and permissions > Suite administration > **Custom labels**.

Permission Name	Description	Level
View custom labels	Allows the user to view the Custom labels page and list of fields.	Base user
Edit label	Allows the user to rename specific user defined and tagged fields available on the Custom labels page.	Account Admin

To show custom labels in forms, the Enable custom labels toggle must be set to *On*, which requires additional permissions. At any time, you can set the Enable custom label toggle to *Off* and the custom labels fields in forms will revert to their original default label.

Choose a field from the list, and then click in the field of the preferred language. Enter the name of the new label, and then click outside the field to save the change.



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CHAPTER 4 – ORGANIZATIONS

4.1 ORGANIZATION SETTINGS

The Organization settings are where the top level of your organization sets the parameters which must be met by the company's requirements, and projects below the root will inherit. Most settings cannot be edited at the project levels, yet there are some that are editable and can be customized to meet each project's needs accordingly.

In Organization settings the administrator defines settings that apply to all projects within your organization. As an administrator, you can configure settings at the organization and project levels. Settings at the organization level are inherited by associated child organizations and projects. At the project level, you can further refine some settings to customize how they are applied in each project.

See Project Settings for general information about InEight cloud platform project settings.

4.1 Step by Step 1 – Open Organization Settings

1. From the Main menu, click All projects & organizations > **Organizations**, and then select the highest level in the OBS. The organization home page opens.

   > If an organization is saved as a favorite, you can select it in the Main menu, and then click **Settings**.

2. In the left navigation menu, click **Settings**. The organization settings General page opens to the Home Page tab.
   - The general organization settings are organized by application on the left and within the application you select on the left, the settings are organized into tabs on the right.

General Settings

Title	Description
Home Page	Contains a register for adding URL links to the organization home page that are visible for all project in the organization.
Global Options	Contains options to allow users to self-assign roles, control how project names and IDs display, and how cost items integrate with other systems.

General Settings (continued)

Title	Description
Fiscal Calendar	Calendar-related settings for the organization.
Custom Lists	Where you can define the tag (label) values you can use to categorize your information within the organization’s projects. You can select tags for the Cost Breakdown Structure, account codes, and pay items.
Attribute Definitions	Used to define project attributes which can be of the types text/date/number or can have source values from Organization, Project, and Market master data. These definitions are inherited to all projects in the organization.
Menu Options	Contains a register for adding URL links to InEight applications to the left navigation menu.

The Organization settings for each application are accessed from the left navigation menu. Click the double arrows to expand the menu and show the application name. Select an application to view application-specific settings and any additional tabs.

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CHAPTER 5 – PROJECTS

5.1 PROJECT HOME

Project settings are where you enter and configure basic information to specify the workflow of your project to communicate with associated InEight applications. The applicable permissions are required to add or edit any settings in your project.

General Settings

Title	Description
Global Options	These options let you assign an equipment resource with a currency that is different than the project currency or alternate currencies, set integration behavior for cost items with InEight Control and an ERP, enable data sharing between InEight applications for AWP, and enable the project to be a template
Home Page	Create custom URL links to show on the Project home page.
Fiscal Calendar	Read-only view of the fiscal calendar settings that determine fiscal reporting time lines and periods for projects. These calendar settings are configured in Organization settings.
Fuel Types	List of fuel types for the project that can be assigned directly to resources. The list defines cost per UoM, currency type, UoM, and can be assigned a specific account code.
Custom Lists	Labels information in your project with additional predetermined information. You can select tags for the Cost Breakdown Structure, account codes, and pay items.
Menu Options	Contains a register for adding URL links to InEight applications to the Project home page left navigation menu.

5.1.1 Application Settings

Project settings for each application are accessed from the left navigation menu. Click the double arrows to expand the menu and show the application name. Select an application to view application-specific settings and any additional tabs. For more information about using these settings, refer to the topics for the specific InEight application.

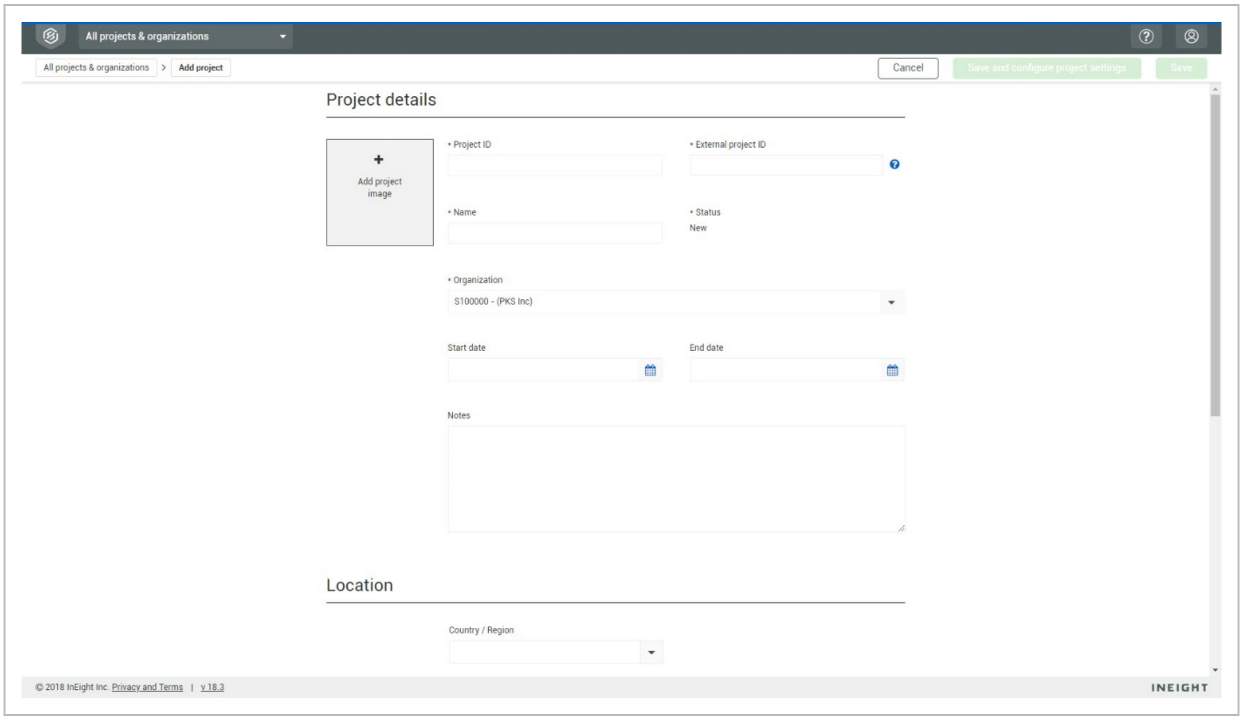
5.2 PROJECT INITIATION

To create a new project in the InEight cloud platform, your estimate in InEight Estimate must be complete, and ready to bring into the system. The project must have a status of New to import from InEight Estimate.

Status	Purpose
New	Projects must have the status of New to import from Estimate. This also hides the project from project roles.
Active	Projects must have Active status for project personnel to access this project.
Closed	Closing the project limits who can access the project.

5.2 Step by Step 1 – Add a New Project

1. From the Main menu, click **All projects & organizations**. The page opens to the Projects tab. Click the **Add project** icon.
2. Click the **Add project** icon. The Project details page opens.



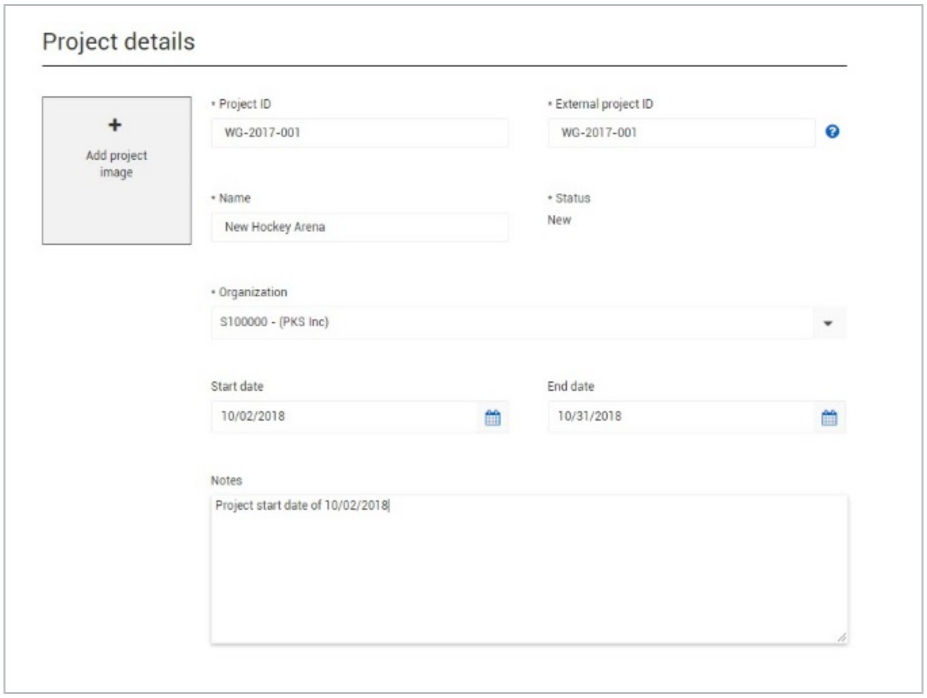
- It is best practice to fill out as much project information as possible. This makes organizing and finding projects in the future much easier.
- If you need to make changes to an existing project, you can edit the basic project information at any time.
- The Project ID must match the Job Code in InEight Estimate.
- The External project ID populates automatically from your ERP system.

5.2 Step by Step 2 – Enter Project Details

1. Enter a Project ID of [**your initials]-2017-001**.
2. Enter an External Project ID of **12345**.
    - The Project ID will most likely come from your ERP system (e.g., SAP) and can be entered for reference
3. Give your project a Project Name of **New Hockey Arena**.

- The Status of the project will default to New
    - This always defaults to New until you save the project

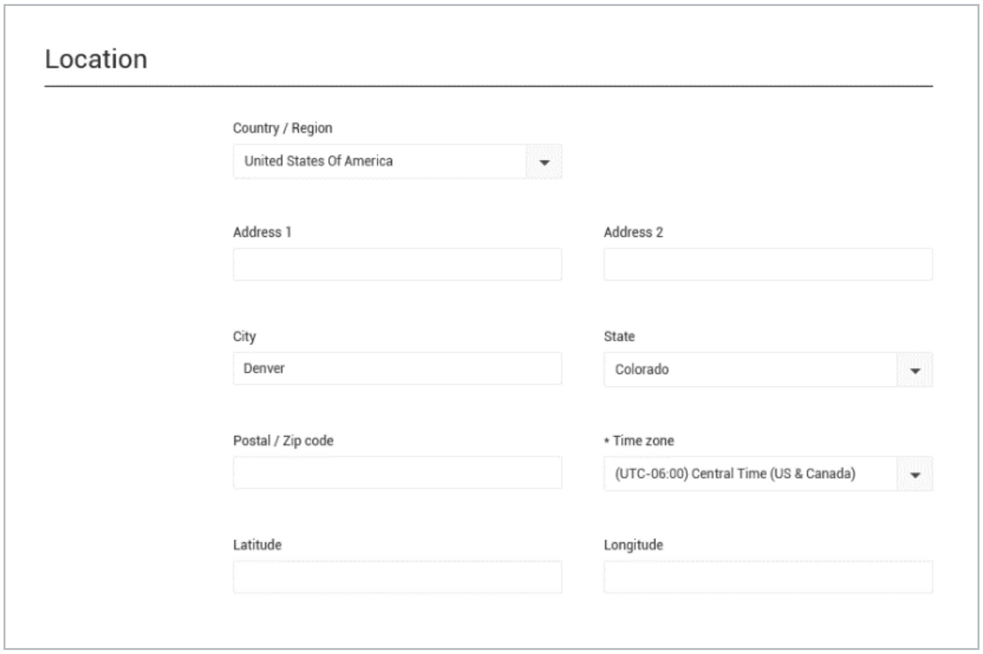
4. Select the Organization where the project is stored.
5. Start Date: [**select today's date]**
6. End Date**: [select a date in the future]**
7. In the Notes field, type: **Project start date of [the date you entered]**.



> You can add a project image, but it cannot be any larger than 250 KB.

5.2.1 Location

You can enter Location information manually, or nearly all this information can be imported.



Once again, it is best practice to make sure as much information is filled out as possible.

5.2.2 Currency

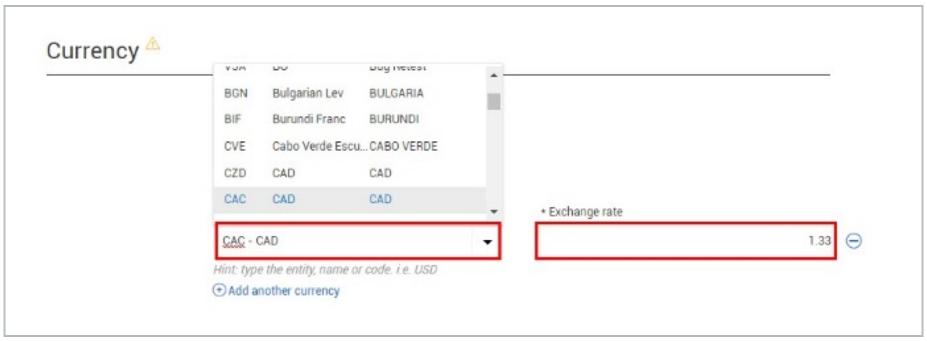
Make sure Currency is selected, but this information can also import with your estimate from InEight Estimate. You can also add additional currencies into your project from this screen by selecting **Add another currency**.

5.2 Step by Step 3 — Add a Currency

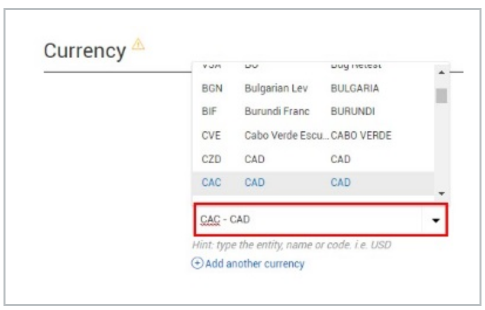
1. From the Projects tab, find the project you just created.
2. Highlight the project and select the **Edit** icon.
3. Scroll to the bottom of the screen to the Currency section.

- Notice that there is a base currency. This currency was established at the Organization level and cannot be removed.
- Any other currencies listed can be deleted using the Remove icon.

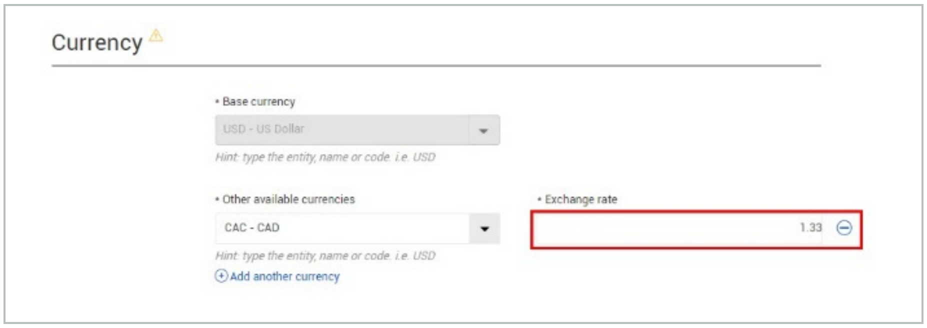
4. Select the **Other available currencies** drop-down list to view all currencies available.



5. Select the currency you want to use.



6. Enter the Exchange rate (required).



7. Click **Save**.
   - You can add another currency by clicking the **Add another currency**.

5.3 PROJECT SETTINGS

Project settings are where you enter and configure basic information to specify the workflow of your project to communicate with associated InEight applications. The applicable permissions are required to add or edit any settings in your project.

Project Settings

1. From the Main menu, click **All projects & organizations**. The page opens to the Projects tab.
2. Select a project from the list, and then click the project name link to open to the project home page.
3. In the left navigation menu, click **Settings**. The project settings General page opens to the Global Options tab.

> If projects are saved in the Main menu Favorites list, you can select a project, and then click **Settings**.

Title	Description
Global Options	These options let you assign an equipment resource with a currency that is different than the project currency or alternate currencies, set integration behavior for cost items with InEight Control and an ERP, enable data sharing between

Title	Description
	InEight applications for AWP, and enable the project to be a template
Home Page	Create custom URL links to show on the Project home page.
Fiscal Calendar	Read-only view of the fiscal calendar settings that determine fiscal reporting time lines and periods for projects. These calendar settings are configured in Organization settings.
Fuel Types	List of fuel types for the project that can be assigned directly to resources. The list defines cost per UoM, currency type, UoM, and can be assigned a specific account code.
Custom Lists	Labels information in your project with additional predetermined information. You can select tags for the Cost Breakdown Structure, account codes, and pay items.
Menu Options	Contains a register for adding URL links to InEight applications to the Project home page left navigation menu.

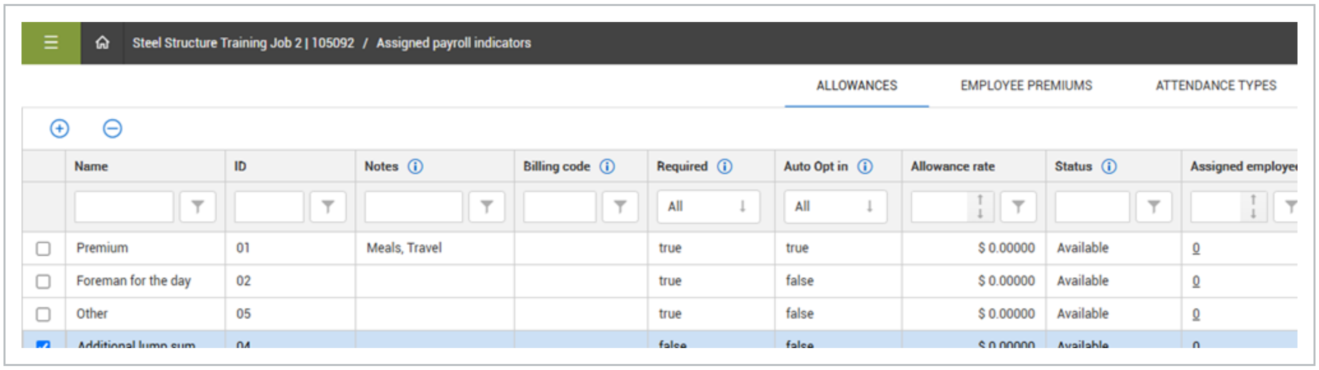
5.3.1 Application Settings

Project settings for each application are accessed from the left navigation menu. Click the double arrows to expand the menu and show the application name. Select an application to view application-specific settings and any additional tabs. For more information about using these settings, refer to the topics for the specific InEight application.

5.4 ASSIGNED PAYROLL INDICATORS

The payroll indicators (allowances, employee premiums, and attendance types) that show in a project are a subset selected from those in master data, which are available to be assigned at the project level and applied if an employee is eligible for the compensation.

Payroll indicators that are set to Required in master data, automatically show in projects when they are created. For payroll indicators that are not set to Required in master data, or that were set as Required after the project already existed, you can assign a payroll indicator from master data to the project manually. Go to Assigned payroll indicators, and then select the **Add** icon.



You can remove a payroll indicator from a project only if the Required value is *false* and no employees are assigned to the payroll indicator.

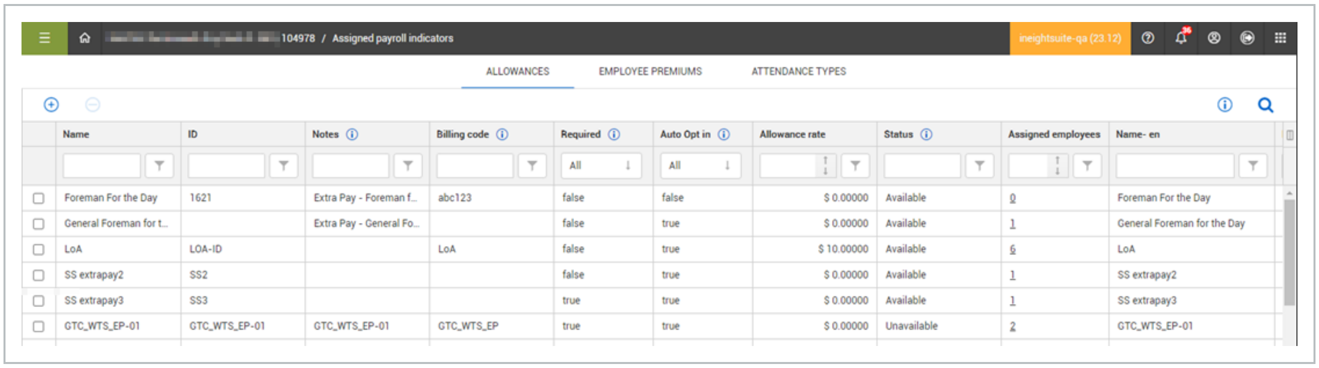
5.4.1 Considerations

Permissions for payroll indicators are configured in Roles and permissions > Organization and project > **Projects**.

Permission name	Description	Level
View payroll indicators	Allows the user to view the payroll indicators in projects.	Base user
Assign/unassign payroll indicators to projects	Allows the user to assign and unassign payroll indicators to projects.	Project Admin
Assign/unassign employees to allowances	Allows the user to assign and unassign allowances to project employees.	Project Admin

5.4.2 Allowances

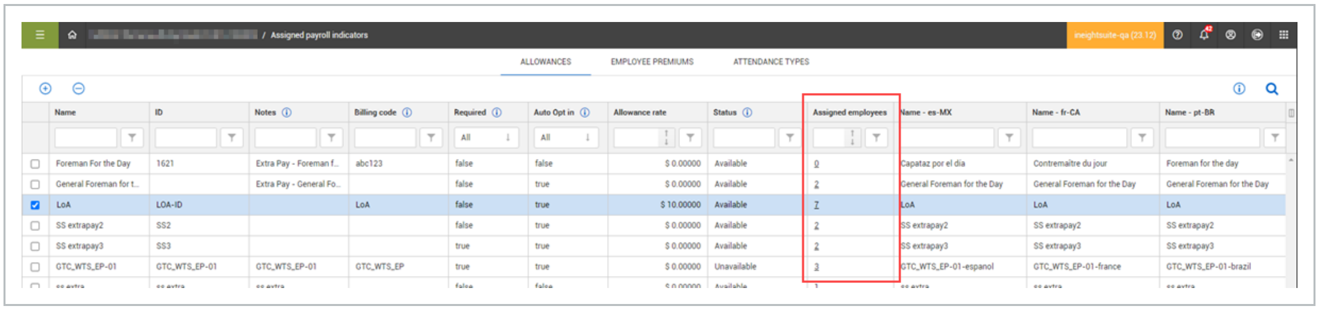
Allowances are extra pay that is made to an employee to cover expenses or compensate for specific working conditions by day, not specific to each hour or phase code. Examples of allowances include: foreman for the day, per diem, meals, subsistence, daily LOA, remote area pay, and tools.



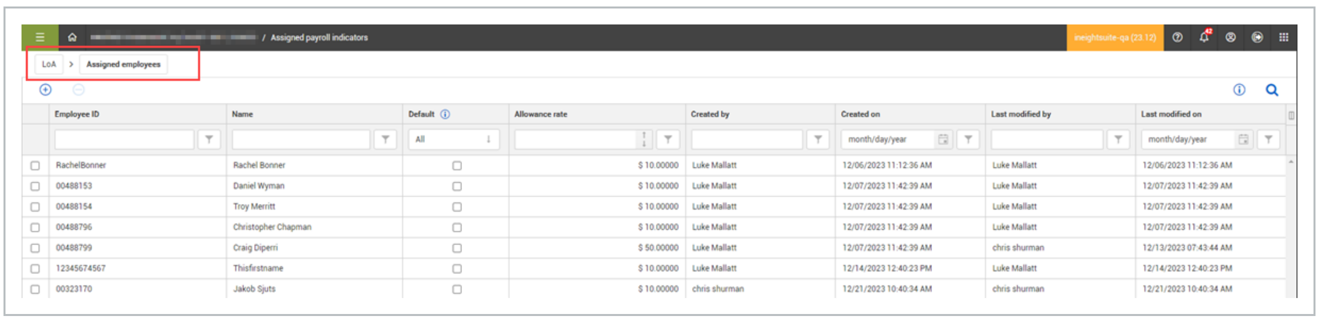
Field name	Description
Name	Name of the allowance that is defined in master data.
ID	Unique identifier for the allowance that is defined in master data.
Notes	Additional information defined in master data about the allowance that shows in the daily plan for the assigned project employee.
Billing code	Billing code associated with the allowance that is used for integration with InEight Billings.
Required	If set to *true*, the allowance was automatically assigned to the project when it was created. This setting is configured in master data and cannot be changed in the project.
Auto Opt in	When the value is set to *true*, the allowance is automatically assigned to all new employees on all projects. This option can be changed in a project if needed.
Allowance rate	Amount given for the allowance. This value can be changed in the project and when it is assigned to individual employees. When the amount is defined at the project level, all assigned employees inherit the amount automatically, but the amount can be overridden at the assigned employee level.
Status	Default is set to *Available*. If set to *Unavailable*, the allowance shows in the list but it cannot be assigned to project employees.
Assigned employees	Shows the number of project employees that are assigned the allowance. Select the link to show the project employees list, which allows you to add or remove employees assigned to the allowance.

5.4.2.1 Assigned employees allowances

In the Assigned employees field, it shows the number of project employees that are assigned to each allowance for the project.

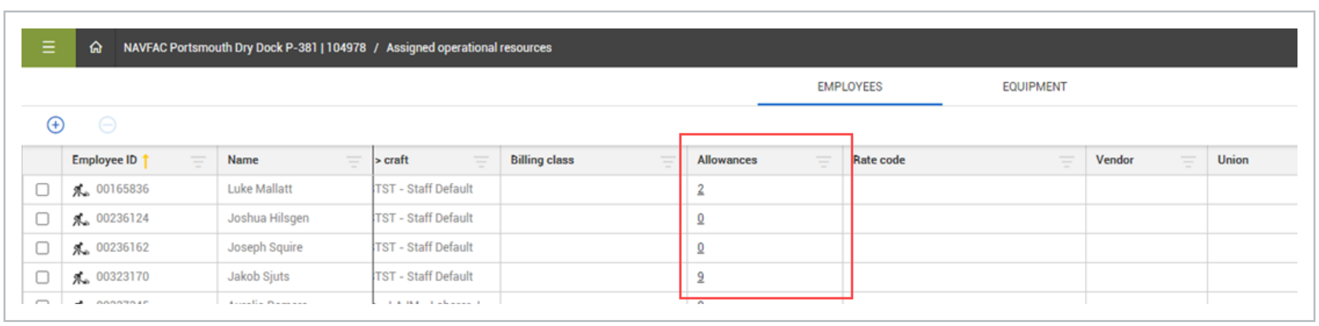


Click the link to view a list of employees assigned to the selected allowance. From this view, you can add or remove employees and change the rate. The Default option is used to assign the allowance to an employee automatically in Progress daily plan where the employee is assigned.

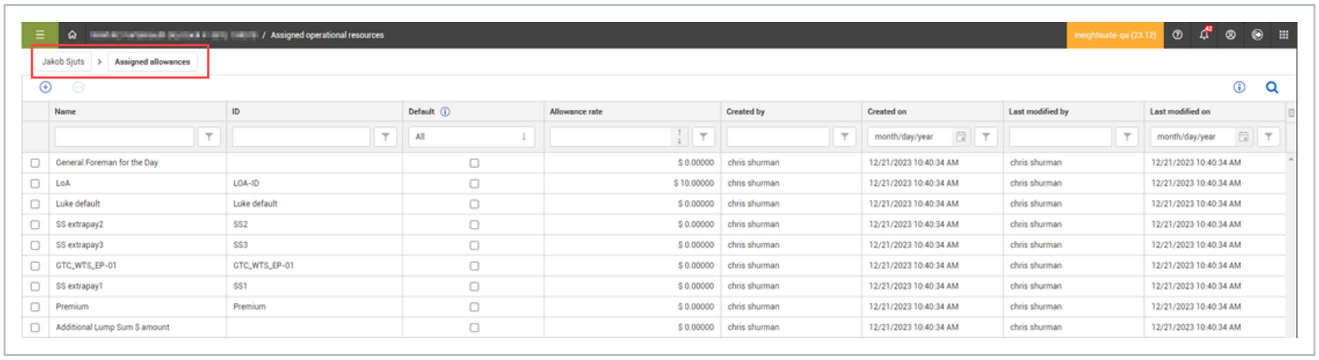


5.4.2.2 Assigned operational resources

From the Assigned operational resources page, you can view the list of project employees and the number of allowances assigned to each of them.

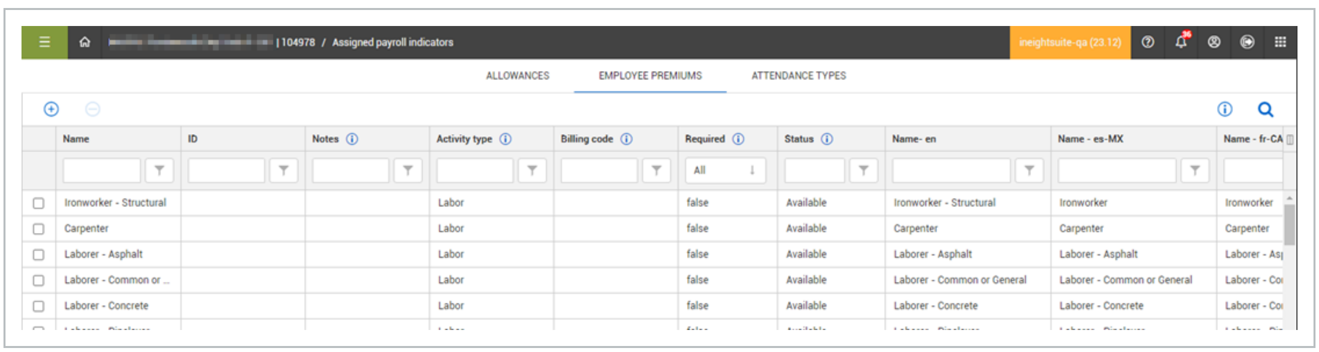


Click the link to view a list of allowances assigned to the individual employee. From this view, you can add or remove allowances for the employee, and change the rate. The Default option is used to assign the allowance automatically in Progress daily plan where the employee is assigned.



5.4.3 Employee premiums

Premiums are payroll instructions used to alter the base wage of an employee for a specific task or reason and associated to specific hours on an employee time sheet. Examples of premiums include: foreman pay, lead hand pay, safety pay, holiday premium, on call premium, and hazard premium.

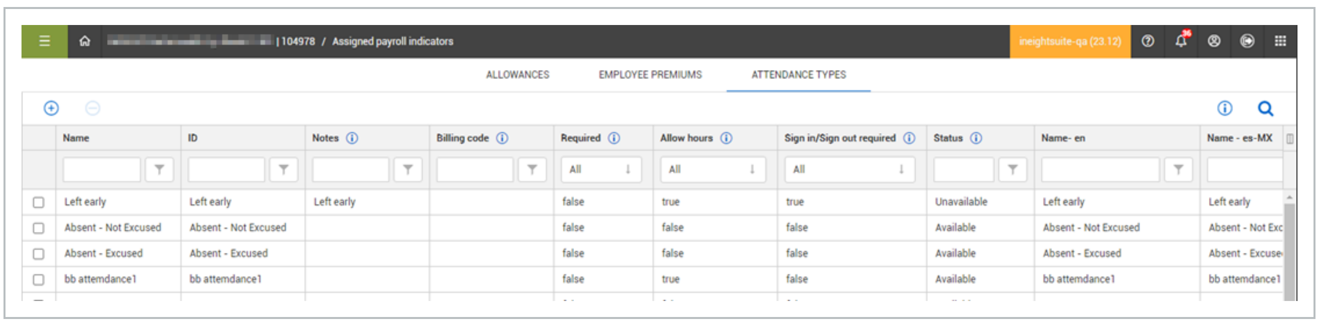


Field name	Description
Name	Name of the premium that is defined in master data.
ID	Unique identifier for the premium that is defined in master data.
Notes	Additional information defined in master data about the premium that shows in the daily plan for the assigned project employee.
Activity type	Labor or maintenance
Billing code	Billing code associated with the premium that is used for integration with

Field name	Description
	InEight Billings.
Required	If set to *True*, the premium was automatically assigned to the project when it was created. This setting is configured in master data and cannot be changed in the project.
Status	Default is set to *Available*. If set to *Unavailable*, the premium shows in the list but it cannot be assigned to project employees.

5.4.4 Attendance types

Attendance types provide a method to identify employee attendance during a normal work day, such as excused absence with pay, unexcused absence, and jury duty.



Field name	Description
Name	Name of the attendance type that is defined in master data.
ID	Unique identifier for the attendance type that is defined in master data.
Notes	Additional information defined in master data about the attendance type that shows in the daily plan for the assigned project employee.
Billing code	Billing code associated with the attendance type that is used for integration with InEight Billings.
Required	If set to *true*, the attendance type was automatically assigned to the project when it was created. This setting is configured in master data and cannot be changed in the project.
Allow hours	If set to *true*, the time entry field in InEight Progress is editable and a value

Field name	Description
	can be entered for the employee absence.
Sign in/Sign out required	Indicates if sign out on the daily plan is expected for the employee.
Status	Default is set to *Available*. If set to *Unavailable*, the attendance type shows in the list but it cannot be assigned to project employees.

For additional information about payroll indicators and how they compare to other payroll options, see Payroll Options Analysis.

5.5 OPERATIONAL RATE CODES

Operational rate codes allow you to define alternative pay rates that an employee is paid due to a contract that is specific to the project or could also be applied to an additional role the employee has on the job. Operational rate codes are typically used for prevailing wage type projects, where the employee rate code and craft rate code, might change based on the work being performed. Rate codes are configured in a project as needed and when available, can be assigned to operational resources in the project.

5.5.1 Considerations

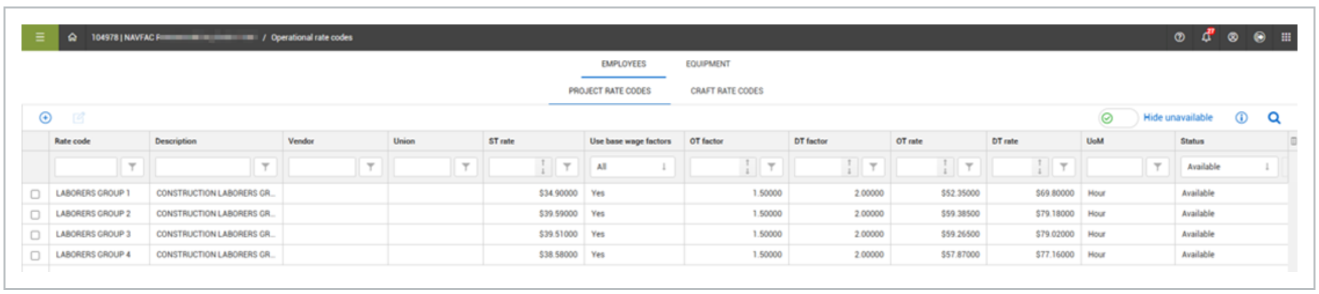
Permissions for payroll indicators are configured in Roles and permissions > Organization and project > **Projects**.

Permission name	Description	Level
View project rate codes	Allows the user to view the list of available rate codes in the project.	Project Admin
Add project rate code	Allows the user to create and add rate codes in the project.	Project Admin
Override project rate codes rates	Allows the user to change the state of the Override rates check box in Assigned operational resources and apply a different rate to employees and equipment.	Project Admin

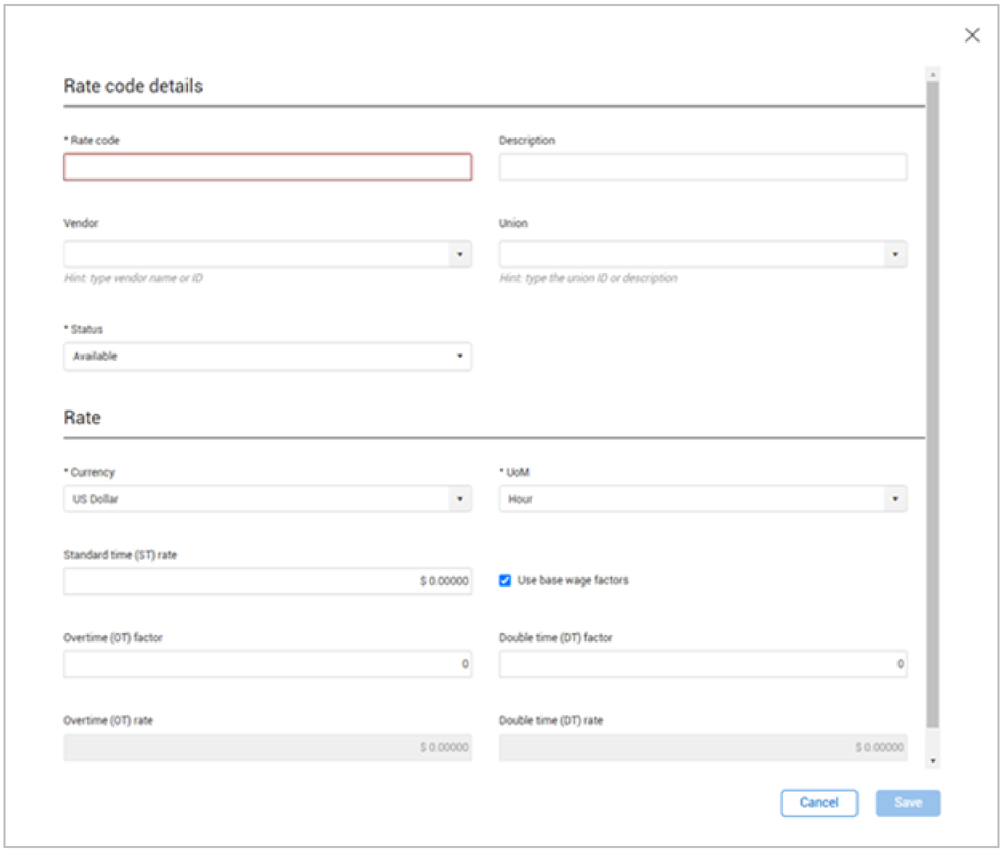
Permission name	Description	Level
Delete project rate codes	Not used. This permission will be deleted in a future release.	
Edit project employee rate code	Allows the user to modify existing rate codes and the rate code assignment of an employee.	

5.5.2 Employee rate codes

The Employee page shows a list of project and craft rate codes that can be selected and assigned to employees on the project.



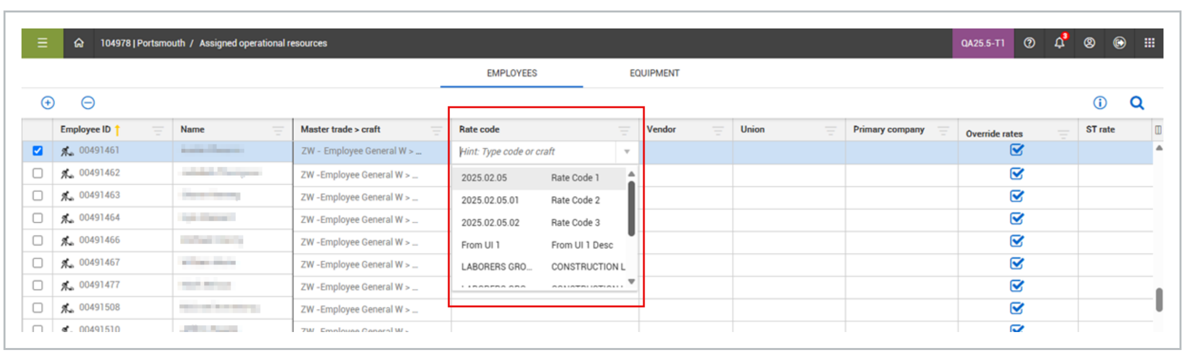
With the applicable permissions, the Add icon and Edit icon are available for you to create new and modify existing rate codes. When adding a rate code, the Rate code field must be a unique identifier.



Set the Status field to *Available* to allow the rate code to be assigned to a project resource. If the status is set to *Unavailable* and the Hide unavailable toggle is *On*, the rate code does not show in the list.

If the Use base wage factors check box is selected, the Overtime rate and Double time rate fields are calculated based on the overtime and double time factors entered.

After rate codes are created and are set to *Available*, then they are shown in a drop-down list on the Assigned operational resources page.



5.5.3 Equipment

Equipment rate codes are used for equipment that is assigned to a prevailing wage type project, the same as operational rate codes are used for employees. When available, the rate codes can then be applied on the Assigned operational resources > Equipment page for the project.

5.6 PROJECT MANAGEMENT

Scenario

> You are a project administrator and you want to grant your project engineer access to edit the project. You also have ten field engineers that you want to view the project and claim quantities. After your team members have been added to the project, you will want to make it active.

5.6.1 Assign Members to the Project

There are key terms to know for managing users and resources for a project.

User Terminology

Classification	Description
User	Person that has an account to use the InEight cloud platform.
Member	Users that are assigned specific roles on a project. Members are also referred to as **assigned users** in some areas of the application. Examples of specific project roles include: Superintendent, Engineer, Foreman. **NOTE:** Being assigned a member with specific roles is necessary for access in other InEight applications, such as InEight Progress.
Operational Resource	The specific employee, equipment, and material used to build the work on the project and tracked in Plan and Progress. **NOTE:** Currently, you can only add employee and equipment operational resources to the project but not materials.
Employee	Employees are operational resources that are assigned to specific projects for cost tracking. For example: • Darrel P. Lewis - Ironworker

User Terminology (continued)

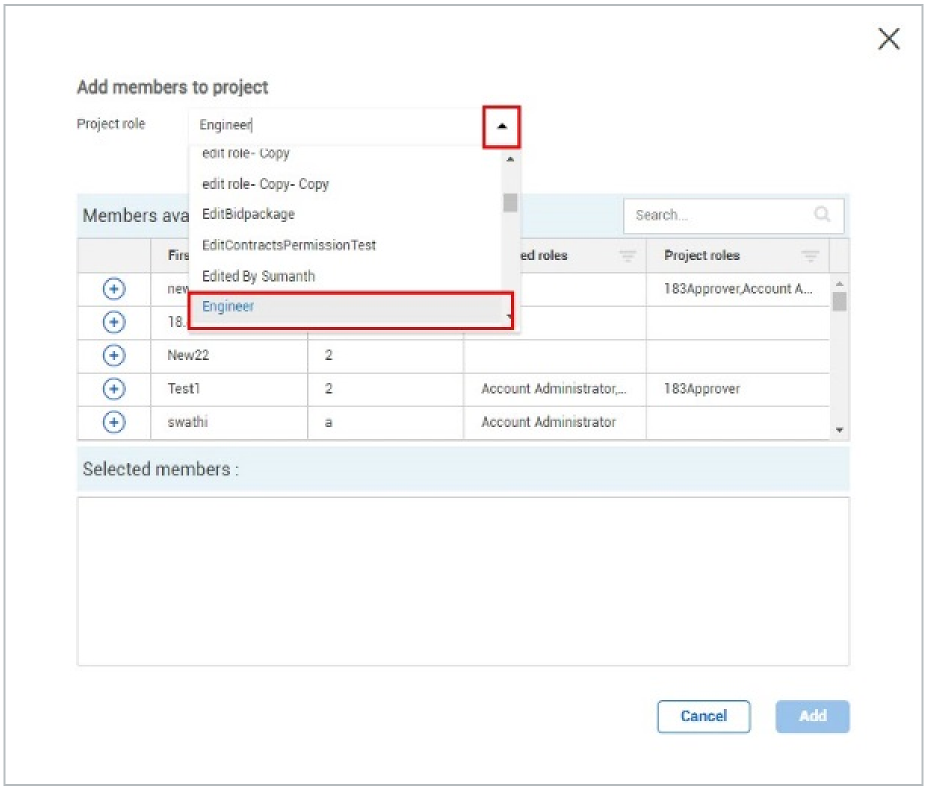
Classification	Description
Equipment	Equipment are operational resources that are assigned to specific projects for cost tracking. For example: • Grove Crane RT880E, ID# 110002

- **Example 1:** A Foreman is listed in the program as an operational resource, and he will be assigned as an employee on a project for tracking purposes. He will also need to be added as a user and assigned as a member on his project, so he can use InEight Progress.
- **Example 2:** A carpenter apprentice is an operational resource that is assigned as an employee on a project. He will not be a user because he will not be using the InEight applications.
- **Example 3:** The Area Manager will be a user with a role that allows access to all the projects in his area. He is not assigned as a member, because he doesn't fill a specific role on a project.
- **Example 4:** A Project Engineer will be a user assigned as a member to a project when working on a specific project.
- **Example 5:** An Excavator Cat349 is an operational resource that is assigned as an equipment on a project.

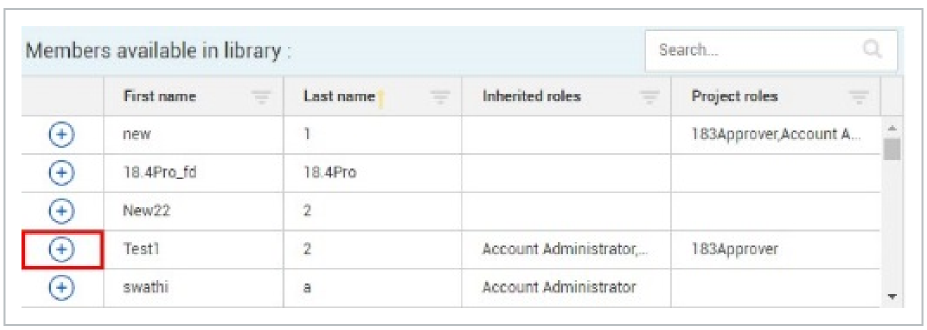
> You must be assigned as a member with the role of Superintendent, Engineer, or Foreman to use the Progress application.

5.6 Step by Step 1 – Assign Users to a Project

1. From the Main menu, select a project from your favorites list, and then click **Project home**. The Project home page opens.
2. On the **Assigned users** tile, click the **Add user** icon. The Add members to project dialog box opens.
3. For Project role, select **Engineer** from the list.



4. Click the **Add** icon next to your name.



5. Click **Add**.

   - Notice the total in the users block now is 1

5.6 Step by Step 2 — View Members on a Project

1. On the Project home page Assigned users tile, click **Manage users**.
    - The Assigned users page opens
2. Sort the **Assigned Roles** column in descending order.
    - All the members that are assigned to the project will be at the top of the screen
    - Note the Inherited Roles column. These are the people that are assigned to the organizational level, that have inherited roles on this project. They can access the project per their permission level, but they are not counted as members

5.6.1.1 Users

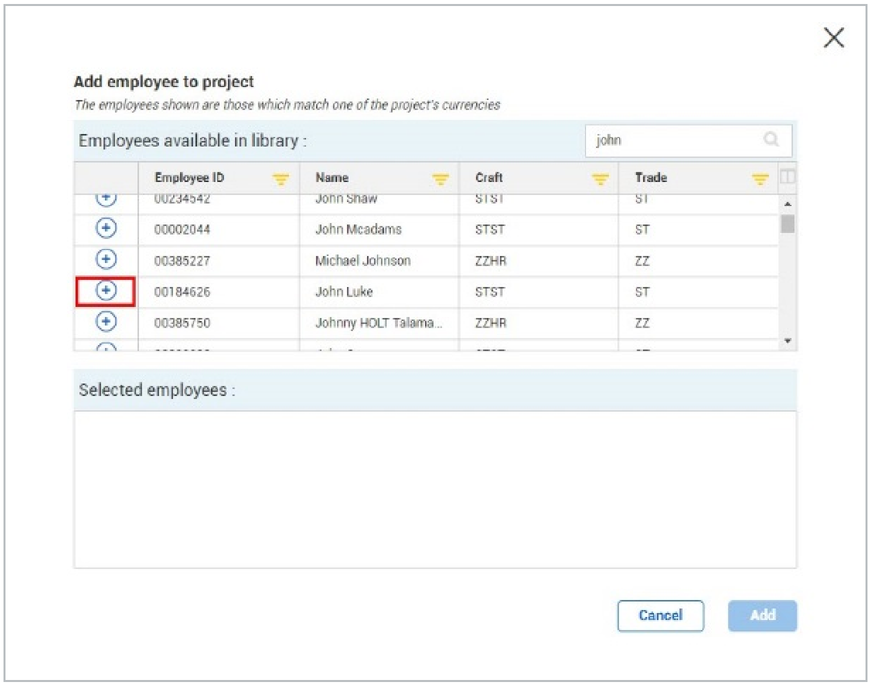
A User is assigned the same permissions as a member. The difference is that they are an outside source to the main organization. For example, a Designer is hired as a contractor and not as a full-time employee. To perform the task effectively, the contractor needs the same permissions as a regular employee.

5.6.2 Add Employees and Equipment to the Project

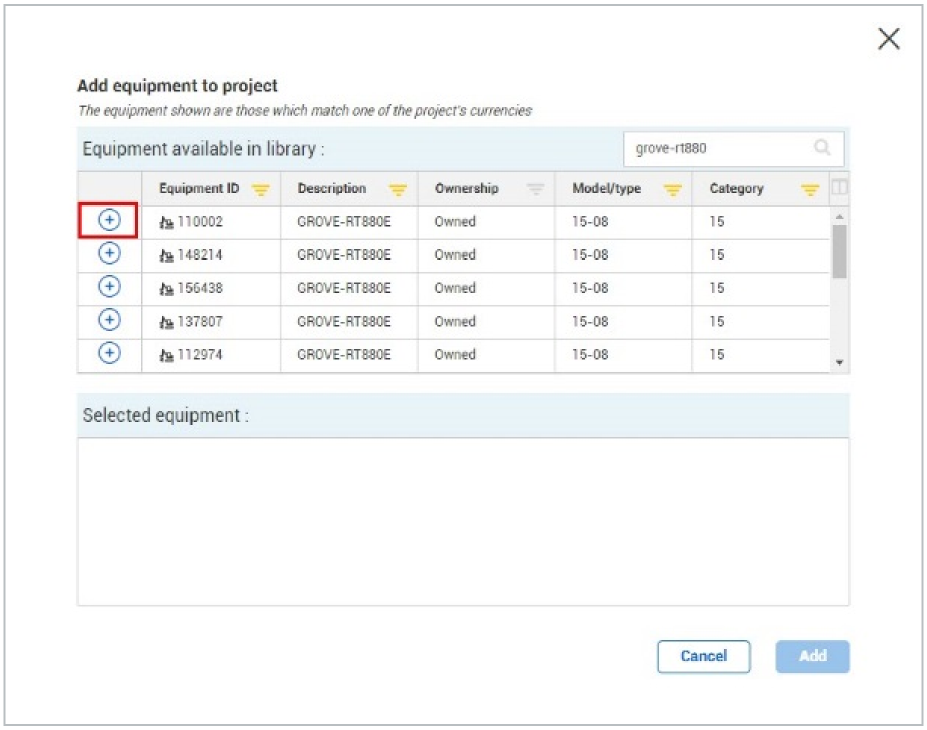
Along with members, you can add employees and equipment to the project, so they can be used by the InEight applications (e.g., Plan, Progress, Control).

5.6 Step by Step 3 — Add Employees and Equipment on a Project

1. On the Project home landing page, click the **Add** icon on the Assigned employees tile.
2. Click the **Add** icon next to the following names to add them to the project (use the search bar to find the names if necessary):
    - John Luke
    - Joe Farley



3. Click **Add**.
    - Notice the number total in the Assigned employees tile increased by two.
4. From the Project home landing page, click the **Add** icon in the Assigned equipment tile.
5. Click the **Add** icon next to the Grove-RT880E (ID# 110002) crane to add it to the project (use the search bar to find it if necessary):

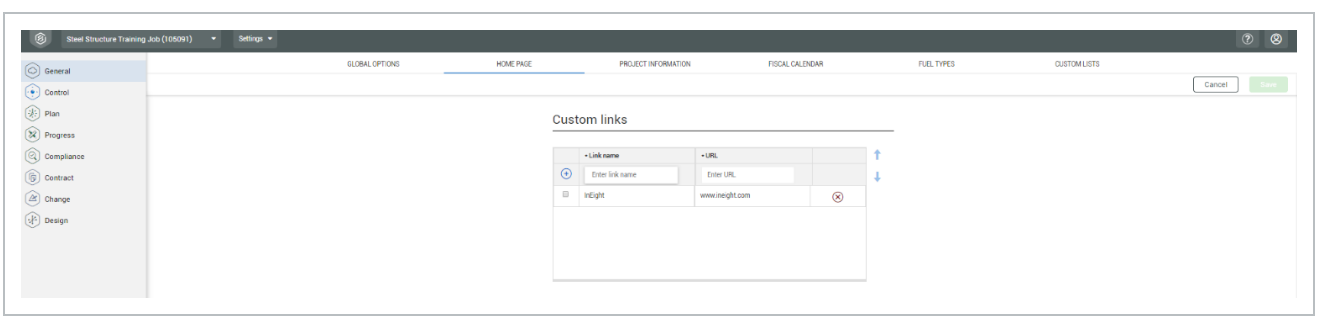


6. Click **Add**.
    - You will notice the total number in the Assigned equipment tile increased by one.

5.6.3 Custom Project Links

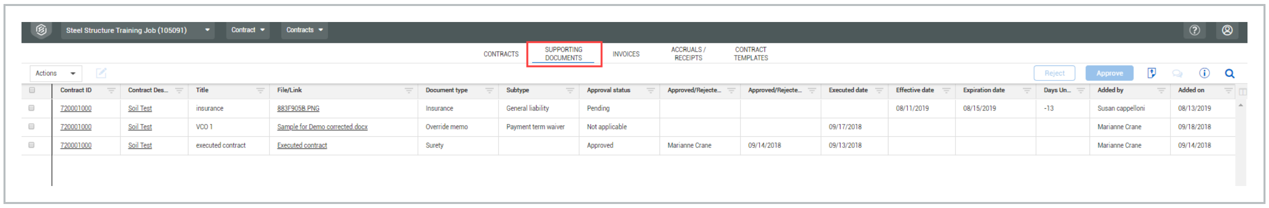
With the required permissions, you can add custom links to the Project home page Links tile for easy access to associated or needed content.

To add a custom link to the project, click the **Add** icon. This opens the Project settings **Home Page** tab, where links can be added or edited.



5.6.4 Documents

Documents are not stored centrally but instead they are stored at the project level. On the Project home page Supporting Documents tile, click the **View** icon to open Contracts page where you can see all the pertinent documents that have been linked to your project.



> You can also access project documents from the left navigation menu and go to Contract > Contracts > **Supporting Documents**.

Along with entering a Title for your document, you can specify what document type you are uploading, for example:

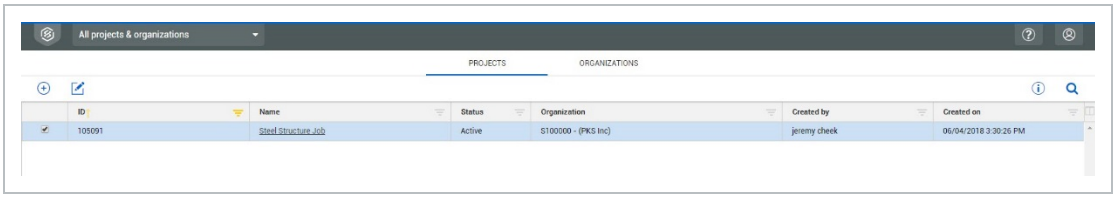
- Change Order
- Contract Document
- Design Document
- Diagram
- Other
- Permit
- Photo
- Request for Information
- Submittal Document
- Transmittal Document

5.6.5 Project Activation

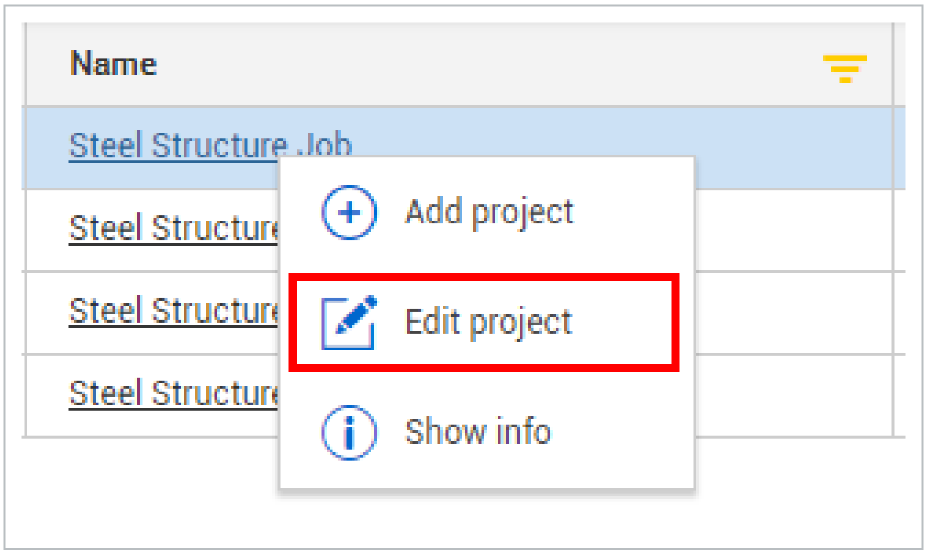
After you have configured the project and received approval from the administrator, the project will be placed into Active status.

5.6 Step by Step 4 – Activate the Project

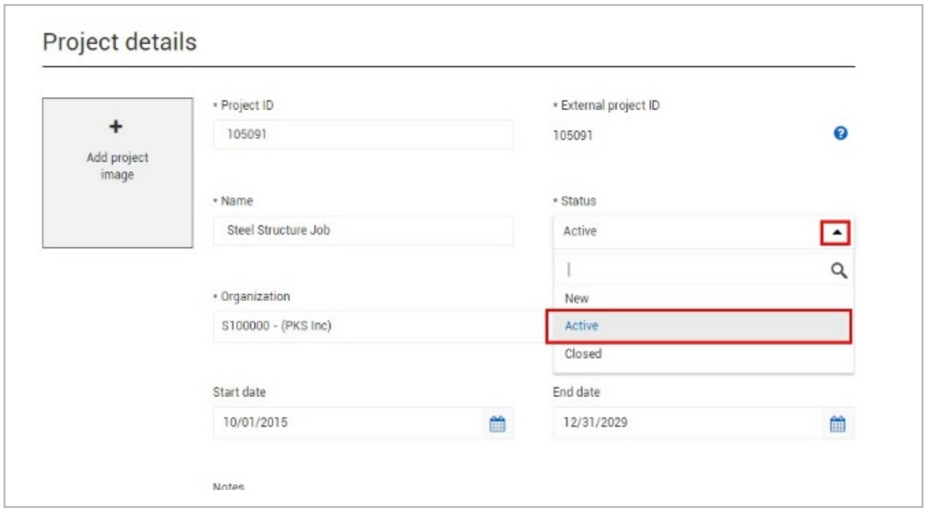
1. On the Projects tab, find your project and click anywhere in the row to highlight it.



2. Right-click on the row and a window appears.
3. Select **Edit project**.



4. Click the drop-down menu in the Status box and select **Active.**



5. Click **Save.**

5.6.6 Close the Project

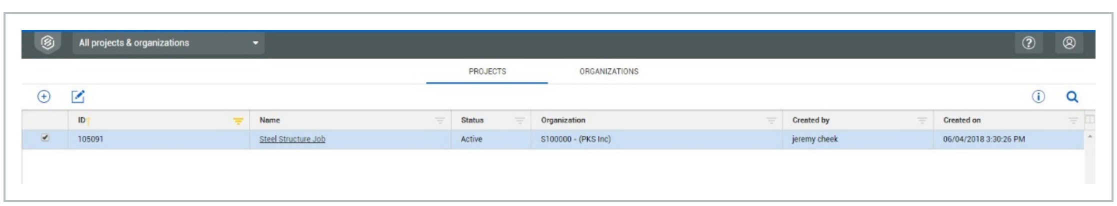
Scenario

> The steel structure was just completed and is ready for opening ceremonies in October. Steve has closed out the contract with the client and is now ready to close the project for archiving.

After the project is complete and all information is finalized, the project can be closed and archived.

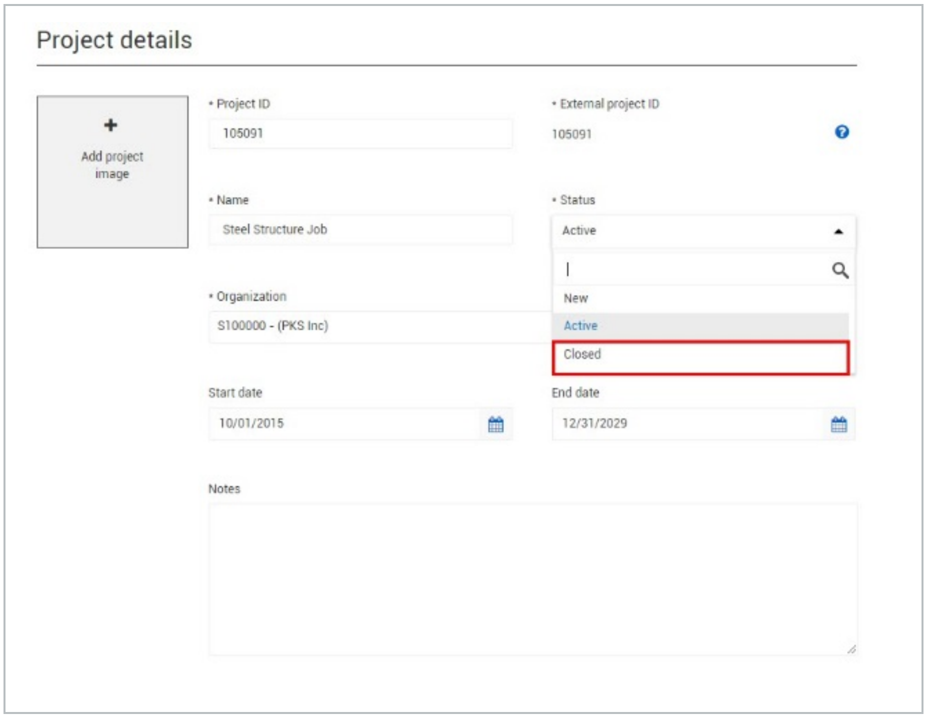
5.6 Step by Step 5 – Close the Project

1. On the Projects tab, find your project and click anywhere in the row to highlight it.



2. Right-click on the project row and a menu shows.
3. Select **Edit project**.

4. Click the drop-down menu in the Status box, and then select **Closed**.



5. Click **Save**.

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CHAPTER 6 – MASTER DATA LIBRARIES

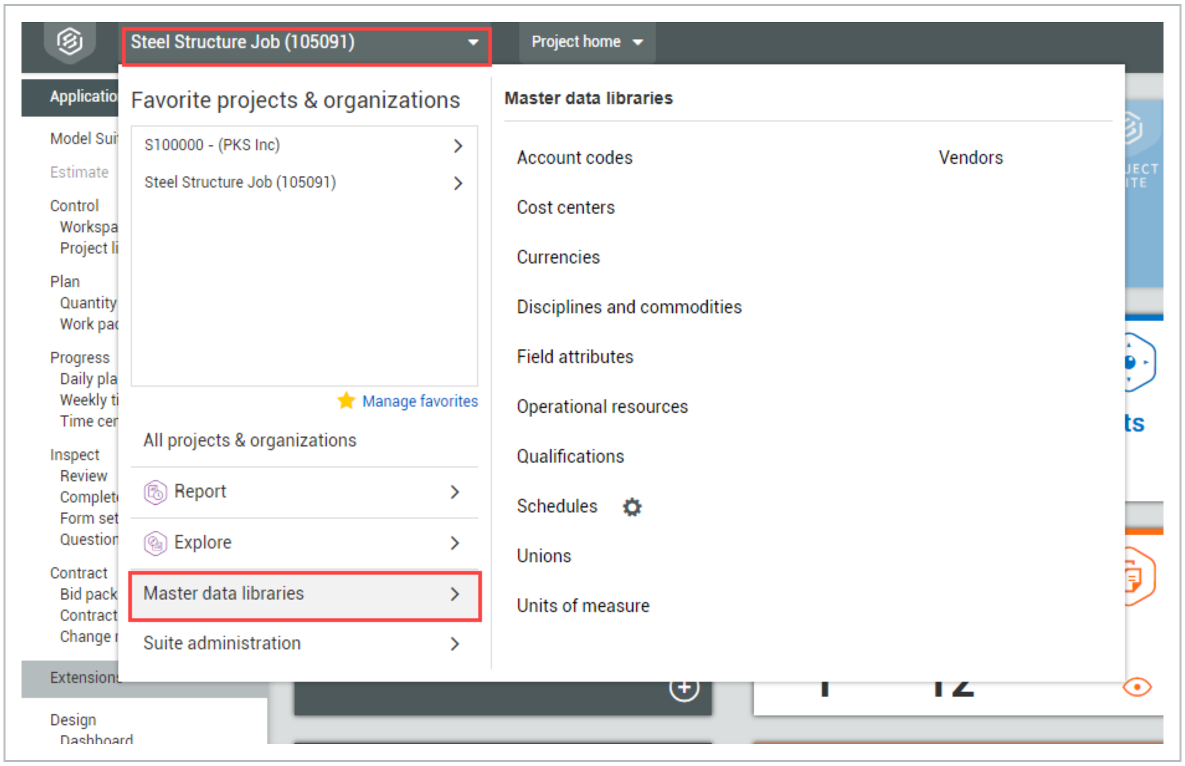
6.1 OVERVIEW

The Master Data Libraries are databases of master information available for use in different projects, specific to your company. The other InEight applications use the information in the Master Data Libraries.

The Master Data Libraries are organized into the following categories:

Section	Description
Account Codes	Assigned to WBS elements in the Control application to standardize cost accounting.
Cost Centers	Indicators of locations for Project resources and possible Budget Code Segment information.
Currencies	Includes all the possible currencies your projects or organization may use.
Disciplines and Commodities	Organization of types of work and materials. Disciplines and Commodities are used in InEight Plan.
Field Attributes	Physical properties assigned to Disciplines for use in the InEight Plan application (Length, Width, Height, etc.…).
Operational Resources	All Employees and Equipment. This can be an import from your ERP system or manually created.
Qualifications	Qualifications assigned to people and equipment for use in InEight Inspect. Typically, also housed in your ERP system.
Schedules	This is the list of schedules your project has created.
Unions	Associate Master Data employees or crafts to a local union as required by the organization.
Units of Measure	Includes all the possible Units of Measures your projects may use.
Vendors	This is the list of Vendors for your company to use in your InEight applications.

To access the Master Data Libraries menu, click on the first level menu drop-down and then select **Master Data Libraries**.

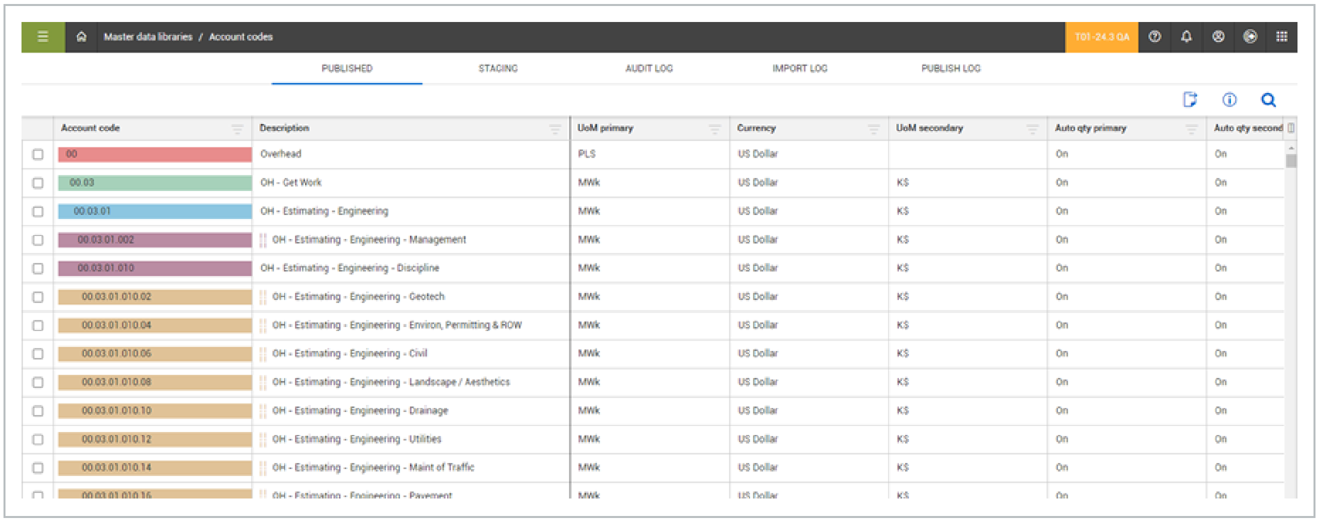


6.2 ACCOUNT CODES

Account codes are a list of codes in master data that are generally dictated by the specifications of accounting and ERP systems, which serves as a standardized coding system to track like operations across a company for the purpose of global reporting and benchmarking. Account codes provide a common language that can be used across multiple InEight applications. By using a master set of account codes, it allows for the cross-referencing of cost items and budget line items of your accounting system across the InEight cloud platform.

Account codes typically follow a hierarchical structure, which allows for summary level reporting rolled up to company standards but can also be a flat list. This hierarchy allows tracking at multiple levels in the project and therefore more accurate tracking and more comparable data. For example, in one project you track all the civil work at subordinate levels and in another project you have contracted out the civil work. You can still compare costs for the civil in these two projects as the subordinate account codes would roll up into a parent account code.

The account codes list and hierarchy is created and maintained in Master data libraries > **Account codes**. Account codes are typically maintained at an organization level to ensure that categories and codes remain consistent with company standards.



The account codes within the account code structure are arranged into a hierarchy of parent-child relationships that can contain varying levels of detail for each level of the hierarchy as indicated by color. You can assign account codes to cost items anywhere from the highest level to the lowest level. The lower the level assigned, the higher the level of detail associated to the account code. Terminal items are account codes at the lowest hierarchy level within a group or family of codes. An icon shows in the description field of a terminal account code.

6.2.1 Account codes tabs

The account codes master data library consists of five tabs: Published, Staging, Audit Log, Import Log, and Publish Log. The Account codes page includes both a Published tab for account codes that are live and a Staging tab that lets you make changes without affecting live account codes that are being used by other products in the cloud platform.

Tab Name	Description
Published	Lists all account codes that are available in the InEight cloud platform for use in projects.
Staging	Create and edit account codes, and then publish for use. Account codes are not available for use in projects until they are published.
Audit Log	Tracks changes made to the account code structure, including the value before and after, the changed date, and who made the change.
Import Log	Track the status of all account code import processes. When you hover over the

Tab Name	Description
	Failed with errors status, an information message shows with next steps. You can download the detailed error log.
Publish Log	Lists all published account codes, along with its associated published status, such as completed or cancelled.

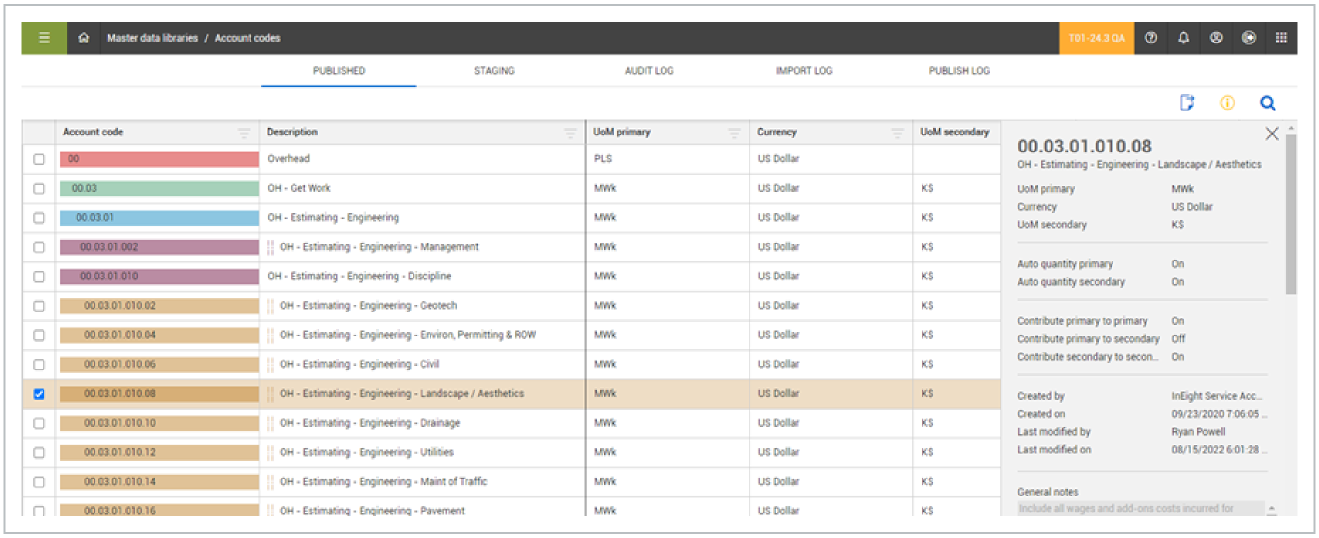
6.2.2 Considerations

If you have the applicable permissions, you can add, delete, edit, or replace account codes.

Permission Name	Description	Level
View account code	Allows the user to view the account code structure and access only the Published tab in master data.	Base user
Add account code	Allows the user to create new account codes in Staging.	Organization Admin
Edit account code	Allows the user to make changes to existing account codes in Staging.	Organization Admin
Delete account code	Allows the user to delete account codes in Staging.	Organization Admin
Approve/Reject account code	Allows the user with this permission to approve or reject account codes in Staging. When approved, account codes show in the Published tab.	Organization Admin
Approve all account codes	Allows the user to access all account code tabs. A user with this permission can use the Approve all option in Staging to move all account code changes to show in the Published tab.	Organization Admin

6.2.3 Published

The Published tab shows the account code structure and all live account codes that are available to use in the InEight cloud platform and applications. You can use the Search and Information functions on this page to find a specific account code and see more details about it. The account code structure can also be exported to an Excel file. Account codes cannot be changed from the Published tab.



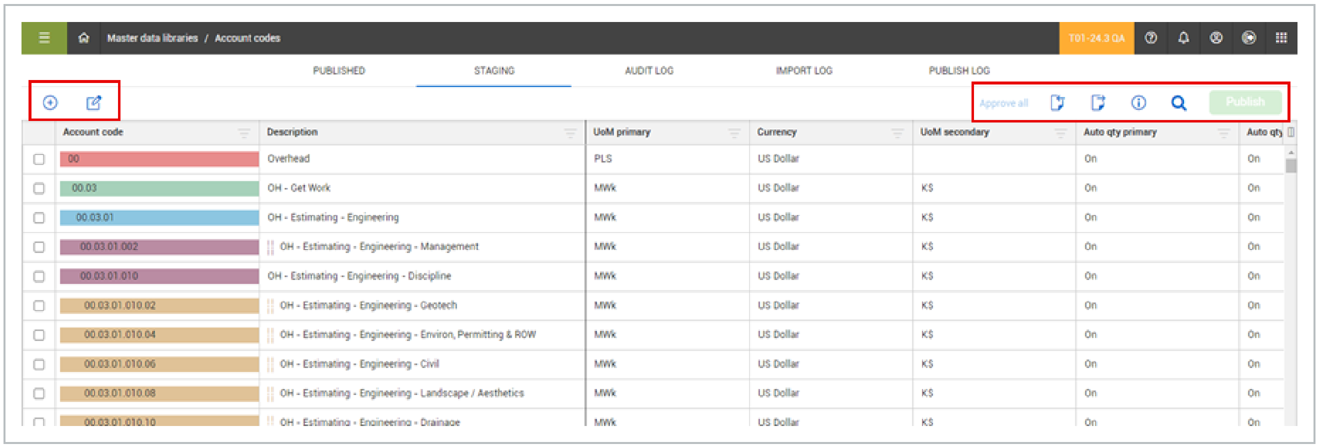
6.2.4 Staging

The Staging tab shows duplicates of the published account codes and is where you can add new account codes and modify or delete existing ones. Staging allows you to make changes without affecting live account codes being used by other products in the platform. Any additions and changes made to account codes in Staging are not available to use until after they are published.

> You can only publish when all pending records have been approved or rejected. The publish option is not available when there are changes pending.

The staging feature allows all account code additions and changes to be published in a batch. Batch publishing allows all changes to remain as pending until they are approved or rejected, and then all changes are publish at the same time to make them available to use. The published changes are then consumed by the InEight application at a time that best suits the application.

To see and review pending account code changes, go to Master data libraries > Account codes > **Staging**.



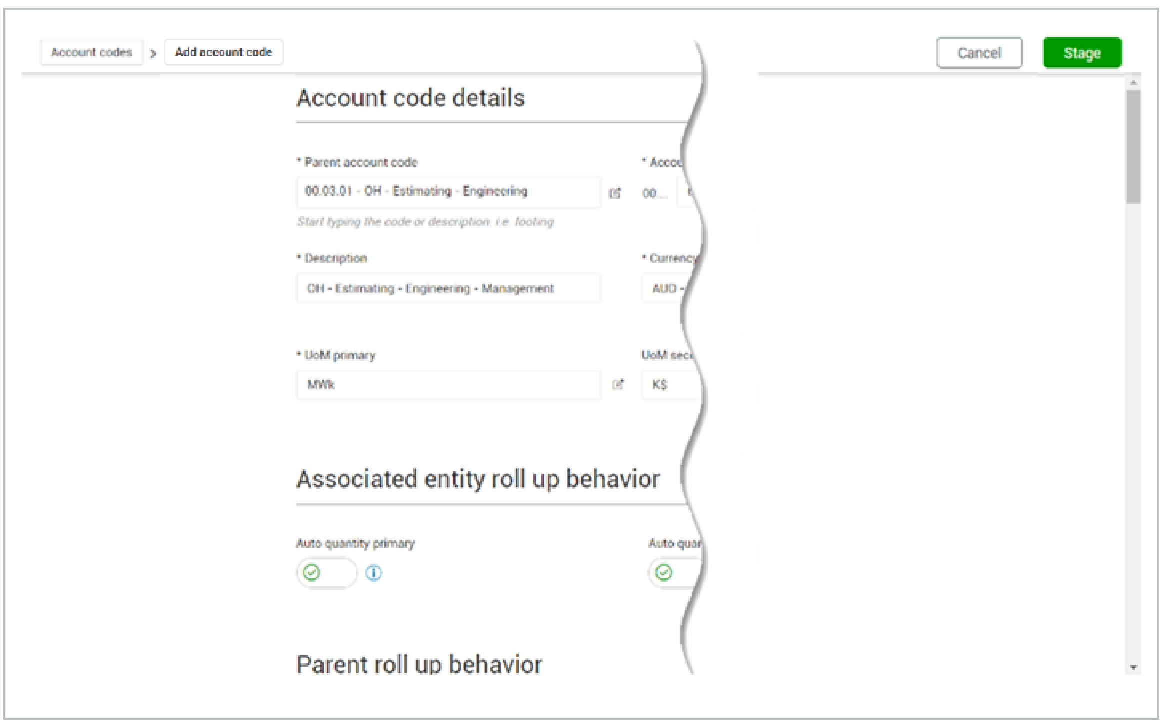
When you select to add or edit an account code, the following details and settings show on the page.

Field Name	Description
Parent account code	Account code with sub-level child account codes below it.
Account code	Alpha numeric sequence assigned as the code.
Description	Description detailing the scope of the account code.
Currency	Currency assigned to and used for the account code.
UoM primary	Primary unit of measure for the account code.
UoM secondary	Secondary unit of measure for the account code.
Auto quantity primary and Auto quantity secondary	When enabled, the option automatically rolls up cost item quantities if the cost items and this account code have the same primary and secondary UoMs. It can also be set on a project specific basis. Changes made to the master list of account codes for Auto quantity secondary will not change existing account codes in InEight Control. New associations going forward will use the updated value of this setting.
Parent Roll Up Behavior	Controls whether primary or secondary quantities of account code roll up to the parent account code’s primary or secondary quantity.
Flag for disable	Flagging an account code for disable automatically flags all associated child account codes.

Field Name	Description
Notes	Option information that can be included about the account code, which can be categorized for general, safety, environmental, and quality. These notes are available for editing, staging, and publishing.
Account code structure tags 1-20	Tags that can be associated with the account code, which allows it to be categorized according to the tags.
Custom text fields 1-10	Optional user defined fields that can be used to add information related to the account code.

6.2.4.1 Add an account code

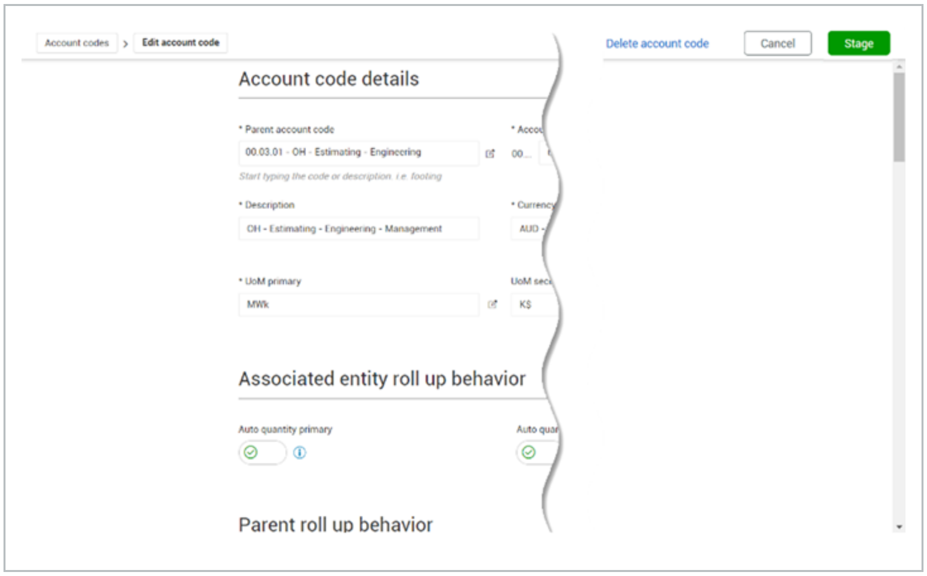
1. In the main menu, go to Master data libraries > Account codes > **Staging**. If you are adding a child to an account code, select the check box of the account code that it will be under.
2. Click the **Add account code** icon. The Add account code page opens to show the new account code details and inherited data from the parent account code. Complete the applicable fields.



3. Click the **Stage** button to show the new account code in the Staging tab with a status of *Pending*. The new account code will not be available to use with a project until it is approved and published.
4. If you have the permission to approve account codes, select the check box for the account code you created, and then click the **Publish** button.

6.2.4.2 Edit an account code

1. In the main menu, go to Master data libraries > Account codes > **Staging**, and then select the check box for the account code that you want to edit.
2. Click the **Edit account code** icon. When you edit an account code, some changes that you make might impact existing use of the account code on current projects.

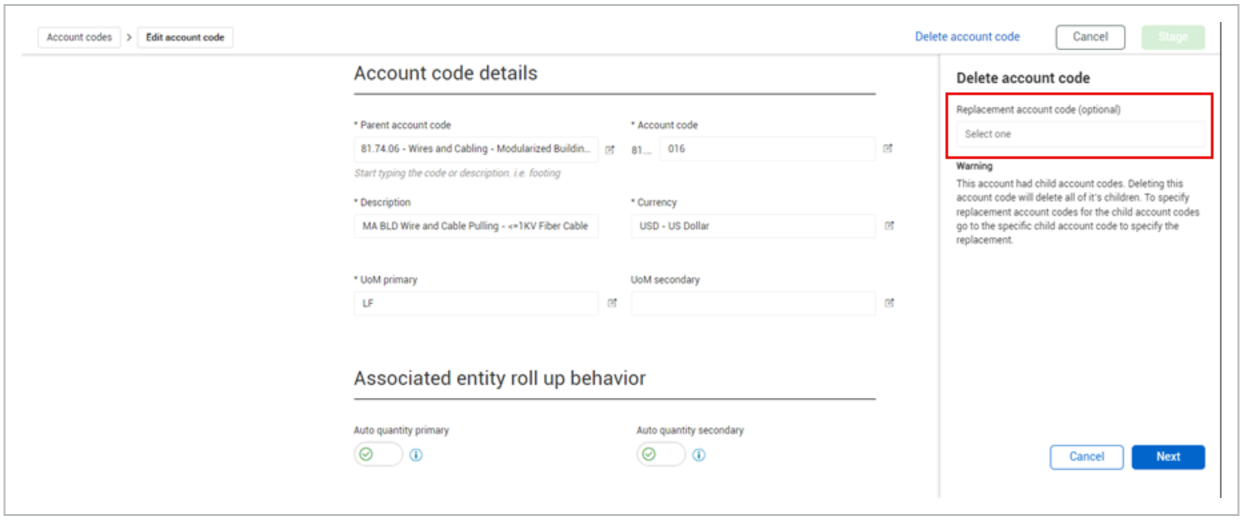


3. Make any necessary changes to the account code, and then click the **Stage** button to show the modified account code in the Staging tab with a status of *Pending*. Changes to the account code will not be available until it is approved and published.
4. If you have the permission to approve account codes, select the check box for the account code you edited, and then click the **Publish** button.

6.2.4.3 Delete an account code

1. In the main menu, go to Master data libraries > Account codes > **Staging**, and then select the check box for the account code that you want to delete.
2. Click the **Edit account code** icon.

3. On the Edit account code page, click **Delete account code**. If the account has child account codes, you can delete all of it's child account codes or move them under another account code. In the slide-out panel do one of the following:
   - Enter an account code to move the child account codes under, and then click **Next**.
   - Leave the Replacement account code field empty to delete the child account codes. Click **Next**



4. Click the **Stage** button to show the deleted account code in the Staging tab with a status of *Pending*. The account code will not be deleted until it is approved and published.
5. If you have the permission to approve account codes, select the check box for the account code you edited, and then click the **Publish** button.

6.2.5 Audit Log

The Audit Log tracks changes made to the account code structure, including the value before and after, the changed date, whether the change was published or just staged, and the user that made the change.

6.2.6 Import Log

The Import Log allows you to view the import logs for all account code Excel imports that completed or failed, so you can track the import process. You can hover over the status, which provides a brief description. Click the **Download error file** icon to see the results and additional information to help resolve the errors.

6.2.7 Published Log

When you publish a new account code in Staging, a record is created and shows in the Publish Log tab.

6.3 ATTRIBUTES

Attributes are data fields that can be associated with project values, disciplines, and commodities, then assigned to a project to help organize and store pertinent information used for filtering and reporting. Multiple attributes can be assigned to a single project value, discipline, and commodity to enhance the collection of information.

6.3.1 Considerations

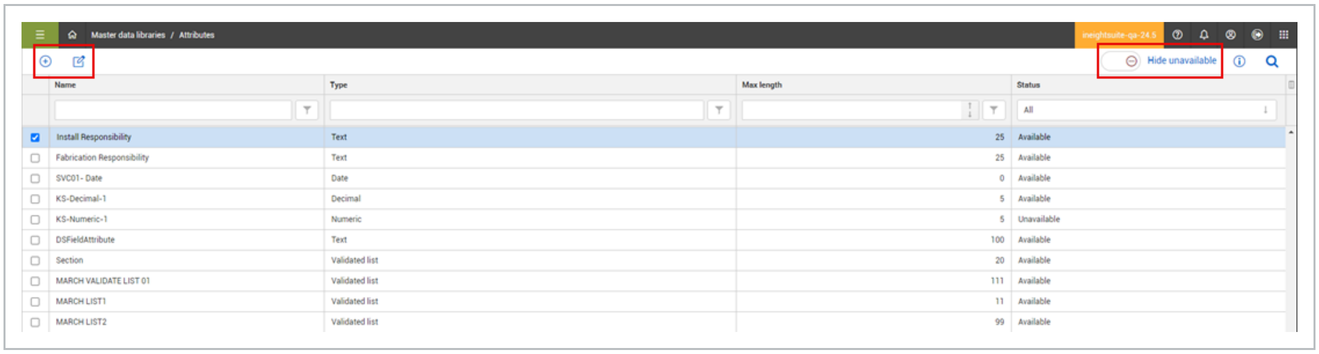
With the applicable permissions, you can select the icon to add, edit, and assign master data attributes. Permissions are configured in Roles and permissions > Master data libraries > **Attributes**.

Permission Name	Description	Level
View attributes	Allows the user to view the list of available attributes in master data.	Base user
Add attributes	Allows the user to create and add attributes to master data.	Organization Admin
Edit attributes	Allows the user to modify existing attributes in master data.	Organization Admin
Assign attributes	Allows the user to assign attributes to project values, disciplines, and commodities in master data.	Account Admin

6.3.2 Attributes master data

The Attributes master data page shows a list of the existing attributes. By default, the Hide unavailable toggle is set to On, which filters the list to show only the available attributes that can be assigned. On this page you can create new attributes or change the status and field length of existing attributes.

Attributes cannot be deleted but the status of an attribute can be set to *Unavailable*, which prevents the attribute from being used and assigned. However, if an attribute is already assigned to a project, then it will still be available in the project.



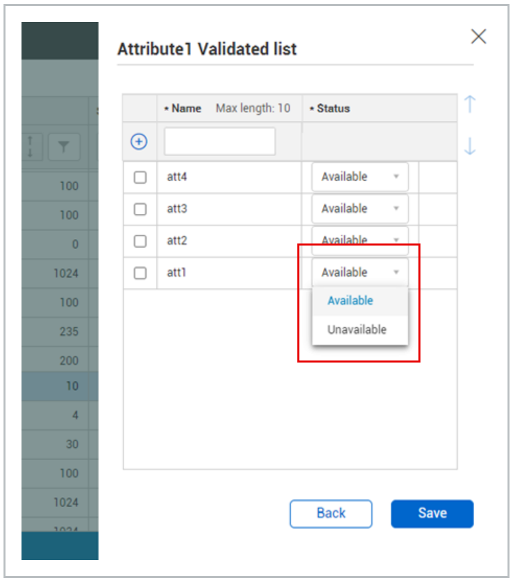
Field Name	Description
Name	Unique name of the attribute.
Type	Select from date, decimal, numeric, text, and validated list to further define the attribute data format.
Max length	Number of characters allowed for the data field.
Status	Set the status to *Available* to allow the attribute to be assigned. If the status is set to *Unavailable* and the Hide unavailable toggle is *On*, the attribute does not show in the list on the master data page.

To create an attribute, click the **Add** icon. Fill in the necessary fields, and then click **Save**.

To edit an attribute, select it from the list, and then click the **Edit** icon. You can change the max length and status as needed, but the name and type cannot be edited.

6.3.2.1 Validated list

When the attribute is a validated list type, you can set the status of individual items in the list in the slide-out panel.



If an item in the validated list is set to *Unavailable*, then it cannot be selected from the drop-down list for that attribute. The status ensures that when a validated list for an attribute is assigned to a project value type, discipline, or commodity, it only shows the list values that are *Available*.

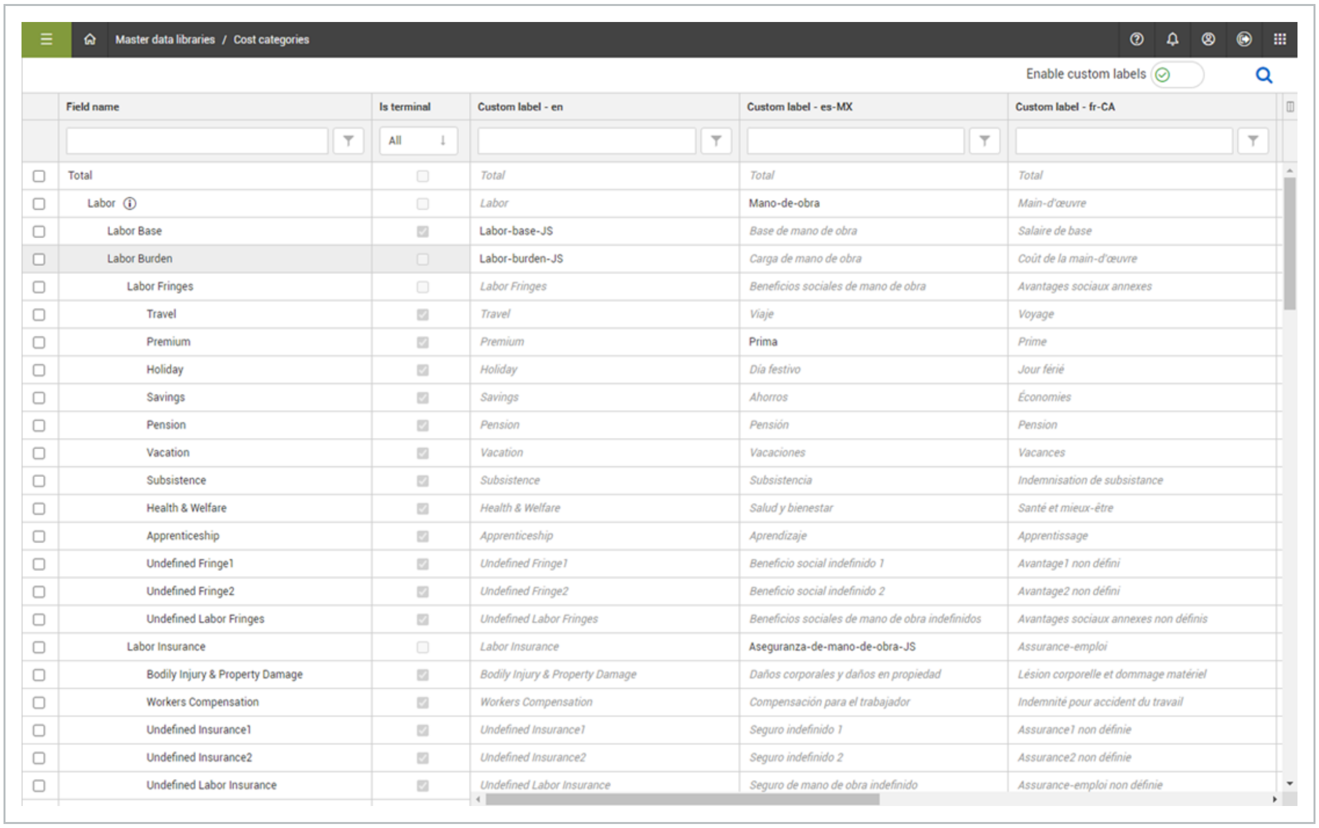
6.4 COST CATEGORIES

Cost categories master data is used by the InEight Control application.

Cost categories are a list of default categories in InEight Platform master data that are used to categorize costs by different criteria. Cost categories are tracked for reporting and benchmarking purposes, which can help understand the sources and effects of costs, to plan, control, and evaluate the performance of a project.

The default Cost categories list is part of the Platform module and is replicated in InEight Control.

You can view cost categories in Main menu > Master data libraries > **Cost categories**.



6.4.1 Considerations

With the applicable permissions, you can view cost categories master data and edit cost category custom labels. Permissions are configured in Suite Administration > Roles and permissions > Master data libraries > **Cost categories**. Cost categories are maintained at an organization level to ensure that they remain consistent with company standards.

Permission Name	Description	Level
View cost categories	Allows the user to view the list of available cost categories in master data.	Base user
Edit cost categories	Allows the user to modify existing cost categories in master data.	Account Admin

6.4.2 Cost categories

The Cost categories show in a hierarchical structure list and have default names for each available language. The default names are shown in gray text. The hierarchical structure allows for summary level reporting rolled up to company standards but can also be a flat list. This hierarchy allows tracking at multiple levels in the project and therefore, more accurate tracking and more comparable data.

You can refine the list using the filtering options below the column headings and also use the Column Chooser to customize what shows the view.

6.4.3 Enable custom labels

You can choose your own custom label name to replace the default cost category naming convention in the Custom label column for your selected language. To rename a label, click in the text field, and then enter text you want. The custom label will show in bold text.

The Enable custom labels toggle must be set to *ON* to enable your cost category custom field names to show throughout Control and across any applicable products. The custom label name changes can take a few minutes to fully generate because custom categories span the entire project. When the Enable custom labels toggle is set to *OFF*, the default category names from the Master data libraries show throughout Control and any applicable products. The toggle is set to *OFF* by default.

6.5 COST CENTERS

Cost centers typically represent business units. These cost centers allow you to further define your integrated data. After available to the InEight portfolio of products, cost centers are utilized as indicators of locations for project resources. Additionally, cost centers, may be included for possible Budget Code Segment information.

Each cost center can have a cost center type, as determined by your business needs within your ERP system.

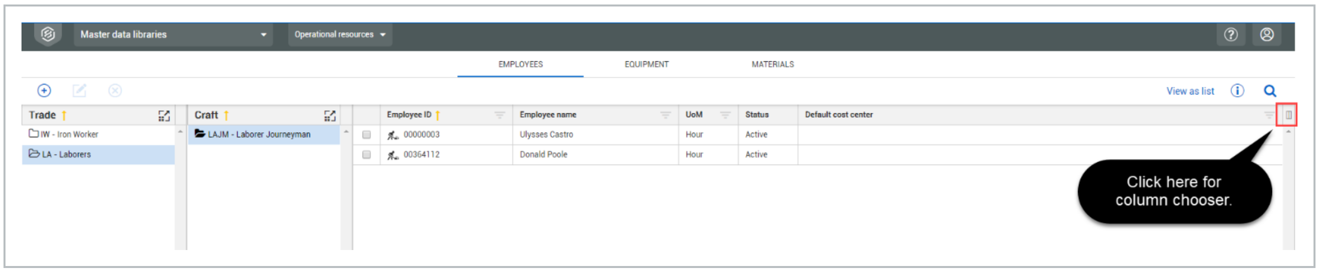
Cost center data is integrated from your external system, and is made available to the following user roles:

At the master data level:	At the project level:
• Operational resource employee • Equipment at the master data level	• Project employee • Equipment resources

To access the cost centers functionality, new cost center permissions must be assigned to your role. After assigned, from the Main menu select Master Data Libraries > **Cost centers** . The Cost centers page opens.

To view or edit cost center associations for an operational resource employee or equipment, from the Main menu select Master Data Libraries > **Operational resources**.

Select either the Employees or Equipment tab. Then view the desired record:



6.6 CURRENCIES

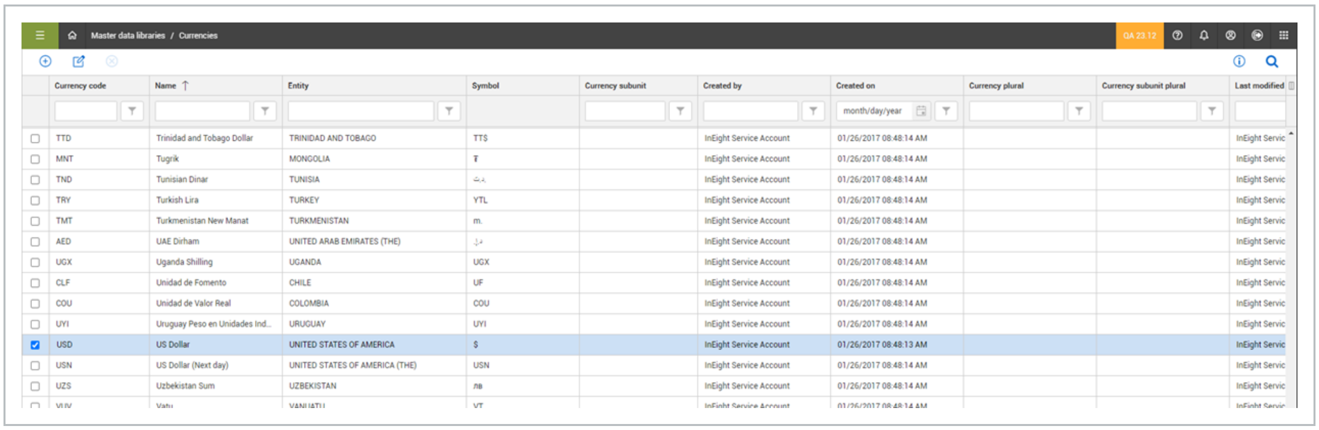
Currencies master data is used by the InEight Compliance, InEight Completions, and InEight Contract applications.

The Currency master data page shows a standardized list of all currencies your company can use, including both system created and user-defined currencies that can be used for various business functions in the InEight cloud platform applications and associated to projects. Each currency allows you to include the applicable plural form of the currency (*i.e.,* Dollar vs. Dollars), the subunit for the currency (*i.e.,* Dollars and Cents), and the plural form of the subunit (*i.e.,* Cents).

With the applicable permissions, you can select the icon to add, edit, or delete master data currencies. Permissions are configured in Roles and permissions > Master data libraries > **Currency**.

Permission Name	Description	Level
View currency	Allows the user to view the list of currencies available in master data. By default, the view permission is selected for all users and cannot be changed.	Base user
Add currency	Allows the user to create and add currencies to master data.	Organization Admin
Edit currency	Allows the user to modify existing currencies in master data.	Organization

Permission Name	Description	Level
	For system created currencies, only the currency subunit, currency plural, and currency subunit plural can be edited.	Admin
Delete custom currency	Allows the user to delete an existing custom currency in master data. System created currencies cannot be deleted. For a custom currency, all associations (*e.g.*, account codes, employees, projects, organizations, etc.) must be removed before it can be deleted.	Organization Admin



When adding or editing currencies, complete the required fields and include any additional fields as needed.

Field Name	Description
Currency code	A three letter unique identifier used for the currency.
Name	Full name of the currency.
Entity	Country of origin or owner of the currency.
Symbol	Symbol associated with the currency.
Currency subunit	Name of the currency subunit.
Currency plural	Name of multiple units of the currency.
Currency subunit plural	Name of multiple units of the currency subunit.

Field Name	Description
Created by	Name of the user that added the currency to the master data library.
Created on	Date and time that the currency was added to the master data library.
Last modified by	Name of the user that last modified the currency record in the master data library.
Last modified on	Date and time that the currency record was modified in the master data library.

6.7 DISCIPLINES AND COMMODITIES

Commodities master data is used by the InEight Compliance, InEight Completions, InEight Model, and InEight Plan applications.

Disciplines master data is used by the InEight Compliance, InEight Completions, InEight Contract, InEight Design, InEight Model, and InEight Plan applications.

Disciplines and commodities master data provides standardized data that can be shared and used across multiple InEight applications. Disciplines in the InEight cloud platform represent the different types of construction work, which can include many things such as architecture, engineering, project management, electrical, and facilities management. Commodities represent the materials, objects or products used in construction work such as concrete, steel beams, and gravel. These disciplines and commodities with their associated attributes data fields are then assigned to a project to help organize and store pertinent information used for filtering and reporting.

6.7.1 Considerations

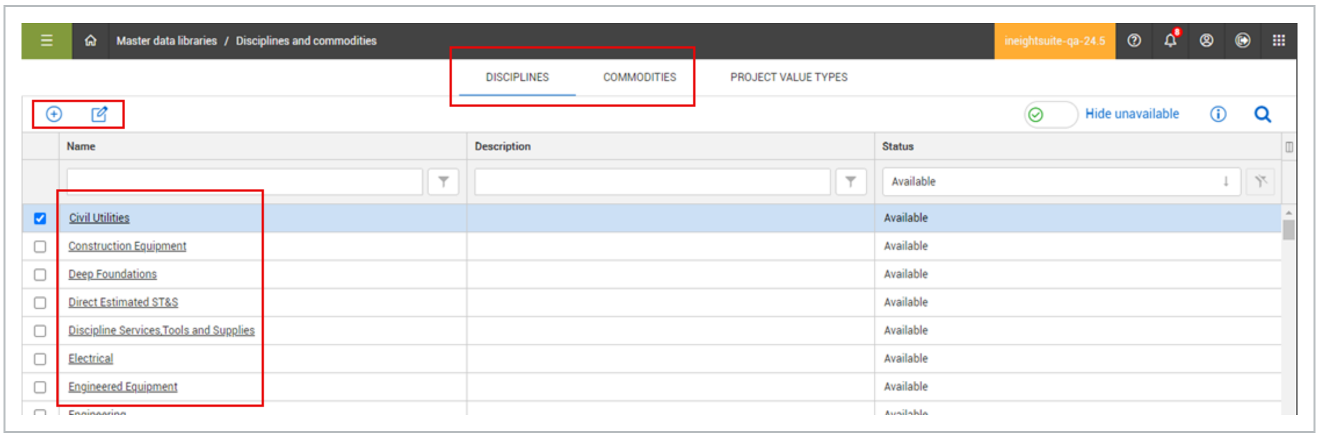
With the applicable permissions, you can select the icon to add or edit master data disciplines and commodities. Permissions are configured in Roles and permissions > Master data libraries > **Disciplines and commodities**.

Permission Name	Description	Level
View disciplines and commodities	Allows the user to view the list of available disciplines and commodities in master data.	Base user
Add disciplines and	Allows the user to create and add disciplines and	Organization

Permission Name	Description	Level
commodities	commodities to master data.	Admin
Edit disciplines and commodities	Allows the user to modify existing disciplines and commodities in master data.	Organization Admin

6.7.2 Disciplines and Commodities master data

Use the tabs to navigate between the Disciplines and Commodities master data pages. By default, the Hide unavailable toggle is set to *On*, which filters the list to show only the available disciplines or commodities that can be assigned to a project. If you change the Hide unavailable toggle to *Off*, the pages show a list of all existing disciplines and commodities that were created.



Field Name	Description
Name	Unique identifier of the discipline or commodity.
Description	Brief description of the discipline or commodity.
Status	Set the status to *Available* to allow the discipline or commodity to be assigned to projects. If the status is set to *Unavailable* and the Hide unavailable toggle is *On*, the discipline or commodity does not show in the list on the master data page.

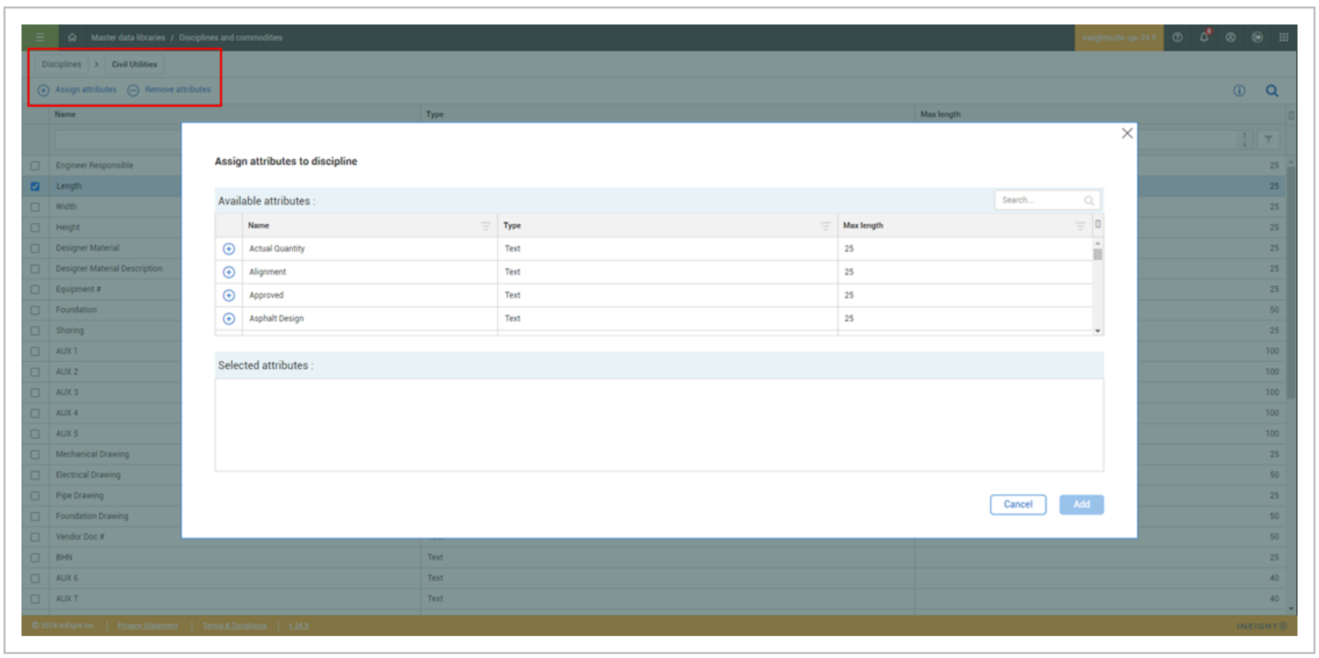
The functionality to add and edit a discipline or commodity on these master data pages are the same. To create a new discipline or commodity, click the **Add** icon. Fill in the necessary fields, and then click **Save**.

To edit a discipline or commodity, select it from the list, and then click the **Edit** icon. You can change the status as needed, but the name and description cannot be edited if the discipline or commodity is assigned to a project.

After a discipline or commodity is created in master data it cannot be deleted. You can set the status of the discipline or commodity to *Unavailable*, which hides it at the project level so it cannot be selected and assigned. However, if a discipline or commodity is already assigned to a project, then the discipline or commodity will still be available in the project.

6.7.3 Assigned attributes

Click the link in the Name column to show a list of the attributes assigned to the item selected. With the applicable permissions, you can add or remove attributes assigned to the selected discipline or commodity.



To add an attribute to the discipline or commodity, click **Assign attributes**. A dialog box opens and shows a list of the attributes available in master data. Select the attributes that you want to assign to the discipline or commodity, and then click **Add**.

To remove an attribute associated to the discipline or commodity, select an attribute or attributes, and then click **Remove attributes**. Removing an attribute only impacts new projects, not existing projects where the project value type is assigned.

6.8 GENERAL LEDGER ACCOUNTS

General ledger accounts master data is used by the InEight Contract application.

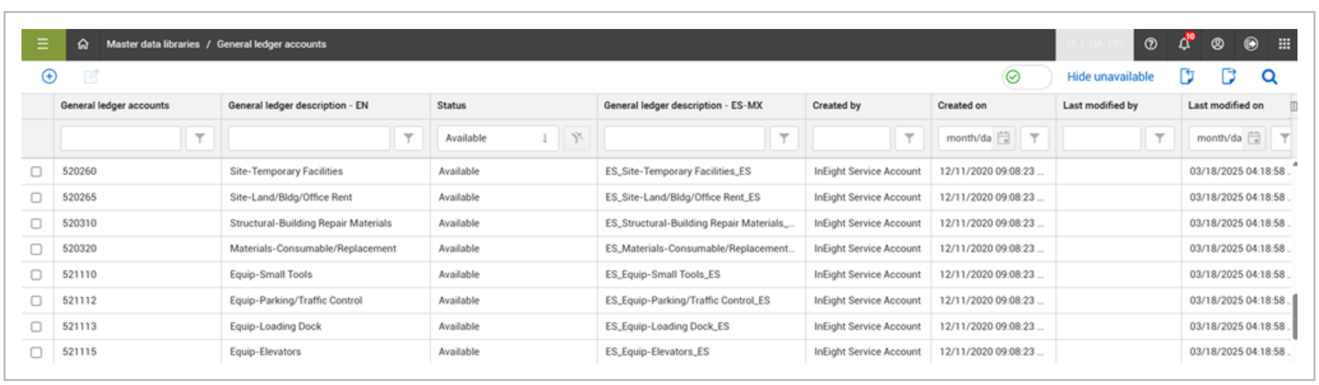
The general ledger is the main accounting record for your organization, consisting of a collection of account categories used for tracking and reporting on the financial transactions across the entire company. The main categories typically include assets, liabilities, revenue, expenses and equity, which are then broken down into subcategories.

6.8.1 Considerations

With the applicable permissions, you can select the icon to add, edit, or delete master data general ledger accounts. Permissions are configured in Roles and permissions > Master data libraries > **General ledger accounts**.

Permission Name	Description	Level
View general ledger accounts	Allows the user to view general ledger accounts master data.	Base user
Add general ledger accounts	Allows the user to create and add general ledger accounts to master data.	Account Admin
Edit general ledger accounts	Allows the user to modify existing general ledger accounts in master data.	Account Admin

Within InEight Platform, you can store the list of accounts used for the general ledger of your organization on the General ledger accounts master data page.



Field	Description
General ledger accounts	The unique name or number that identifies the general ledger account.
General ledger description	Brief description to further identify the account.
Status	Set the status to *Available* to allow the account to be used. If the status is set to *Unavailable* and the Hide unavailable toggle is set to *On*, the account does not show in the list.

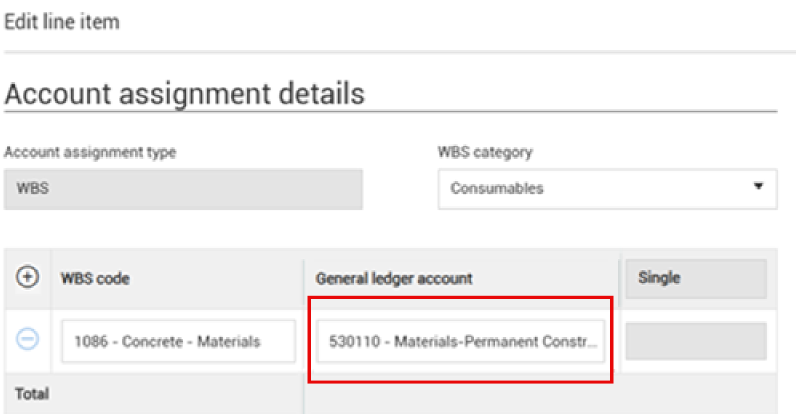
6.8.2 Manage General Ledger Accounts

You can add and edit general ledger accounts by clicking the **Add** and **Edit** icons. From the right toolbar, the Import and Export icons allow you to add and export your general ledger accounts in bulk.

By default, the Hide unavailable toggle is set to *On*, which filters the list to show only the available accounts that can be assigned. General ledger accounts cannot be deleted but the status of a general ledger account can be set to *Unavailable*, which prevents the account from being used and assigned. However, if a general ledger account is already assigned to a project, then it will still be available in the project.

6.8.3 Use General Ledger Accounts

General ledger accounts can be assigned to contract line items within InEight Contract to capture their costs and send them by general ledger account category to your accounting (ERP) system via integration. In the example, a contract line item for concrete material is assigned to a Concrete WBS code for tracking costs in InEight Control but is also assigned to a general ledger account to track these material costs for the general ledger in your accounting system.



6.9 INCOTERMS

Incoterms master data is used by the InEight Contract application.

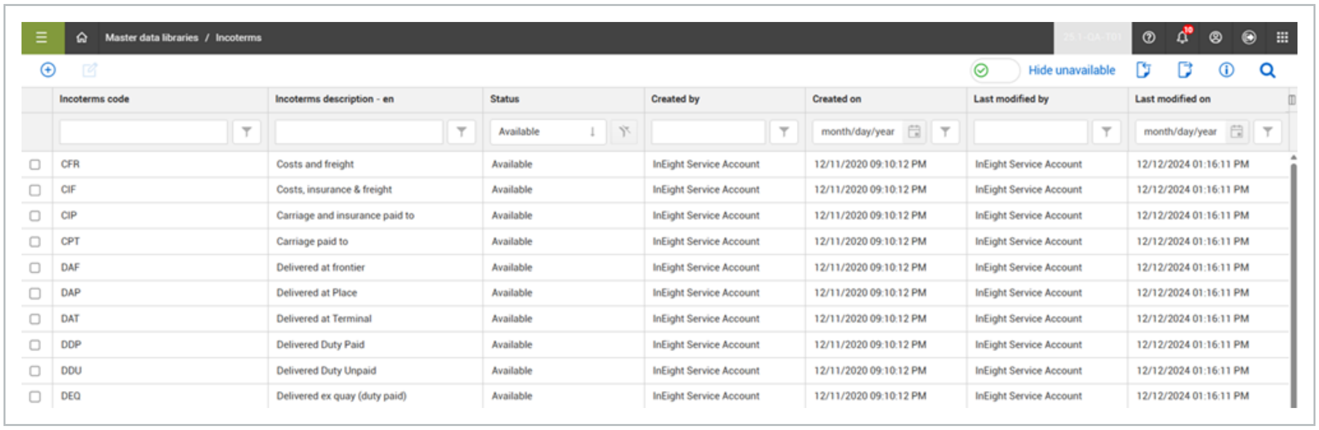
Incoterms (International Commercial Terms) are a set of terms established globally to clearly define who is responsible for what when trading goods, from when the goods leave the seller to when they arrive at the buyer’s final destination. Examples of incoterms include: EXW (Ex Works), FCA (Free Carrier), CPT (Carriage Paid To), CIP (Carriage and Insurance Paid To), DAP (Delivered at Place), DPU (Delivered at Place Unloaded), and DDP (Delivered Duty Paid).

6.9.1 Considerations

With the applicable permissions, you can select the icon to add, edit, or delete master data general ledger accounts. Permissions are configured in Roles and permissions > Master data libraries > **Incoterms**.

Permission Name	Description	Level
View incoterms	Allows the user to view incoterms master data.	Base user
Add incoterms	Allows the user to create and add incoterms to master data.	Account Admin
Edit incoterms	Allows the user to modify existing incoterms in master data.	Account Admin

Within InEight Platform, you can store a list of incoterms used by your organization on the Incoterms master data page.



Field	Description
Incoterms code	The unique identifier for the incoterm.
Incoterms description	Brief description to further identify the incoterm.
Status	Set the status to *Available* to allow the incoterm to be used. If the status is set to *Unavailable* and the Hide unavailable toggle is set to *On*, the incoterm does not show in the list.

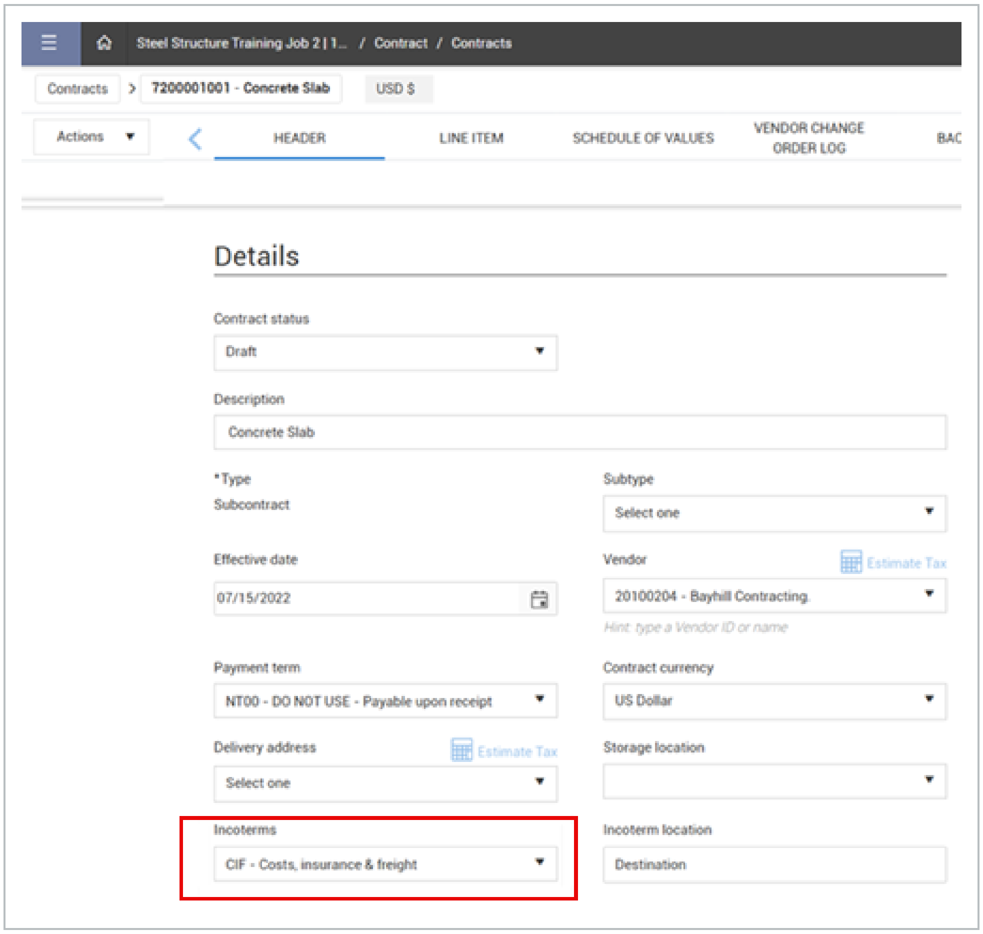
6.9.2 Manage Incoterms

You can add and edit incoterms by clicking the **Add** and **Edit** icons. From the right toolbar, the Import and Export icons allow you to add and export your incoterms in bulk.

By default, the Hide unavailable toggle is set to *On*, which filters the list to show only the available incoterms that can be assigned. Incoterm records cannot be deleted but the status of an incoterm record can be set to *Unavailable*, which prevents the incoterm from being used and assigned. However, if an incoterm is already indicated on a contract within a project, then it will still be available in that contract but will not be available for future contracts.

6.9.3 Use Incoterms

Within the InEight Contract application, on the Header details of a contract, you can select the incoterm for the contract from a drop-down list.



The values shown in this list are the incoterms on the master data page that have a status of *Available*.

6.10 MARKETS

Markets master data is used in project details and by the InEight Contract and InEight Change applications.

Markets master data provides standardized data that can be shared and used across multiple InEight applications. In general, markets can be categorized into different types based on varying factors such as geographic location, industry type, product type, customer segment, in addition to the different stages of the construction process.

6.10.1 Considerations

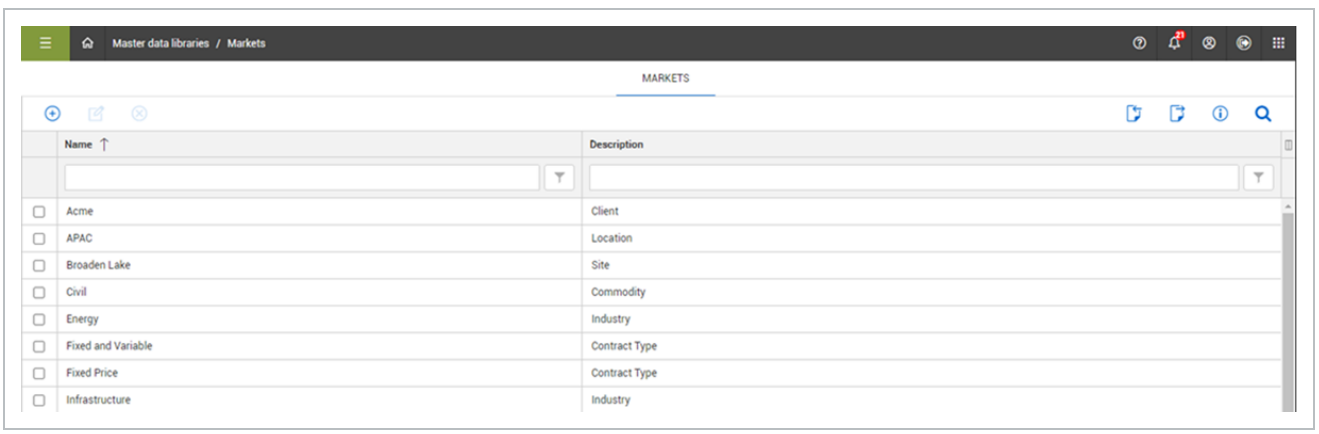
With the applicable permissions, you can select the icon to add, edit, or delete master data general ledger accounts. Permissions are configured in Roles and permissions > Master data libraries >

Markets.

Permission Name	Description	Level
View markets	Allows the user to view the list of available markets in master data.	Base user
Add markets	Allows the user to create and add markets to master data.	Account Admin
Edit markets	Allows the user to modify an existing market in master data.	Account Admin
Delete markets	Allows the user to delete existing markets in master data. A market cannot be deleted if it is associated with any projects.	Account Admin

6.10.2 Markets master data

To access Markets master data, from the Main menu go to Master data libraries > **Markets**. The Markets master data page shows a standardized list of user-defined markets your company can use for various business functions in InEight cloud platform applications and associated with projects.



Field	Description
Name	The unique identifier for the market.
Incoterms description	Brief description to further identify the market.

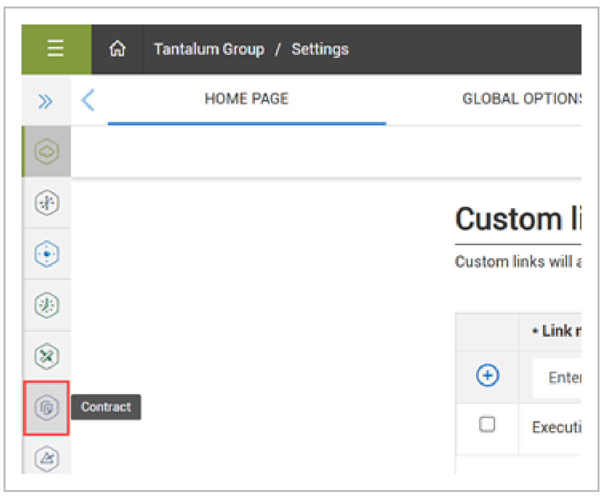
6.10.3 Use Markets for Contract and Change templates

Markets can be assigned to templates in Contract and Change, as well as to projects which controls what templates are available in each project.

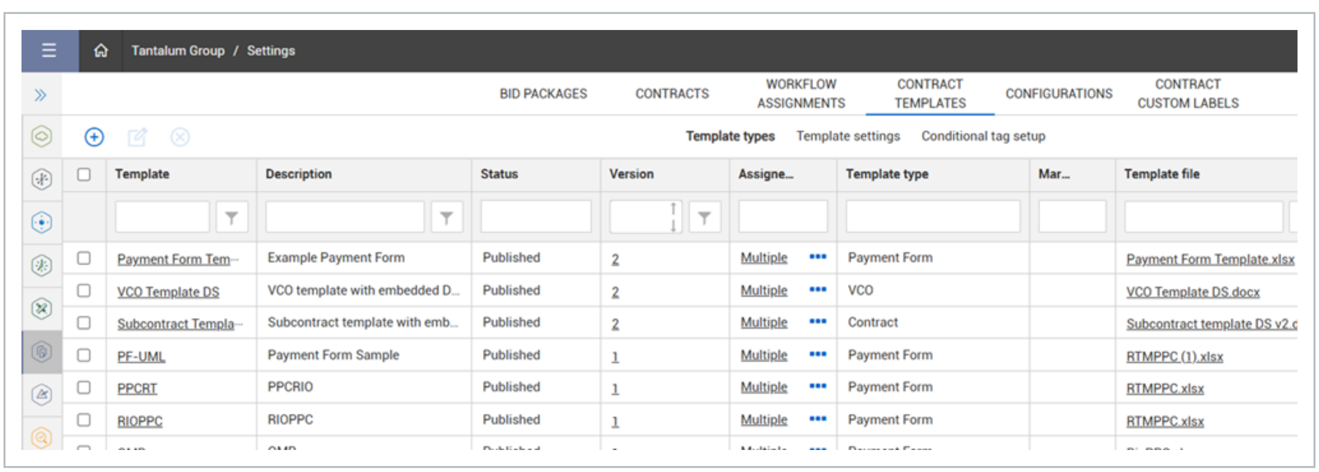
6.10.3.1 Assign markets to templates

Both Contract and Change include the ability to create and store templates for generating documentation related to contracts and change orders. These templates can be stored at the organization and project level in Settings. Templates created at the organization level are available to all projects in the organization and maintain their attributes.

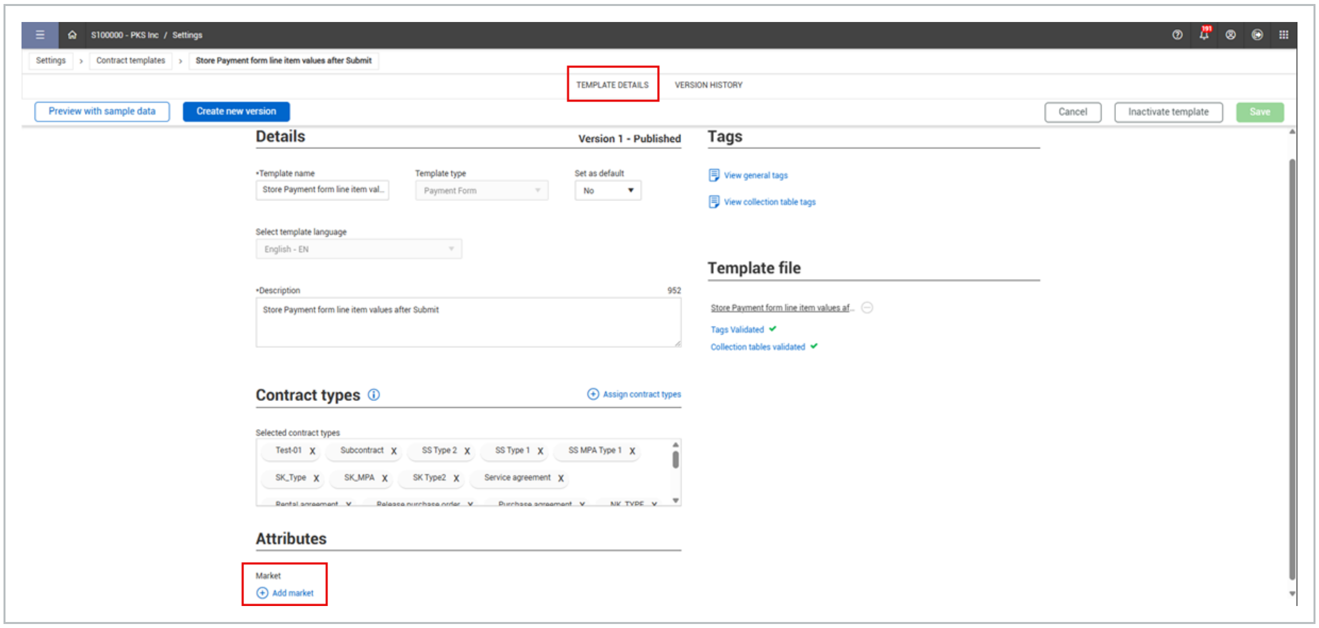
To access the templates for Contract at the organization level, select organization > **Settings**, and then select **Contract** from the Settings menu on the left.



From the Contract settings, select the **Contract Templates** tab. The Contract Templates tab shows a list of all the templates that have been created and stored for the organization.



Select a template from the list, and then select the **Template Details** tab. On the page, you can view and edit the details, including adding Market attributes. Click **Add market** to select a market attribute from the drop down list. You can add multiple markets for the template attributes.



Projects can also be assigned a market attribute. By assigning markets to the template, you can control which projects can access the template. Select and add markets from the list. Only projects assigned to one of the same market attributes will be able to use that template.

6.10.3.2 Assign a market to a project

Both the project and the template must be assigned the same market attribute to make the template available to use in Contract for the project.

Go to project > Project details > **Details**. In the Markets section, select and add a market from the drop down list. You can add multiple market attributes to the project.

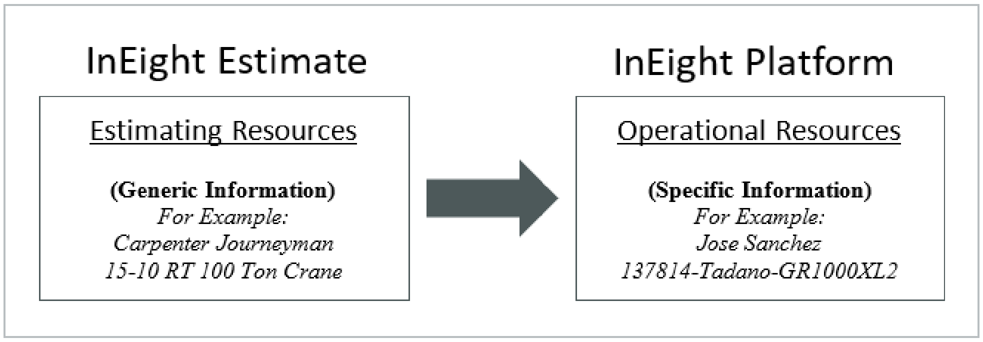
6.11 OPERATIONAL RESOURCES

6.11.1 Operational vs estimating resources

In the master data libraries operational resources, employee, equipment and material resources are organized and stored for use in the InEight cloud platform. These resources should not be confused with the Estimate Resources stored in the Project library of InEight Control, which might also be used in your project. To clarify, note the following definitions of estimating resources and operational resources for project resources.

Term	Definition
Estimating Resources	The generic resources used to estimate work for the project. For example: • Ironworker Journeyman • RT 80 Ton Crane These are typically imported from InEight Estimate, but additional generic resources can be added in Control as needed for additional work such as for change orders. Estimate resources are not accessed from the Master data libraries menu. They are accessed at the project level in the Control application (Control > Project library).
Operational Resources	The specific employee, equipment, and material used to build the work on the project and tracked in Plan and Progress. For example: • Darrel P. Lewis - Ironworker • Grove Crane RT880E, ID# 110002 If you have the applicable role, you can add operational resources to specific projects. Currently, you can only add employee and equipment operational resources to the project but not materials.

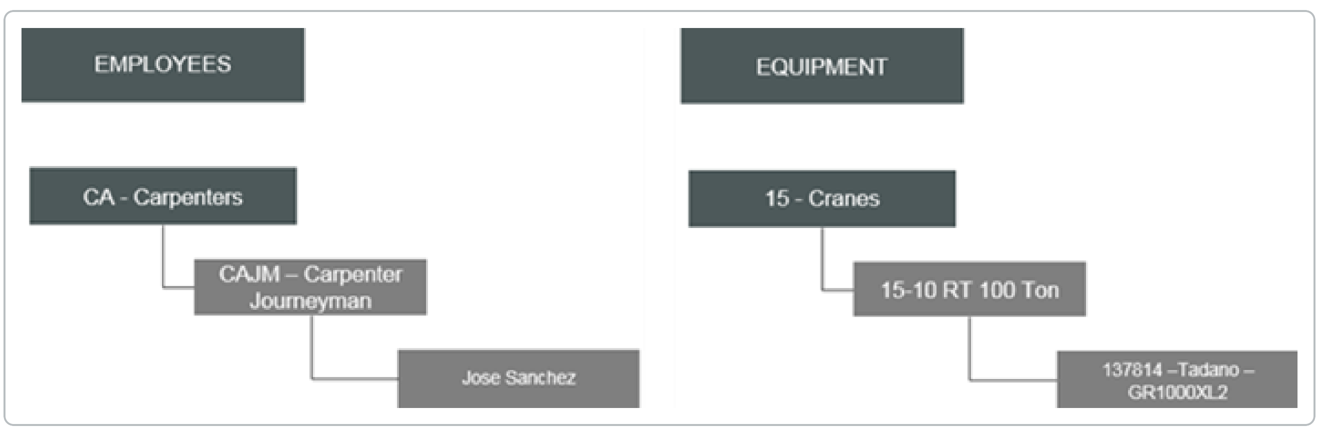
The following diagram illustrates the difference between estimating and operational resources.



6.11.2 Operational resources hierarchy

For employee and equipment, there are three tiers to each of the operational resources as shown below.

Below it shows examples for each tier of an employee and equipment resource.



6.11.3 Employees

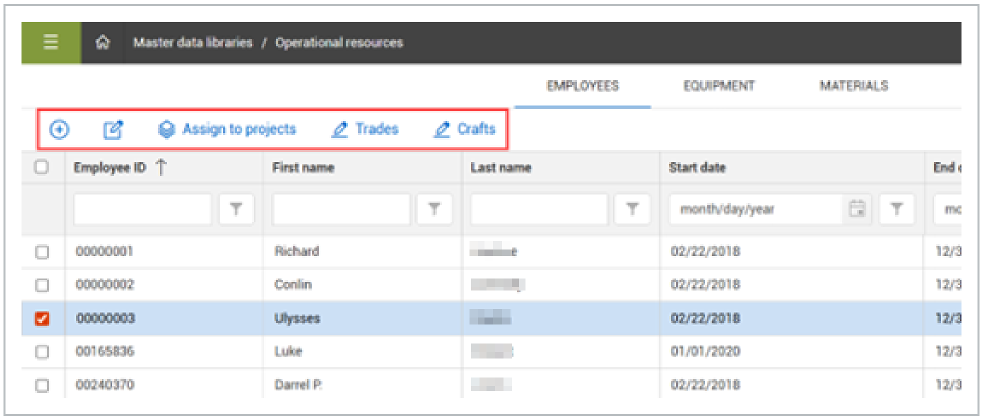
In the master data library, employee operational resource hierarchy is organized into three levels for trade, craft, and employee. Employee operational resources are used in these InEight applications: Billings, Compliance, Completions, Plan, and Progress (Time Center).

Employee Operational Resources Hierarchy	
Term	Definition
Trade	Top layer of the employee operational resource entity, traditionally used as a method to organize crafts into operational or functional areas within a company's structure. An example of a trade would be Electricians.
Craft	Assigned to a trade, traditionally used to define a level or category of employees with metadata details including ID, description, union, and vendor as well as cost metadata including currency, unit of measure (UoM), and pay rates (standard, overtime, and double time). An example of a craft would be Apprentice Electrician.
Employee	Assigned to a craft, traditionally defines the actual named employee with all required metadata including the employee's ID, name, global start and end dates, job title, etc. In addition, this would include the individual employee's pay rates, which are initially inherited from the craft that the employee is assigned to.

To manage employee operational resources, go to Main menu > Master data libraries > **Operational resources**. The page opens to the Employees tab.

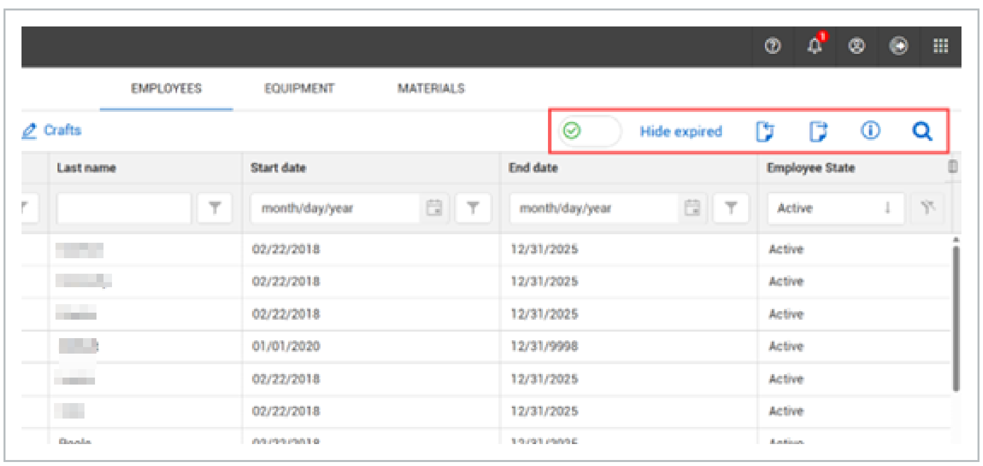
From the Employees page left toolbar, you can do the following:

- Add and edit employee records
- Manage trade and craft values
- Assign employees to projects



From the right toolbar, you can:

- Set a toggle to show all employees or hide employees that have an expired end date.
- Import and export employee records via Microsoft Excel template by selecting the Import and Export icons.
- Select the **Show information details** icon to open a slide-out panel with details for the selected employee, without having to open the employee record.
- With a potentially high number of employee records, click the **Search** icon to help you quickly find an employee record.



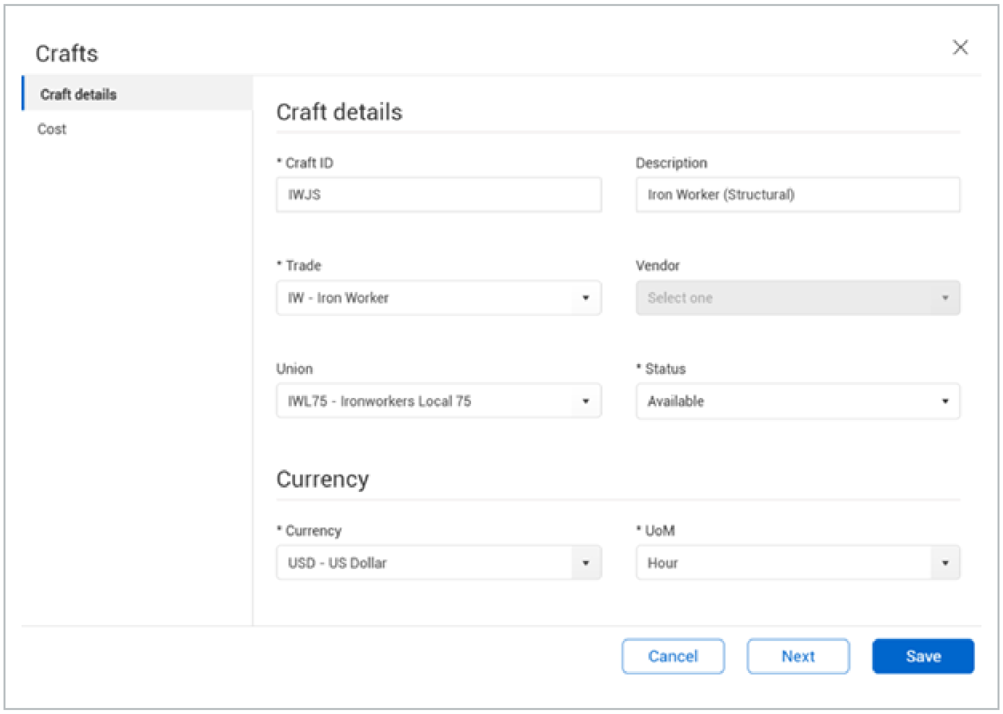
6.11.3.1 Manage trades

To manage the list of trades on the Employees page, click the **Trades** icon to open the Manage trades dialog box. In the Manage trades dialog box, click the **Add trade** icon to add new trades. When you create a new trade, you can set the status to either *Unavailable* or *Available*. You can edit the trade ID, description, and status directly in their respective fields in the Manage trades dialog box. Use the toggle in the right toolbar, to show or hide unavailable trades.

6.11.3.2 Manage crafts

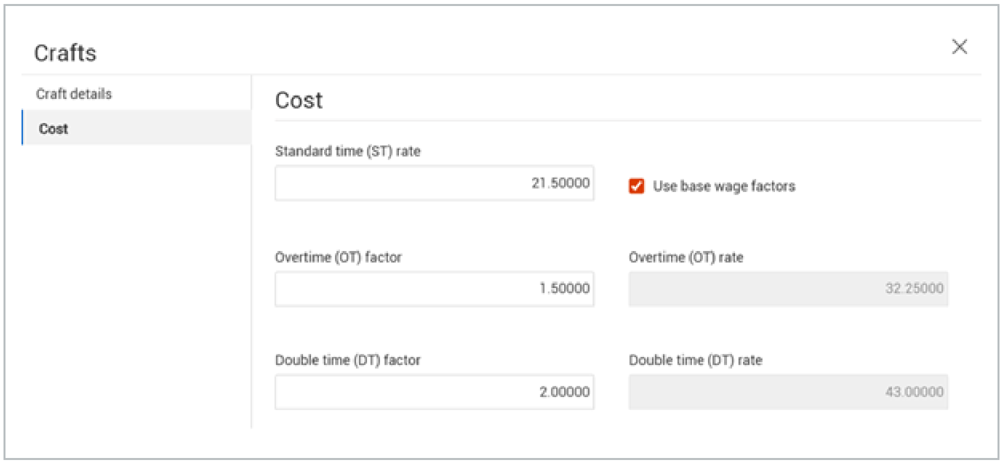
Click the **Crafts** icon to open the Manage crafts page. Similar to the Employees page, the Crafts page has left and right toolbars for adding, editing, importing, exporting and hiding unavailable crafts.

Click the **Add craft** or **Edit craft** icons to open the Crafts dialog box, which has tabs for defining craft details and costs.



In Craft details, you must define the craft ID, the associated trade, the status, currency, and UoM. If a vendor or union are specified for the craft, any employees assigned to the craft will inherit those values.

The Cost tab includes a standard rate that you can enter for the craft, which is applied to the employees assigned to the craft. You can also select the **Use base wage factors** check box to specify factors for calculating overtime and double time.



6.11.3.3 Add and edit employees

From the Employees page, when you select to add a new employee or edit an existing employee it opens a dialog box on the page. There are multiple tabs in the employee dialog box that are organized to help you find specific employee information.

Details

The Details tab includes specific employee information, such as employee ID, first and last name, and the employee's start and end date. Employees are only available, for example to use on a daily plan in InEight Progress, if that date that within their start and end date. The Union and Vendor fields are read-only, which are inherited from the craft. These fields can be used for tracking payroll when collecting hours from the field.

On the tab you can also specify job details, including job title and union job title. In the Job details section, you can also specify a supervisor for the employee. If your organization requires supervisor approval of time cards before they are submitted to payroll, those employees must have a supervisor assigned to them.

The Details tab includes the option to add a PIN for the employee, which is necessary if your organization requires a PIN for employees to sign out on daily plans in Progress.

Rates

On the Rates tab, you can enter standard time (ST), overtime (OT), and double time (DT) rates, which are used by Progress for understanding productivity, estimated actuals in Control, and for use on some InEight reports. These rates can be inherited from the craft level, or you can override the craft rates, which allows you to have different employee rates from project to project.

Time reporting

The Time reporting tab shows these three toggles that are used for time reporting options:

- Employee available for selection in daily plan
- Employee available for selection in weekly timesheet
- Requires supervisor approval

If the Requires supervisor approval toggle is set to *On*, the employee must also have a supervisor assigned on the Details tab for it to be available for approval. This setting is only needed if the Supervisor approval required toggle is set to *On* in organization > **Project settings**.

Refer to Manage Time Cards > Supervisor Approval and Sign In/Sign Out for more information about time reporting.

Qualifications

Qualifications refer to any requirements for employees on a worksite such as a certification to operate a type of heavy equipment, or a certificate to perform on-site safety checks.

To add qualifications for an employee on the Qualifications tab, click the **Add** icon, and then select the applicable qualification from the drop-down list in the Name field. The list of available qualifications is stored in Master data libraries > **Qualifications**. You can also select a start date, expiration date, or indicate if the qualification does not expire.

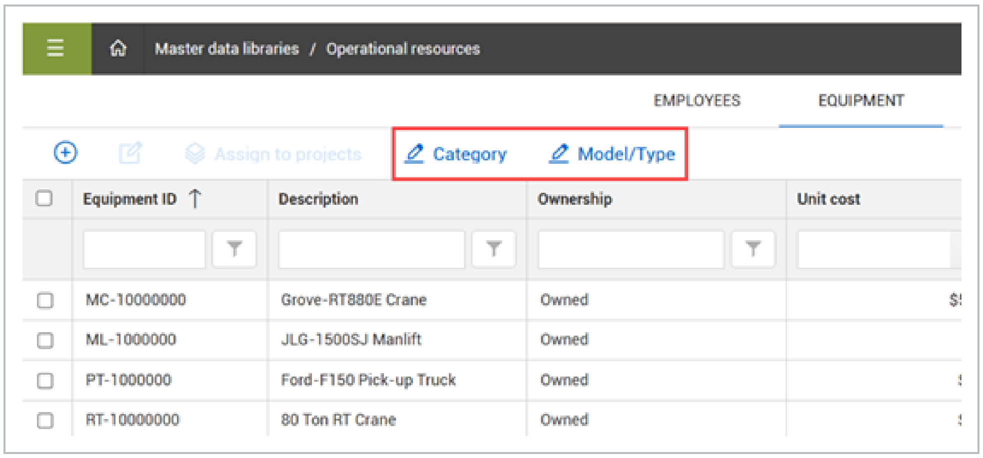
6.11.4 Equipment

Equipment operational resources are organized into a hierarchy by category, model or type, and piece of equipment, which are defined in the following table.

Equipment Operational Resources Hierarchy	
Term	Definition
Category	Top level in the hierarchy of the equipment operational resource entity, used to organize your equipment at a high level such as trucks, excavators, cranes.
Model/Type	Assigned under categories and provides additional details to define equipment into a smaller sub group. Examples are, Crane RT 50-79 Ton, Crane RT 80-119 Ton.

Equipment Operational Resources Hierarchy	
Equipment	Represents the actual piece of equipment being used on the project. Includes the ID, description, ownership as either rented or owned and the unit cost.

To manage equipment operational resources, go to Main menu > Master data libraries > Operational resources > **Equipment**. The same functionality used to manage employees applies to the operational resources Equipment page. Similar to employees, you can select the sublevel icons for Category and Model/Type to manage those levels.

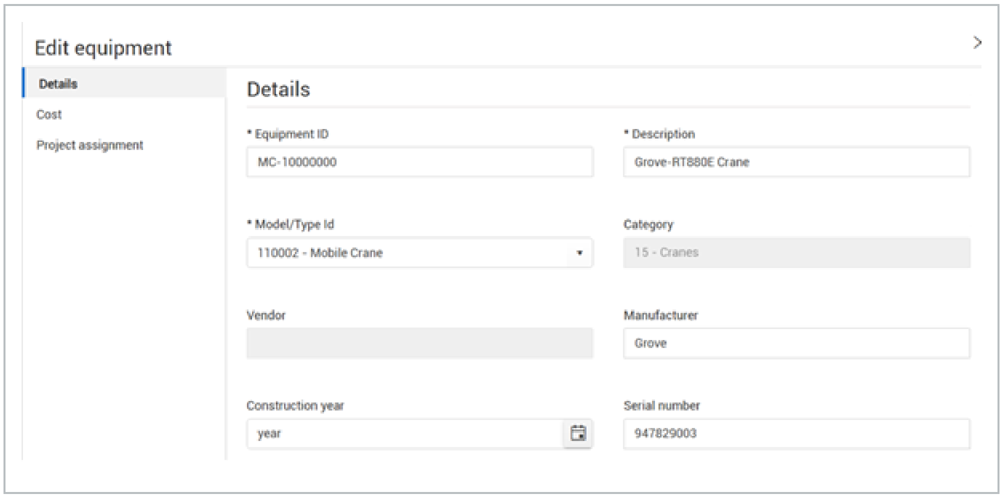


6.11.4.4 Add and edit Equipment

From the Equipment page, when you select to add new equipment or edit existing equipment it opens a dialog box on the page. There are multiple tabs in the equipment dialog box that are organized to help you find specific equipment information.

Details

On the Details tab you can specify key information for the equipment including ID, description, manufacturer, year, serial number, and if the equipment is owned or rented. In the Status section on the page, you can provide a status for the availability and provide a location for the equipment.



Cost

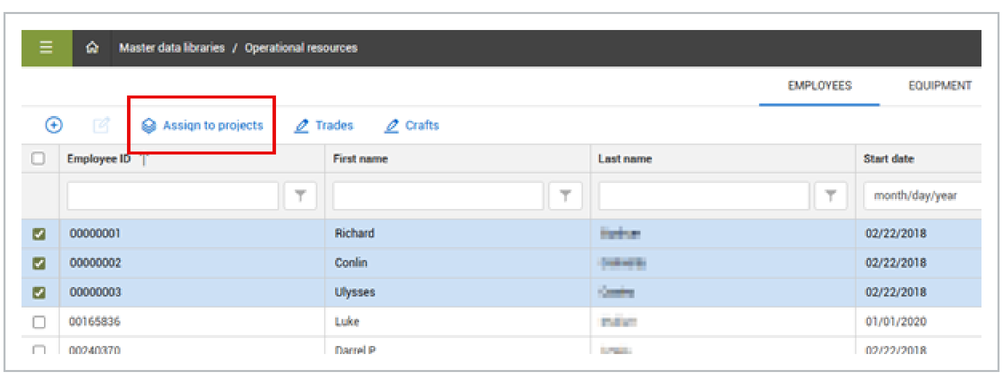
On the cost tab, you can define the unit cost for the equipment and assign it to a cost center for tracking purposes. You can also define a standby unit cost to account for when the equipment is sitting idle versus when it is being operated.

6.11.5 Assign employees and equipment to projects

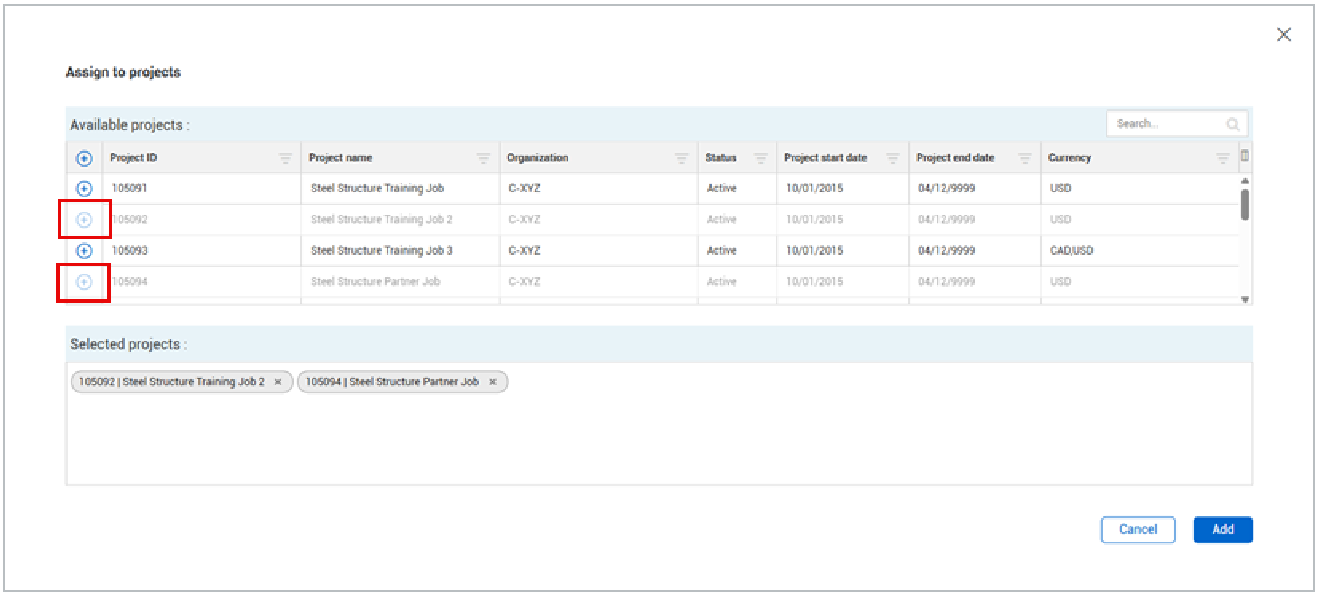
You can assign employees and equipment resources to projects from the operational resources page in the master data library. Platform allows you to select one or more resources and assign them to a project or multiple projects from the Employee and Equipment pages or from the Edit employee and Edit equipment dialog boxes.

6.11.5.5 Employee or Equipment pages

From either the Employee or Equipment page, you can select the resource or resources to assign, and then click the **Assign to projects** icon.



In the Assign to project dialog box, click the **Add** icon for a project in the list to select it to be assigned. You can use the Search field to find a specific project in the list. After you select a project, it shows in the Selected section of the dialog box. Click **Add** to complete the assignment.



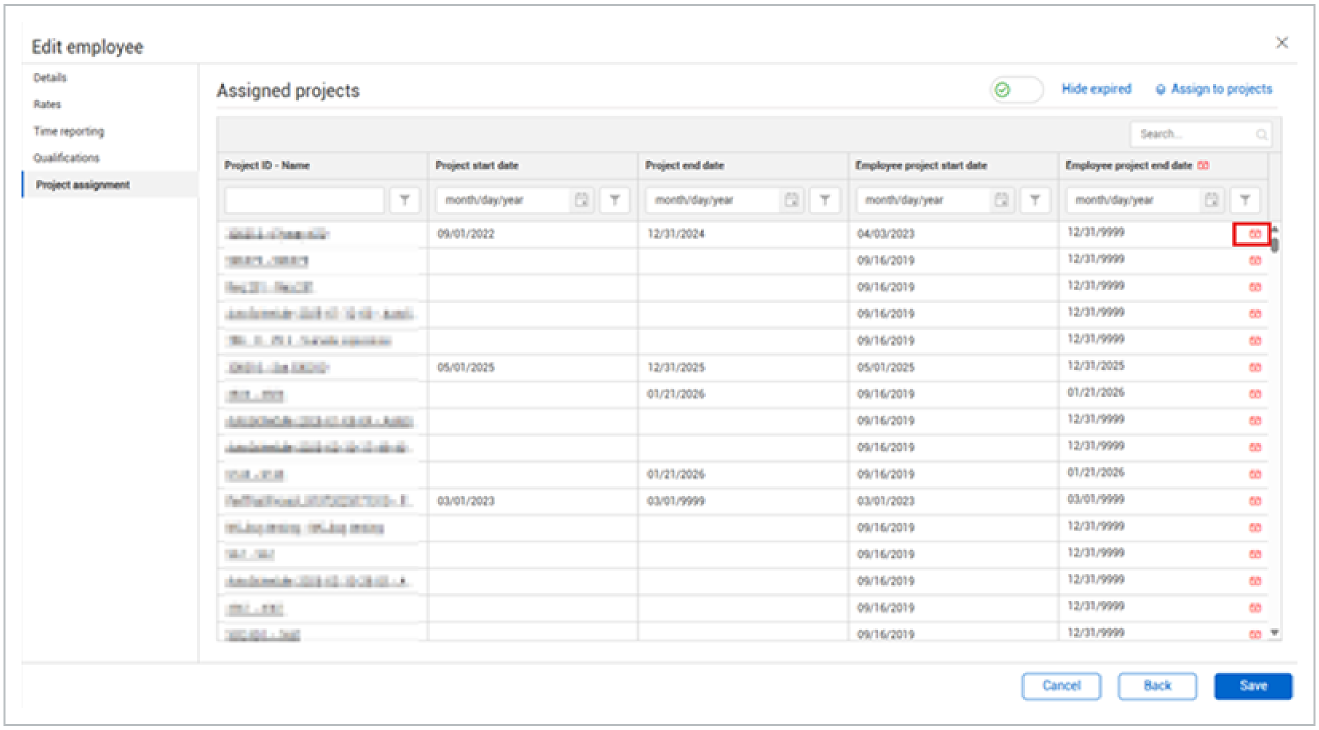
> When doing bulk assignments of many employees to many projects, a message shows when the operation is completed and if any errors have occurred. If an error occurs, click the **Notifications** icon at the top of the page to see the error details. For performance reasons, the bulk assignment of employees to projects is limited to 30,000 (*n* employees x *n* projects).

6.11.5.6 Edit employee or Edit equipment dialog box

You can also assign individual resources to a project or projects by selecting the resource and clicking the **Edit employee** or **Edit equipment** icon. On the Project assignment tab of the Edit employee or Edit equipment dialog box, it shows a list of all the projects the employee or equipment is assigned to and allows you to quickly manage project start and end dates for the resource. On the Project assignment page, you can do the following for the selected employee:

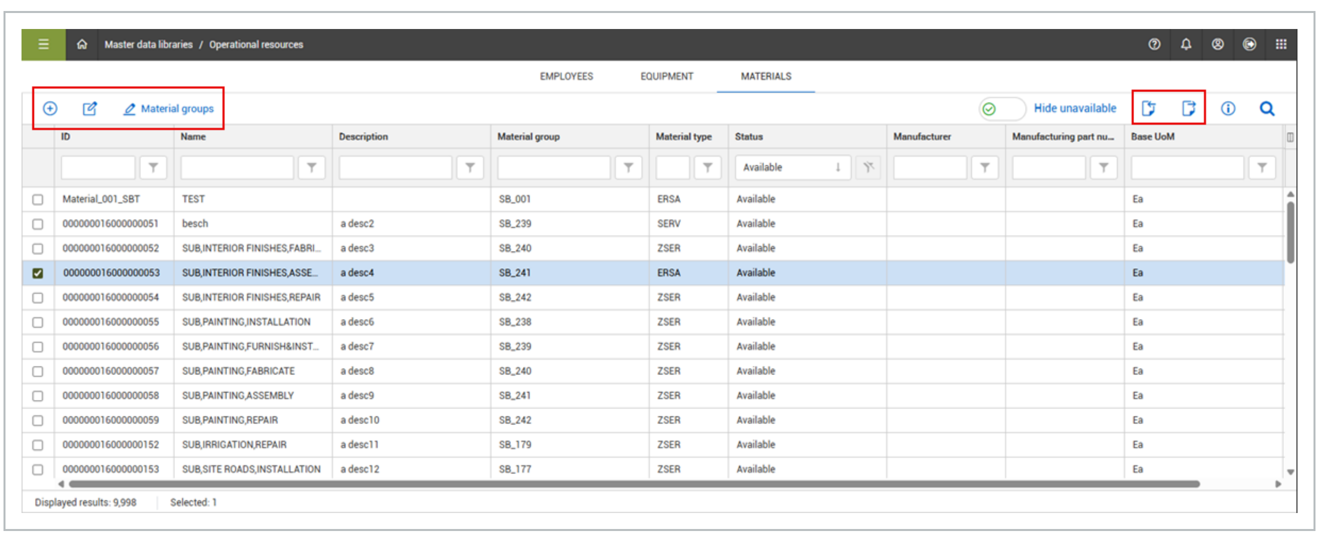
- Click the **Expire now** icon to set the project end date to today's date and remove the resource from the project.
- Click the **Expire all now** icon at the top of the column to remove the resource from all assigned projects.
- Click the **Assign to projects** button to add the resource to another project or projects.

- Click the project link to open the Assigned operational resources > **Employees** or **Equipment** page in a new tab, which is filtered to show the employee or equipment project details.



6.11.6 Materials

From the Materials tab, you can manage materials and material groups. The functionality for managing materials matches the same functions found on the Employee and Equipment tabs, including the ability to add, edit, export and import materials.



6.12 PAYMENT TERMS

Payment terms master data is used by the InEight Contract application.

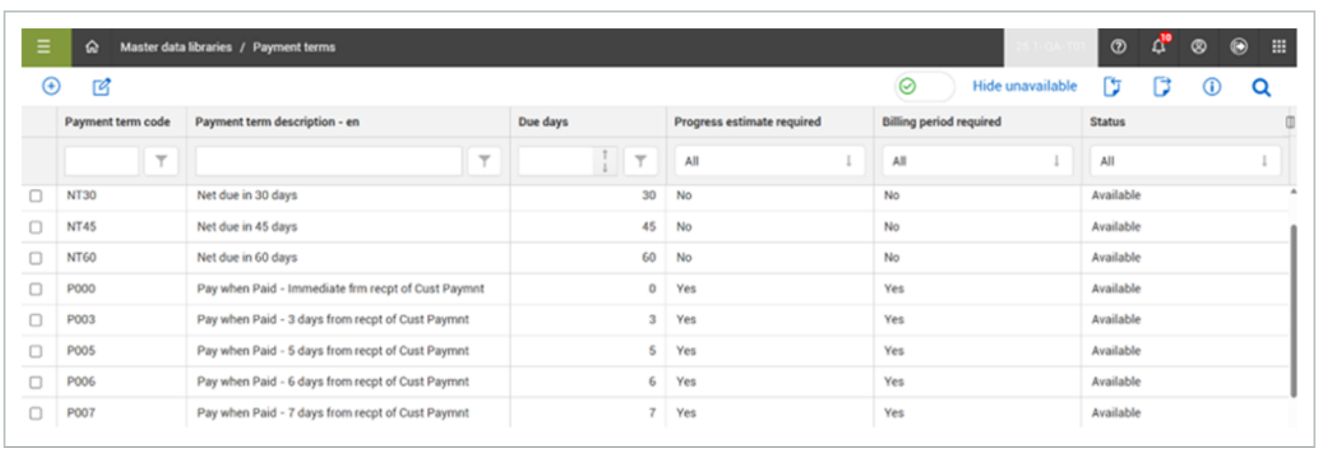
Payment terms are the conditions set between subcontractor and owner or contractor for how and when payment for goods or services will be made, such as net 30 and pay when paid.

6.12.1 Considerations

With the applicable permissions, you can select the icon to add, edit, or delete master data payment terms. Permissions are configured in Roles and permissions > Master data libraries > **Payment terms**.

Permission Name	Description	Level
View payment terms	Allows the user to view payment terms master data.	Base user
Add payment terms	Allows the user to create and add payment terms to master data.	Account Admin
Edit payment terms	Allows the user to modify existing payment terms in master data.	Account Admin

Within InEight Platform, you can store a list of payment terms used by your organization on the Payment terms master data page.



Field	Description
Payment terms code	The unique identifier for the the payment term, which can include letters and numbers.
Payment terms description	Brief description to further identify the payment term.
Due days	Number-only field that indicates the number of days before payment is due.
Progress estimate required	Setting that indicates if a progress estimate is required as part of the payment terms.
Billing period required	Setting that indicates if a billing period is required.
Status	Set the status to *Available* to allow the payment term to be used. If the status is set to *Unavailable* and the Hide unavailable toggle is set to *On*, the payment term does not show in the list.

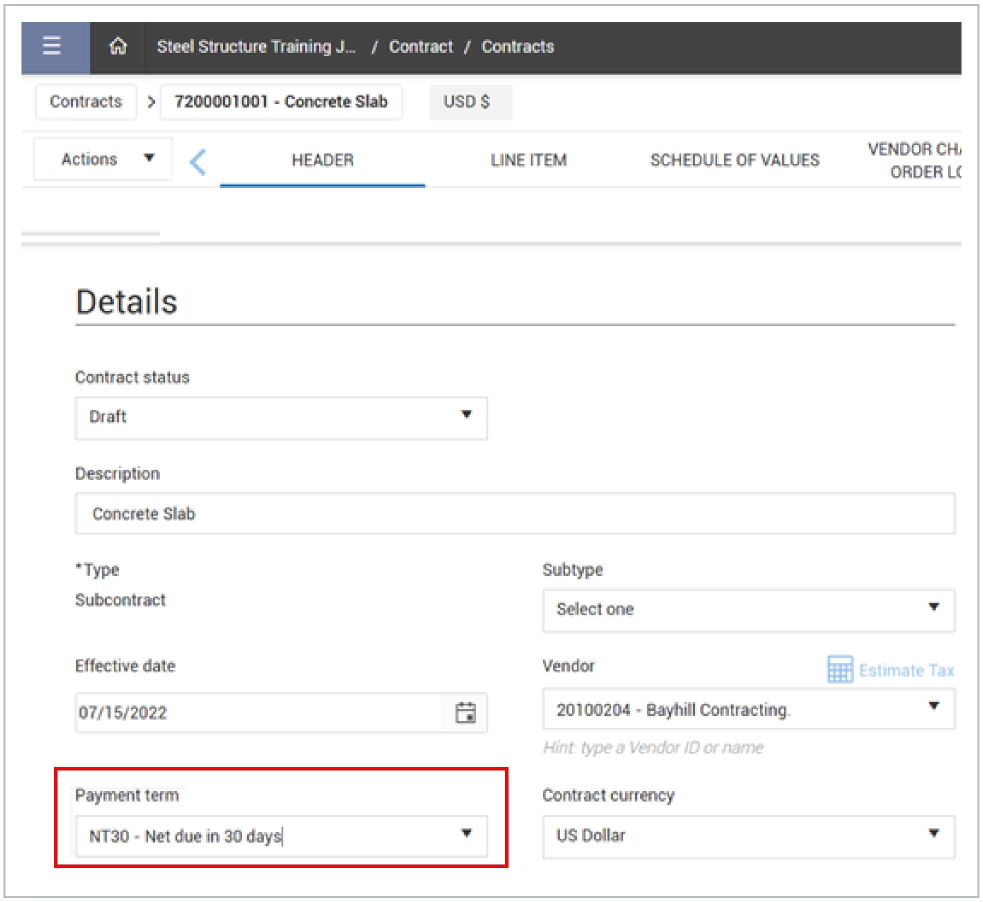
6.12.2 Manage payment terms

You can add and edit payment terms by clicking the **Add** and **Edit** icons. From the right toolbar, the Import and Export icons allow you to add and export your payment terms in bulk.

By default, the Hide unavailable toggle is set to *On*, which filters the list to show only the available payment terms that can be assigned. Payment term records cannot be deleted but the status of a payment term record can be set to *Unavailable*, which prevents the payment term from being used and assigned. However, if a payment term is already indicated on a contract within a project, then it will still be available in that contract but will not be available for future contracts.

6.12.3 Use payment terms

Within the InEight Contract application, on the Header details of a contract, you can select the payment term for the contract from a drop-down list. If the contract vendor has a default payment term associated with it in the master data library, then the vendor’s default payment term is populated.



The values shown in this list are the payment terms on the master data page that have a status of *Available*.

If integrated with your ERP system, the assigned payment term will push to your ERP along with the other pertinent details of the contract.

6.13 PAYROLL INDICATORS

The payroll indicators master data, which includes allowances, employee premiums, and attendance types, provides a means that allow users of InEight Progress to give more information about an employee's compensation for the workday.

By configuring payroll indicators in master data and establishing a baseline, an administrator at the project level can easily assign available payroll indicators to project employees, so they have all applicable payroll indicators assigned when they are added to daily plans.

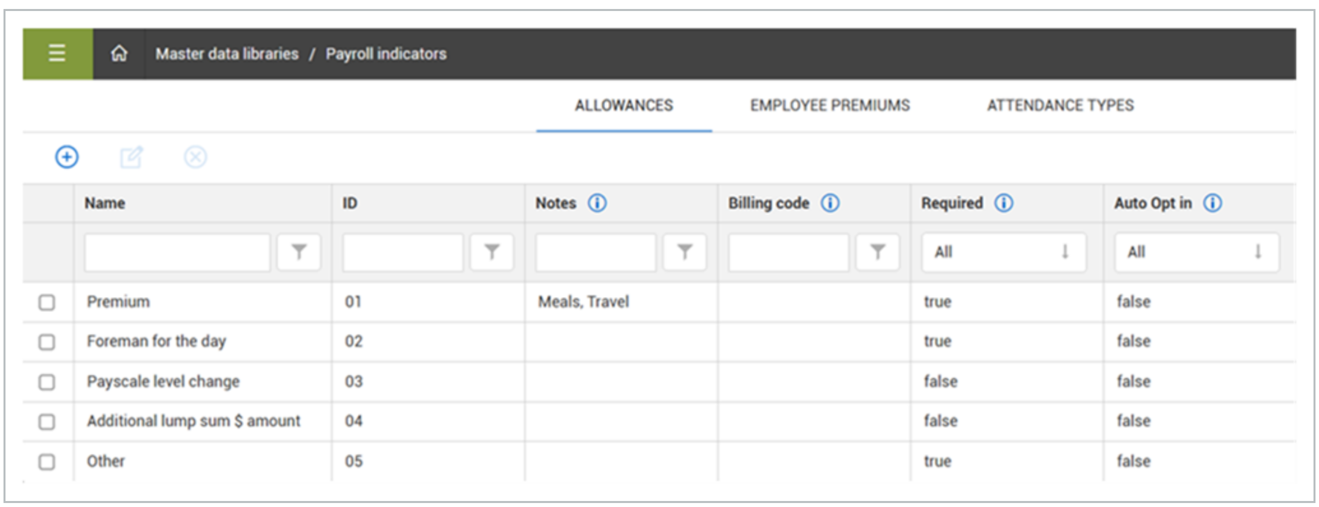
6.13.1 Considerations

With the applicable permissions, you can select the icon to add, edit, or delete master data payroll indicators. Permissions are configured in Roles and permissions > Master data libraries > **Payroll indicators**.

Permission Name	Description	Level
View payroll indicators	Allows the user to view the payroll indicator master data.	Base user
Add payroll indicators	Allows the user to create and add payroll indicators to master data.	Account Admin
Edit payroll indicators	Allows the user to modify existing payroll indicators in master data.	Account Admin
Delete payroll indicators	Allows the user to delete existing payroll indicators in master data.	Account Admin

6.13.2 Allowances

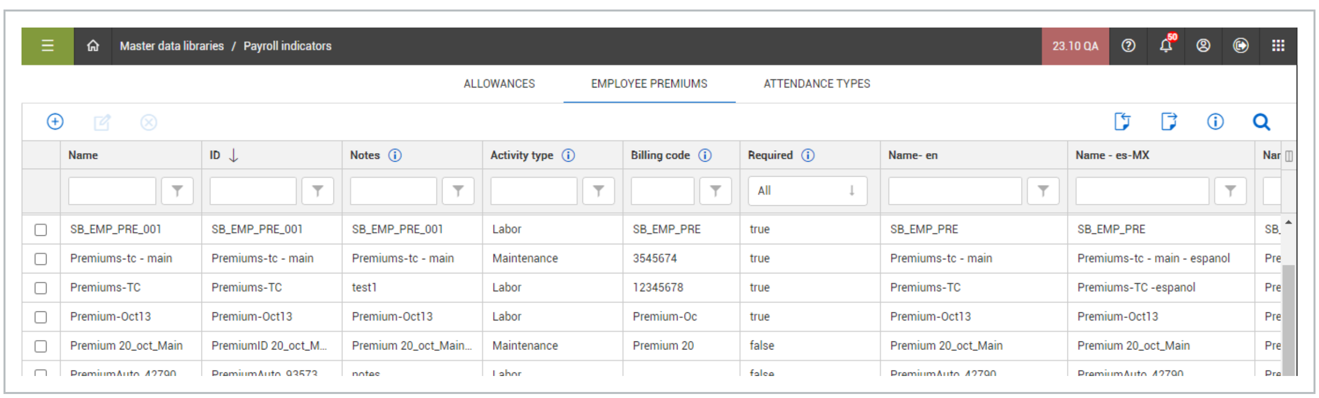
Allowances are extra pay that is made to an employee to cover expenses or compensate for specific working conditions by day, not specific to each hour or phase code. Examples of allowances include: foreman for the day, per diem, meals, subsistence, daily LOA, remote area pay, and tools.



Field Name	Description
ID	Unique identifier for the allowance.
Name	Name of the allowance.
Notes	Additional information about the allowance that shows in the daily plan for the project employee.
Billing code	Billing code associated with the allowance that is used for integration with InEight Billings.
Required	When the value is set to *true*, the allowance is required and automatically assigned at the project level when a new project is created. When the allowance shows as Required in master data, it cannot be changed at the project level.
Auto Opt in	When the value is set to *true*, the allowance is automatically assigned to all new employees on all projects. This option can be changed in a project if needed.

6.13.3 Employee Premiums

Premiums are payroll instructions used to alter the base wage of an employee for a specific task or reason and associated to specific hours on an employee time sheet. Examples of premiums include: foreman pay, lead hand pay, safety pay, holiday premium, on call premium, and hazard premium.



Field Name	Description
ID	Unique identifier for the premium.

Field Name	Description
Name	Name of the premium.
Notes	Additional information about the premium that shows in the daily plan for the project employee.
Activity type	Defines the activity as either labor or maintenance.
Billing code	Billing code associated with the premium that is used for integration with InEight Billings.
Required	If the value is set to *true*, the premium is automatically assigned at the project level when a new project is created. When the premium shows as Required in master data, it cannot be changed at the project level.

6.13.4 Attendance Types

Attendance types provide a method to identify employee attendance during a normal workday, such as excused absence with pay, unexcused absence, and jury duty.

Field Name	Description
ID	Unique identifier for the attendance type.
Name	Name of the attendance type.
Notes	Additional information about the attendance type that shows in the daily plan for the project employee.
Billing code	Billing code associated with the attendance type that is used for integration with InEight Billings.
Required	If the value is set to *true*, the attendance type is automatically assigned at the project level when a new project is created. When the attendance type shows as Required in master data, it cannot be changed at the project level.
Allow hours	If the value is set to *true*, the time entry field in InEight Progress is editable, and a value can be entered for the employee absence.
Sign	Indicates if sign out on the daily plan is expected for the employee.

Field Name	Description
in/Sign out required	

For additional information about payroll indicators and how they compare to other payroll options, see Payroll Options Analysis.

6.14 PROJECT VALUE TYPES

Project value type master data is used by the InEight Change, InEight Compliance, InEight Completions, InEight Contract, InEight Control, InEight Design, and InEight Plan applications.

Project value type master data provides standardized data that can be shared and used across multiple InEight applications. Project value types in the InEight cloud platform represent the different entities common in construction and engineering work. The system managed project value types include Area, Segment, System, Subsystem, Turnover package, Construction commodity, and Work classification. A business can also configure their own standard entities in the system. These project value types with their associated attribute data fields are configured at a project level to help organize and store pertinent scope information used for filtering and reporting.

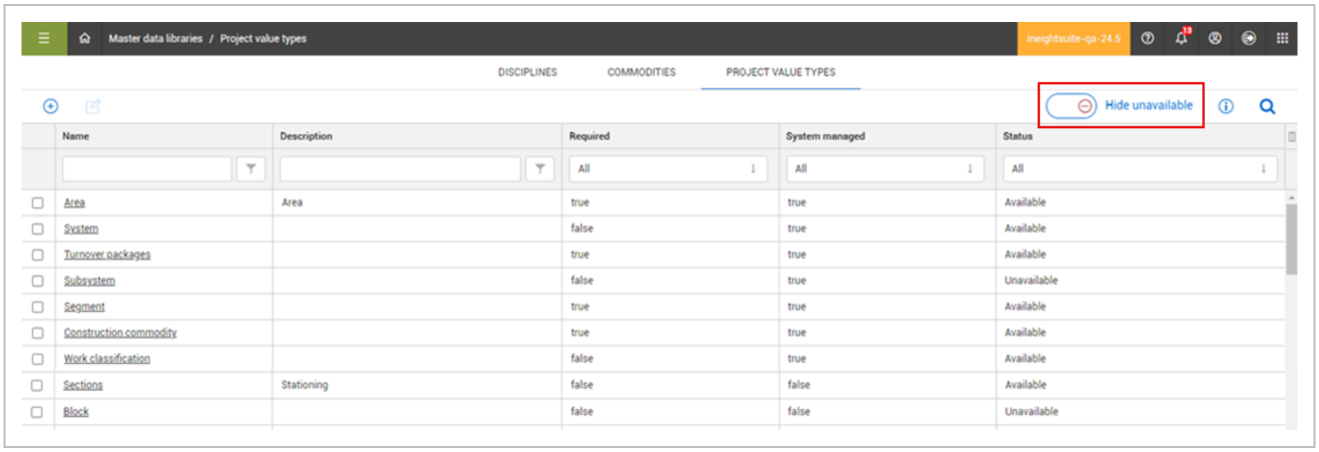
6.14.1 Considerations

With the applicable permissions, you can select the icon to add or edit master data project value types. Permissions are configured in Roles and permissions > Master data libraries > **Project value types**.

Permission Name	Description	Level
View project value types	Allows the user to view the list of available project value types in master data.	Base user
Add project value types	Allows the user to create and add project value types to master data.	Account Admin
Edit project value types	Allows the user to modify existing project value types in master data.	Account Admin

6.14.2 Project value types master data

The Project value types master data page shows a list of all the values created. By default, the Hide unavailable toggle is set to *On*, which filters the list to show only the available project value types that can be assigned to a project. You can change the Hide unavailable toggle to *Off* to show all existing project value types that were created.



Field Name	Description
Name	Unique identifier of the project value type. The name of system managed project value types cannot be edited.
Description	Brief description of the project value type.
Required	If the Required field set to *True*, the project value type is automatically included in the data set of predetermined values that are available when a new project is created and is also pushed out to existing projects. Required can only be selected when the status of the project value is set to *Available*. If the Required field set to *False*, the project value type can still be added from master data at the project level.
System managed	Set of project value types that are always listed in master data. These values are Area, Segment, System, Subsystem, Turnover Packages, Construction commodity, and Work classification. The names of system managed value types cannot be changed.
Status	Set the status to *Available* to allow the project value type to be assigned to projects. When the status is set to *Unavailable* and the Hide unavailable toggle is *On*, the project value type does not show in the list on the master data page.

To create a new project value type, click the **Add** icon. Fill in the necessary fields, and then click **Save**.

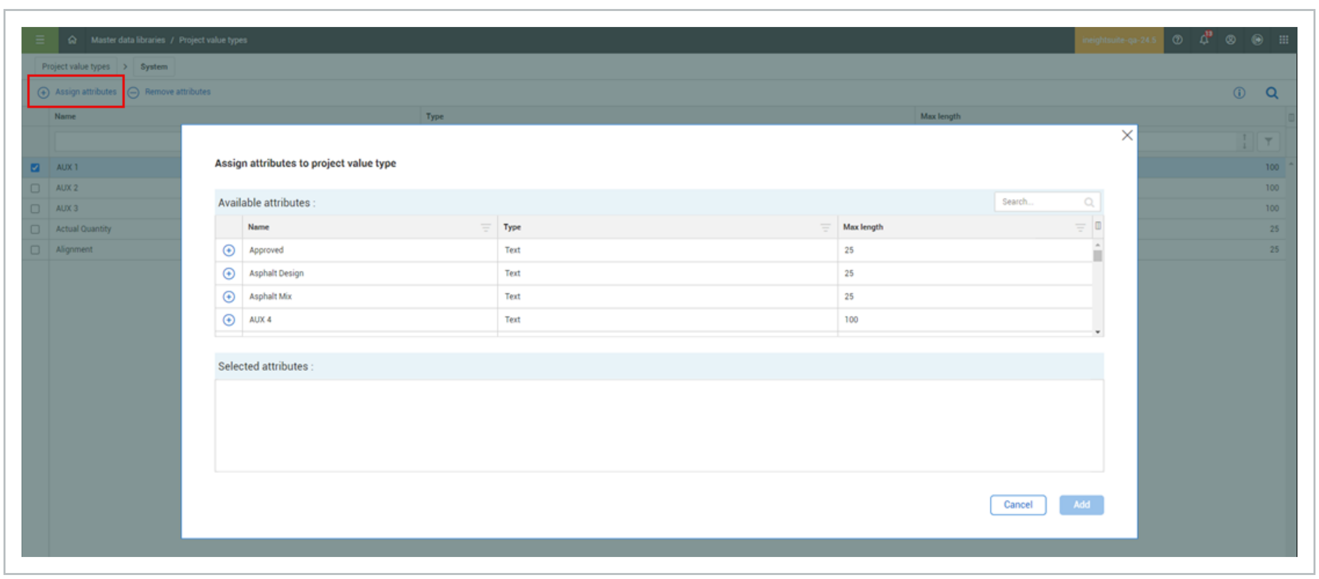
> When you add a new project value type in master data, do not initially set it to be required before assigning attributes. If you save project value type initially as required, the attributes will not show assigned at the project level. Instead, create the new project value type, save it, and then assign attributes. Next, select the project value type, then edit it and select the **Required** check box.

To edit a project value type, select an item from the list, and click the **Edit** icon. You can change the name, description, or change the Required setting.

After a project value type is created in master data it cannot be deleted. You can set the status of the project value type to *Unavailable*, which hides it at the project level so it cannot be selected and assigned. However, if a project value type is already assigned to a project, then the project value type will still be available in the project.

6.14.3 Assigned attributes

Click the name of the project value type to show a list of attributes assigned to it. If you have the applicable permissions, you can assign or remove attributes associated with the project value type.



To add an attribute to the project value type, click **Assign attributes**. A dialog box opens and shows a list of the attributes available in master data. Select the attributes that you want to assign to the project value type, and then click **Add**. If the attribute is associated to a project value type that is required, it is added to all projects. If the project value type is not required, the attribute will only be added to new projects.

To remove an attribute associated to the project value type, select an attribute or attributes, and then click **Remove attributes**. Removing an attribute only impacts new projects, not existing projects where the project value type is assigned.

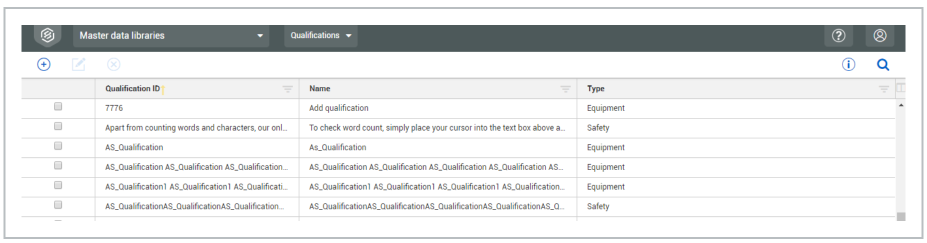
6.15 QUALIFICATIONS

Qualifications are used to assign inspection tasks to people or equipment. For example, a person with a forklift qualification would be able to inspect that forklift. Qualifications are assigned in your ERP system, but you can view them here. Qualifications are used in InEight Compliance.

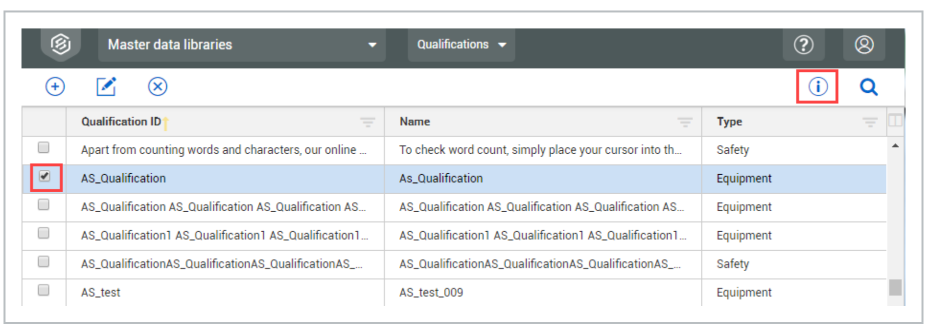
> With the proper permissions, you can add new qualifications manually.

6.15 Step by Step 1 – View Qualification

1. From the Main menu, select Master Data Libraries > **Qualifications**. The Qualifications page opens and shows all the Qualifications, name and type of qualifications.

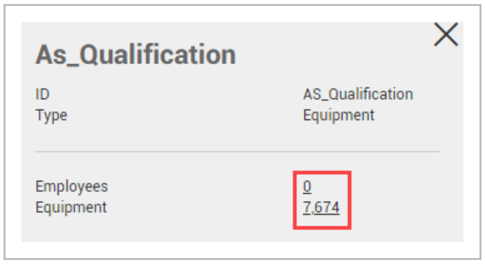


2. Select the **Qualification**, and then click the **Information** icon.



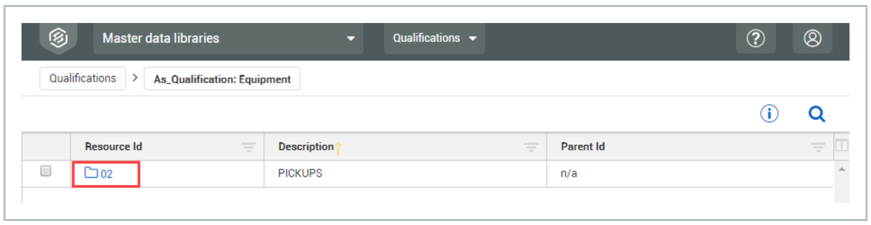
- The information slide-out panel opens. Employees and Equipment show with or without numbers.

3. Select the **number** link next to either Employees or Equipment.

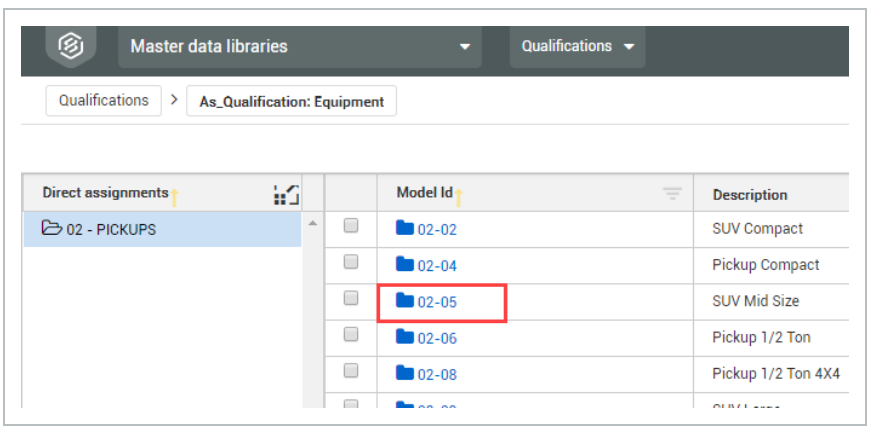


4. Click through file structure to get to list of equipment or employees.

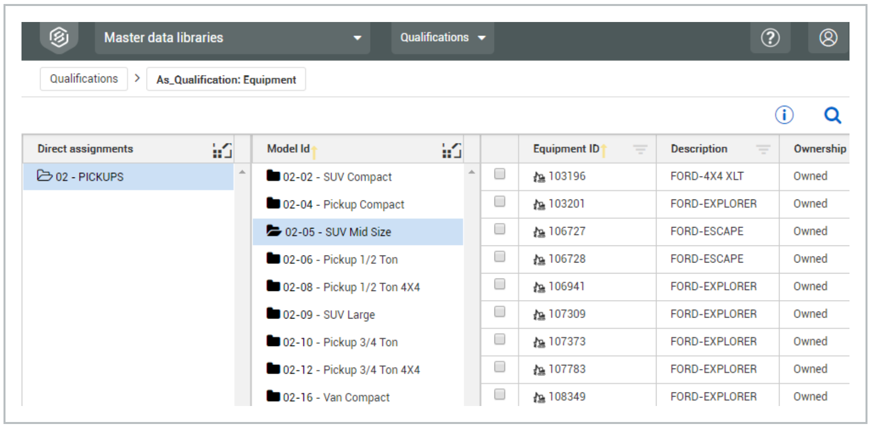
- Click the **Resource ID**



- Click on the **Model ID**



- The list of the Equipment or Employees will appear



6.16 REVENUE CATEGORIES

Revenue categories master data is used by the InEight Change and InEight Control applications.

When managing change orders in the Change and Control applications, you can select a revenue category to indicate a percentage probability that the change order will be reimbursed. The categories and probabilities percentages are set at the organization level and based on their organization's business rules. Examples of revenue categories, change status, and percentage that could be used, are shown in the Revenue categories master data image below.

After the revenue category is assigned to the change order, the associated probability percentage is factored in the related forecasted revenue in Control.

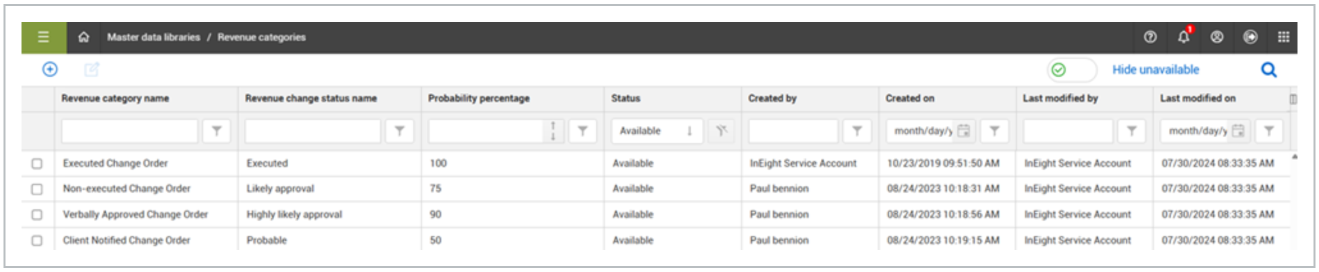
6.16.1 Considerations

With the applicable permissions, you can select the icon to add, edit, or delete master data revenue categories. Permissions are configured in Roles and permissions > Master data libraries > **Revenue category**.

Permission Name	Description	Level
View revenue category	Allows the user to view revenue categories master data.	Base user

Permission Name	Description	Level
Add revenue category	Allows the user to create and add revenue categories to master data.	Account Admin
Edit revenue category	Allows the user to modify existing revenue categories in master data.	Account Admin

Within InEight Platform, you can store a list of revenue categories used by your organization on the Revenue categories master data page.



Field	Description
Revenue category name	Name of the revenue category that shows in the drop-down lists in the Change and Control applications.
Revenue change status name	Name provided by the organization that is associated with the approval probability percentage status used in Control.
Probability percentage	Value that indicates the probability percentage for the revenue category.
Status	Set the status to *Available* to allow the revenue category to be used. If the status is set to *Unavailable* and the Hide unavailable toggle is set to *On*, the revenue category does not show in the list.

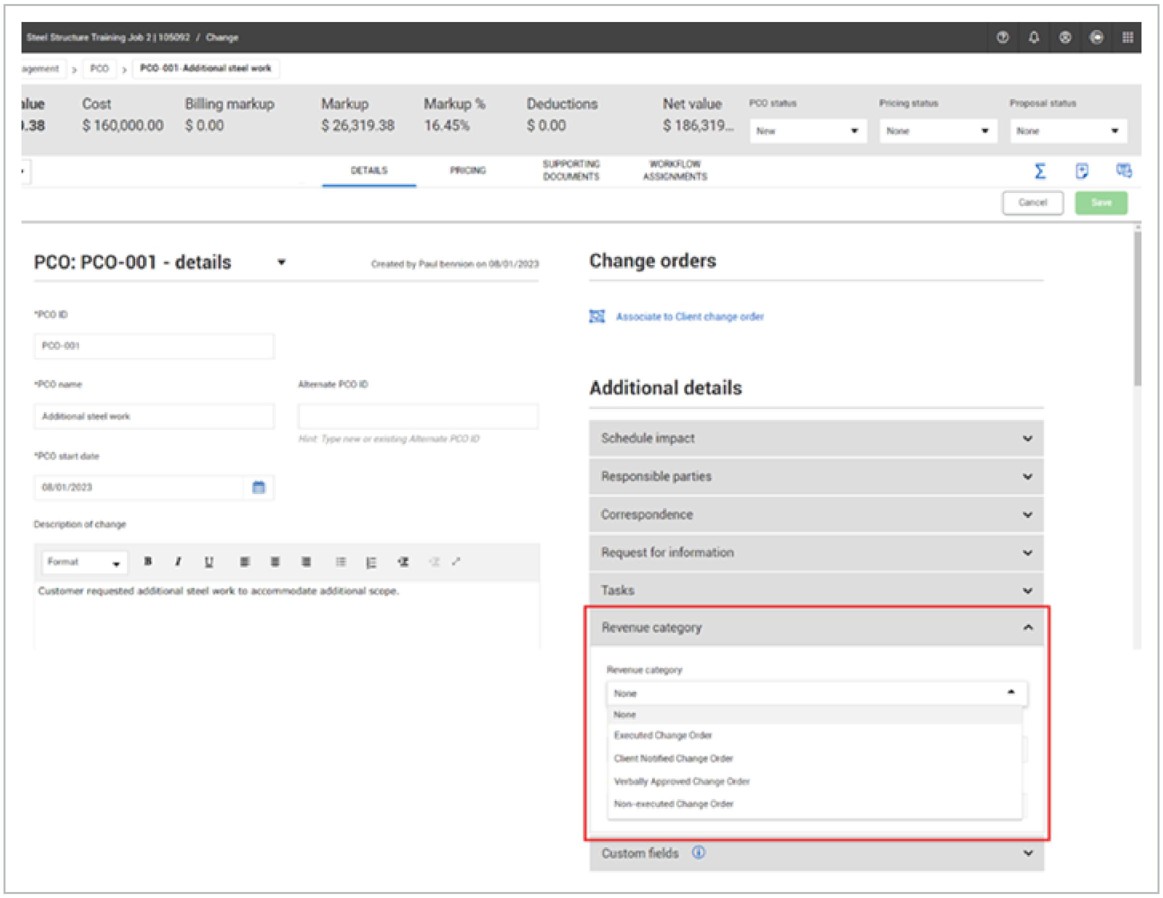
6.16.2 Manage revenue categories

You can add and edit revenue categories by clicking the **Add** and **Edit** icons. From the right toolbar, the Import and Export icons allow you to add and export your revenue categories in bulk.

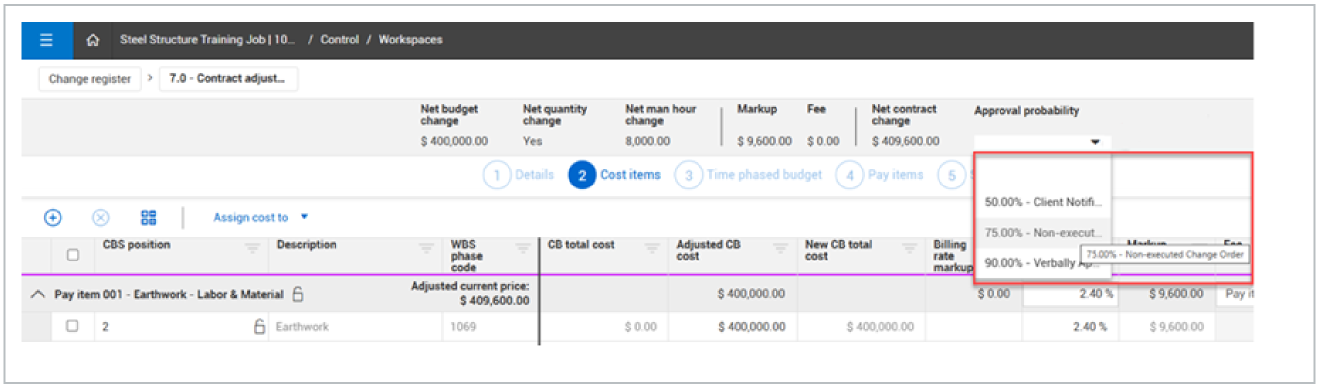
By default, the Hide unavailable toggle is set to *On*, which filters the list to show only the available revenue categories that can be assigned. Revenue category records cannot be deleted but the status of a revenue category record can be set to *Unavailable*, which prevents the revenue category from being used and assigned. However, if a revenue category is already indicated on a contract within a project, then it will still be available in that contract but will not be available for future contracts.

6.16.3 Use revenue categories

In Change, you can assign a revenue category to a potential change order (PCO) on its Details tab, in the Revenue category drop-down list.



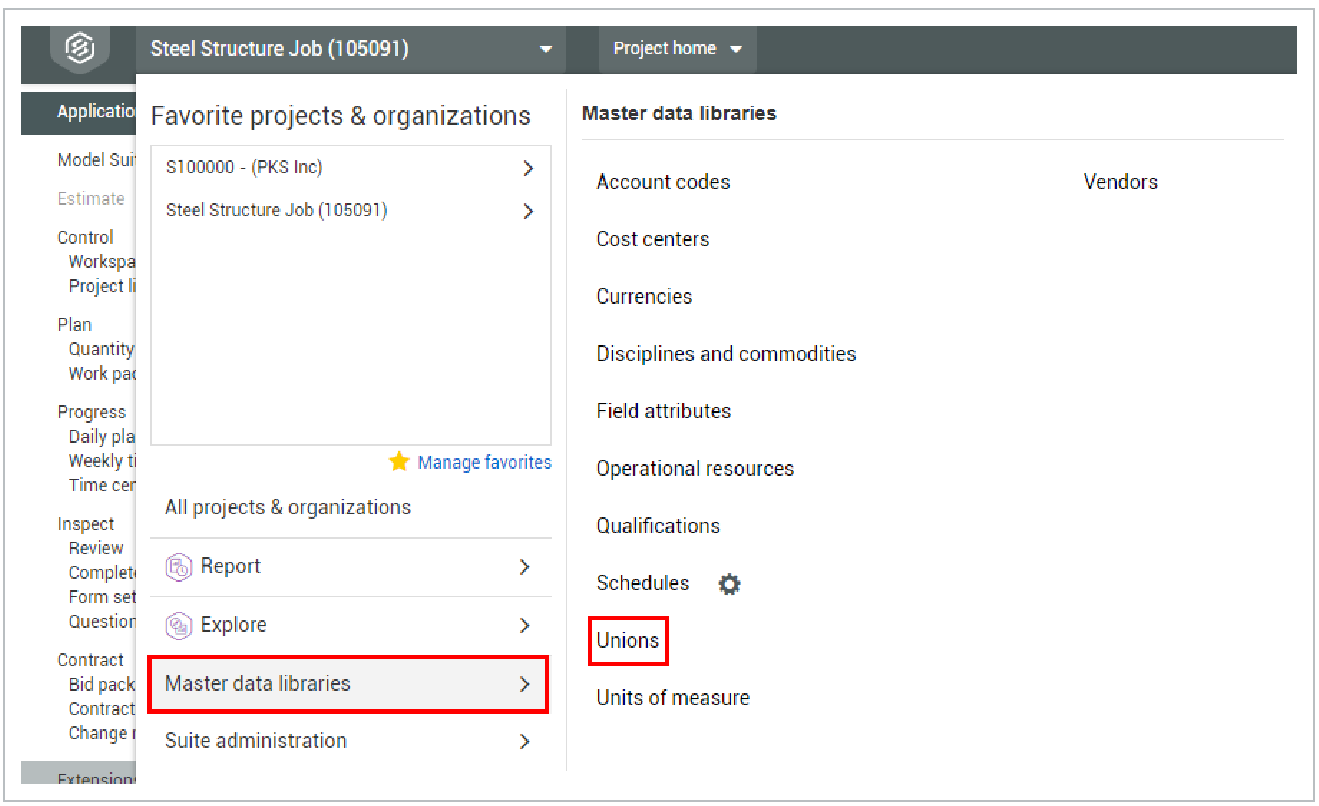
In Control, you can assign the revenue category to a contract adjustment in the Approval probability section.



6.17 UNIONS

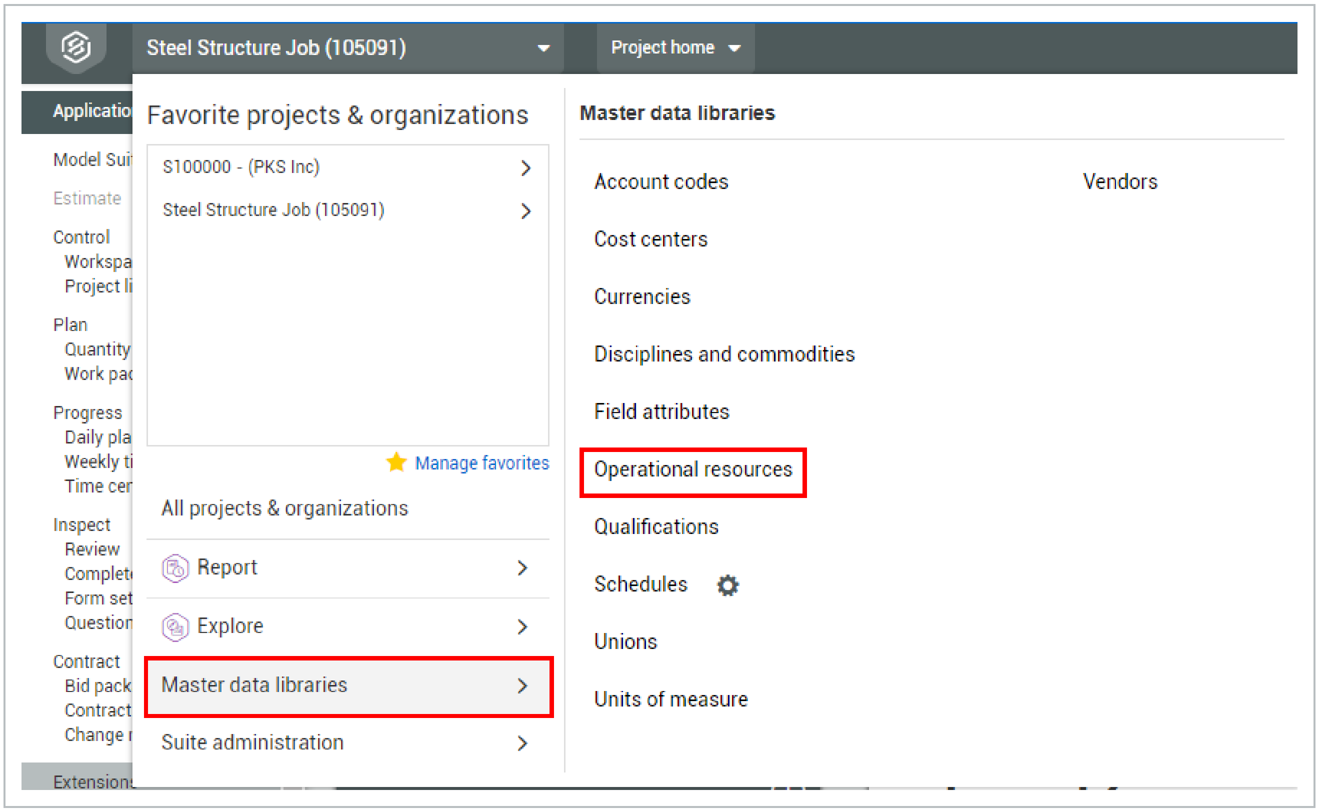
The Unions master data library gives you the ability to associate Master Data employees or crafts to a local union as required by the organization. Union data was initially imported from your external system as part of your company's implementation of the InEight Platform.

To access the Unions master data library, new Union permissions must be assigned to your role. Once assigned, you access Unions by navigating to the first level menu, clicking **Master Data Libraries** and then selecting **Unions**. This will take you to the Unions page.

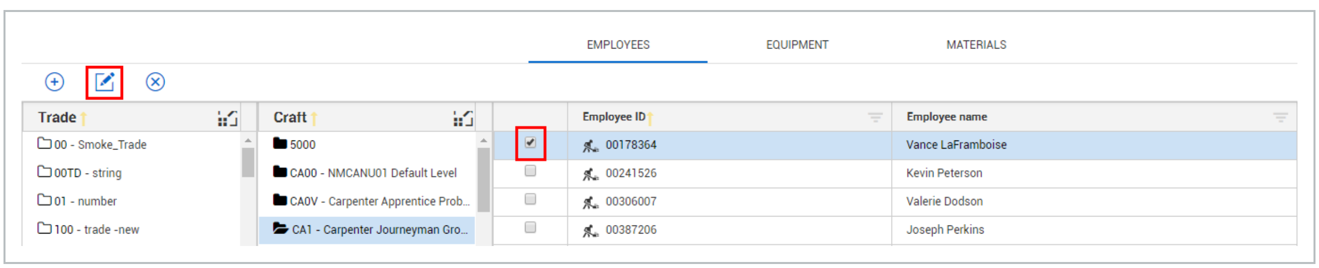


You can associate the unions listed in your Unions master data library with your employee operational resources by opening either the craft or employee within the Operational resources master data library and editing the Union field.

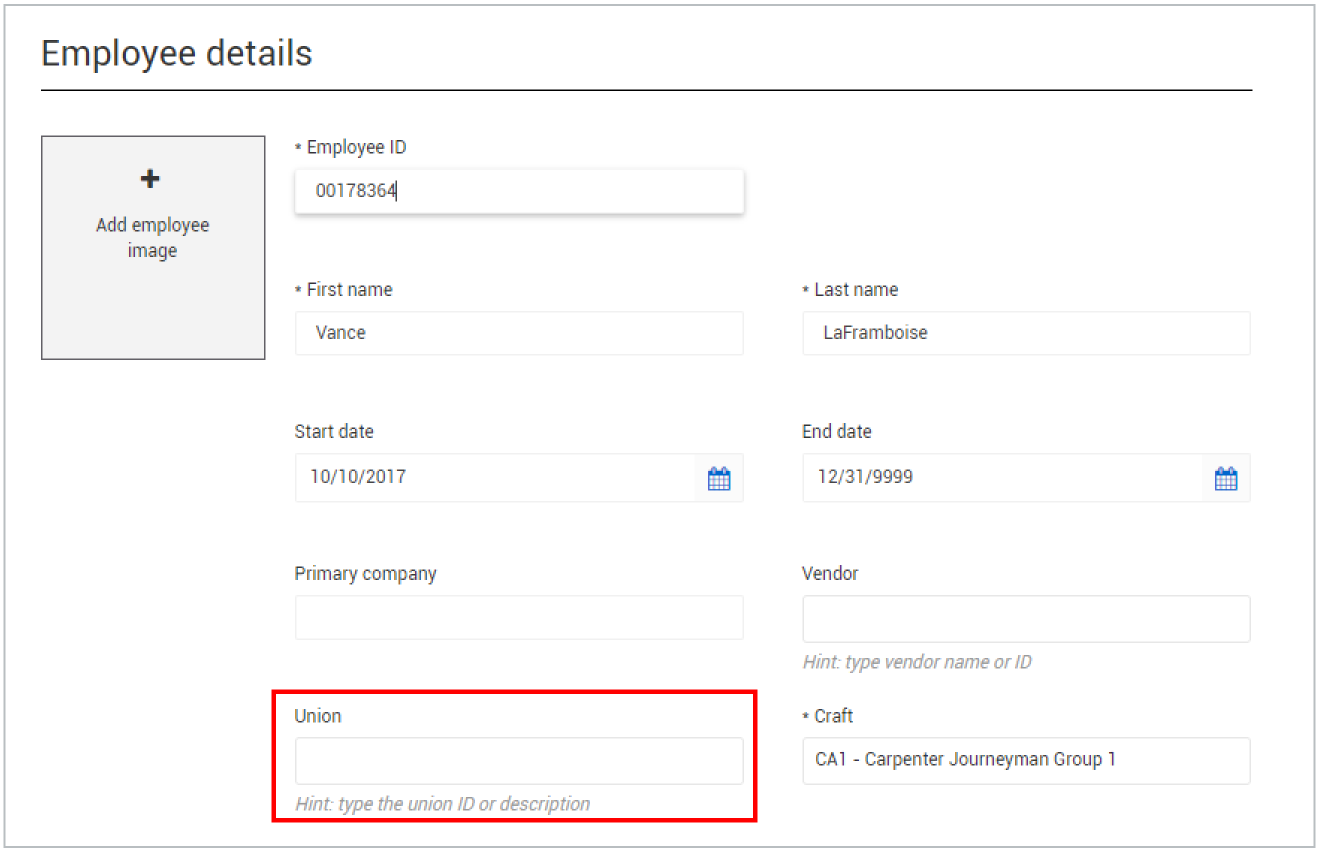
To view or edit Union association for an Operational Resource Craft or Employee, from the Main menu, select Master Data Libraries > **Operational Resources**.



Then select **Employees** tab. Select a Trade, Craft, and then an employee. Then click the **Edit** icon.



Now edit the **Union** field under Employee Details.



Operational employee resources will inherit the Union associated from the Operational craft assignment. To change an Operational employee resource's Union association, either the Operational craft's Union association must be modified, or the Operational employee resource's craft assignment must be modified.

6.17.1 Union Use Cases

Optionally combining Union and Vendor associations further enhances the security of your account level information by restricting visibility to employee Union association information dependent on a user's Vendor assignment.

Once consumed by other applications such as InEight Progress and Time Center, Unions will allow you to assign Allowances, Premiums and other characteristics to multiple employees associated with the selected Union.

6.18 UNITS OF MEASURE

The Units of measure page contains all the units you may use on a project. From the Main menu, select Master Data Libraries > **Units of Measure**. The Units of Measure page opens.

Each unit of measure comes with details, as indicated below:

Unit of Measure Details

Term	Definition	Example
Term	Definition	Example
Name	The name of the unit of measure.	Yard
Measurement type	Indicates whether the unit is area, length, volume, power, unit, or weight.	Length
Base UoM	What the unit of measure references to relate to other units of measure.	Meter
Conversion factor	Provides the factor to convert the unit of measure to its Default alternate measurement.	0.9144000
Measurement system	Indicates if the unit of measure is English or Metric.	English
Default alternate measurement	The measurement the unit of measure converts to by default.	Meter

With the required permissions, you can add new units of measure manually.

6.19 VENDORS

The Vendors page is a list of all the vendors that your company uses. This list is referenced and used by the various InEight applications. To access your list of vendors, From the Main menu, select Master Data Libraries > **Vendors**.

6.19.1 Vendor Use Cases

When using other InEight applications, you can access your list of vendors as needed via drop-down vendor-related fields.

For owners and prime contractors that have invited users from other companies to access your environment, you can assign them to a vendor code and description, so they can only view the operational resources tagged for that vendor. This is an effective way to secure your resources and their rates, so each contractor only sees the rates that pertain to them.

6.20 VIDEO INDEX

This is an index of video transcript pages. For the full video gallery, see the main video page.

- Create and Assign Roles video
- Create Project Structure video
- Document API Integration video
- General Navigation video
- Home Landing Page video
- User Management video
- User Profile Settings video