

PLATFORM USER GUIDE



Release 26.1
Last Updated: 26 February 2026

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EXERCISES

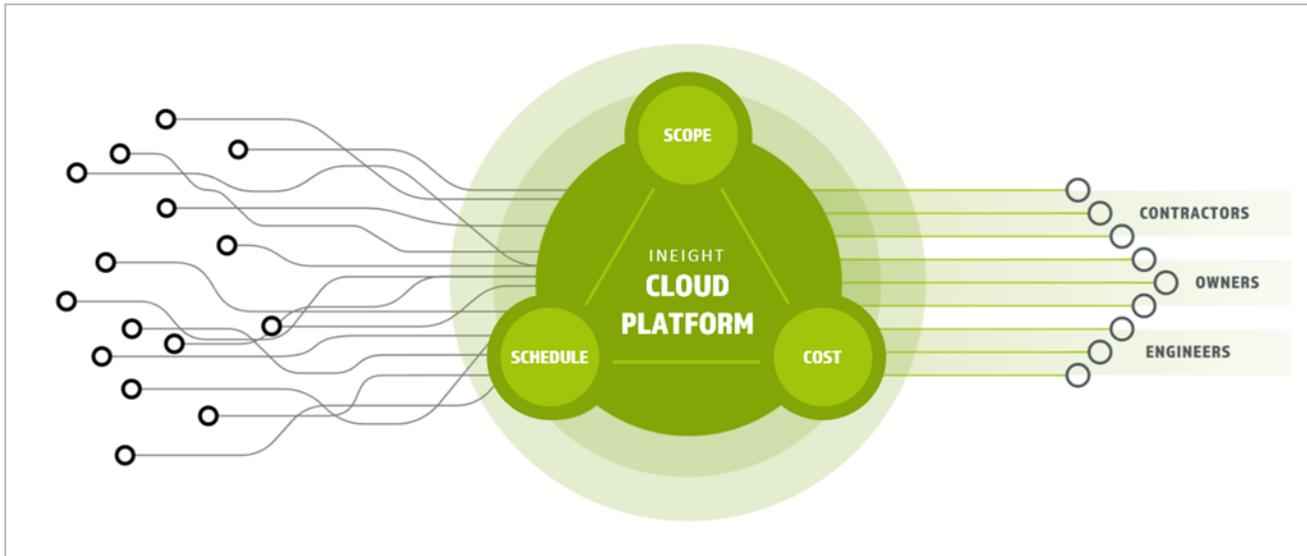
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1.1 OVERVIEW

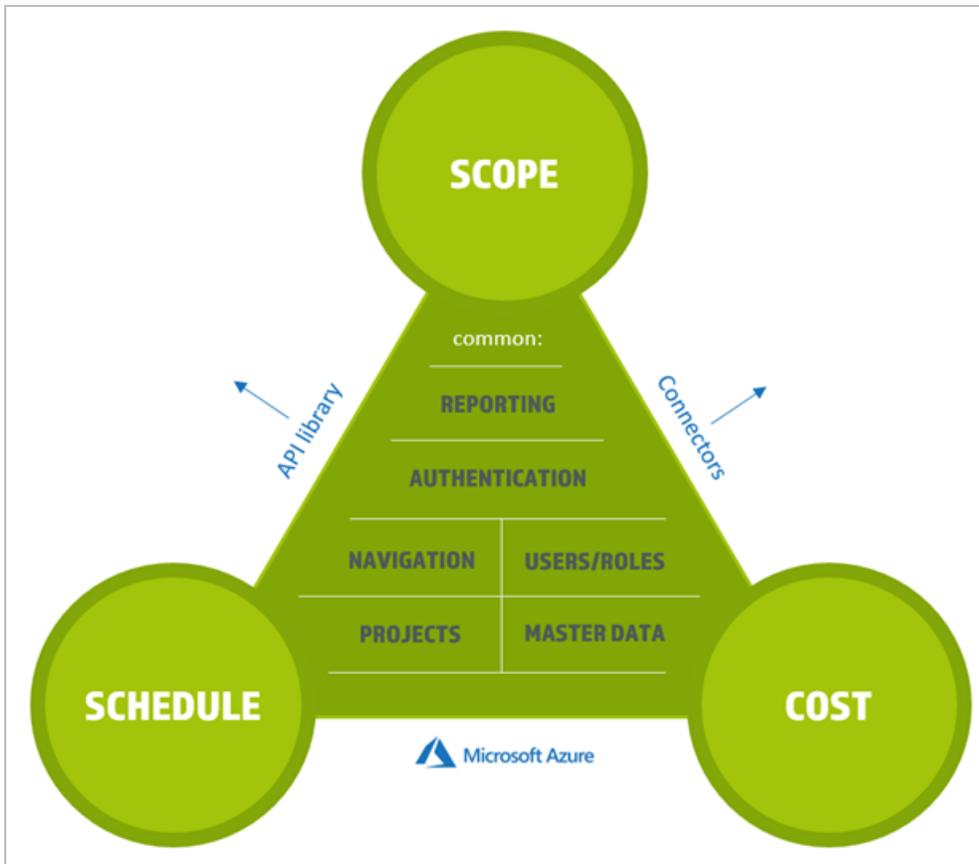


1.1.1 Integration of Applications and Processes

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 3 rd -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.

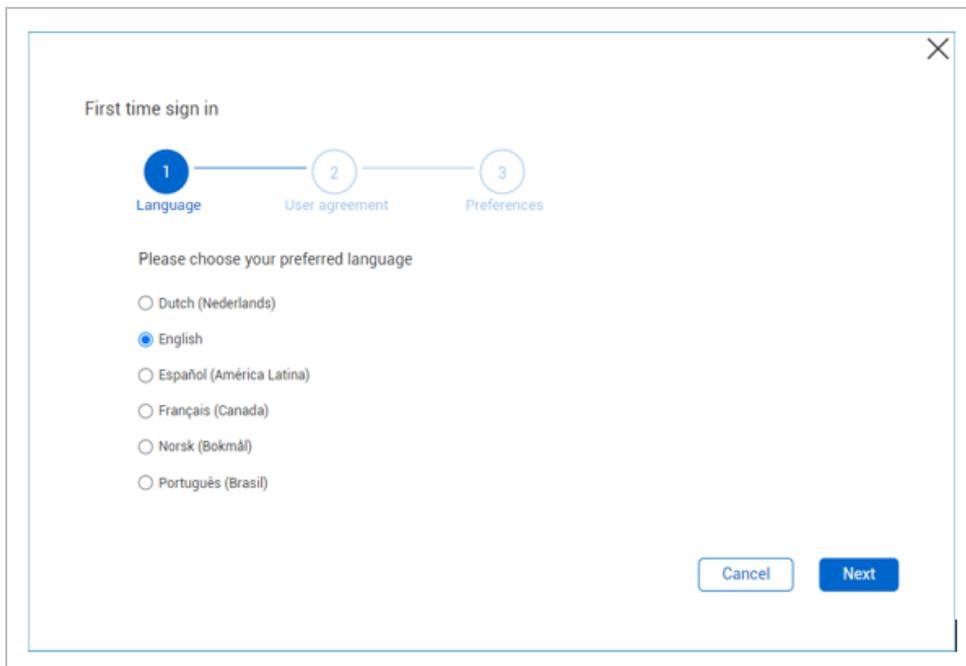
1.2 FIRST TIME SIGN IN

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.

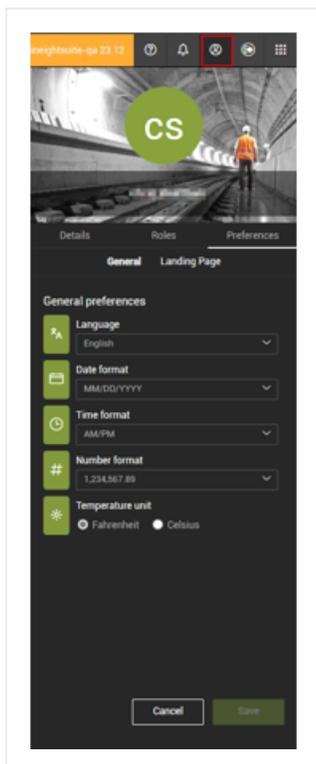
The First-time sign in dialog boxes only show for the initial sign-in to any of the InEight products.

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**.

First time sign in

1 Language 2 User agreement 3 Preferences

User agreement:

TERMS OF USE

THESE TERMS OF USE / SERVICE (THE "TERMS") ARE A LEGAL AGREEMENT BETWEEN YOU ("USER" OR "YOU") AND INEIGHT INC. AND ITS SUBSIDIARIES ("INEIGHT") WITH RESPECT TO YOUR ACCESS OR USE WWW.INEIGHT.COM_WEBSITE AND ANY OTHER ONLINE SITES HOSTED BY INEIGHT (THE "SITES").

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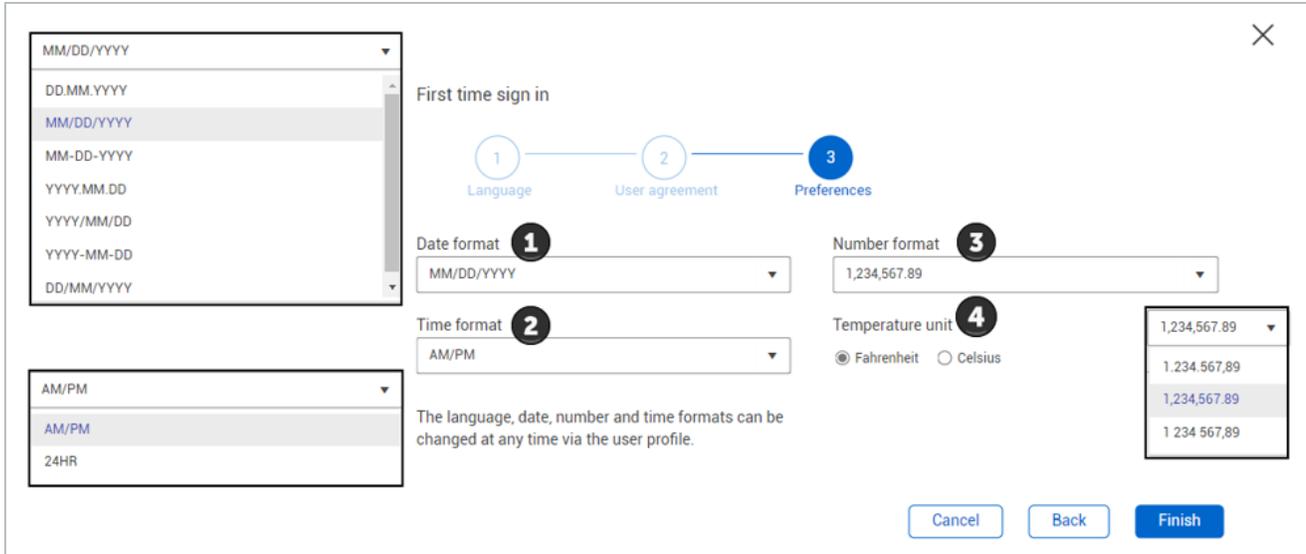
YOUR RIGHT TO ACCESS AND USE OF THE SITES AND INEIGHT SOFTWARE PRODUCTS AND SERVICES (AS APPLICABLE) COLLECTIVELY THE INEIGHT

I agree to the InEight [Terms and Conditions](#) and [Privacy Policy](#).

Cancel Back 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.

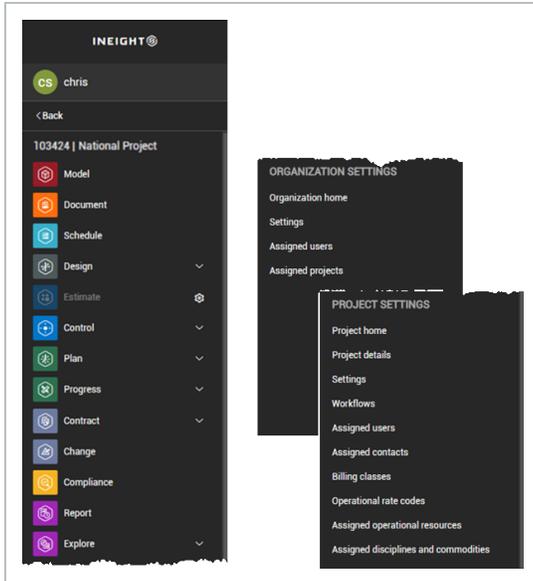
1.3.1 Main Menu

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.

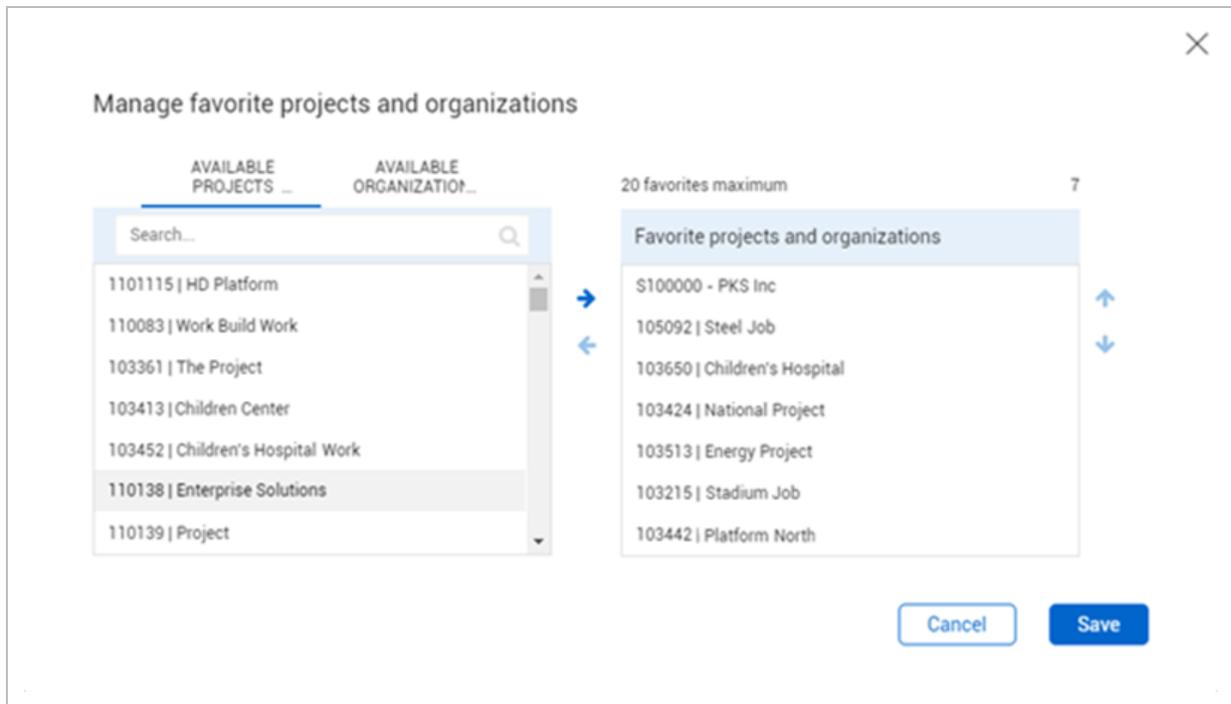
When you select a project or organization from your favorites, the menu updates to show the available applications. From this menu view, you can select and open an application or module, or access project settings or organization settings. Click the project or organization name to open the home page.



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 include 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.

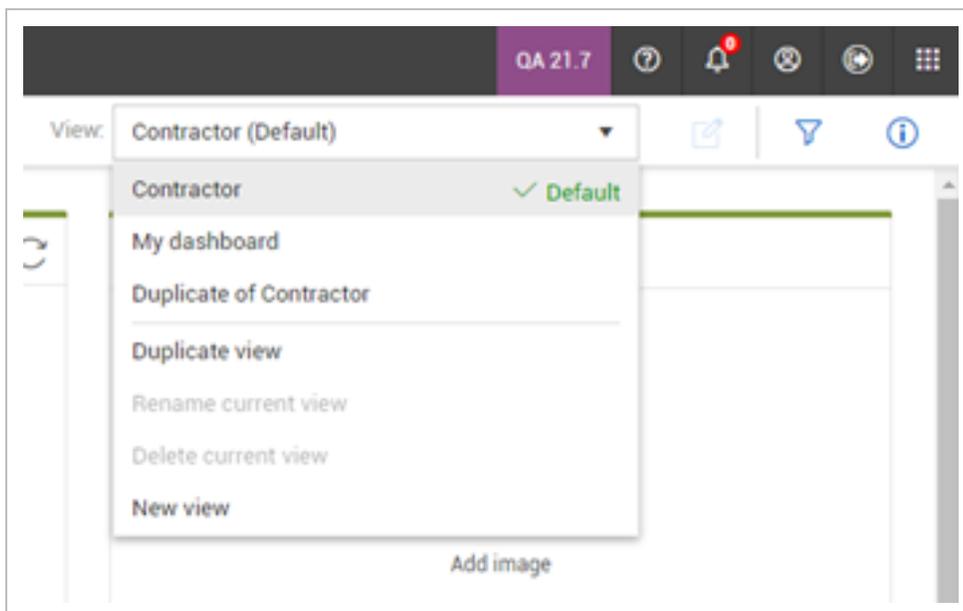
- [InEight.com](https://ineight.com) gives you quick access to the website for customer stories, blogs, industry events, webinars, partners and integrations, and the product finder page.

1.4 LANDING PAGE

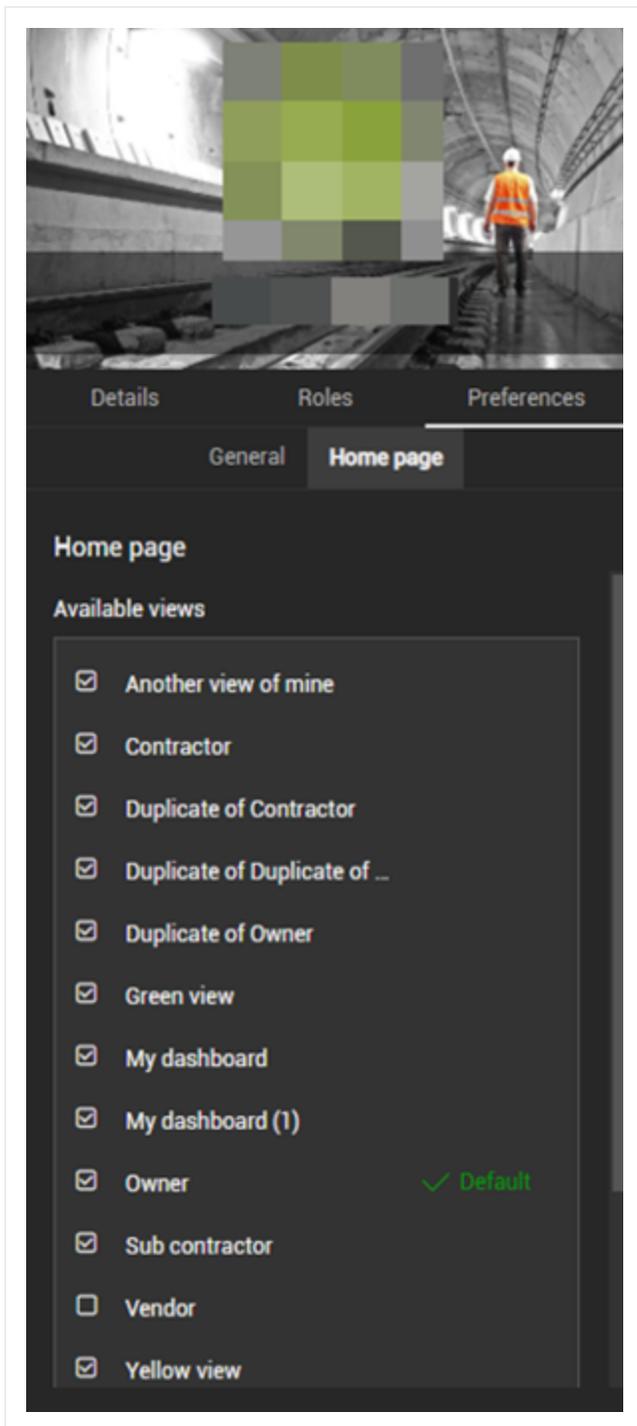
When you sign in to the InEight cloud platform, the view opens to a user-specific landing page. Initially, the page opens to a predefined view (Owner, Contractor, Subcontractor, Vendor) depending on your assigned role. Landing pages can be customized to focus on your day-to-day tasks and areas specific 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.

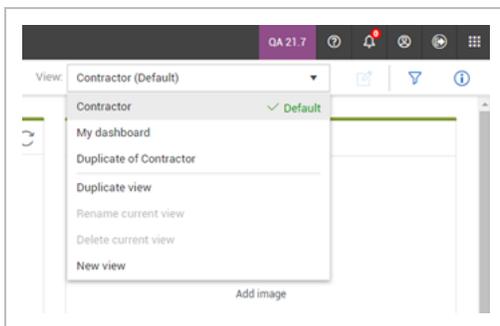
To view or configure (add, edit) the system views assigned to a role, go to Suite Administration > Roles and permissions. Select either Add role or Edit role. This requires the permissions View roles and permissions, Add roles and permissions, or Edit roles and permissions (respectively).

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

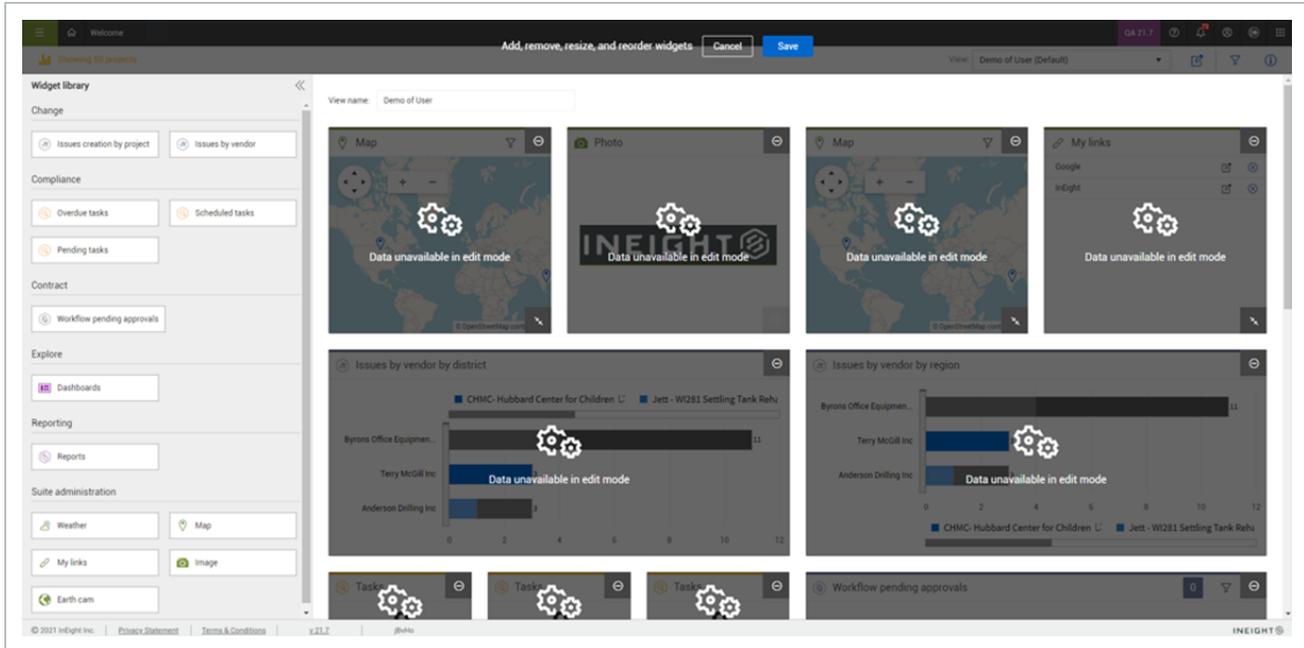
Custom views are only show in a user profile and available to the user that created it. Custom views cannot be assigned to a role.

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

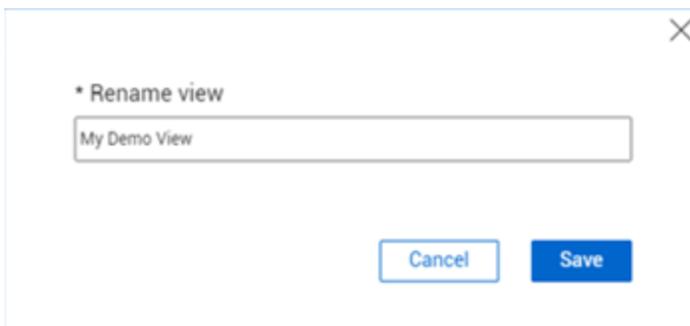
Click **Save** after you have completed creating your new view or making modifications to an existing view. After the view is saved, it opens to the live version of the view, and all widgets will fetch the applicable data.

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

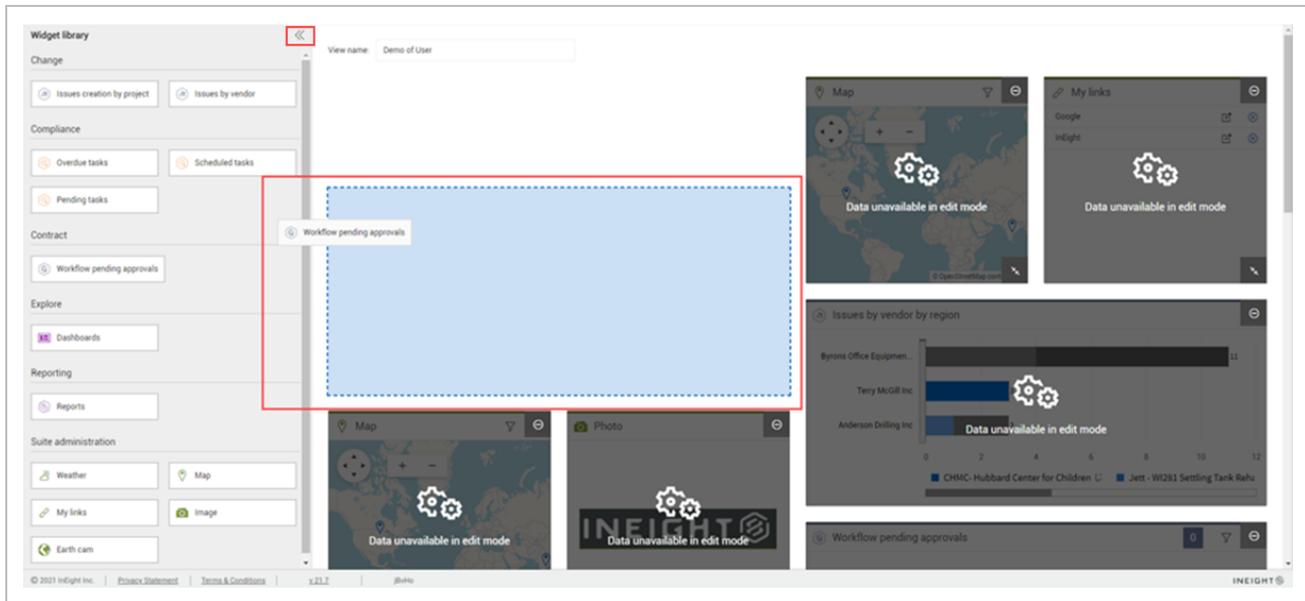
The staging area of the edit screen allows you to add or remove widgets as needed. All the available widgets that you can add are shown in the Widget library on the right side of the staging area page.

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.

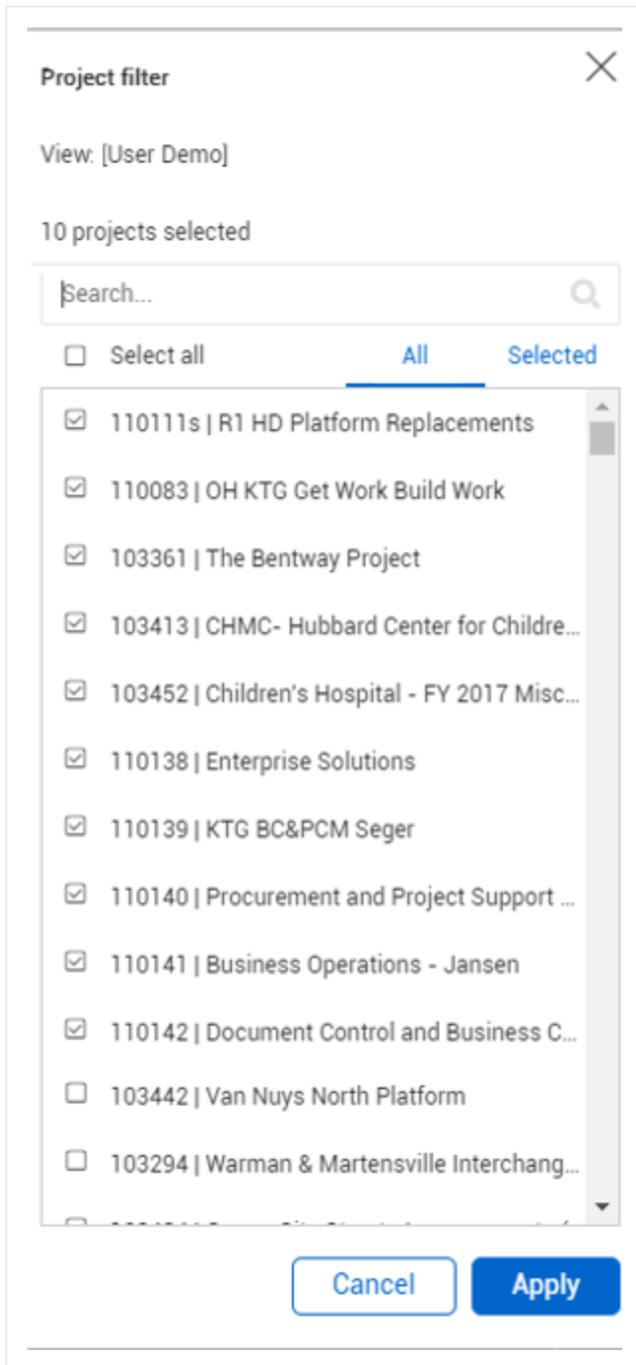
- EarthCam (InEight Platform): Configure a live EarthCam video stream on the widget area.
- Overdue tasks (InEight Compliance): Shows a count of overdue tasks, which could be clicked to take you to that page.
- Pending tasks (InEight Compliance): Shows a count of pending tasks, which could be clicked 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.



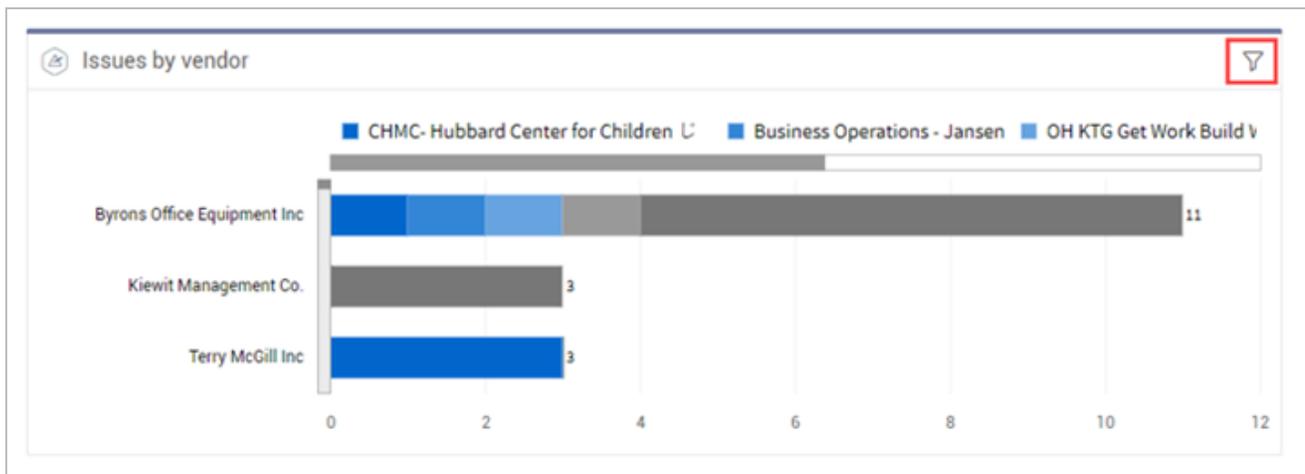
The Project filter slide-out panel shows the following:

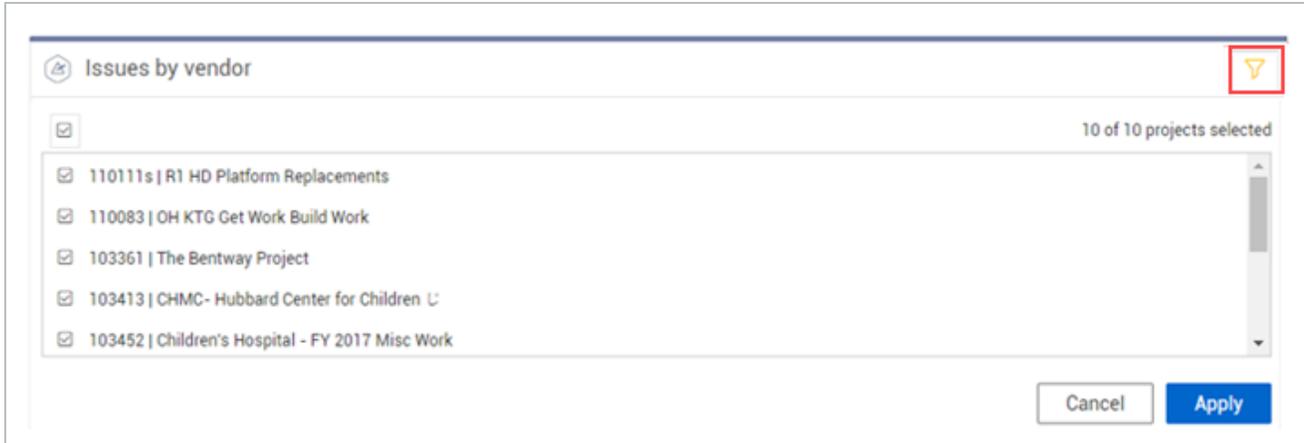
- View: The name of the view currently selected.
- Number of projects selected: Indicates the number of projects currently selected.
- Search: Provides the function to search your list of available projects.
- All or Selected: Toggles to show all projects or to show only selected projects.
- Cancel/Apply: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

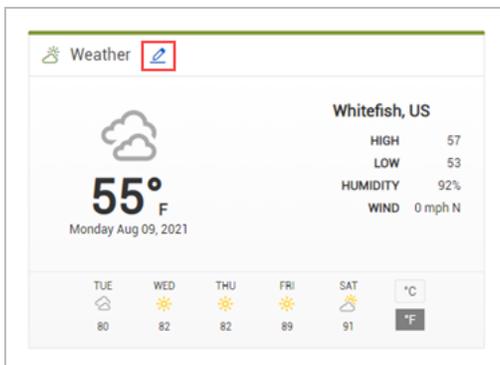




When you duplicate a view, the view level or tile level projects are also copied. The configurations can then be updated in the duplicated view.

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.



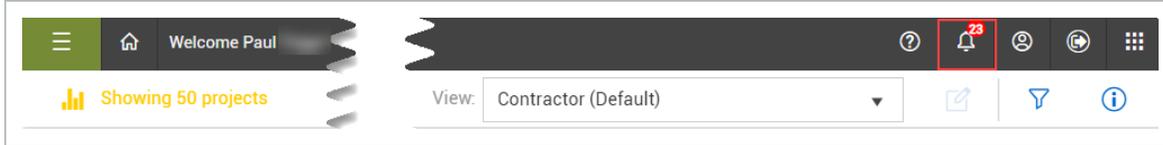
There are some additional options for specific widgets that allow for individual configurations, such as specifying the location for the weather, or adding new links to the My links tile. Other widgets could have additional options to configure that are not detailed in these release notes.

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

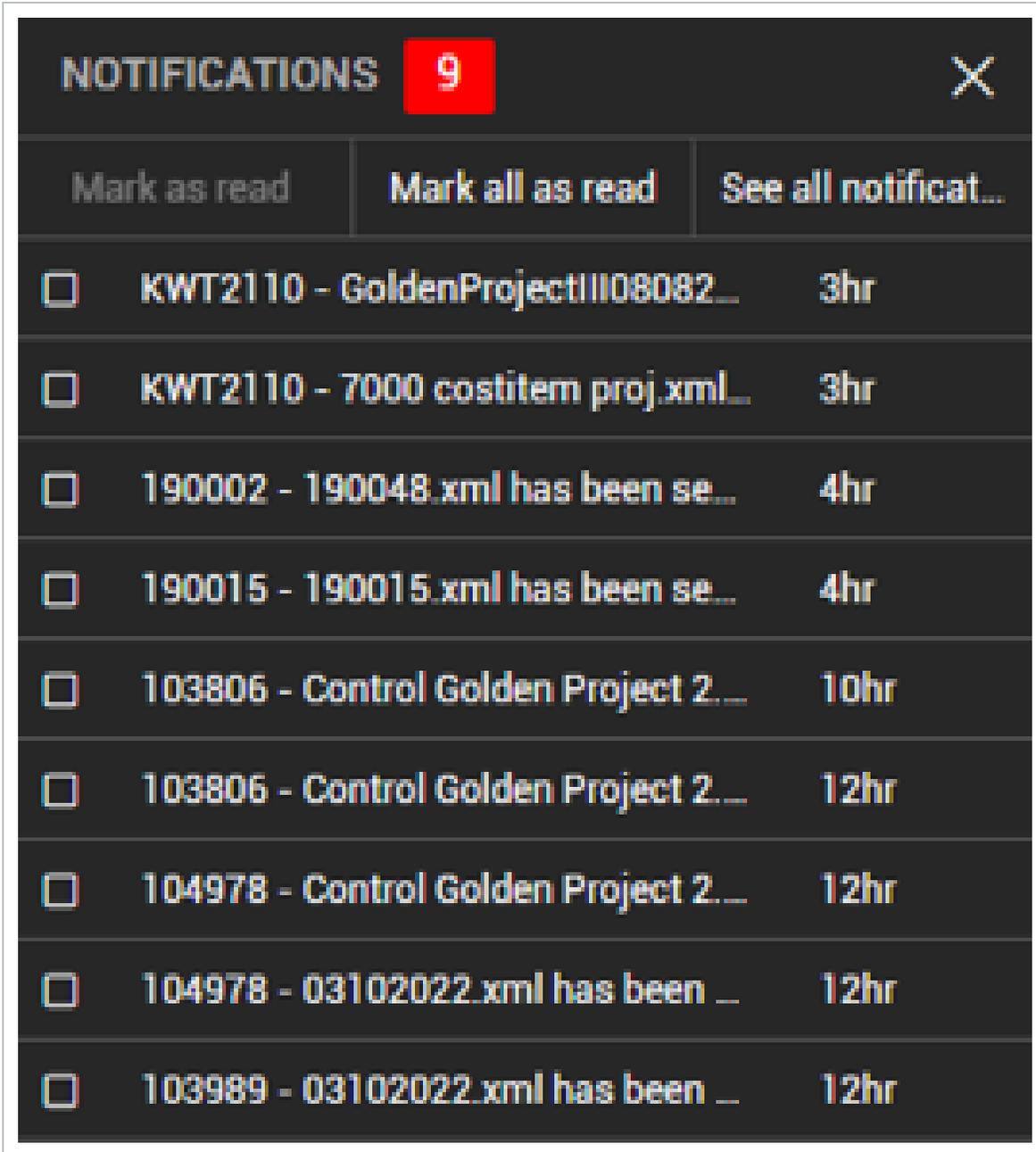
system activities. Message content can range from a notification informing you of a failed import process, to notification about a planned system outage.

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.



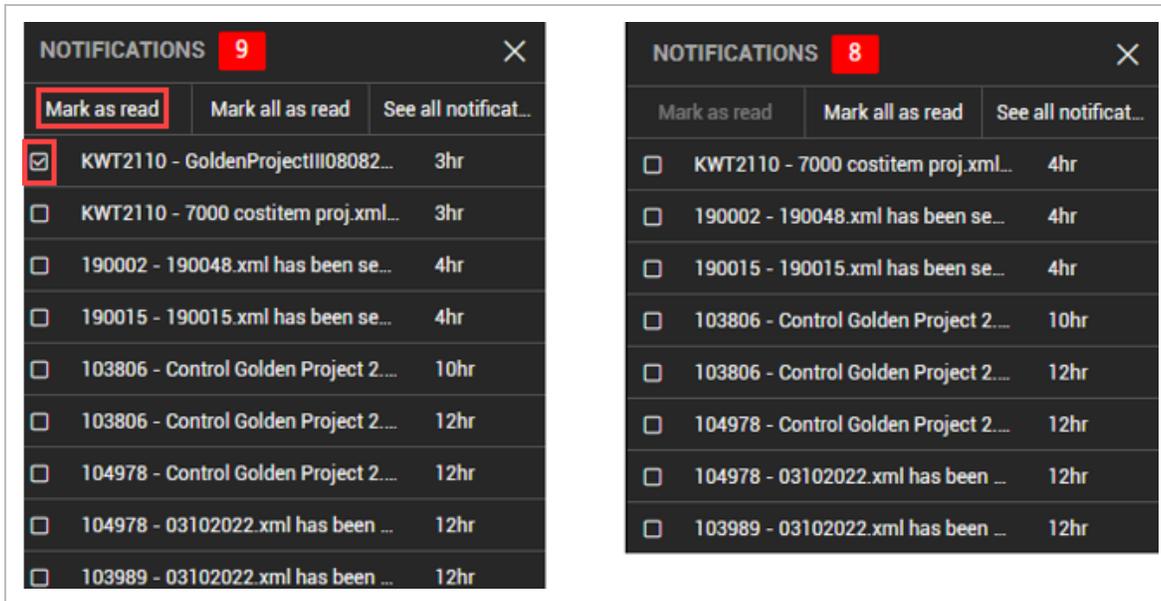
1.7.1 Notifications slide-out panel

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

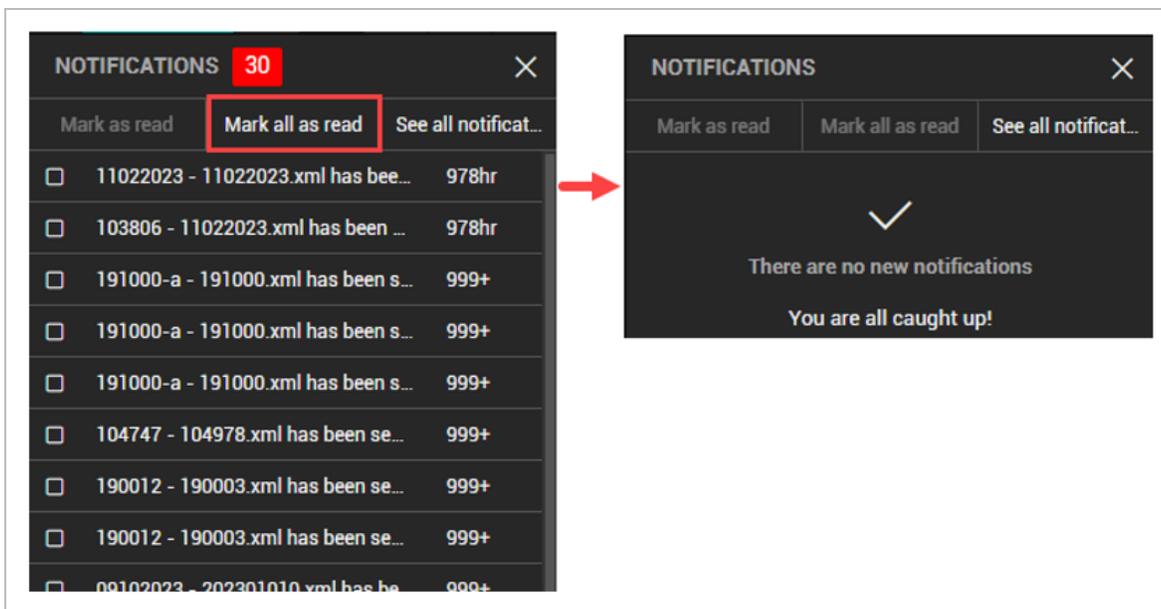


1.7.1.1 Mark as Read

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.

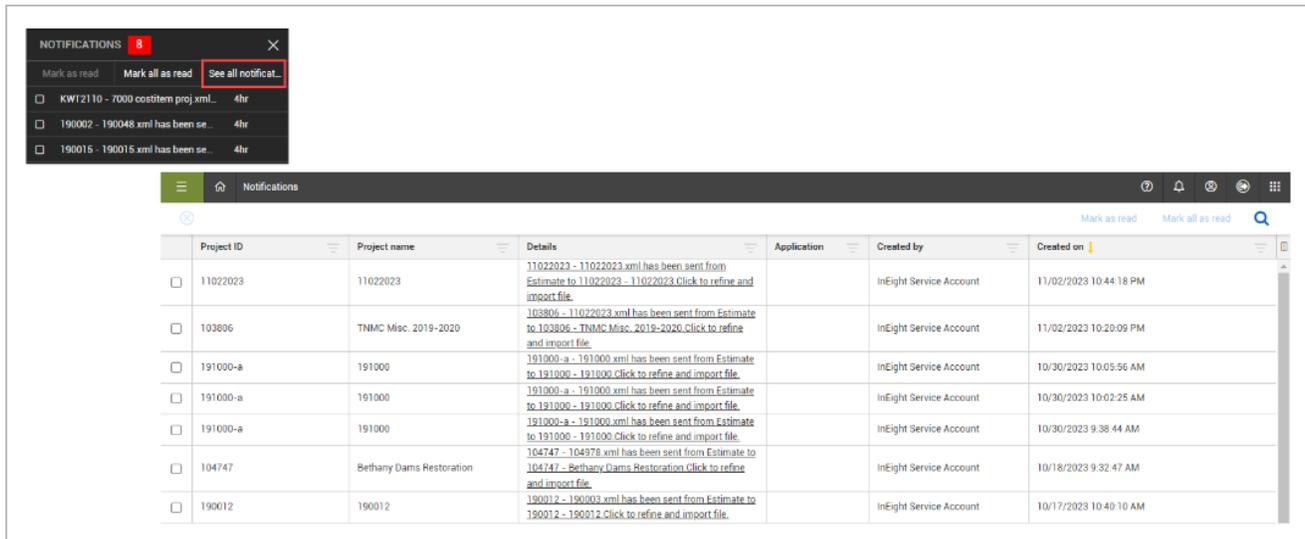


1.7.1.2 See all notifications

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.



The screenshot shows a notifications interface. At the top left, a slide-out panel titled 'NOTIFICATIONS' with a red badge showing '8' is open. It contains three buttons: 'Mark as read', 'Mark all as read', and 'See all notificat...'. Below these are three notification items, each with a checkbox and a timestamp of '4hr'. The main interface below the panel shows a 'Notifications' header with search and action icons. A table lists notifications with columns for Project ID, Project name, Details, Application, Created by, and Created on.

Project ID	Project name	Details	Application	Created by	Created on
<input type="checkbox"/> 11022023	11022023	11022023 - 11022023.xml has been sent from Estimate to 11022023 - 11022023. Click to refine and import file.		InEight Service Account	11/02/2023 10:44:18 PM
<input type="checkbox"/> 103806	TNMC Misc. 2019-2020	103806 - 11022023.xml has been sent from Estimate to 103806 - TNMC Misc. 2019-2020. Click to refine and import file.		InEight Service Account	11/02/2023 10:20:09 PM
<input type="checkbox"/> 191000-a	191000	191000-a - 191000.xml has been sent from Estimate to 191000 - 191000. Click to refine and import file.		InEight Service Account	10/30/2023 10:05:56 AM
<input type="checkbox"/> 191000-a	191000	191000-a - 191000.xml has been sent from Estimate to 191000 - 191000. Click to refine and import file.		InEight Service Account	10/30/2023 10:02:25 AM
<input type="checkbox"/> 191000-a	191000	191000-a - 191000.xml has been sent from Estimate to 191000 - 191000. Click to refine and import file.		InEight Service Account	10/30/2023 9:38:44 AM
<input type="checkbox"/> 104747	Bethany Dams Restoration	104747 - 104978.xml has been sent from Estimate to 104747 - Bethany Dams Restoration. Click to refine and import file.		InEight Service Account	10/18/2023 9:32:47 AM
<input type="checkbox"/> 190012	190012	190012 - 190003.xml has been sent from Estimate to 190012 - 190012. Click to refine and import file.		InEight Service Account	10/17/2023 10:40:10 AM

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 an admin.

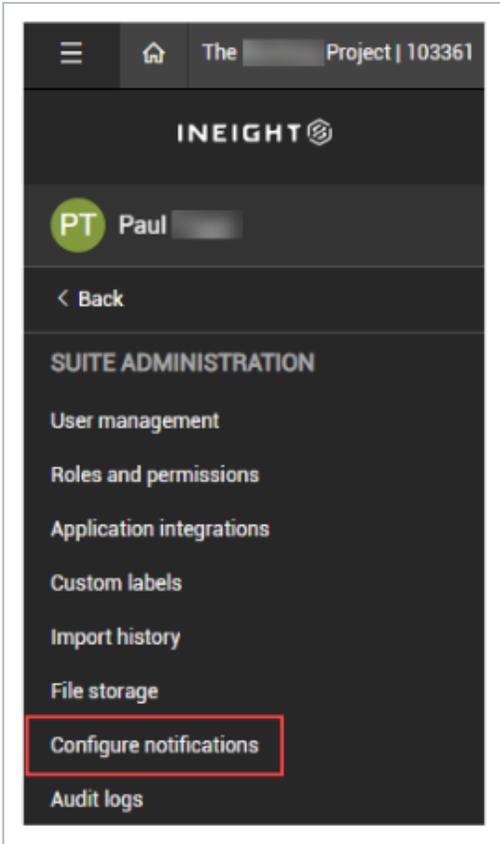
Permissions for notification settings are configured in Suite Administration > Roles and permissions > Suite Administration > **Configure notifications**. With the applicable permissions a user in an admin role can customize the notification preferences for other users.

Configure notifications

-  View recipient lists
-  Add recipient lists 
-  Edit recipient lists 
-  Delete recipient lists
- Send notifications

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.

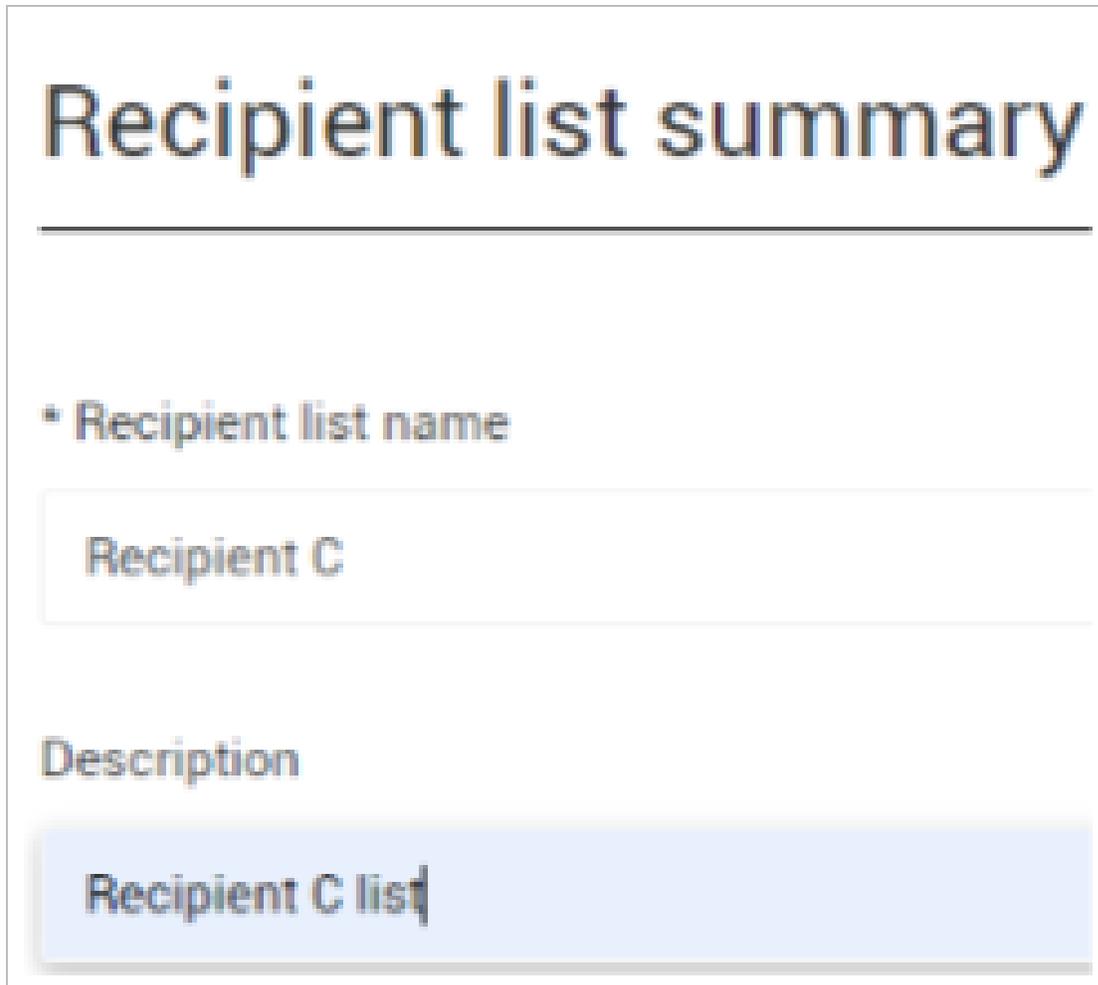
The screenshot shows a web browser interface for the 'Configure notifications' page. The breadcrumb is 'Suite administration / Configure notifications'. There are utility icons at the top right, including a help icon, a notification bell with a red '20' badge, a refresh icon, and a settings icon. A 'Send notification' button is present. Below is a table with the following data:

	Recipient list name ↑	Description	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/>	Configuration A	Recipient A list	Paul [redacted]	01/16/2024 3:12:54 PM	Paul [redacted]	01/16/2024 3:36:35 PM
<input type="checkbox"/>	Configuration B	Recipient B list	palani [redacted]	12/25/2023 5:11:39 AM	Paul [redacted]	01/16/2024 3:36:54 PM
<input type="checkbox"/>	Configuration C	Recipient C list	palani [redacted]	12/25/2023 5:16:21 AM	Paul [redacted]	01/16/2024 3:37:17 PM

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.



Recipient list summary

* Recipient list name

Recipient C

Description

Recipient C list

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.

Edit recipient list

Roles

Search...

Current selections

Cost Controller

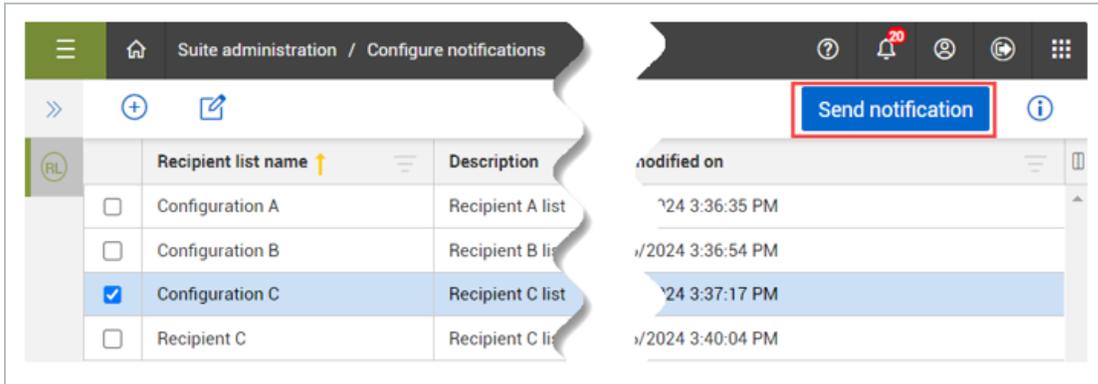
Cancel Save

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.

Send notification ⓘ

Send admin notifications ✕

* Notification type

Email

Subject

Message

In App

Notification text

Please submit your forecast ASAP

Cancel Send

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

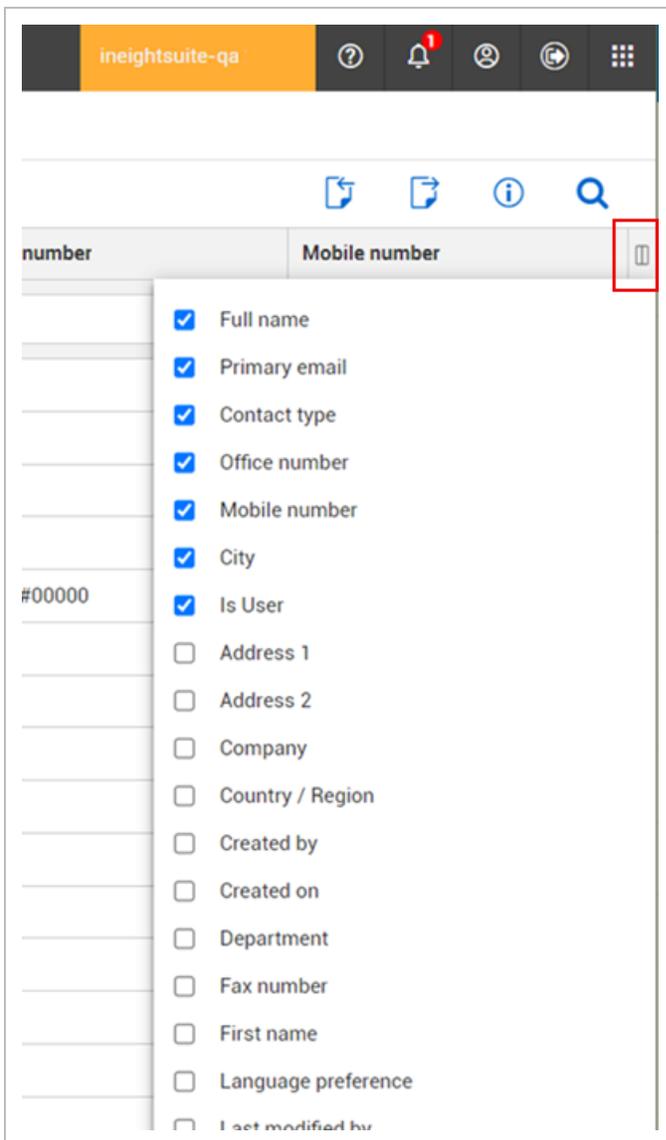
Click in the column header and drag it to another location in the grid to change the order of the column sequence.

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.

The screenshot shows a table with columns: ID, Description, Created by, Created on, Last modified by, and Last modified on. The 'ID' header has an upward arrow with the number '2', 'Description' has an upward arrow with '1', and 'Last modified by' has a downward arrow with '3'. Below the headers are four rows of data with checkboxes on the left.

ID	Description	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> ESB union1	ESB union1	InEight Service Account	11/30/2023 06:03:39 AM	InEight Service Account	11/30/2023 06:03:39 AM
<input type="checkbox"/> ESB union2	ESB union2	InEight Service Account	11/30/2023 06:04:03 AM	InEight Service Account	11/30/2023 06:04:03 AM
<input type="checkbox"/> MR Union A1	MR Union A1	Mahendra R	11/30/2023 03:11:07 AM	Mahendra R	11/30/2023 03:11:07 AM
<input type="checkbox"/> MR Union A2	MR Union A2	Mahendra R	11/30/2023 03:10:53 AM	Mahendra R	11/30/2023 03:10:53 AM

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.

The screenshot shows the same table as above, but with a filter dropdown menu open over the 'Description' column. The dropdown menu lists filter criteria: 'Is equal to', 'Is not equal to', 'Contains', 'Does not contain', 'Starts with', and 'Ends with'. The 'ID' column header has a red box around it, and the dropdown menu also has a red box around it.

ID	Description	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> unions7		palani nadiya	11/23/2023 04:39:36 AM	palani nadiya	12/27/2023 11:19:42 PM
<input type="checkbox"/> unions11		palani nadiya	11/23/2023 04:40:53 AM	palani nadiya	11/23/2023 04:40:53 AM
<input type="checkbox"/> unions12		palani nadiya	11/23/2023 04:41:18 AM	palani nadiya	11/23/2023 04:41:18 AM
<input type="checkbox"/> unions13		palani nadiya	11/23/2023 04:41:29 AM	palani nadiya	11/23/2023 04:41:29 AM
<input type="checkbox"/> unions14		palani nadiya	11/23/2023 04:42:07 AM	palani nadiya	11/23/2023 04:42:07 AM
<input type="checkbox"/> unions15		palani nadiya	11/23/2023 04:43:13 AM	palani nadiya	11/23/2023 04:43:13 AM
<input type="checkbox"/> unions17		palani nadiya	11/23/2023 04:43:28 AM	palani nadiya	11/23/2023 04:43:28 AM

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CHAPTER 2 – ALL PROJECTS AND ORGANIZATIONS

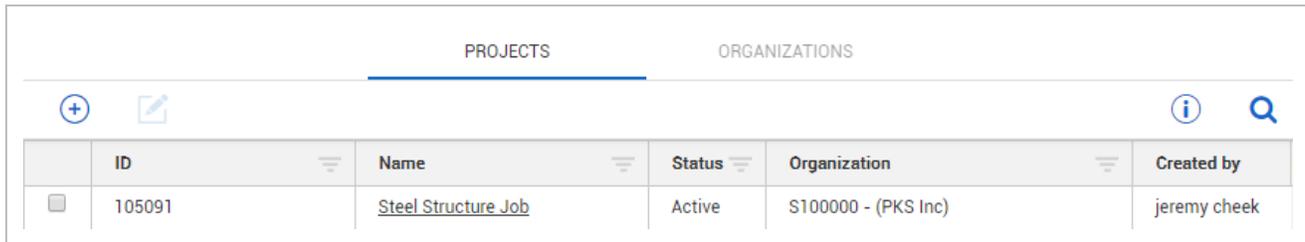
2.1 All Projects and Organizations	54
2.1.1 Projects	54
2.1.2 Organizations	54
2.2 Organizational Breakdown Structure	55
2.3 Edit the Organizational Breakdown Structure (OBS)	56
2.3.1 Account Code Delimiters	58
2.4 Alternate organization hierarchies	59
2.5 Define Project Attributes for Alternate Organization Parenting	59
2.5.1 Alternate organization parents within a project	60

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.



PROJECTS		ORGANIZATIONS		
ID	Name	Status	Organization	Created by
<input type="checkbox"/> 105091	Steel Structure Job	Active	S100000 - (PKS Inc)	jeremy cheek

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 (<i>e.g.</i> , 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.

Organization	Description
S100000 - (PKS Inc)	PKS Inc's
S100000 - (PKS Inc) - LS - Org under root	LS - Org under root test
S100000 - (PKS Inc) - LS - Org under root - LS - Org under childs	LS - Org under childs
S100000 - (PKS Inc) - LS - Org under root - child Org	Custom child org
S100000 - (PKS Inc) - Menu Progress	Menu Progresser
S100000 - (PKS Inc) - Menu Progress - CoreSmoke_Mar_001A	CoreSmoke_Mar_00_des56mmmm
S100000 - (PKS Inc) - Menu Progress - CoreSmoke_Mar_001A - New desc	desc alter
S100000 - (PKS Inc) - automation3	SA_Smoke
S100000 - (PKS Inc) - automation3 - automation3	automation3
S100000 - (PKS Inc) - automation3 - automation3 - automation3	automation3
S100000 - (PKS Inc) - automation3 - automation3 - S100000 - (PKS Inc) - automation3 - automation3 - Next Level OBg	Testing
S100000 - (PKS Inc) - automation3 - automation3 - S100000 - (PKS Inc) - automation3 - automation3 - Next Level OBg - Level 2	Leve 2 Test
S100000 - (PKS Inc) - automation3 - Test	Test
S100000 - (PKS Inc) - YJ_Organization_Apr_02_01	YJ_Organization_Apr_02_01_desc
S100000 - (PKS Inc) - MR Smoke OBS 26.03.2018ssss	MR Smoke OBS 26.03.2018
S100000 - (PKS Inc) - MR Smoke OBS 26.03.2018ssss - Core smoke 4-5-2018	Core smoke 4-5-2018 Edit
S100000 - (PKS Inc) - Core smoke 26.03.2018	Core smoke 26.03.2018 - Edit
S100000 - (PKS Inc) - PK-OBS-01	PK-OBS-01

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.

Organization	Description
<input checked="" type="checkbox"/> \$100000 - (PKS Inc)	PKS Inc's
<input type="checkbox"/> \$100000 - (PKS Inc) - LS - Org under root	LS - Org under root test
<input type="checkbox"/> \$100000 - (PKS Inc) - LS - Org under root - LS - Org under child	LS - Org under child
<input type="checkbox"/> \$100000 - (PKS Inc) - LS - Org under root - child Org	Custom child org
<input type="checkbox"/> \$100000 - (PKS Inc) - Menu Progress	Menu Progresser
<input type="checkbox"/> \$100000 - (PKS Inc) - Menu Progress - CoreSmoke_Mar_001A	CoreSmoke_Mar_00_des56mmmm
<input type="checkbox"/> \$100000 - (PKS Inc) - Menu Progress - CoreSmoke_Mar_001A - New desc	desc alter
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3	SA_Smoke
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - automation3	automation3
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - automation3 - automation3	automation3
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - automation3 - \$100000 - (PKS Inc) automation3 automation3 Next Level Org	Testing
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - automation3 - \$100000 - (PKS Inc) automation3 automation3 Next Level Org - Level 2	Leve 2 Test
<input type="checkbox"/> \$100000 - (PKS Inc) - automation3 - Test	Test
<input type="checkbox"/> \$100000 - (PKS Inc) - VJ_Organization_Aer_02_01	VJ_Organization_Apr_02_01_desc
<input type="checkbox"/> \$100000 - (PKS Inc) - MR Smoke OBS 26.03.201811111	MR Smoke OBS 26.03.2018
<input type="checkbox"/> \$100000 - (PKS Inc) - MR Smoke OBS 26.03.201811111 - Core smoke 4-5-2018	Core smoke 4-5-2018 Edit
<input type="checkbox"/> \$100000 - (PKS Inc) - Core smoke 26.03.2018	Core smoke 26.03.2018 - Edit
<input type="checkbox"/> \$100000 - (PKS Inc) - PK-OBS-01	PK-OBS-01
<input type="checkbox"/> \$100000 - (PKS Inc) - PK-OBS-01 - \$\$\$	SD
<input type="checkbox"/> \$100000 - (PKS Inc) - PK-OBS-02	PK-OBS-02

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

Organization details

Parent organization
Root organization

Name: \$100000 - (PKS Inc) Description: PKS Inc's

External organization ID
RootOrg1

Configurations

Default base currency: USD - US Dollar Account code delimiter: Period ()

Unique budget code ▲
Segment 1: Project

Buttons: Cancel, 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

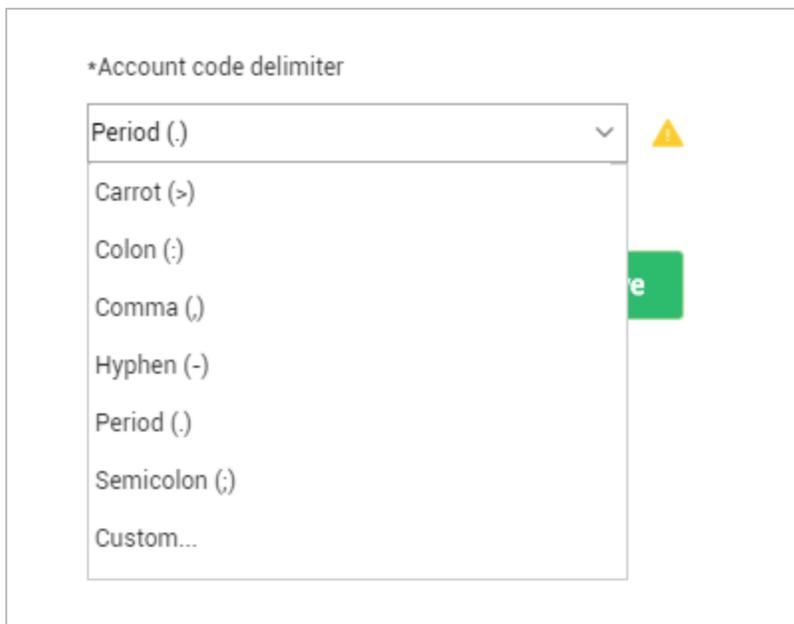
Identify a Cost Item which can then be utilized throughout the InEight portfolio of products.

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.

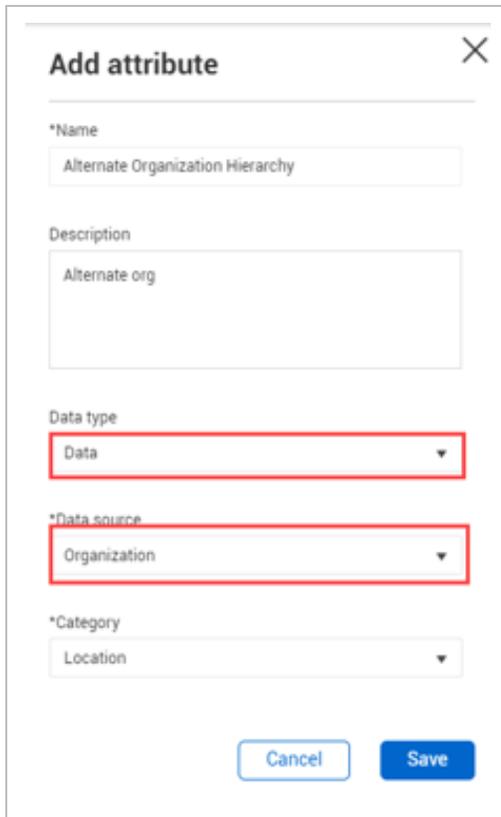
The Alternate Organization Parent feature allows you to define one or more alternate assignment options at the account level and to give each option a specific name. These options appear as attributes of all Projects where an alternate organization node from the OBS can be selected. For example, you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



Add attribute ✕

*Name
Alternate Organization Hierarchy

Description
Alternate org

Data type
Data

*Data source
Organization

*Category
Location

Cancel Save

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.

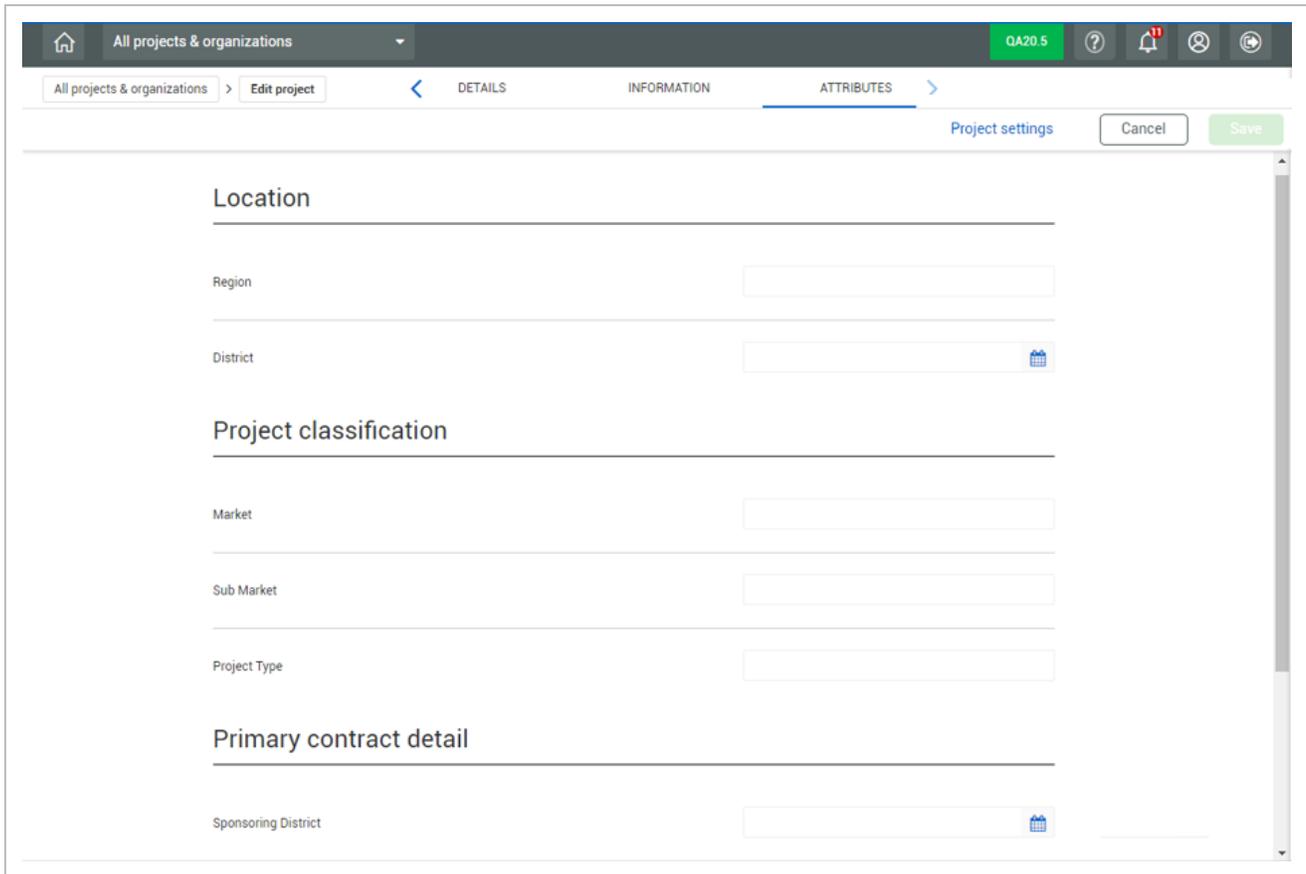
The system does not make any project attribute a mandatory field within a project. It is up to you to enforce this as needed.

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.

The screenshot shows the 'Edit project' interface with the 'ATTRIBUTES' tab selected. The 'Alternate Organization Hierarchy' field is highlighted with a red box, and a dropdown menu is open showing a list of organizations: Demo org 1, demo org 2, demo org 3, DEmo org 4, Demo org 5, and Demoorg 6. Other fields include 'District', 'Primary contract detail', 'Delay days' (5.00000), and 'Project Site Inspection' (05/13/2020).

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

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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 information for users 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.

Jeff Janton

Email address	in8fake17@in8fake...
Employee ID	00005564 - Jeffrey ...
Status	Active
Start date	05/21/1993
End date	12/31/9999
Vendor	
Office number	
Mobile number	
Country / Region	
Address 1	
Address 2	
City	
State	
Postal / Zip code	
Last login date	

Created by	Service Account
Created on	02/02/2017 12:24:5...
Last modified by	Service Account
Last modified on	02/24/2020 10:00:1 ...

ROLES AND PERMISSIONS

Gopala Level 0	Project - Non Ter...	
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Suite administration 

Organization and project 

Master data libraries 

[Assign/unassign roles](#)

[Assign/unassign vendors](#)

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.

The screenshot shows a web interface for editing a user. At the top, there is a dark header with a 'MENU' icon and the word 'Platform'. Below the header, the breadcrumb 'User management > Edit user' is visible. On the right side of the form, there are two buttons: 'Cancel' and 'Save'. The main content area is titled 'User details' and contains several input fields and labels:

* First name	* Last name
<input type="text" value="User"/>	<input type="text" value="01"/>
Email address	Employee ID
<input type="text" value="user1@ineight.com"/>	
Start date	End date
<input type="text" value="12/31/2016"/>	<input type="text" value="12/31/2025"/>

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

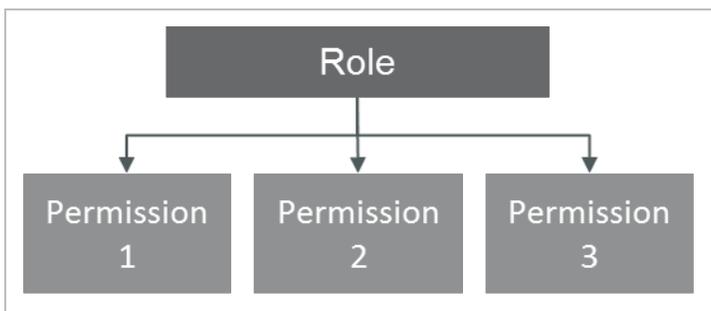
1. Click the **Notification** icon to open the notifications slide-out panel.
 - The list shows all unread notifications, click **See all notifications** to open the Notifications page to see all read and unread notifications. From this page you can delete, mark as read, and search notifications. In 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, and 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

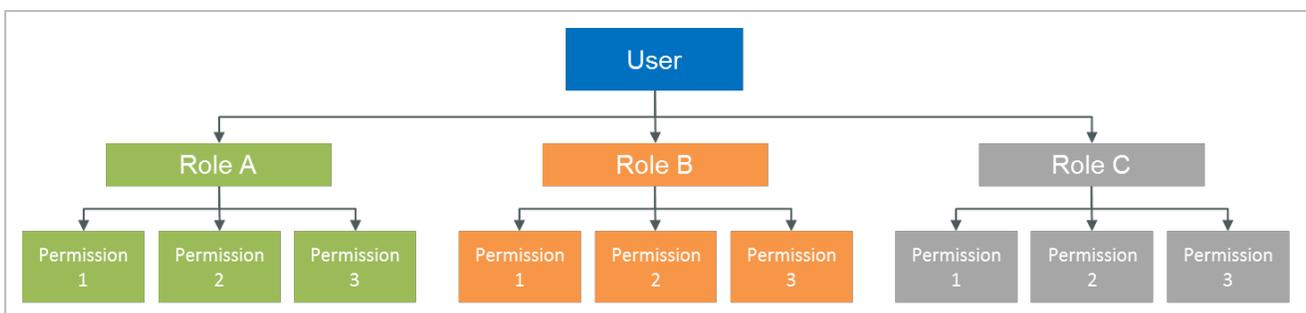
1. Click the **User** icon to open the User profile slide-out panel.
 - This opens to the Details tab and shows your user name and email. Your roles are shown on the Roles tab.
2. Click the Preference tab to change your user preferences.
 - You can change your preferences for language, date format, and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

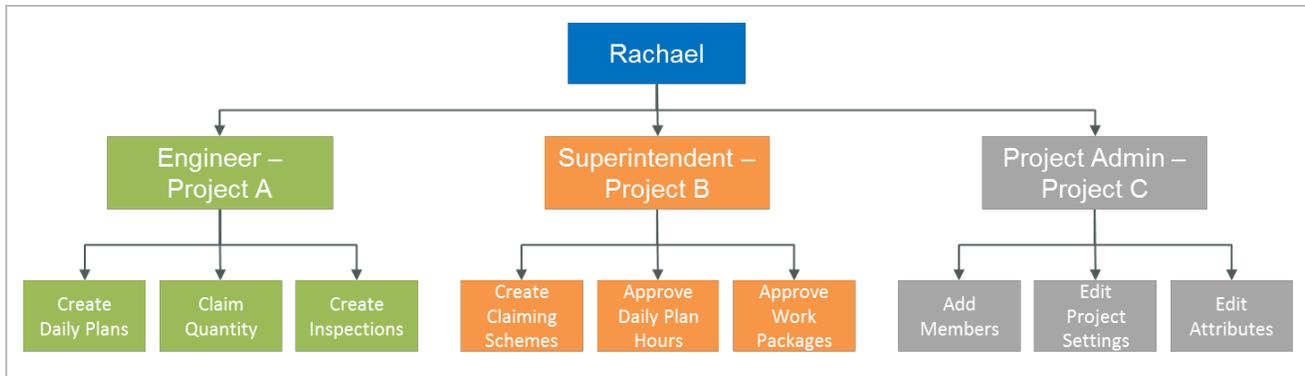


Users with the same role will have the same permissions.

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:

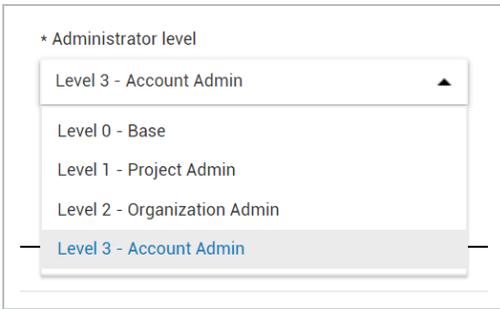


3.2.1 Role Creation

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.

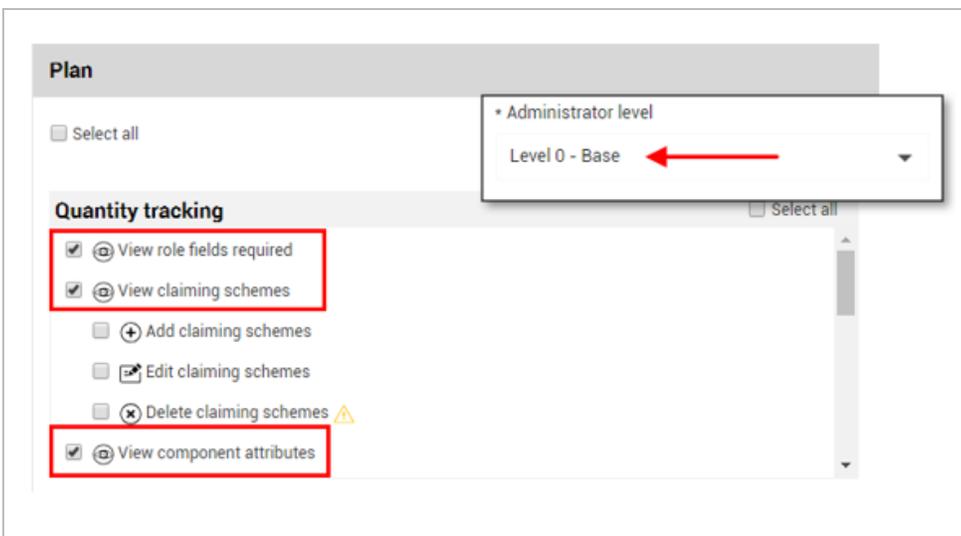
Level	Descriptor	Available Permissions
0	Base	View access only.
1	Project Admin	Edit information for a project.
2	Organization Admin	Edit User information and create new projects.
3	Account Admin	All the available permissions including adding users and editing roles and permissions.

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

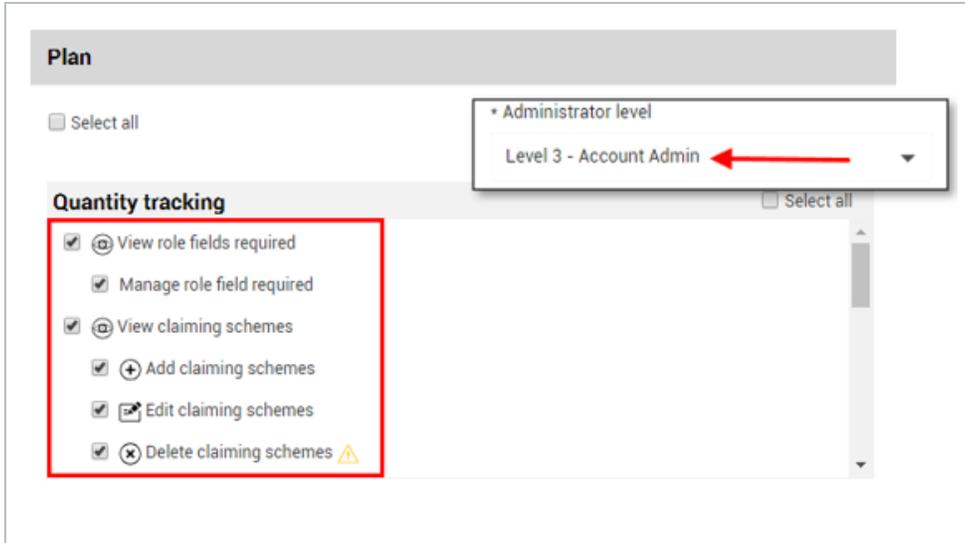


In this example, it shows how the permissions are filtered based on the level that is selected.

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.

Permissions
Suite administration
Organization and project
Master data libraries
Model Suite
Estimate
Control
Plan
Progress
Inspect
Contract
Reporting
Explore
Design
Billing

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

Control ←

Select all

Tasks and cost items Select all

- View task data block
- Edit task data block
- Add cost items
- Edit cost items
- Delete cost items ⚠
- Move cost items up/down

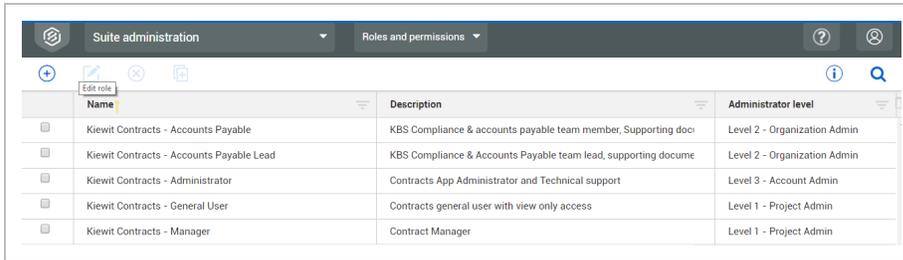
View sets Select all

- View corporate view sets ⚠
- Add corporate view sets
- Edit corporate view sets
- Delete corporate view sets ⚠
- Share corporate view sets
- View personal view sets ⚠

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

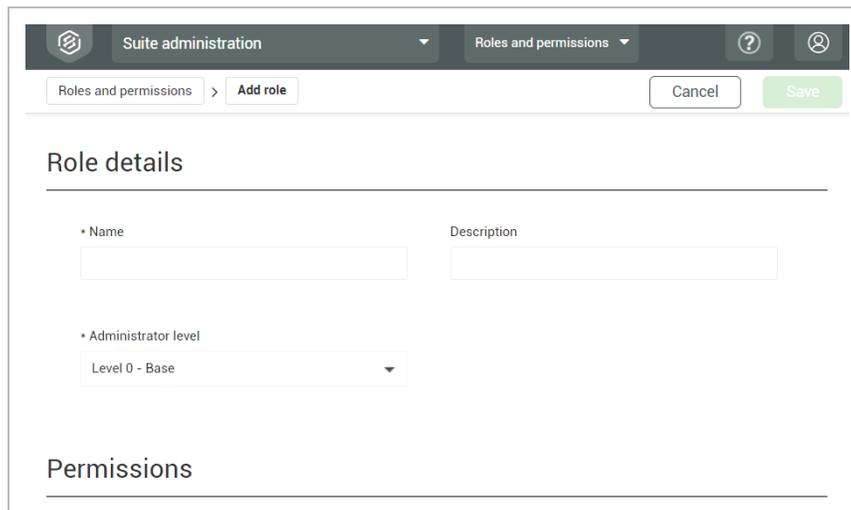
Create a Role

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



Name	Description	Administrator level
Kiewit Contracts - Accounts Payable	KBS Compliance & accounts payable team member, Supporting doc	Level 2 - Organization Admin
Kiewit Contracts - Accounts Payable Lead	KBS Compliance & Accounts Payable team lead, supporting docume	Level 2 - Organization Admin
Kiewit Contracts - Administrator	Contracts App Administrator and Technical support	Level 3 - Account Admin
Kiewit Contracts - General User	Contracts general user with view only access	Level 1 - Project Admin
Kiewit Contracts - Manager	Contract Manager	Level 1 - Project Admin

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



Role details

• Name

Description

• Administrator level
Level 0 - Base

Permissions

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

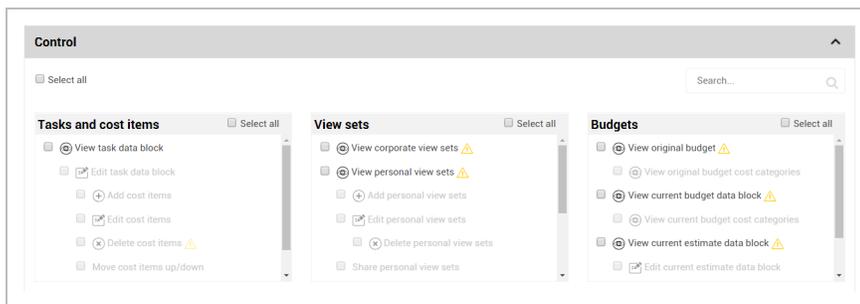
Roles cannot be deleted but you can change the status, which lets you determine whether the role is available or unavailable to be assigned to a user. If an existing user is assigned a role that was later changed to *Unavailable*, a notification will indicate it in the Edit user dialog box for the user's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

3.2.2 Permissions

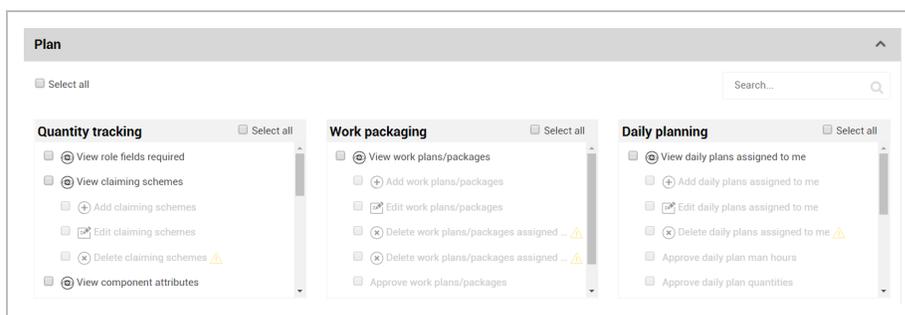
After you create a role, you can edit the role to define its permissions.

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.

Engineer 2-[Your Initials]

Roles

Role	Organization/Project
Engineer	S100000 - (PKS Inc)

[+ Add role](#)

8. Click the **Save** button.

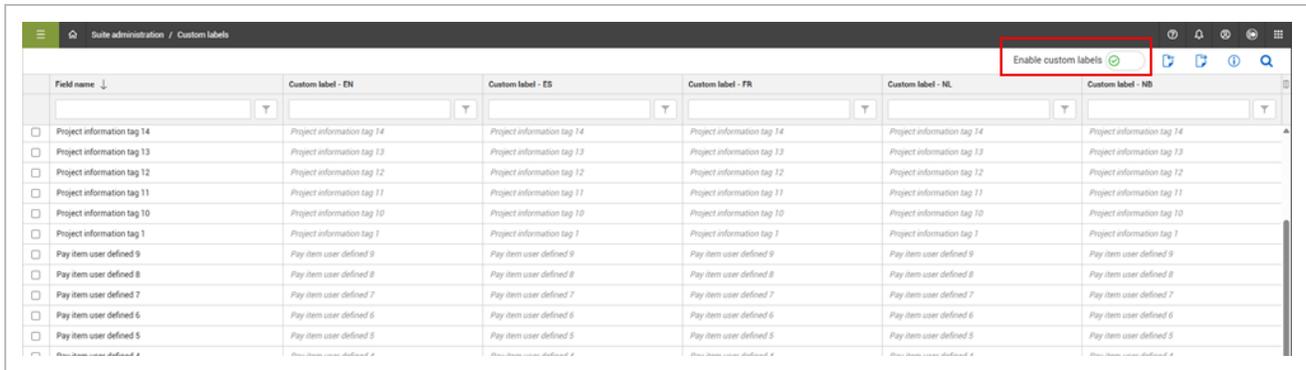
3.3 CUSTOM LABELS

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 80

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

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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.

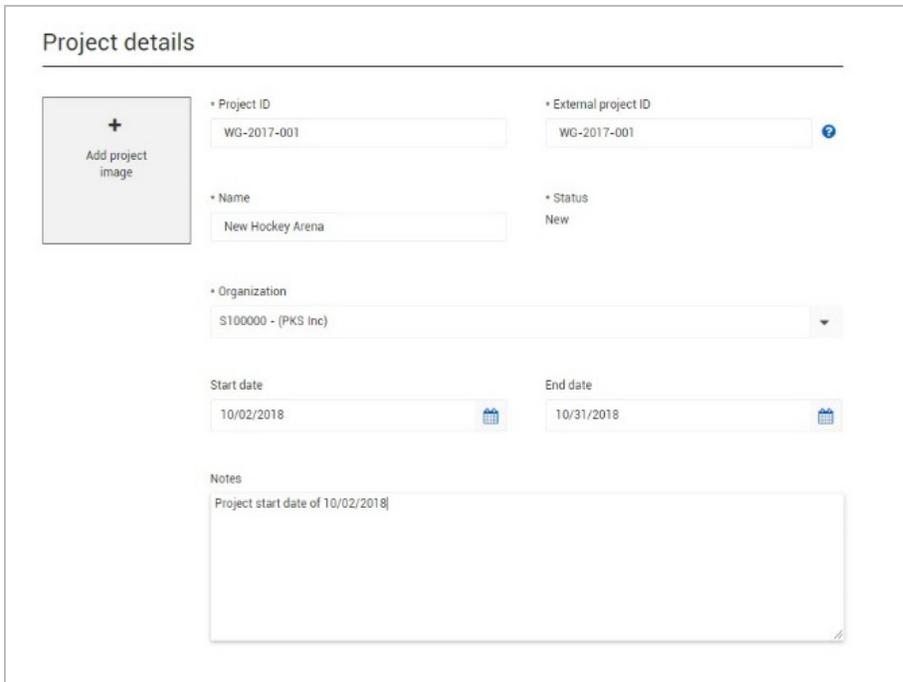
The screenshot shows the 'Project details' form in the InEight platform. The form is titled 'Project details' and is located within a window titled 'All projects & organizations'. The form contains several input fields: 'Project ID', 'External project ID', 'Name', 'Status' (set to 'New'), 'Organization' (set to 'S100000 - (PKS Inc)'), 'Start date', 'End date', and 'Notes'. There is also a 'Location' section with a 'Country / Region' dropdown. The form has a 'Cancel' button and a 'Save and configure project settings' button. The footer of the window shows '© 2018 InEight Inc. Privacy and Terms | v.18.2' and the 'INEIGHT' logo.

- 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].**



The screenshot shows a 'Project details' form with the following fields and values:

- Project ID:** WG-2017-001
- External project ID:** WG-2017-001
- Name:** New Hockey Arena
- Status:** New
- Organization:** S100000 - (PKS Inc)
- Start date:** 10/02/2018
- End date:** 10/31/2018
- Notes:** Project start date of 10/02/2018

There is also an 'Add project image' button on the left side of the form.

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.

Location

Country / Region
United States Of America ▼

Address 1

Address 2

City

State ▼

Postal / Zip code

* Time zone ▼

Latitude

Longitude

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**.

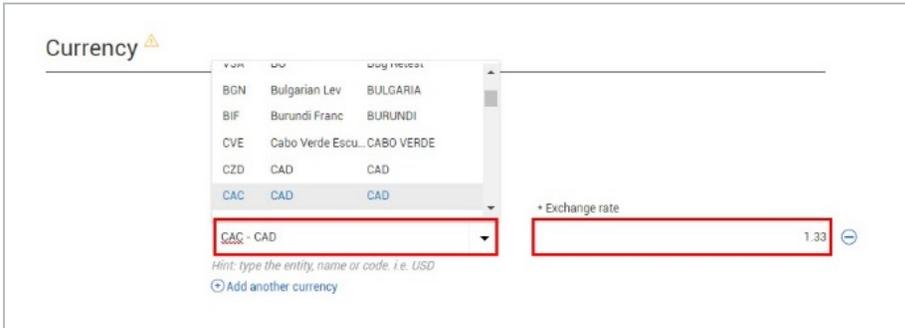
5.2 Step by Step 3 – Add a Currency

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.

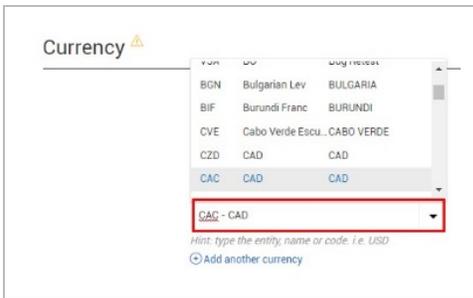


- Notice that there is a base currency. This currency was established at the Organization level and cannot be removed.
- Any other currencies listed can be deleted using the Remove icon.

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

- From the Main menu, click **All projects & organizations**. The page opens to the Projects tab.
- Select a project from the list, and then click the project name link to open to the project home page.
- 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.

Steel Structure Training Job 2 105092 / Assigned payroll indicators										
ALLOWANCES										
Name	ID	Notes	Billing code	Required	Auto Opt in	Allowance rate	Status	Assigned employees		
<input type="checkbox"/>	Premium	01	Meals, Travel		true	true	\$ 0.00000	Available	0	
<input type="checkbox"/>	Foreman for the day	02			true	false	\$ 0.00000	Available	0	
<input type="checkbox"/>	Other	05			true	false	\$ 0.00000	Available	0	
<input checked="" type="checkbox"/>	Additional lump sum	04			false	false	\$ 0.00000	Available	0	

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.

Name	ID	Notes	Billing code	Required	Auto Opt in	Allowance rate	Status	Assigned employees	Name-en
<input type="checkbox"/> Foreman For the Day	1621	Extra Pay - Foreman f...	abc123	false	false	\$ 0.00000	Available	0	Foreman For the Day
<input type="checkbox"/> General Foreman for L...		Extra Pay - General Fo...		false	true	\$ 0.00000	Available	1	General Foreman for the Day
<input type="checkbox"/> LoA	LoA-ID		LoA	false	true	\$ 10.00000	Available	6	LoA
<input type="checkbox"/> SS extrapay2	SS2			false	true	\$ 0.00000	Available	1	SS extrapay2
<input type="checkbox"/> SS extrapay3	SS3			true	true	\$ 0.00000	Available	1	SS extrapay3
<input type="checkbox"/> GTC_WTS_EP-01	GTC_WTS_EP-01	GTC_WTS_EP-01	GTC_WTS_EP	true	true	\$ 0.00000	Unavailable	2	GTC_WTS_EP-01

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 <i>true</i> , 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 <i>true</i> , 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 <i>Available</i> . If set to <i>Unavailable</i> , 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.

Name	ID	Notes	Billing code	Required	Auto Opt in	Allowance rate	Status	Assigned employees	Name - es-MX	Name - fr-CA	Name - pt-BR
Foreman For the Day	1621	Extra Play - Foreman f...	abc123	false	false	\$ 0.00000	Available	0	Capataz por el día	Contremaître du jour	Foreman for the day
General Foreman for L...		Extra Play - General Fo...		false	true	\$ 0.00000	Available	2	General Foreman for the Day	General Foreman for the Day	General Foreman for the Day
LoA	LOA-ID		LoA	false	true	\$ 10.00000	Available	2	LoA	LoA	LoA
SS extrapay2	SS2			false	true	\$ 0.00000	Available	2	SS extrapay2	SS extrapay2	SS extrapay2
SS extrapay3	SS3			true	true	\$ 0.00000	Available	2	SS extrapay3	SS extrapay3	SS extrapay3
GTC_WTS_EP-01	GTC_WTS_EP-01	GTC_WTS_EP-01	GTC_WTS_EP	true	true	\$ 0.00000	Unavailable	2	GTC_WTS_EP-01-espanol	GTC_WTS_EP-01-france	GTC_WTS_EP-01-brazil

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.

Employee ID	Name	Default	Allowance rate	Created by	Created on	Last modified by	Last modified on
RachelBonner	Rachel Bonner	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/06/2023 11:12:36 AM	Luke Mallatt	12/06/2023 11:12:36 AM
00488153	Daniel Wyman	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/07/2023 11:42:39 AM	Luke Mallatt	12/07/2023 11:42:39 AM
00488154	Troy Merritt	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/07/2023 11:42:39 AM	Luke Mallatt	12/07/2023 11:42:39 AM
00488796	Christopher Chapman	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/07/2023 11:42:39 AM	Luke Mallatt	12/07/2023 11:42:39 AM
00488799	Craig Dipieri	<input type="checkbox"/>	\$ 50.00000	Luke Mallatt	12/07/2023 11:42:39 AM	chris shurman	12/13/2023 07:43:44 AM
12345674567	Thisfirstname	<input type="checkbox"/>	\$ 10.00000	Luke Mallatt	12/14/2023 12:40:23 PM	Luke Mallatt	12/14/2023 12:40:23 PM
00323170	Jakob Sjuts	<input type="checkbox"/>	\$ 10.00000	chris shurman	12/21/2023 10:40:34 AM	chris shurman	12/21/2023 10:40:34 AM

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.

Employee ID	Name	> craft	Billing class	Allowances	Rate code	Vendor	Union
00165836	Luke Mallatt	TST - Staff Default		2			
00236124	Joshua Hilsgen	TST - Staff Default		0			
00236162	Joseph Squire	TST - Staff Default		0			
00323170	Jakob Sjuts	TST - Staff Default		2			

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.

Name	ID	Default	Allowance rate	Created by	Created on	Last modified by	Last modified on
General Foreman for the Day		<input type="checkbox"/>	\$ 0.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM
LoA	LOA-ID	<input type="checkbox"/>	\$ 10.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM
Luke default	Luke default	<input type="checkbox"/>	\$ 0.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM
SS extrapay2	SS2	<input type="checkbox"/>	\$ 0.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM
SS extrapay3	SS3	<input type="checkbox"/>	\$ 0.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM
GTC_WTS_EP-01	GTC_WTS_EP-01	<input type="checkbox"/>	\$ 0.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM
SS extrapay1	SS1	<input type="checkbox"/>	\$ 0.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM
Premium	Premium	<input type="checkbox"/>	\$ 0.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM
Additional Lump Sum \$ amount		<input type="checkbox"/>	\$ 0.00000	chris shumman	12/21/2023 10:40:34 AM	chris shumman	12/21/2023 10:40:34 AM

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.

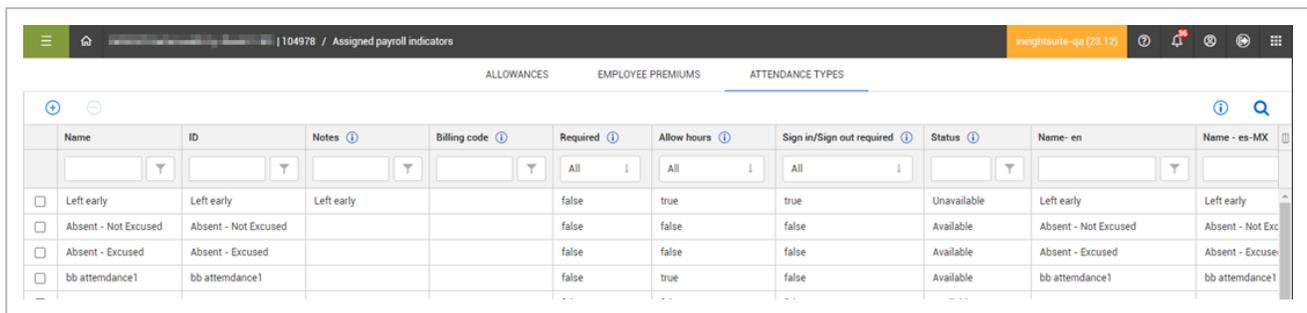
Name	ID	Notes	Activity type	Billing code	Required	Status	Name - en	Name - es-MX	Name - fr-CA
Ironworker - Structural			Labor		false	Available	Ironworker - Structural	Ironworker	Ironworker
Carpenter			Labor		false	Available	Carpenter	Carpenter	Carpenter
Laborer - Asphalt			Labor		false	Available	Laborer - Asphalt	Laborer - Asphalt	Laborer - Asf
Laborer - Common or ...			Labor		false	Available	Laborer - Common or General	Laborer - Common or General	Laborer - Coi
Laborer - Concrete			Labor		false	Available	Laborer - Concrete	Laborer - Concrete	Laborer - Coi

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 <i>True</i> , 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 <i>Available</i> . If set to <i>Unavailable</i> , 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 <i>true</i> , 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 <i>true</i> , 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 <i>Available</i> . If set to <i>Unavailable</i> , 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.

Rate code	Description	Vendor	Union	ST rate	Use base wage factors	OT factor	DT factor	OT rate	DT rate	UoM	Status
LABORERS GROUP 1	CONSTRUCTION LABORERS GR...			\$34.90000	Yes	1.50000	2.00000	\$52.35000	\$69.80000	Hour	Available
LABORERS GROUP 2	CONSTRUCTION LABORERS GR...			\$39.59000	Yes	1.50000	2.00000	\$59.38500	\$79.18000	Hour	Available
LABORERS GROUP 3	CONSTRUCTION LABORERS GR...			\$39.51000	Yes	1.50000	2.00000	\$59.26500	\$79.02000	Hour	Available
LABORERS GROUP 4	CONSTRUCTION LABORERS GR...			\$38.58000	Yes	1.50000	2.00000	\$57.87000	\$77.16000	Hour	Available

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.

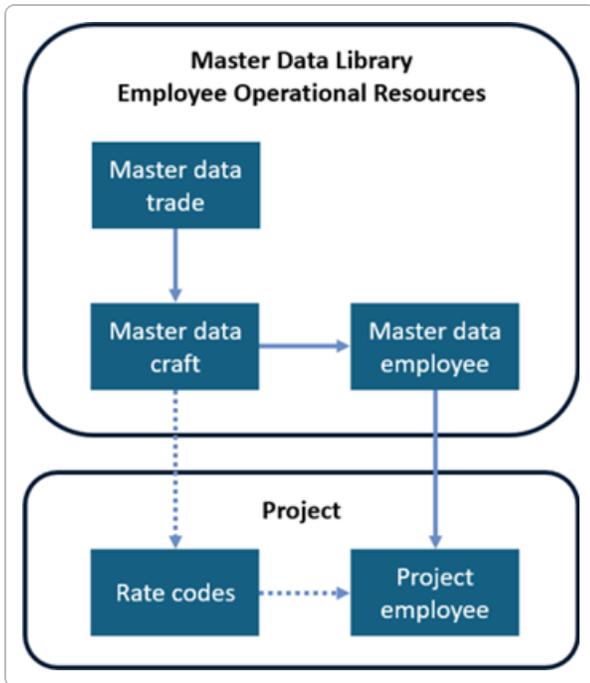
5.6 EMPLOYEE RATE INHERITANCE

To explain how employee rates are inherited, it is necessary to define additional terms.

Term	Definition
Rate Codes	Accessible at the project level, rate codes exist as a 1:1 ratio to the master data crafts and are traditionally used when a project employee is assigned a role or craft on a specific project, which differs from their normal master data craft assignment. For example, if a contracted rate has been negotiated for a project that differs from the employees' standard master data craft rate.
Project Employee	Accessible at the project level, a project employee is a master data employee that has been assigned as a resource for a specific project. In addition to specified project start and end dates, the employee initially inherits the pay rates from the assigned master data craft.

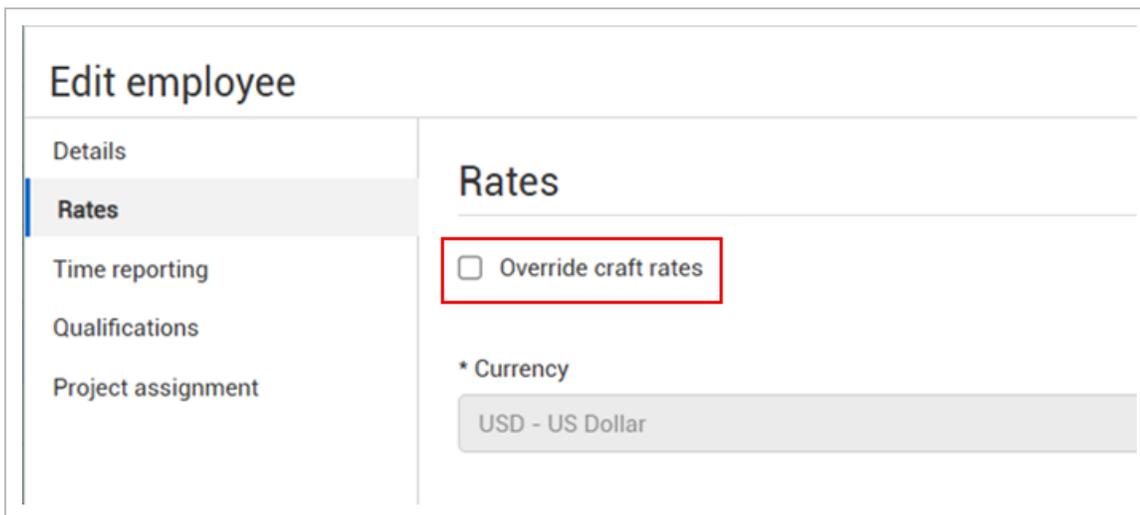
5.6.1 Rate inheritance use cases

There are five available options for rate inheritance, depending on your business process and use cases. Refer to the diagram for each use case to see how rates flow and are inherited between levels in the master data library and projects.



5.6.1.1 Option 1: Full inheritance no overrides

This model can be used when the project employee pay rate agreement for a project follows the employee’s standard company rate. The employee record automatically inherits the craft rate, with the Override craft rates option not selected by default.



The advantage of this model is that any changes to the values of the master data employee records is automatically inherited down to the assigned project employees.

The project employee's rates are inherited from the associated master data employee rates for that employee, which are themselves inherited from the associated master data craft. The rate data flow is master data craft > master data employee > project employee, in which the project employee inherits the rate of master data craft.

5.6.1.2 Option 2: Master data employee override

This model can be used when the normal standard rates for an employee initially differ or change from those of the associated master data craft. In this example, the Override craft rates check box is selected and the Standard time (ST) rate field has been changed to \$23/hour.

The screenshot shows the 'Edit employee' interface with the 'Rates' section active. The 'Override craft rates' checkbox is checked. The 'Standard time (ST) rate' is set to 23.00000. The 'Overtime (OT) factor' is 1.50000 and the 'Overtime (OT) rate' is 34.50000. The 'Double time (DT) factor' is 2.00000 and the 'Double time (DT) rate' is 46.00000. The currency is USD - US Dollar and the unit of measure is Hour.

Like the full inheritance option, any changes to the master data employee rate is automatically inherited down to the project employee.

Because the master data employee record has been overridden, any changes made to the associated master data craft is not inherited by the master data employee, and therefore the rates for the project employee does not change.

The rate data flow is master data employee > project employee, which means the project employee has the override rate of master data employee.

5.6.1.3 Option 3: Project rate code assigned no overrides

This option can be used when the normal standard rates for a project employee differ from the employee's normal master data employee rates, or the employee will be performing craft duties outside their standard normal associated master data craft on the project.

The advantage of this option is that a rate code can be selected for the specific project employee, and it only influences the pay rates for the employee on the specific project.

You can manage rate codes for a project and access them from the Project home page. From the left menu under Project home, select **Operational rate codes**. The Operational rate codes page opens, where you can view, add, and edit rate codes. The operational rate codes are organized into different tabs.

- **Project Rate Codes:** You can add rate codes that might not already exist as craft rates in the system, such as for prevailing wage rates. The primary use case for this option is in the instance where there could be several employees on the same project performing the same type of work for the duration of the project that is outside of their main crafts.
- **Craft Rate Codes:** You can select crafts from the master data craft list to use as rate codes on the project. This can be useful for situations where an employee is performing work on the project for an existing craft that is outside of their main craft.

After rate codes are defined for the project, they are available to assign to operational resources on the project.

Rate code	Description	ST rate	Use base wage factors	OT factor	DT factor
<input type="checkbox"/> 03EL	Electrician	\$45.00000	Yes	0.00000	
<input type="checkbox"/> 05OE	Operating Engineer	\$55.00000	Yes	0.00000	
<input type="checkbox"/> 06IW	Iron Worker/Structural	\$50.00000	Yes	0.00000	

Note that there is also a tab with project operational rate codes for equipment.

To assign a rate code to an operational resource on the project, from the left menu under Project home, select **Assigned operational resources**. The Assigned operational resources page opens, where you can select from the drop-down list in the Rate code column for the applicable employee.

After the rate code has been assigned, going forward the project employee’s rate uses the assigned rate code even if there has been a change to the employee’s associated master data employee rate.

The rate data flow is rate code > project employee for rate codes defined on the Project Rate Codes tab and master data craft > rate code > project employee for rate codes defined on the Craft Rate Codes tab. The employee will have that rate code as the rate through their project assignment.

5.6.1.4 Option 4: Rate code override

This option can be used when an employee needs to do work for a craft outside of their regular work, and the rate for the craft needs to be different than the craft's rate in the master data library.

To override a craft rate on a project, go to the Operational rate codes > **Craft Rate Codes** tab for the project. Select the applicable rate code, and then click the **Edit** icon. The Craft details dialog box opens, where in the Rate section you can select the **Override craft rates** check box to input the new rate information.

Rate

Override craft rates

Standard time (ST) rate Use base wage factors

Overtime (OT) factor Double time (DT) factor

When saved, the craft rate code has a value of Yes in the Override craft rates column. This rate code can be assigned to any of the assigned operational resources on the project.

The rate data flow is rate code with override rate > project employee project employee has the override rate of project craft.

5.6.1.5 Option 5: Project employee override

This option can be used when all other standard rates for a specific project employee differ from the specific agreed upon project rate. You can override rates at the project employee level by navigating to Project home > **Assigned operational resources**.

Override rate on a project employee

1. In the left menu on the Project home page, select **Assigned operational resources**.
2. The Assigned resources page opens and shows the Employees tab. Select the **Override rates** check box for the project employee that you want to edit.
3. Click in the ST rate field for the project employee to change the Standard Time rate.

Employee ID ↑	First name	Last name	Master trade > craft	Rate code	Override rates	Standard time (ST) rate	Use base wage factors	Overtime
00004244	Catarino		PP - Pipe Workers > PPL1 - Struc...		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>	
00007160	Sergio		LA - Laborers > LAGF - Labourer ...		<input checked="" type="checkbox"/>	24.53000	<input type="checkbox"/>	
00101918	Gaspar		LA - Laborers > LAGF - Labourer ...		<input type="checkbox"/>	\$22.13000	<input type="checkbox"/>	
00121151	Terry		LA - Laborers > LAUN - UnCertifie...		<input type="checkbox"/>	\$19.98000	<input type="checkbox"/>	

Because the project employee rate has been overridden, any changes to any associated master data craft, master data employee, or rate code is not inherited to the project employee.

The primary use case for this terminal level override example is a specific project contract agreement pay rate for the specific project employee which could be a one-time only rate. The rate data flow is only at project employee; the project employee has the override rate entered at project employee level.

One of the integral pieces of the override logic is that when an override is in place, changes which occur *above* the override are not inherited. Therefore, for example, if you override a rate at the project employee level, a rate change *above* at the master data craft or master data employee level does not affect the already overridden project employee rate.

5.7 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.

5.7.1 Assign Members to the Project

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

User Terminology

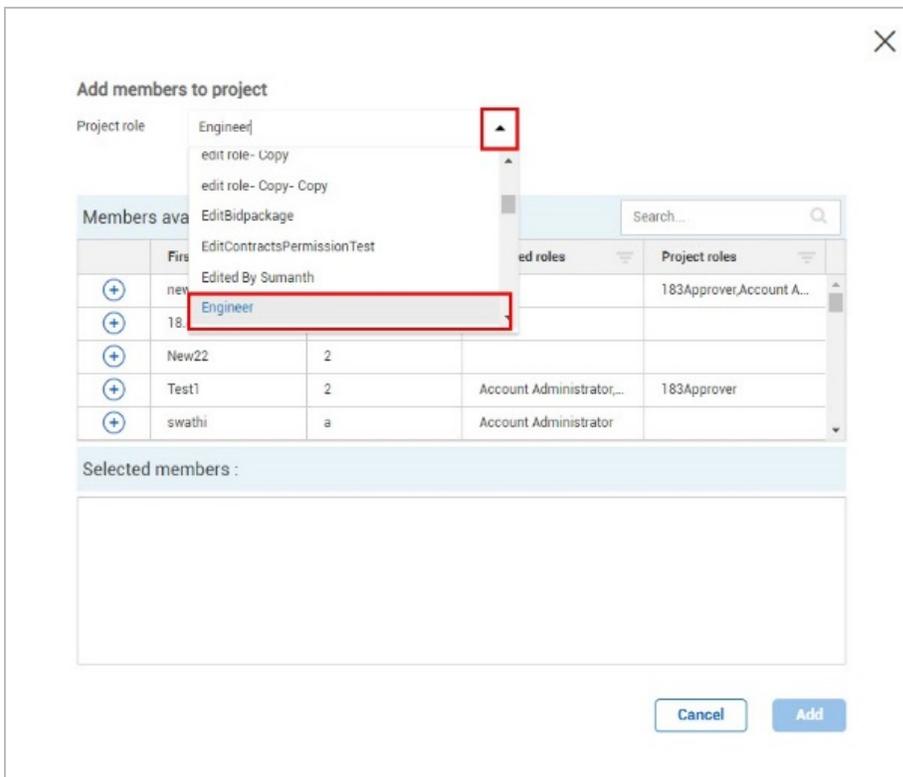
Classification	Description
User	Person that has an account to use the InEight cloud platform.
Member	<p>Users that are assigned specific roles on a project. Members are also referred to as assigned users in some areas of the application. Examples of specific project roles include: Superintendent, Engineer, Foreman.</p> <p>NOTE: Being assigned a member with specific roles is necessary for access in other InEight applications, such as InEight Progress.</p>
Operational Resource	<p>The specific employee, equipment, and material used to build the work on the project and tracked in Plan and Progress.</p> <p>NOTE: Currently, you can only add employee and equipment operational resources to the project but not materials.</p>
Employee	<p>Employees are operational resources that are assigned to specific projects for cost tracking. For example:</p> <ul style="list-style-type: none"> • Darrel P. Lewis - Ironworker
Equipment	<p>Equipment are operational resources that are assigned to specific projects for cost tracking. For example:</p> <ul style="list-style-type: none"> • 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.

5.7 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.

Members available in library :				
	First name	Last name	Inherited roles	Project roles
+	new	1		183Approver,Account A...
+	18.4Pro_fd	18.4Pro		
+	New22	2		
+	Test1	2	Account Administrator,...	183Approver
+	swathi	a	Account Administrator	

5. Click **Add**.

- Notice the total in the users block now is 1

5.7 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

5.7.1.1 Users

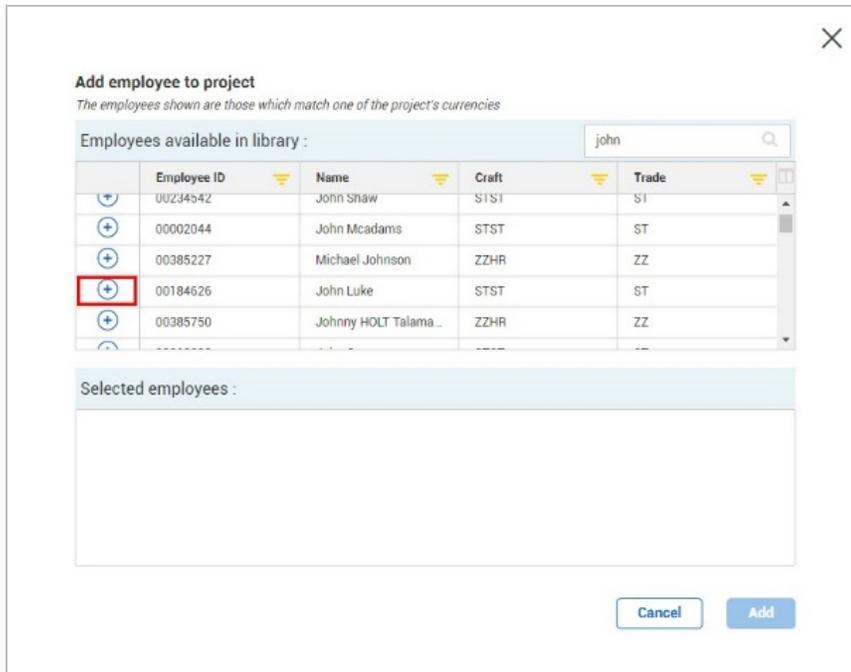
A User is assigned the same permissions as a member. The difference is that they are an outside source to the main organization. For example, a Designer is hired as a contractor and not as a full-time employee. To perform the task effectively, the contractor needs the same permissions as a regular employee.

5.7.2 Add Employees and Equipment to the Project

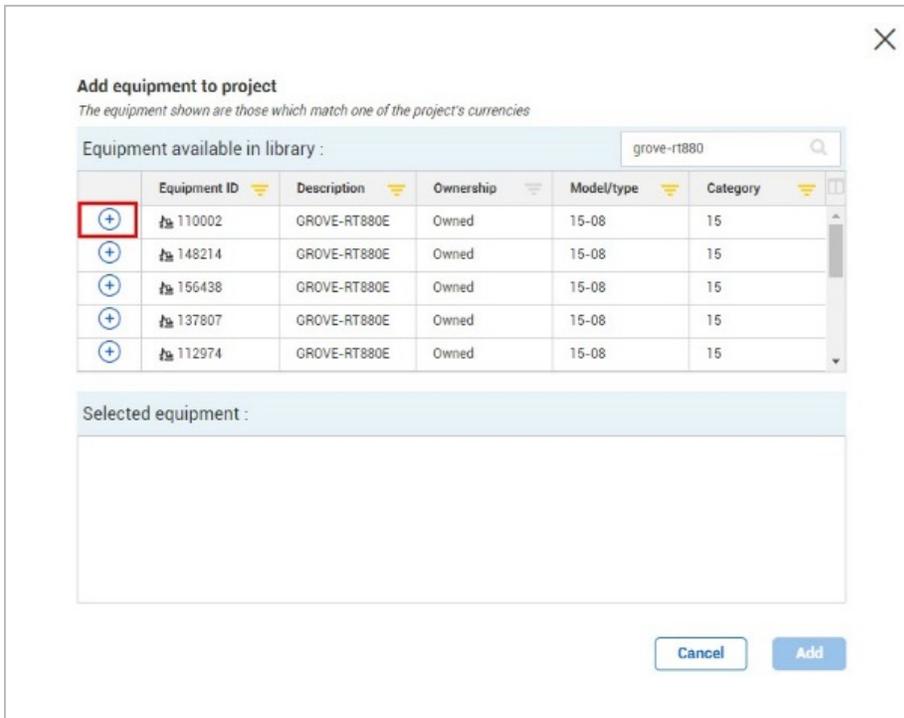
Along with members, you can add employees and equipment to the project, so they can be used by the InEight applications (e.g., Plan, Progress, Control).

5.7 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):



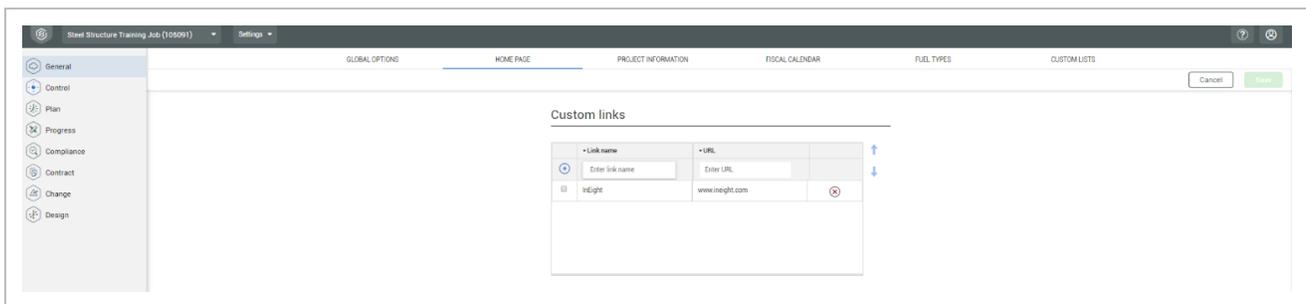
6. Click **Add**.

- You will notice the total number in the Assigned equipment tile increased by one.

5.7.3 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.



5.7.4 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.

Contract ID	Contract Desc.	Title	File/Link	Document type	Subtype	Approval status	Approved/Rejected	Approved/Rejected	Executed date	Effective date	Expiration date	Days Lin.	Added By	Added on
720001000	Soil Test	insurance	8879208.PNG	Insurance	General Liability	Pending				08/11/2019	08/15/2019	-13	Susan capponeri	08/13/2019
720001000	Soil Test	VCD 1	Sample for Demo connected.docx	Override memo	Payment term waiver	Not applicable			09/17/2018				Marianne Crane	09/18/2018
720001000	Soil Test	executed contract	Executed contract	Surety		Approved	Marianne Crane	09/14/2018	09/13/2018				Marianne Crane	09/14/2018

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:

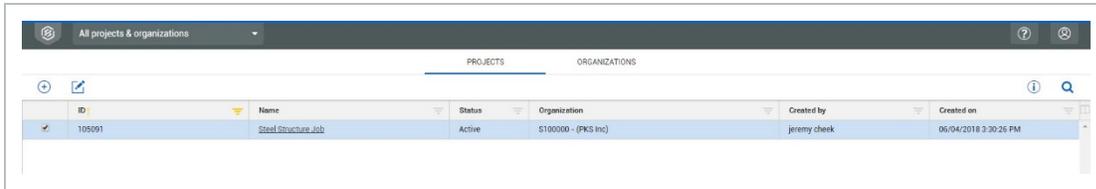
- Change Order
- Contract Document
- Design Document
- Diagram
- Other
- Permit
- Photo
- Request for Information
- Submittal Document
- Transmittal Document

5.7.5 Project Activation

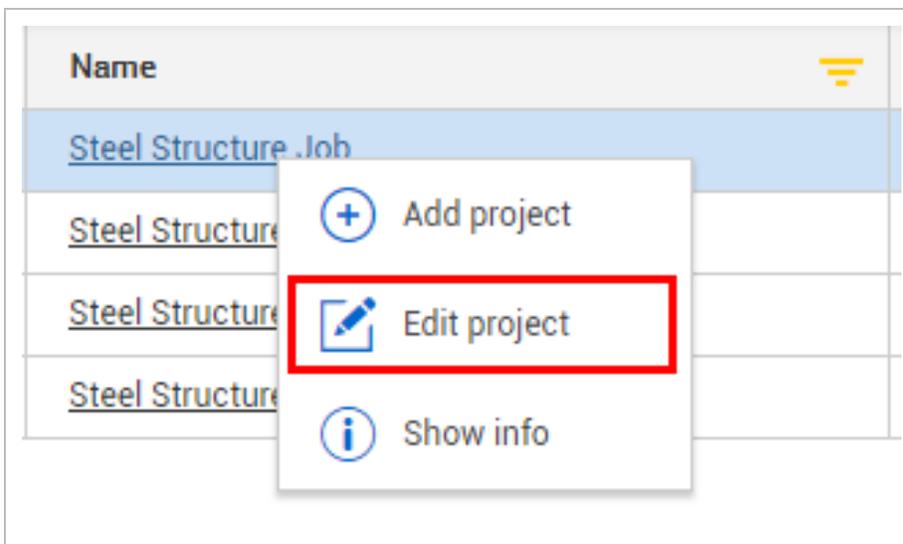
After you have configured the project and received approval from the administrator, the project will be placed into Active status.

5.7 Step by Step 4 – Activate the Project

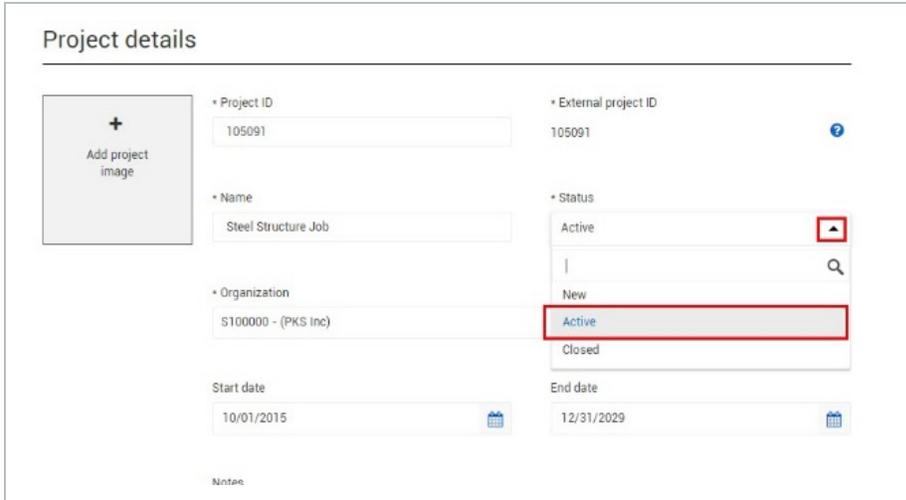
1. On the Projects tab, find your project and click anywhere in the row to highlight it.



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**.

5.7.6 Close the Project

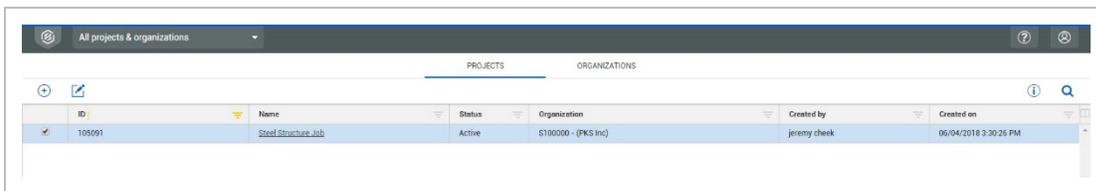
Scenario

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.

5.7 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**.

Project details

+ Add project image

* Project ID 105091	* External project ID 105091 
* Name Steel Structure Job	* Status Active   New Active Closed
* Organization S100000 - (PKS Inc)	End date 12/31/2029 
Start date 10/01/2015 	

Notes

5. Click **Save**.

CHAPTER 6 – MASTER DATA LIBRARIES

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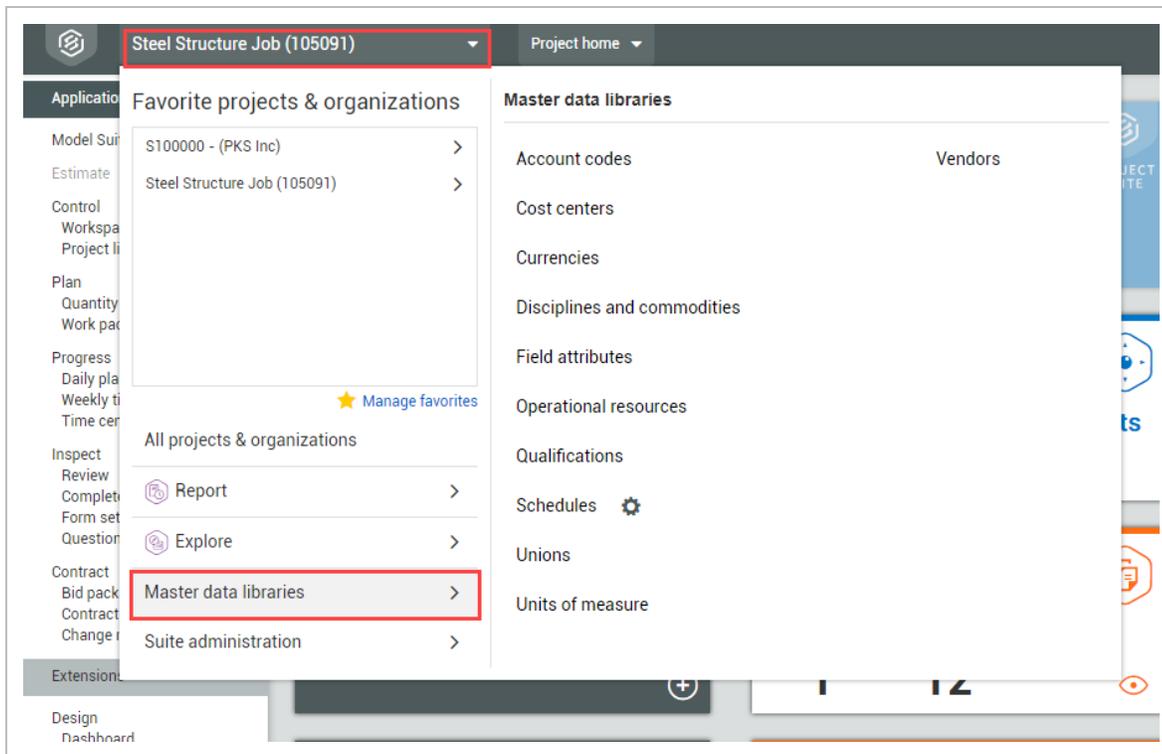
6.1 OVERVIEW

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.

Account code	Description	UoM primary	Currency	UoM secondary	Auto qty primary	Auto qty second
00	Overhead	PLS	US Dollar		On	On
00.03	OH - Get Work	MWk	US Dollar	KS	On	On
00.03.01	OH - Estimating - Engineering	MWk	US Dollar	KS	On	On
00.03.01.002	OH - Estimating - Engineering - Management	MWk	US Dollar	KS	On	On
00.03.01.010	OH - Estimating - Engineering - Discipline	MWk	US Dollar	KS	On	On
00.03.01.010.02	OH - Estimating - Engineering - Geotech	MWk	US Dollar	KS	On	On
00.03.01.010.04	OH - Estimating - Engineering - Environ, Permitting & ROW	MWk	US Dollar	KS	On	On
00.03.01.010.06	OH - Estimating - Engineering - Civil	MWk	US Dollar	KS	On	On
00.03.01.010.08	OH - Estimating - Engineering - Landscape / Aesthetics	MWk	US Dollar	KS	On	On
00.03.01.010.10	OH - Estimating - Engineering - Drainage	MWk	US Dollar	KS	On	On
00.03.01.010.12	OH - Estimating - Engineering - Utilities	MWk	US Dollar	KS	On	On
00.03.01.010.14	OH - Estimating - Engineering - Maint of Traffic	MWk	US Dollar	KS	On	On
00.03.01.010.16	OH - Estimating - Engineering - Pavement	MWk	US Dollar	KS	On	On

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.

Account code	Description	UoM primary	Currency	UoM secondary
00	Overhead	PLS	US Dollar	
00.03	OH - Get Work	MWk	US Dollar	KS
00.03.01	OH - Estimating - Engineering	MWk	US Dollar	KS
00.03.01.002	OH - Estimating - Engineering - Management	MWk	US Dollar	KS
00.03.01.010	OH - Estimating - Engineering - Discipline	MWk	US Dollar	KS
00.03.01.010.02	OH - Estimating - Engineering - Geotech	MWk	US Dollar	KS
00.03.01.010.04	OH - Estimating - Engineering - Environ, Permitting & ROW	MWk	US Dollar	KS
00.03.01.010.06	OH - Estimating - Engineering - Civil	MWk	US Dollar	KS
00.03.01.010.08	OH - Estimating - Engineering - Landscape / Aesthetics	MWk	US Dollar	KS
00.03.01.010.10	OH - Estimating - Engineering - Drainage	MWk	US Dollar	KS
00.03.01.010.12	OH - Estimating - Engineering - Utilities	MWk	US Dollar	KS
00.03.01.010.14	OH - Estimating - Engineering - Maint of Traffic	MWk	US Dollar	KS
00.03.01.010.16	OH - Estimating - Engineering - Pavement	MWk	US Dollar	KS

00.03.01.010.08
 OH - Estimating - Engineering - Landscape / Aesthetics

UoM primary: MWk
 Currency: US Dollar
 UoM secondary: KS

Auto quantity primary: On
 Auto quantity secondary: On

Contribute primary to primary: On
 Contribute primary to secondary: Off
 Contribute secondary to second...: On

Created by: InEight Service Acc...
 Created on: 09/23/2020 7:06:05 ...
 Last modified by: Ryan Powell
 Last modified on: 08/15/2022 6:01:28 ...

General notes
 Include all wages and add-ons incurred for

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 published 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**.

Account code	Description	UoM primary	Currency	UoM secondary	Auto qty primary	Auto qty
00	Overhead	PLS	US Dollar		On	On
00.03	OH - Get Work	MWk	US Dollar	KS	On	On
00.03.01	OH - Estimating - Engineering	MWk	US Dollar	KS	On	On
00.03.01.002	OH - Estimating - Engineering - Management	MWk	US Dollar	KS	On	On
00.03.01.010	OH - Estimating - Engineering - Discipline	MWk	US Dollar	KS	On	On
00.03.01.010.02	OH - Estimating - Engineering - Geotech	MWk	US Dollar	KS	On	On
00.03.01.010.04	OH - Estimating - Engineering - Environ, Permitting & ROW	MWk	US Dollar	KS	On	On
00.03.01.010.06	OH - Estimating - Engineering - Civil	MWk	US Dollar	KS	On	On
00.03.01.010.08	OH - Estimating - Engineering - Landscape / Aesthetics	MWk	US Dollar	KS	On	On
00.03.01.010.10	OH - Estimating - Engineering - Drainage	MWk	US Dollar	KS	On	On

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.

- On the Edit account code page, click **Delete account code**. If the account has child account codes, you can delete all of its 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**

- 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.
- 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

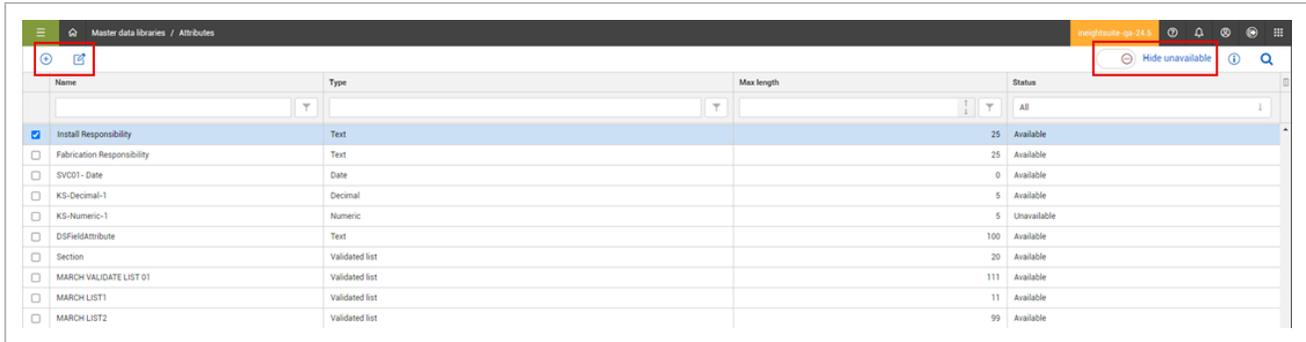
With the applicable permissions, you can select the icon to add, edit, and assign master data attributes. Permissions are configured in Roles and permissions > Master data libraries > **Attributes**.

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.



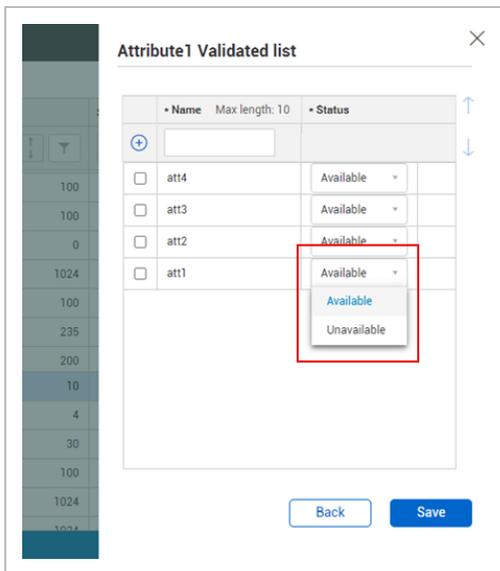
Field Name	Description
Name	Unique name of the attribute.
Type	Select from date, decimal, numeric, text, and validated list to further define the attribute data format.
Max length	Number of characters allowed for the data field.
Status	Set the status to <i>Available</i> to allow the attribute to be assigned. If the status is set to <i>Unavailable</i> and the Hide unavailable toggle is <i>On</i> , 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**.

Field name	Is terminal	Custom label - en	Custom label - es-MX	Custom label - fr-CA
<input type="checkbox"/> Total	<input type="checkbox"/>	Total	Total	Total
<input type="checkbox"/> Labor ⓘ	<input type="checkbox"/>	Labor	Mano-de-obra	Main-d'œuvre
<input type="checkbox"/> Labor Base	<input checked="" type="checkbox"/>	Labor-base-JS	Base de mano de obra	Salaire de base
<input type="checkbox"/> Labor Burden	<input type="checkbox"/>	Labor-burden-JS	Carga de mano de obra	Coût de la main-d'œuvre
<input type="checkbox"/> Labor Fringes	<input type="checkbox"/>	Labor Fringes	Beneficios sociales de mano de obra	Avantages sociaux annexes
<input type="checkbox"/> Travel	<input checked="" type="checkbox"/>	Travel	Viaje	Voyage
<input type="checkbox"/> Premium	<input checked="" type="checkbox"/>	Premium	Prima	Prime
<input type="checkbox"/> Holiday	<input checked="" type="checkbox"/>	Holiday	Día festivo	Jour férié
<input type="checkbox"/> Savings	<input checked="" type="checkbox"/>	Savings	Ahorros	Économies
<input type="checkbox"/> Pension	<input checked="" type="checkbox"/>	Pension	Pensión	Pension
<input type="checkbox"/> Vacation	<input checked="" type="checkbox"/>	Vacation	Vacaciones	Vacances
<input type="checkbox"/> Subsistence	<input checked="" type="checkbox"/>	Subsistence	Subsistencia	Indemnisation de subsistance
<input type="checkbox"/> Health & Welfare	<input checked="" type="checkbox"/>	Health & Welfare	Salud y bienestar	Santé et mieux-être
<input type="checkbox"/> Apprenticeship	<input checked="" type="checkbox"/>	Apprenticeship	Aprendizaje	Apprentissage
<input type="checkbox"/> Undefined Fringe1	<input checked="" type="checkbox"/>	Undefined Fringe1	Beneficio social indefinido 1	Avantage1 non défini
<input type="checkbox"/> Undefined Fringe2	<input checked="" type="checkbox"/>	Undefined Fringe2	Beneficio social indefinido 2	Avantage2 non défini
<input type="checkbox"/> Undefined Labor Fringes	<input checked="" type="checkbox"/>	Undefined Labor Fringes	Beneficios sociales de mano de obra indefinidos	Avantages sociaux annexes non définis
<input type="checkbox"/> Labor Insurance	<input type="checkbox"/>	Labor Insurance	Aseguranza-de-mano-de-obra-JS	Assurance-emploi
<input type="checkbox"/> Bodily Injury & Property Damage	<input checked="" type="checkbox"/>	Bodily Injury & Property Damage	Daños corporales y daños en propiedad	Lésion corporelle et dommage matériel
<input type="checkbox"/> Workers Compensation	<input checked="" type="checkbox"/>	Workers Compensation	Compensación para el trabajador	Indemnité pour accident du travail
<input type="checkbox"/> Undefined Insurance1	<input checked="" type="checkbox"/>	Undefined Insurance1	Seguro indefinido 1	Assurance1 non définie
<input type="checkbox"/> Undefined Insurance2	<input checked="" type="checkbox"/>	Undefined Insurance2	Seguro indefinido 2	Assurance2 non définie
<input type="checkbox"/> Undefined Labor Insurance	<input checked="" type="checkbox"/>	Undefined Labor Insurance	Seguro de mano de obra indefinido	Assurance-emploi non définie

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.

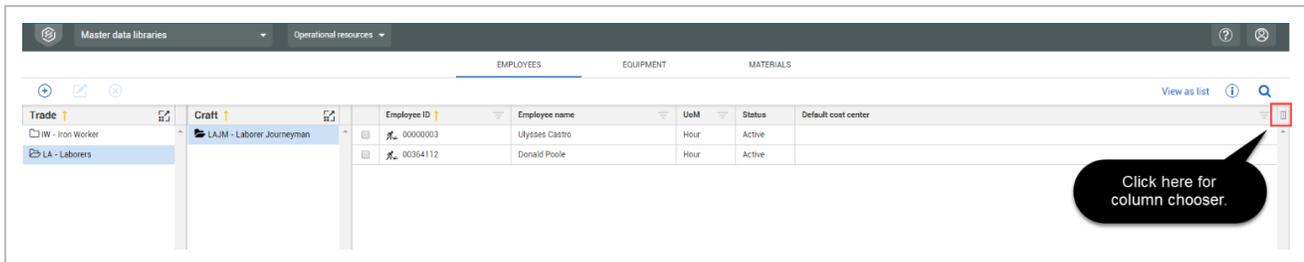
Cost center data is integrated from your external system, and is made available to the following user roles:

At the master data level:	At the project level:
<ul style="list-style-type: none"> Operational resource employee Equipment at the master data level 	<ul style="list-style-type: none"> 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:



The screenshot shows the 'Operational resources' page with the 'EMPLOYEES' tab selected. The table displays the following data:

Trade	Craft	Employee ID	Employee name	UoM	Status	Default cost center
IW - Iron Worker	LAJM - Laborer Journeyman	00000003	Ulysses Castro	Hour	Active	
LA - Laborers		00364112	Donald Poole	Hour	Active	

A callout bubble with the text 'Click here for column chooser.' points to a small icon in the top right corner of the table header area.

6.6 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.

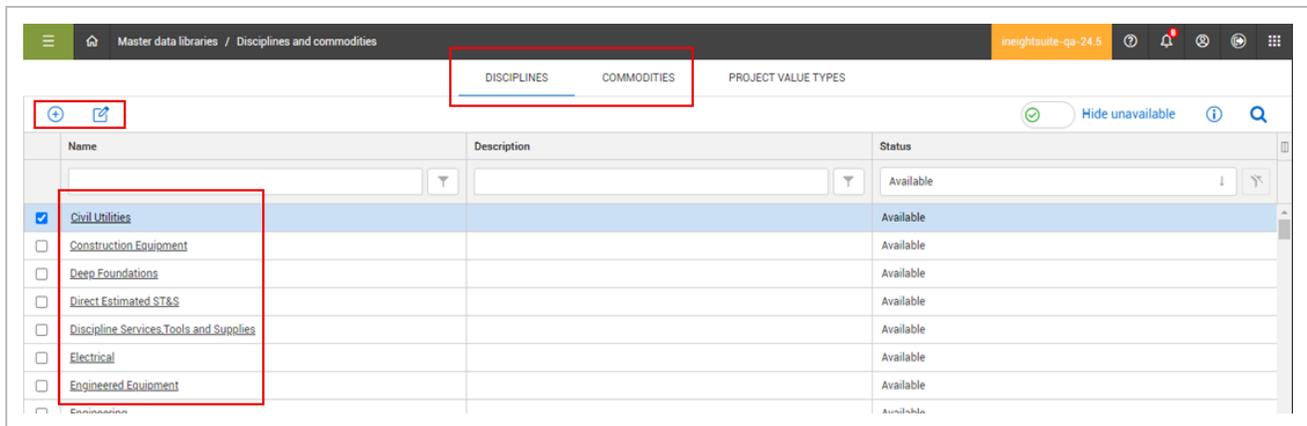
6.6.1 Considerations

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 commodities	Allows the user to create and add disciplines and commodities to master data.	Organization Admin
Edit disciplines and commodities	Allows the user to modify existing disciplines and commodities in master data.	Organization Admin

6.6.2 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 <i>Available</i> to allow the discipline or commodity to be assigned to projects. If the status is set to <i>Unavailable</i> and the Hide unavailable toggle is <i>On</i> , the discipline or commodity does not show in the list on the master data page.

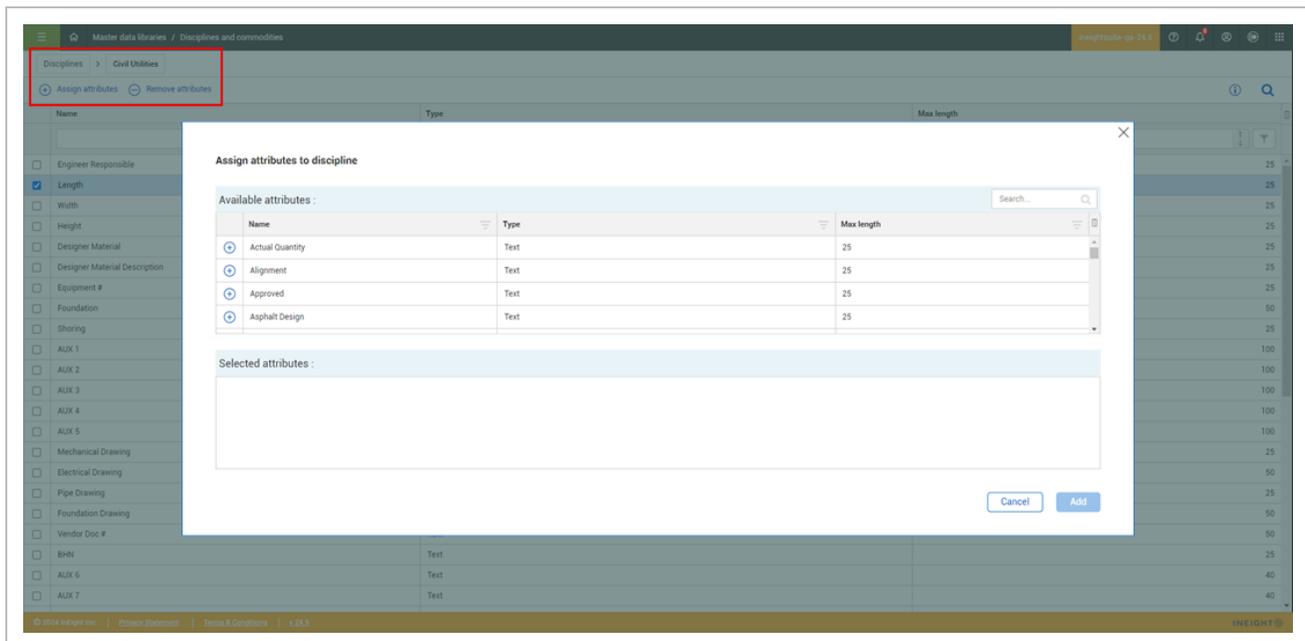
The functionality to add and edit a discipline or commodity on these master data pages are the same. To create a new discipline or commodity, click the **Add** icon. Fill in the necessary fields, and then click **Save**.

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.

6.6.3 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.

6.7 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.

6.7.1 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.

General ledger accounts	General ledger description - EN	Status	General ledger description - ES-MX	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> 520260	Site-Temporary Facilities	Available	ES_Site-Temporary Facilities_ES	InEight Service Account	12/11/2020 09:08:23 ...		03/18/2025 04:18:58 ...
<input type="checkbox"/> 520265	Site-Land/Bldg/Office Rent	Available	ES_Site-Land/Bldg/Office Rent_ES	InEight Service Account	12/11/2020 09:08:23 ...		03/18/2025 04:18:58 ...
<input type="checkbox"/> 520310	Structural-Building Repair Materials	Available	ES_Structural-Building Repair Materials...	InEight Service Account	12/11/2020 09:08:23 ...		03/18/2025 04:18:58 ...
<input type="checkbox"/> 520320	Materials-Consumable/Replacement	Available	ES_Materials-Consumable/Replacement...	InEight Service Account	12/11/2020 09:08:23 ...		03/18/2025 04:18:58 ...
<input type="checkbox"/> 521110	Equip-Small Tools	Available	ES_Equip-Small Tools_ES	InEight Service Account	12/11/2020 09:08:23 ...		03/18/2025 04:18:58 ...
<input type="checkbox"/> 521112	Equip-Parking/Traffic Control	Available	ES_Equip-Parking/Traffic Control_ES	InEight Service Account	12/11/2020 09:08:23 ...		03/18/2025 04:18:58 ...
<input type="checkbox"/> 521113	Equip-Loading Dock	Available	ES_Equip-Loading Dock_ES	InEight Service Account	12/11/2020 09:08:23 ...		03/18/2025 04:18:58 ...
<input type="checkbox"/> 521115	Equip-Elevators	Available	ES_Equip-Elevators_ES	InEight Service Account	12/11/2020 09:08:23 ...		03/18/2025 04:18:58 ...

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 <i>Available</i> to allow the account to be used. If the status is set to <i>Unavailable</i> and the Hide unavailable toggle is set to <i>On</i> , the account does not show in the list.

6.7.2 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.

6.7.3 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.

Edit line item

Account assignment details

Account assignment type		WBS category	
WBS		Consumables	
+	WBS code	General ledger account	Single
-	1086 - Concrete - Materials	530110 - Materials-Permanent Constr...	
Total			

6.8 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).

6.8.1 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 > **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.

Incoterms code	Incoterms description - en	Status	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> CFR	Costs and freight	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> CIF	Costs, insurance & freight	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> CIP	Carriage and insurance paid to	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> CPT	Carriage paid to	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> DAF	Delivered at frontier	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> DAP	Delivered at Place	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> DAT	Delivered at Terminal	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> DDP	Delivered Duty Paid	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> DDU	Delivered Duty Unpaid	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM
<input type="checkbox"/> DEQ	Delivered ex quay (duty paid)	Available	InEight Service Account	12/11/2020 09:10:12 PM	InEight Service Account	12/12/2024 01:16:11 PM

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

6.8.2 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.

6.8.3 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 screenshot displays the 'Details' page for a contract in the InEight Contract application. The page is titled 'Steel Structure Training Job 2 | 1... / Contract / Contracts'. The contract ID is '7200001001 - Concrete Slab' and the currency is 'USD \$'. The page is divided into sections: 'Actions', 'HEADER', 'LINE ITEM', 'SCHEDULE OF VALUES', 'VENDOR CHANGE ORDER LOG', and 'BAC'. The 'Details' section includes the following fields:

- Contract status: Draft
- Description: Concrete Slab
- *Type: Subcontract
- Subtype: Select one
- Effective date: 07/15/2022
- Vendor: 20100204 - Bayhill Contracting. (Hint: type a Vendor ID or name)
- Payment term: NT00 - DO NOT USE - Payable upon receipt
- Contract currency: US Dollar
- Delivery address: Select one (Estimate Tax icon)
- Storage location: Select one
- Incoterms: CIF - Costs, insurance & freight (highlighted with a red box)
- Incoterm location: Destination

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

6.9 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.

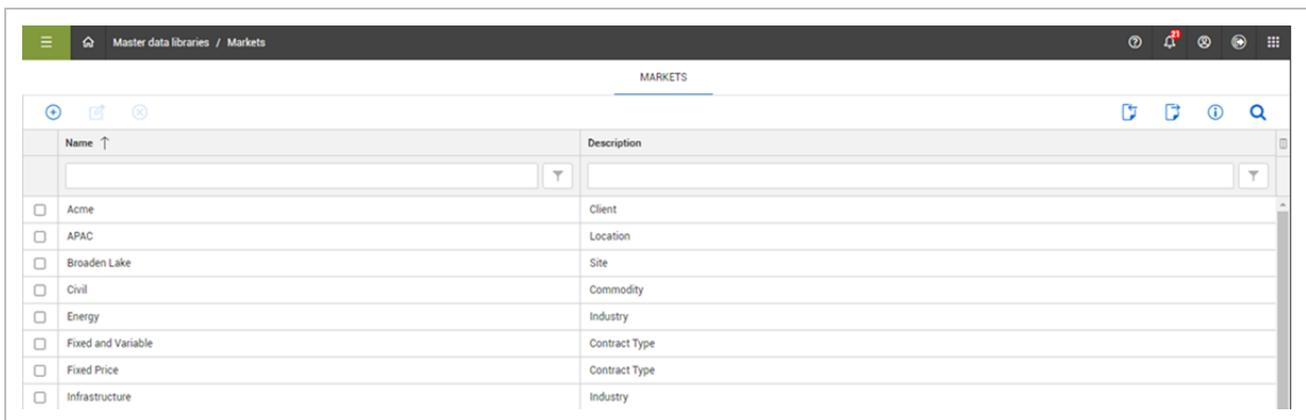
6.9.1 Considerations

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 > **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

6.9.2 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.

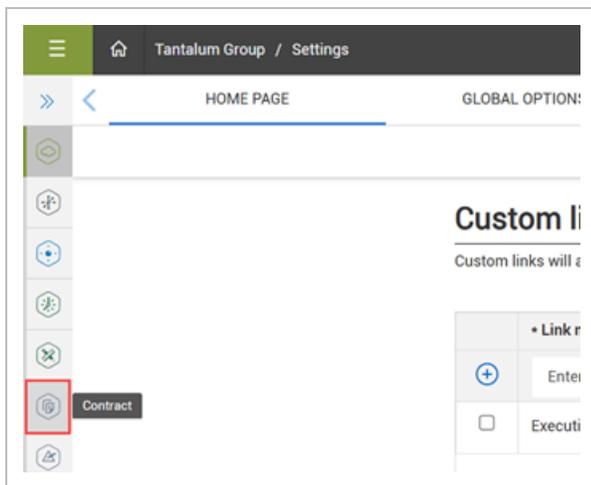
6.9.3 Use Markets for Contract and Change templates

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

6.9.3.1 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.

Template	Description	Status	Version	Assigne...	Template type	Mar...	Template file
Payment Form Tem...	Example Payment Form	Published	2	Multiple	Payment Form		Payment Form Template.xlsx
VCO Template DS	VCO template with embedded D...	Published	2	Multiple	VCO		VCO Template DS.docx
Subcontract Templa...	Subcontract template with emb...	Published	2	Multiple	Contract		Subcontract template DS v2.c
PF-UML	Payment Form Sample	Published	1	Multiple	Payment Form		RTMPPC (1).xlsx
PPCRT	PPCRIO	Published	1	Multiple	Payment Form		RTMPPC.xlsx
RIOPPC	RIOPPC	Published	1	Multiple	Payment Form		RTMPPC.xlsx

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.

Template Details | VERSION HISTORY

Preview with sample data | Create new version | Cancel | Inactivate template | Save

Details | Version 1 - Published

•Template name: Store Payment form line item val... | Template type: Payment Form | Set as default: No

Select template language: English - EN

•Description: Store Payment form line item values after Submit

Contract types | Assign contract types

Selected contract types: Test01 X, Subcontract X, SS Type 2 X, SS Type 1 X, SS MPA Type 1 X, SK_Type X, SK_MPA X, SK_Type2 X, Service agreement X

Attributes

Market | **Add market**

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.

6.9.3.2 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.

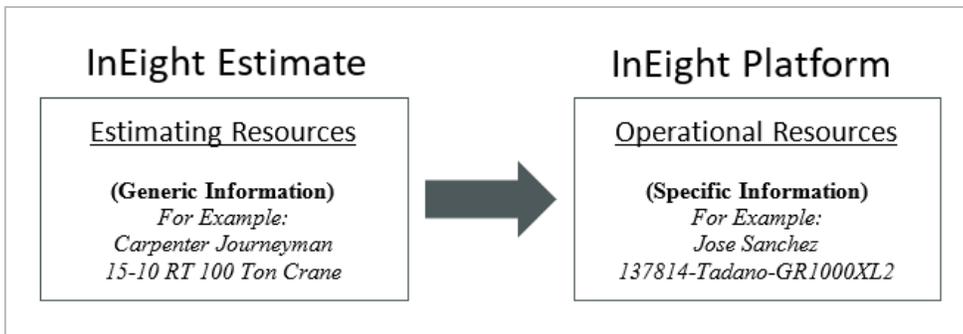
6.10 OPERATIONAL RESOURCES

6.10.1 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	<p>The generic resources used to estimate work for the project. For example:</p> <ul style="list-style-type: none"> • Ironworker Journeyman • RT 80 Ton Crane <p>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.</p> <p>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).</p>
Operational Resources	<p>The specific employee, equipment, and material used to build the work on the project and tracked in Plan and Progress. For example:</p> <ul style="list-style-type: none"> • Darrel P. Lewis - Ironworker • Grove Crane RT880E, ID# 110002 <p>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.</p>

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



6.10.2 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.



6.10.3 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

Employee ID	First name	Last name	Start date	End date
00000001	Richard		02/22/2018	12/3
00000002	Conlin		02/22/2018	12/3
00000003	Ulysses		02/22/2018	12/3
00165836	Luke		01/01/2020	12/3
00240370	Darrel P.		02/22/2018	12/3

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.

Last name	Start date	End date	Employee State
	month/day/year	month/day/year	Active
	02/22/2018	12/31/2025	Active
	02/22/2018	12/31/2025	Active
	02/22/2018	12/31/2025	Active
	01/01/2020	12/31/9998	Active
	02/22/2018	12/31/2025	Active
	02/22/2018	12/31/2025	Active

6.10.3.1 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.

6.10.3.2 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.

The screenshot shows a 'Crafts' dialog box with a 'Craft details' tab selected. The form contains the following fields:

- * Craft ID: IWJS
- Description: Iron Worker (Structural)
- * Trade: IW - Iron Worker
- Vendor: Select one
- Union: IWL75 - Ironworkers Local 75
- * Status: Available
- Currency: USD - US Dollar
- * UoM: Hour

Buttons at the bottom: Cancel, Next, Save.

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.

The screenshot shows a dialog box titled 'Crafts' with a close button (X) in the top right corner. On the left, there is a sidebar with 'Craft details' and 'Cost' tabs. The 'Cost' tab is active. The main area is titled 'Cost' and contains the following fields:

Field	Value
Standard time (ST) rate	21.50000
Overtime (OT) factor	1.50000
Double time (DT) factor	2.00000
Overtime (OT) rate	32.25000
Double time (DT) rate	43.00000

A checkbox labeled 'Use base wage factors' is checked.

6.10.3.3 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 is 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.

6.10.4 Equipment

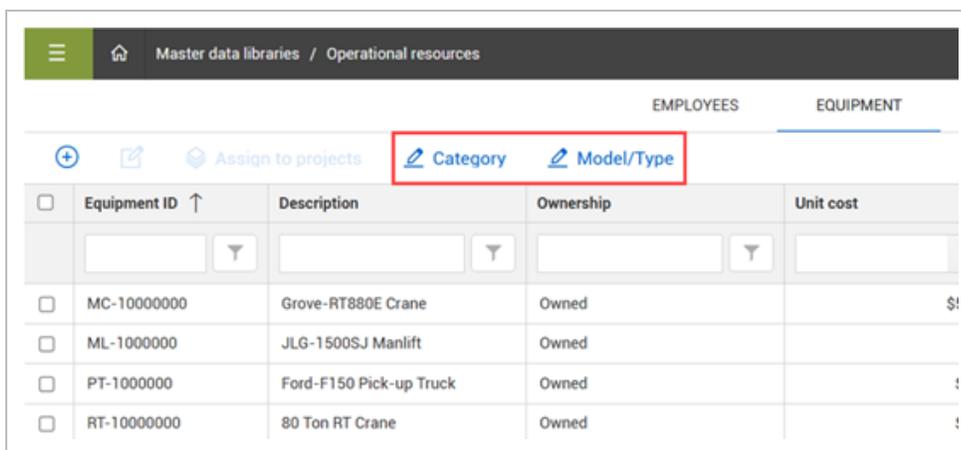
Equipment operational resources are organized into a hierarchy by category, model or type, and piece of equipment, which are defined in the following table.

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.



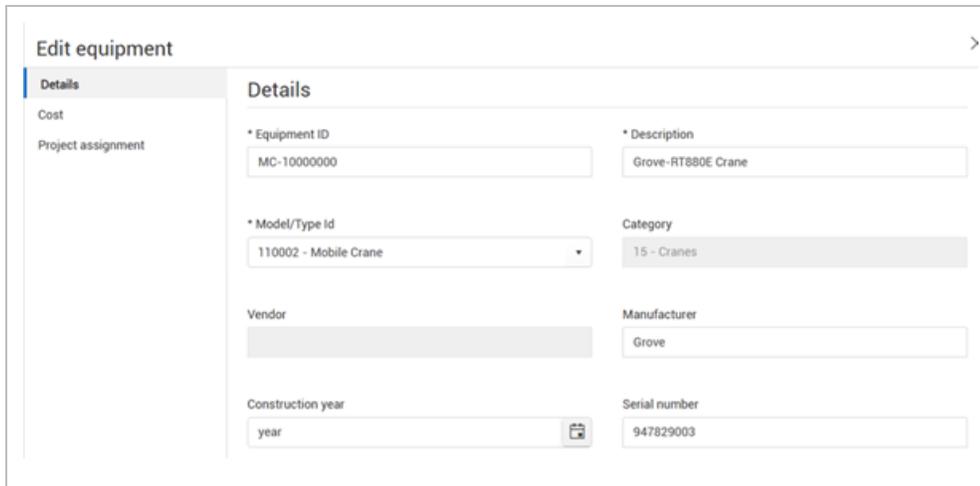
Equipment ID ↑	Description	Ownership	Unit cost
<input type="checkbox"/> MC-10000000	Grove-RT880E Crane	Owned	\$!
<input type="checkbox"/> ML-1000000	JLG-1500SJ Manlift	Owned	
<input type="checkbox"/> PT-1000000	Ford-F150 Pick-up Truck	Owned	!
<input type="checkbox"/> RT-10000000	80 Ton RT Crane	Owned	!

6.10.4.4 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.



The screenshot shows the 'Edit equipment' dialog box with the 'Details' tab selected. The form contains the following fields:

- Equipment ID:** MC-10000000
- Description:** Grove-RT880E Crane
- Model/Type Id:** 110002 - Mobile Crane
- Category:** 15 - Cranes
- Vendor:** (Empty field)
- Manufacturer:** Grove
- Construction year:** year
- Serial number:** 947829003

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.

6.10.5 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.

6.10.5.5 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.

The screenshot shows the 'Operational resources' page with tabs for 'EMPLOYEES' and 'EQUIPMENT'. The 'Assign to projects' button is highlighted with a red box. Below it is a table of employees with columns for Employee ID, First name, Last name, and Start date.

Employee ID	First name	Last name	Start date
00000001	Richard	Richard	02/22/2018
00000002	Conlin	Conlin	02/22/2018
00000003	Ulysses	Ulysses	02/22/2018
00165836	Luke	Luke	01/01/2020
00740370	Daniel P	Daniel P	02/22/2018

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.

The 'Assign to projects' dialog box contains a table of available projects and a 'Selected projects' section. Two projects are highlighted with red boxes in the available list, and their corresponding 'Add' icons are also highlighted. The 'Selected projects' section shows two projects: '105092 | Steel Structure Training Job 2' and '105094 | Steel Structure Partner Job'.

Project ID	Project name	Organization	Status	Project start date	Project end date	Currency
105091	Steel Structure Training Job	C-XYZ	Active	10/01/2015	04/12/9999	USD
105092	Steel Structure Training Job 2	C-XYZ	Active	10/01/2015	04/12/9999	USD
105093	Steel Structure Training Job 3	C-XYZ	Active	10/01/2015	04/12/9999	CAD,USD
105094	Steel Structure Partner Job	C-XYZ	Active	10/01/2015	04/12/9999	USD

Selected projects:

- 105092 | Steel Structure Training Job 2
- 105094 | Steel Structure Partner Job

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).

6.10.5.6 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.

Edit employee
✕

- Details
- Rates
- Time reporting
- Qualifications
- Project assignment

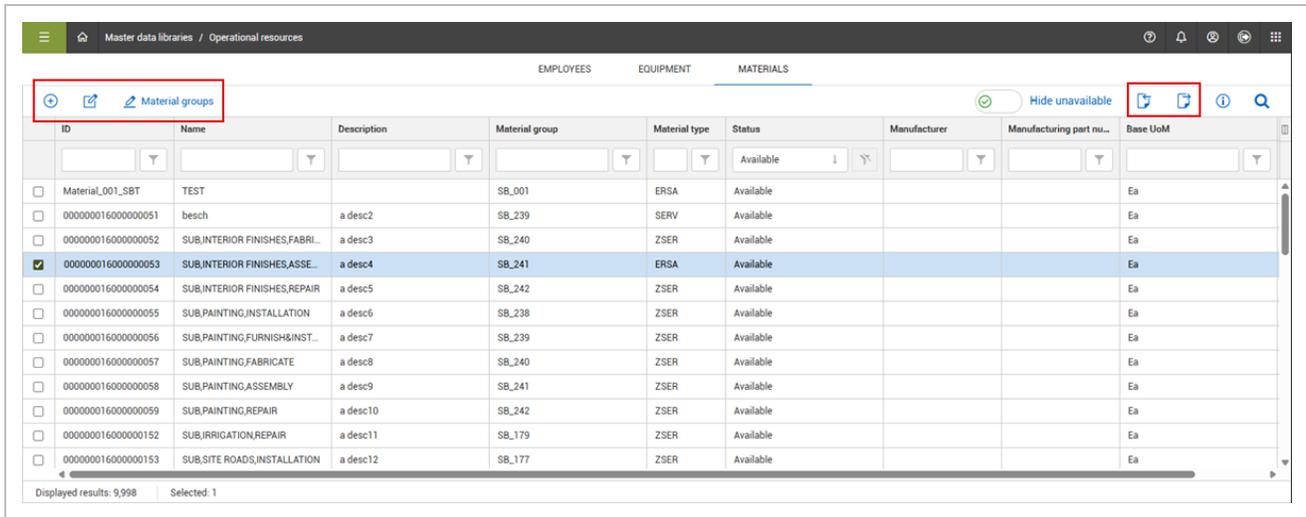
Assigned projects
Hide expired
Assign to projects

Project ID - Name	Project start date	Project end date	Employee project start date	Employee project end date	
...	09/01/2022	12/31/2024	04/03/2023	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp
...	05/01/2025	12/31/2025	05/01/2025	12/31/2025	Exp
...		01/21/2026	09/16/2019	01/21/2026	Exp
...			09/16/2019	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp
...		01/21/2026	09/16/2019	01/21/2026	Exp
...	03/01/2023	03/01/9999	03/01/2023	03/01/9999	Exp
...			09/16/2019	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp
...			09/16/2019	12/31/9999	Exp

Cancel Back Save

6.10.6 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.



6.11 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.

6.11.1 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.

Payment term code	Payment term description - en	Due days	Progress estimate required	Billing period required	Status
<input type="checkbox"/> NT30	Net due in 30 days	30	No	No	Available
<input type="checkbox"/> NT45	Net due in 45 days	45	No	No	Available
<input type="checkbox"/> NT60	Net due in 60 days	60	No	No	Available
<input type="checkbox"/> P000	Pay when Paid - Immediate frm rcpt of Cust Paymnt	0	Yes	Yes	Available
<input type="checkbox"/> P003	Pay when Paid - 3 days from rcpt of Cust Paymnt	3	Yes	Yes	Available
<input type="checkbox"/> P005	Pay when Paid - 5 days from rcpt of Cust Paymnt	5	Yes	Yes	Available
<input type="checkbox"/> P006	Pay when Paid - 6 days from rcpt of Cust Paymnt	6	Yes	Yes	Available
<input type="checkbox"/> P007	Pay when Paid - 7 days from rcpt of Cust Paymnt	7	Yes	Yes	Available

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 <i>Available</i> to allow the payment term to be used. If the status is set to <i>Unavailable</i> and the Hide unavailable toggle is set to <i>On</i> , the payment term does not show in the list.

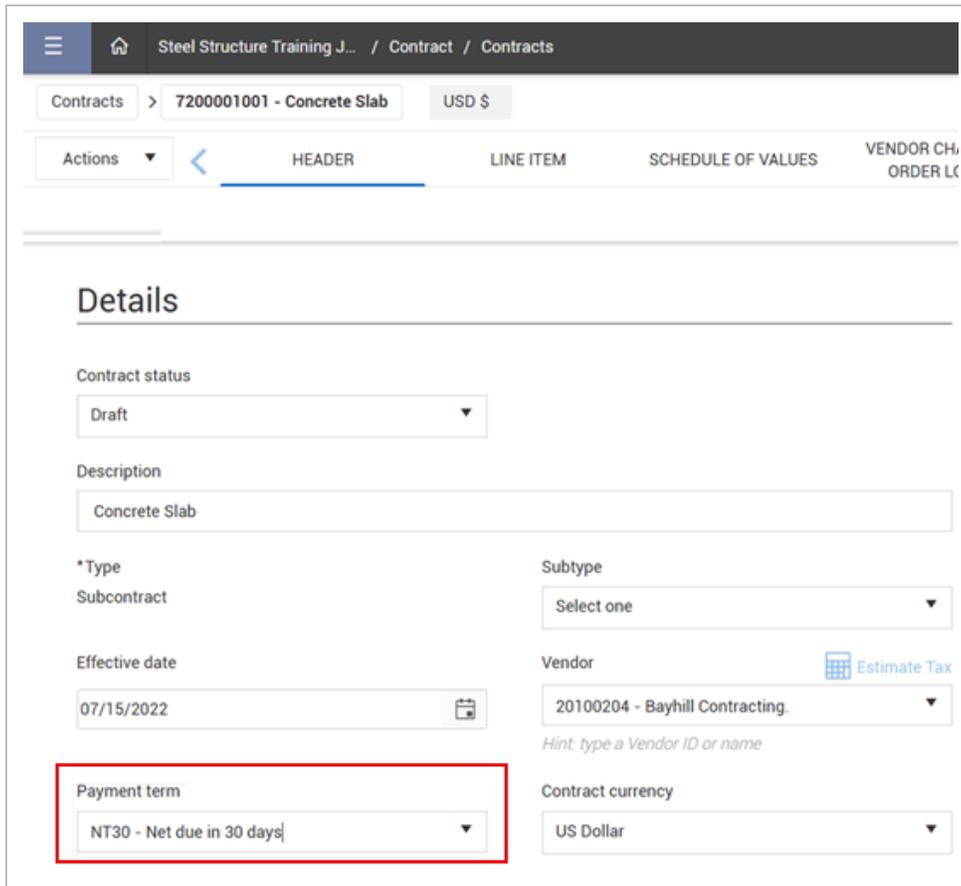
6.11.2 Manage payment terms

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.

6.11.3 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 screenshot displays the 'Details' page for a contract in the InEight Contract application. The breadcrumb trail at the top reads 'Steel Structure Training J... / Contract / Contracts'. Below this, there are navigation tabs for 'Contracts', '7200001001 - Concrete Slab', and 'USD \$'. A navigation bar includes 'Actions', 'HEADER' (selected), 'LINE ITEM', 'SCHEDULE OF VALUES', and 'VENDOR CH ORDER LC'. The 'Details' section contains the following fields:

- Contract status: Draft
- Description: Concrete Slab
- *Type: Subcontract
- Subtype: Select one
- Effective date: 07/15/2022
- Vendor: 20100204 - Bayhill Contracting. (with an 'Estimate Tax' icon)
- Payment term: NT30 - Net due in 30 days (highlighted with a red box)
- Contract currency: US Dollar

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.

6.12 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.

6.12.1 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

6.12.2 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.

Master data libraries / Payroll indicators						
ALLOWANCES						
Name	ID	Notes	Billing code	Required	Auto Opt in	
<input type="checkbox"/> Premium	01	Meals, Travel		true	false	
<input type="checkbox"/> Foreman for the day	02			true	false	
<input type="checkbox"/> Payscale level change	03			false	false	
<input type="checkbox"/> Additional lump sum \$ amount	04			false	false	
<input type="checkbox"/> Other	05			true	false	

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 <i>true</i> , 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 <i>true</i> , the allowance is automatically assigned to all new employees on all projects. This option can be changed in a project if needed.

6.12.3 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.

Name	ID	Notes	Activity type	Billing code	Required	Name - en	Name - es-MX	Nar
SB_EMP_PRE_001	SB_EMP_PRE_001	SB_EMP_PRE_001	Labor	SB_EMP_PRE	true	SB_EMP_PRE	SB_EMP_PRE	SB
Premiums-tc - main	Premiums-tc - main	Premiums-tc - main	Maintenance	3545674	true	Premiums-tc - main	Premiums-tc - main - espanol	Pre
Premiums-TC	Premiums-TC	test1	Labor	12345678	true	Premiums-TC	Premiums-TC - espanol	Pre
Premium-Oct13	Premium-Oct13	Premium-Oct13	Labor	Premium-Oc	true	Premium-Oct13	Premium-Oct13	Pre
Premium 20_oct_Main	PremiumID 20_oct_M...	Premium 20_oct_Main...	Maintenance	Premium 20	false	Premium 20_oct_Main	Premium 20_oct_Main	Pre
PremiumAuto 42700	PremiumAuto 03673	notae	Labor		false	PremiumAuto 42700	PremiumAuto 42700	Dra

Field Name	Description
ID	Unique identifier for the premium.
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 <i>true</i> , 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.

6.12.4 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.

Field Name	Description
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 <i>true</i> , 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 <i>true</i> , the time entry field in InEight Progress is editable, and a value 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.

For additional information about payroll indicators and how they compare to other payroll options, see [Payroll Options Analysis](#).

6.13 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.

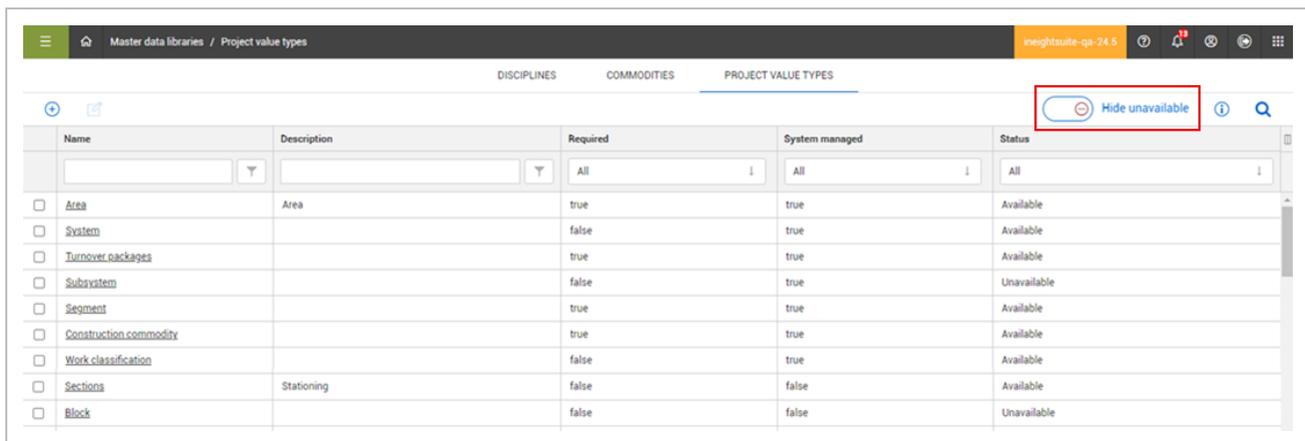
6.13.1 Considerations

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

6.13.2 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.



Name	Description	Required	System managed	Status
<input type="checkbox"/> Area	Area	true	true	Available
<input type="checkbox"/> System		false	true	Available
<input type="checkbox"/> Turnover packages		true	true	Available
<input type="checkbox"/> Subsystem		false	true	Unavailable
<input type="checkbox"/> Segment		true	true	Available
<input type="checkbox"/> Construction commodity		true	true	Available
<input type="checkbox"/> Work classification		false	true	Available
<input type="checkbox"/> Sections	Stationing	false	false	Available
<input type="checkbox"/> Block		false	false	Unavailable

Field Name	Description
Name	Unique identifier of the project value type. The name of system managed project value types cannot be edited.

Field Name	Description
Description	Brief description of the project value type.
Required	If the Required field set to <i>True</i> , 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 <i>Available</i> . If the Required field set to <i>False</i> , 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 <i>Available</i> to allow the project value type to be assigned to projects. When the status is set to <i>Unavailable</i> and the Hide unavailable toggle is <i>On</i> , 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**.

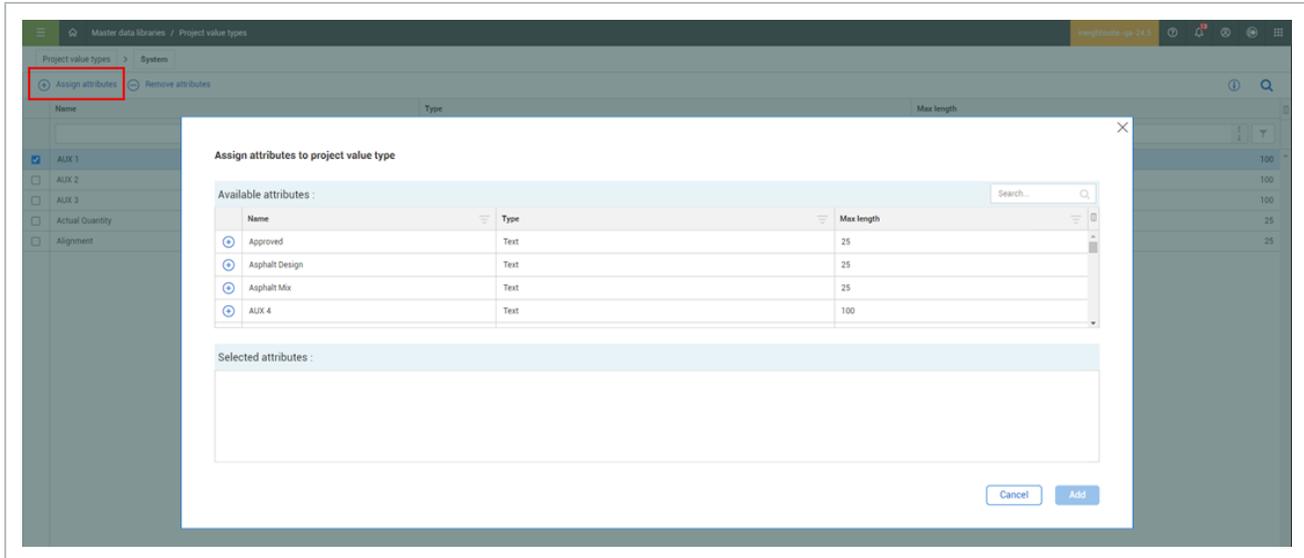
When you add a new project value type in master data, do not initially set it to be required before assigning attributes. If you save project value type initially as required, the attributes will not show assigned at the project level. Instead, create the new project value type, save it, and then assign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

6.13.3 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.

6.14 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.

6.14 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.

Qualification ID	Name	Type
7776	Add qualification	Equipment
...
AS_Qualification	As_Qualification	Equipment
AS_Qualification AS_Qualification AS_Qualification...	AS_Qualification AS_Qualification AS_Qualification AS_Qualification AS...	Equipment
AS_Qualification1 AS_Qualification1 AS_Qualification1...	AS_Qualification1 AS_Qualification1 AS_Qualification1 AS_Qualification1...	Equipment
AS_QualificationAS_QualificationAS_QualificationAS_...	AS_QualificationAS_QualificationAS_QualificationAS_QualificationAS_...	Safety

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

Qualification ID	Name	Type
...
AS_Qualification	As_Qualification	Equipment
AS_Qualification AS_Qualification AS_Qualification AS_...	AS_Qualification AS_Qualification AS_Qualification AS_...	Equipment
AS_Qualification1 AS_Qualification1 AS_Qualification1...	AS_Qualification1 AS_Qualification1 AS_Qualification1...	Equipment
AS_QualificationAS_QualificationAS_QualificationAS_...	AS_QualificationAS_QualificationAS_QualificationAS_...	Safety
AS_test	AS_test_009	Equipment

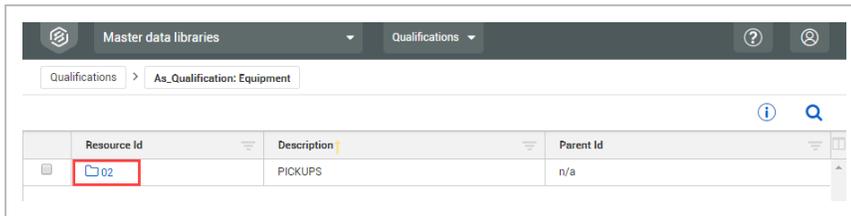
- The information slide-out panel opens. Employees and Equipment show with or without numbers.

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

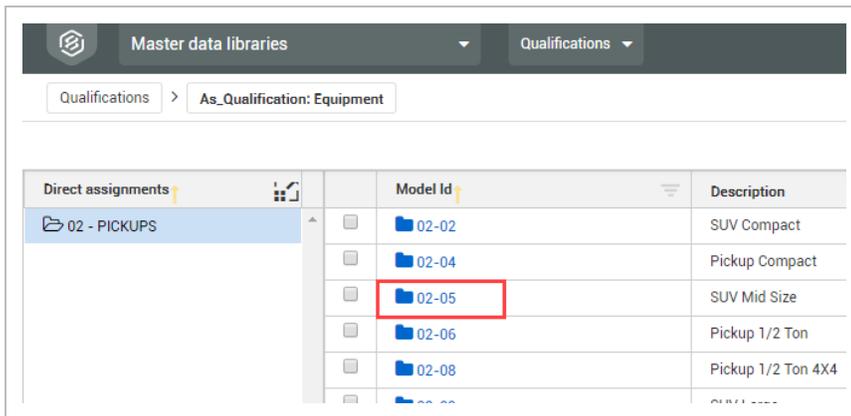


4. Click through file structure to get to list of equipment or employees.

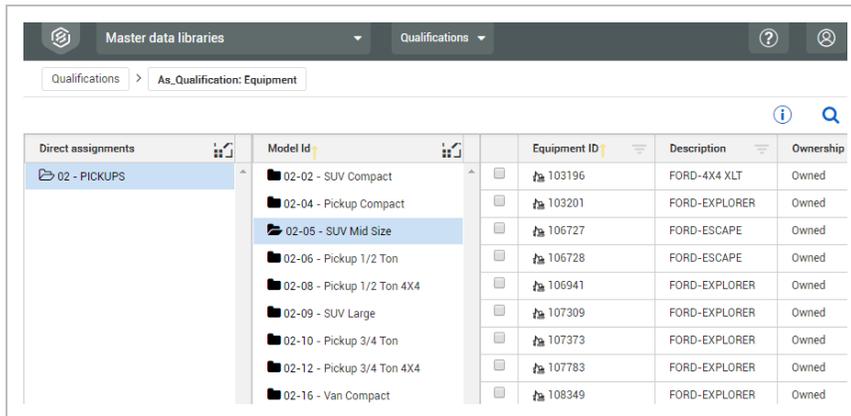
- Click the **Resource ID**



- Click on the **Model ID**



- The list of the Equipment or Employees will appear



6.15 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.

6.15.1 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
Add revenue	Allows the user to create and add revenue categories to	Account

Permission Name	Description	Level
category	master data.	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.

Revenue category name	Revenue change status name	Probability percentage	Status	Created by	Created on	Last modified by	Last modified on
<input type="checkbox"/> Executed Change Order	Executed	100	Available	InEight Service Account	10/23/2019 09:51:50 AM	InEight Service Account	07/30/2024 08:33:35 AM
<input type="checkbox"/> Non-executed Change Order	Likely approval	75	Available	InEight Service Account	08/24/2023 10:18:31 AM	InEight Service Account	07/30/2024 08:33:35 AM
<input type="checkbox"/> Verbally Approved Change Order	Highly likely approval	90	Available	Paul bennion	08/24/2023 10:18:56 AM	InEight Service Account	07/30/2024 08:33:35 AM
<input type="checkbox"/> Client Notified Change Order	Probable	50	Available	Paul bennion	08/24/2023 10:19:15 AM	InEight Service Account	07/30/2024 08:33:35 AM

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 <i>Available</i> to allow the revenue category to be used. If the status is set to <i>Unavailable</i> and the Hide unavailable toggle is set to <i>On</i> , the revenue category does not show in the list.

6.15.2 Manage revenue categories

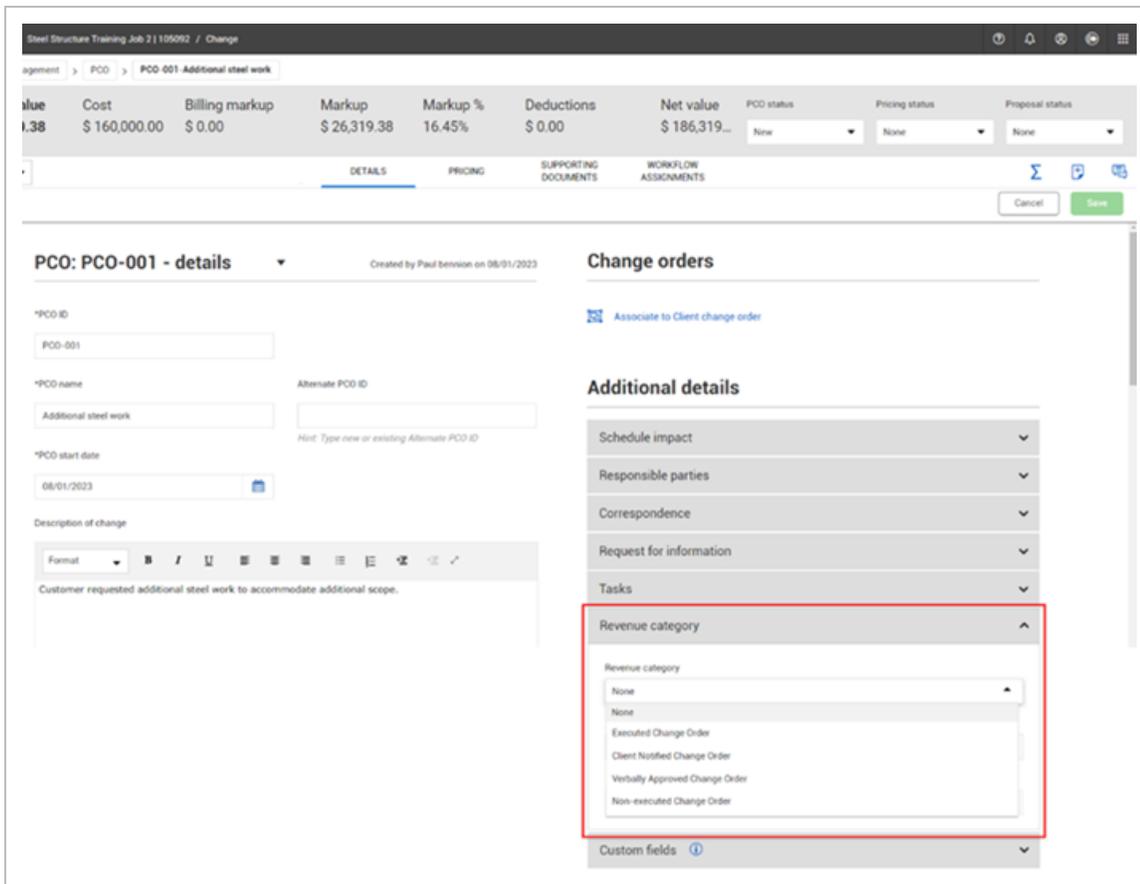
You can add and edit revenue categories by clicking the **Add** and **Edit** icons. From the right toolbar, the Import and Export icons allow you to add and export your revenue categories in bulk.

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.

6.15.3 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.

Net budget change	Net quantity change	Net man hour change	Markup	Fee	Net contract change	Approval probability
\$ 400,000.00	Yes	8,000.00	\$ 9,600.00	\$ 0.00	\$ 409,600.00	

CBS position	Description	WBS phase code	CB total cost	Adjusted CB cost	New CB total cost	Billing rate markup	Pay it
Pay item 001 - Earthwork - Labor & Material				\$ 400,000.00		\$ 0.00	
2	Earthwork	1069	\$ 0.00	\$ 400,000.00	\$ 400,000.00	2.40 %	\$ 9,600.00

6.16 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.

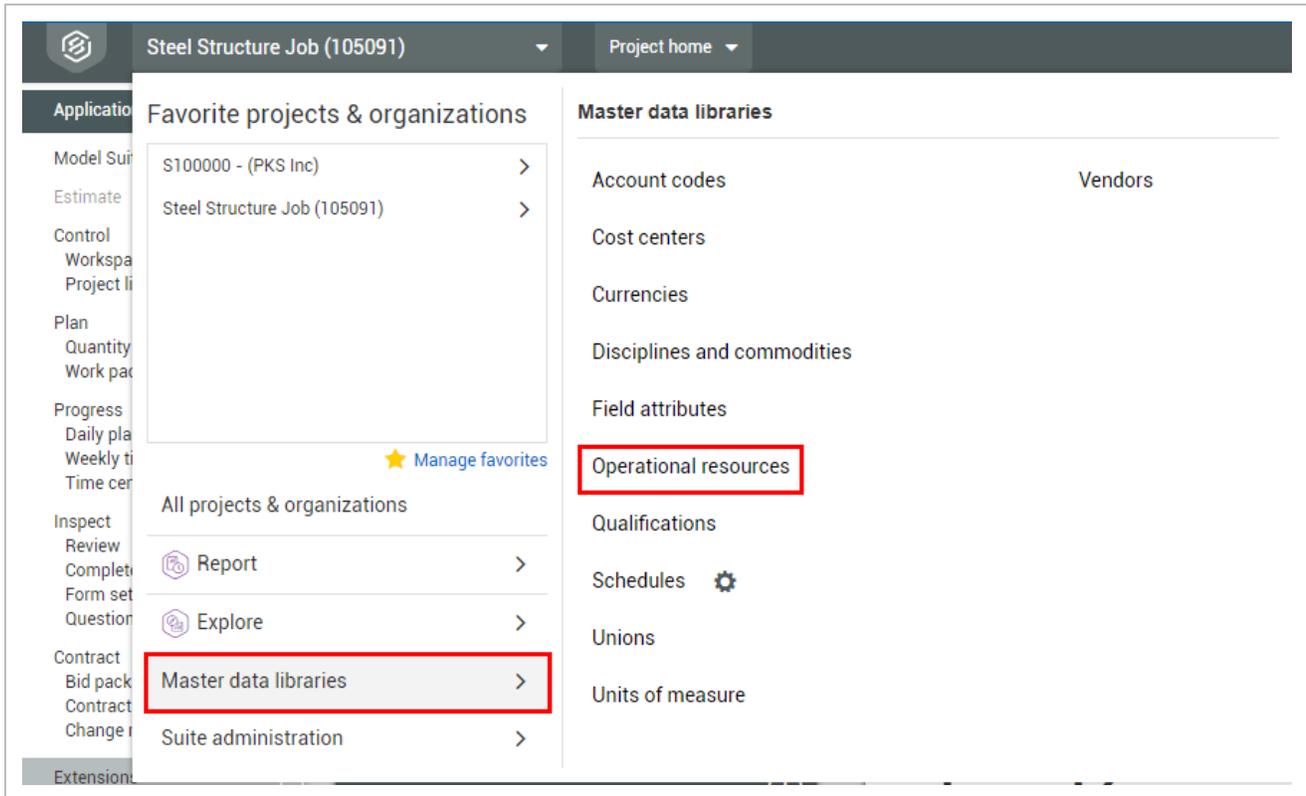
To access the Unions master data library, new Union permissions must be assigned to your role. Once assigned, you access Unions by navigating to the first level menu, clicking **Master Data Libraries** and then selecting **Unions**. This will take you to the Unions page.

Steel Structure Job (105091) | Project home

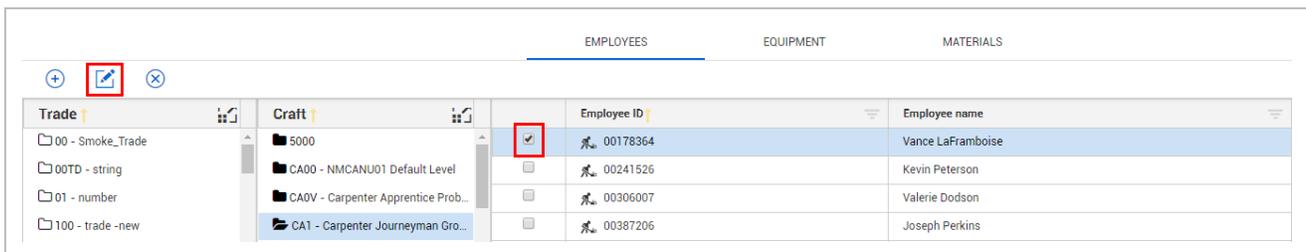
- Application
 - Favorite projects & organizations
 - S100000 - (PKS Inc)
 - Steel Structure Job (105091)
 - All projects & organizations
 - Report
 - Explore
 - Master data libraries**
 - Suite administration
- Master data libraries
 - Account codes
 - Cost centers
 - Currencies
 - Disciplines and commodities
 - Field attributes
 - Operational resources
 - Qualifications
 - Schedules
 - Unions**
 - Units of measure

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.

Employee details

+

Add employee image

* Employee ID

* Last name

* First name

* Last name

Start date

End date

Primary company

Vendor

Hint: type vendor name or ID

Union

Hint: type the union ID or description

* Craft

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.

6.16.1 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.

6.17 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.

6.18 VENDORS

Vendors master data is used by the following InEight applications: Billings, Compliance, Completions, Contract, Control, Design, Estimate, Plan, and Progress.

In the InEight applications, vendors can be defined as contractors, subcontractors, or suppliers your company works with to complete work on a project. The master list of vendor records and their associated details are stored in the Vendors master data library. The InEight applications use the master list of vendors for multiple purposes, including both as a tag for filtering, reporting and

correspondence, and to give vendors access to perform specific functions in the applications. For more details about how vendors are used by other InEight applications, see [Use cases](#).

To access the master vendors list from the Main menu, select Master data libraries > **Vendors**. The Vendors page consists of two tabs for vendors and vendor types. When vendor master data is used in the InEight applications, it is typically shown in a drop-down list of vendors and as needed can also show vendor-related fields.

6.18.1 Considerations

With the applicable permissions, you can add, edit, and assign master data vendors. Permissions are configured in Roles and permissions > Master data libraries > **Vendors**.

Permission Name	Description	Level
View vendors	Allows the user to view the vendors list. Allows the user to add new vendors. Allows the user to edit vendors. Allows the user to delete vendors.	Base user
Add vendors	Allows the user to view the vendors list. Allows the user to add new vendors. Allows the user to edit vendors. Allows the user to delete vendors.	Account Admin
Edit vendors	Allows the user to view the vendors list. Allows the user to add new vendors. Allows the user to edit vendors. Allows the user to delete vendors.	Account Admin
Delete vendors	Allows the user to view the vendors list. Allows the user to add new vendors. Allows the user to edit vendors. Allows the user to delete vendors.	Account Admin

6.18.2 Manage vendors

On the Vendors tab, you can add, edit, and delete vendors using the icons in the toolbar. The Import and Export icons allow you to add and export your vendors in bulk. When a vendor is selected, you can click the **Show information details** icon to view the vendor's details in the slide-out panel, without having to open the vendor's record.

ID	Name	Alternate name	Type	Country / Region	
<input type="checkbox"/>	20100201	Architectural Designs, Inc.		United States	
<input type="checkbox"/>	20100202	Arizona Department of Transportation		United States	
<input type="checkbox"/>	20100203	BA Blacktop		United States	
<input checked="" type="checkbox"/>	20100204	Bayhill Contracting	Bayhill	Sub	United States
<input type="checkbox"/>	20100224	InEight - Chief Estimator		United States	
<input type="checkbox"/>	20100225	InEight Engineering Group		United States	
<input type="checkbox"/>	20100226	InEight International		United States	
<input type="checkbox"/>	20100227	Merrill Iron & Steel Inc.		United States	
<input type="checkbox"/>	201002036	Gilbert Contracting			

Bayhill Contracting

ID: 20100204

Alternate name: Bayhill

Type: Sub

Vendor tax ID: 20100204

Vendor tax jurisdiction: Available

Default currency: US Dollar

Default payment terms: NT30

Default incoterms: Destination

Default incoterms location: Destination

6.18.2.1 Vendor details

Vendor records can include an address and phone number for correspondence, as well as other useful information, such as payment terms and incoterms.

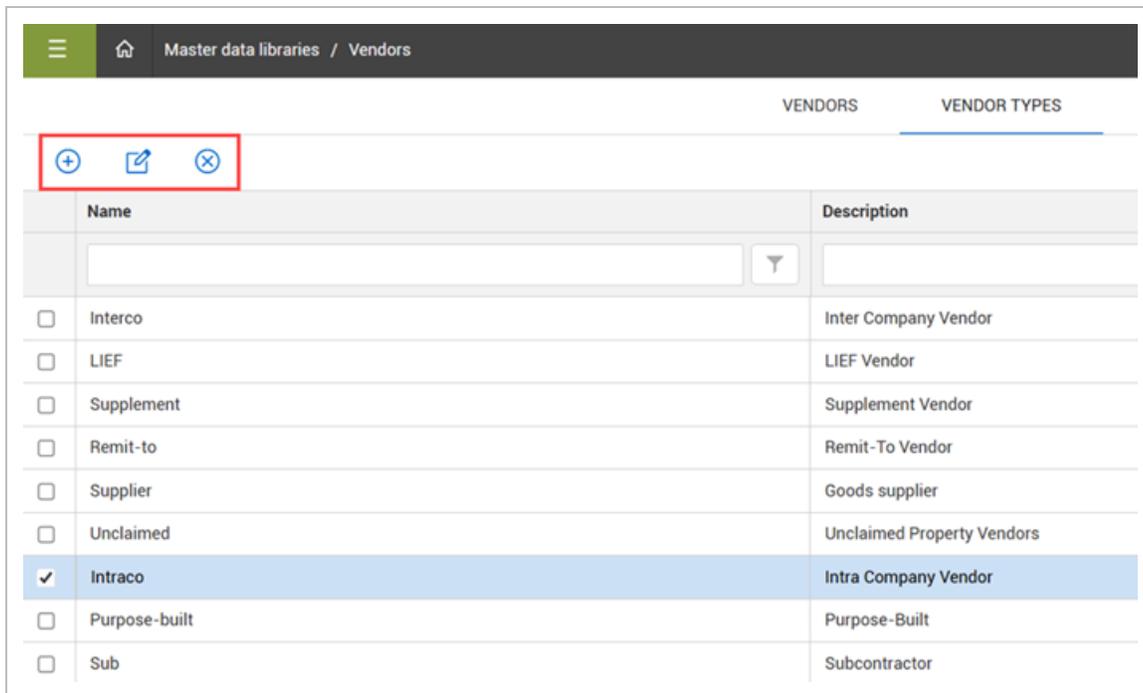
Field Name	Description
ID	Unique identifier for the vendor.
Name	Name of the vendor.
Alternate name	An additional identifier that can be used for custom purposes. For example, a simplified name for the vendor.
Vendor type	A validated field populated with values from the Vendors > Vendor types tab. Used to further classify vendors for sorting, filtering, and reporting purposes.
Vendor tax ID	Official identifier used by the vendor for tax purposes.
Vendor tax jurisdiction	Geographic area where the vendor is registered for tax purposes.
Status	Set the status to <i>Available</i> to allow the vendor to be used. If the status is set to <i>Unavailable</i> and the Hide unavailable toggle is <i>On</i> , the vendor does not show in the list on the master data page.
Default currency	Type of currency associated with the vendor by default. The values from this validated field are populated from the Currencies master data library.
Default payment terms	Payment terms associated with the vendor by default. The values

Field Name	Description
	from this validated field are populated from the Payment terms master data library.
Default incoterms	Incoterms associated with the vendor by default. The values from this validated field are populated from the Incoterms master data library.
Default incoterms location	Incoterms location associated with the vendor by default.
Address-related fields	Includes Country/Region, Address, City, State, Postal/Zip code, Phone number, and Fax number fields available under three separate tabs for primary, remit to, and additional.

6.18.3 Vendor types

One of the attributes available to define in the vendor details is the vendor type. You can use the vendor type field to further clarify what kind of vendor it is such as a, subcontractor, equipment rentals, goods supplier. Because the list of vendors for a company can contain numerous entries, vendor type can be a useful label for filtering the vendors list.

To maintain a consistent list of vendor type values, the Vendor type field is a drop-down list of pre-defined values. With the applicable permissions, you can add, edit, or delete vendor type values on the Vendor Types tab of the Vendors master data library page.



Name		Description
<input type="checkbox"/>	Interco	Inter Company Vendor
<input type="checkbox"/>	LIEF	LIEF Vendor
<input type="checkbox"/>	Supplement	Supplement Vendor
<input type="checkbox"/>	Remit-to	Remit-To Vendor
<input type="checkbox"/>	Supplier	Goods supplier
<input type="checkbox"/>	Unclaimed	Unclaimed Property Vendors
<input checked="" type="checkbox"/>	Intraco	Intra Company Vendor
<input type="checkbox"/>	Purpose-built	Purpose-Built
<input type="checkbox"/>	Sub	Subcontractor

6.18.4 Assign a user to a vendor

Depending on project arrangements, your company might give vendors access to perform certain functions in InEight applications (see Use cases). User access is given to a vendor by creating a user record in InEight Platform and associating it with a vendor and can be done either from the User management page or when editing a vendor record in the Vendors master data library.

You can add users by selecting Main menu > Suite administration > **User management**. When adding a user, you can associate it with a vendor from the Vendor field drop-down list in the user details. To learn more about creating a user record under User management, see [User Management](#).

Do the following to add a user from the Edit vendor record in Vendors master data library.

Add a user to a vendor

1. In the Vendors master data library, select the vendor check box, and then click the **Edit** icon to open the vendor record.
2. On the Edit vendor page, select the **Users** tab.
3. Click **Add users** to open the Add users slide-out panel.



4. Complete the information for the user details, and then click **Next**.
5. Assign the user to the applicable role, and organization or project from the drop-down lists.
6. Click **Save**.

6.18.5 Vendor user access

When a user is logged in to an account that is associated to a vendor, the following conditions are applied by the system:

- The Home page defaults to the Vendor view.
- Access to projects is automatically filtered to include only those linked to their assigned vendor.
- Access to some data is restricted based on vendor assignment. For example, if you are signed in with a vendor account in the Operational resources master data library, your view is restricted to operational resources associated with that vendor.

Users that are associated with a vendor can still have access to InEight applications and even organization and project settings, depending on the roles and permissions assigned to them. It is important to make sure vendor access is restricted through the role assigned, so the vendor only has access to the functions they need to do their work.

6.18.6 Add a contact to a vendor

Contacts can be assigned to a vendor, for use in the Estimate and Contract applications.

Add a contact to a vendor

1. In the Vendors master data library, select the vendor check box, and then click the **Edit** icon to open the vendor record.
2. On the Edit vendor page, select the **Contacts** tab.
3. Click the **Add contact** icon. The Add contact slide-out panel opens.



4. Complete the information for the contact details, and then click **Next**.
5. Add any additional details as needed for the contact, and then click **Save**.

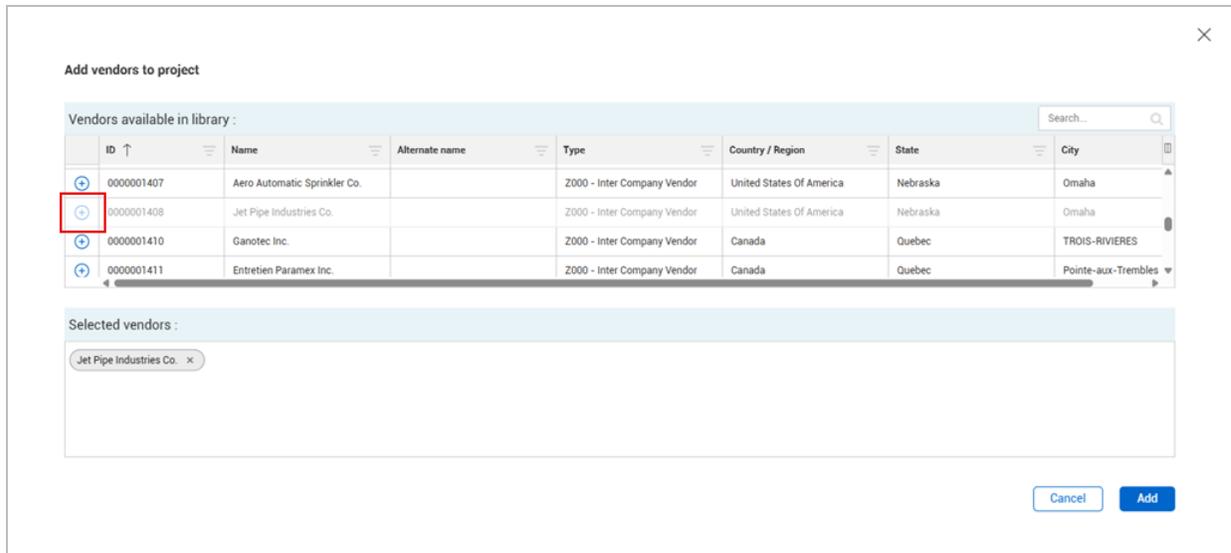
You can also add vendors and contacts from the address book in the InEight Estimate application. For more information on the use of vendors and contacts in Estimate, see [Library Address Book](#).

6.18.7 Assign a vendor to a project

There are some InEight applications such as Design, Contract, and Progress that allow access for a vendor to perform limited functions in those applications. To use the applications and perform any functions in them, a vendor must first be assigned to the applicable project.

Assign a vendor to a project

1. From the Main menu, select **All projects & organizations** to open the list of projects.
2. Click the project name link to open it.
3. On the Project home page in the left menu, select **Assigned vendors**. The Assigned vendors page opens.
4. Click the **Assign existing vendors to the project icon**. The Add vendors to project dialog box opens.
5. In the Add vendors to project dialog box, click the **Add** icon for the vendor or vendors that you want to assign to the project.



6. Click **Add**. The vendor or vendors show in the list on the Assigned vendors page for the project.

6.18.8 Use cases

Vendors are used throughout InEight applications for different purposes.

6.18.8.2 Billings

The Billings application uses vendor information to indicate which clients to bill on a project.

6.18.8.3 Compliance and Completions

Vendors are used in Compliance and Completions for informational purposes. When building a form template, you can use an integrated list question type to add a series of cascading questions that must be answered by selecting from drop-down lists, where the values on those lists come from a master data library in Platform, including the Vendors master data library. For more information about the use of vendors in Compliance and Completions, refer to [Integrated list](#).

6.18.8.4 Contract

Contract uses the Vendors master data library to award vendors to bid packages and assign vendors to contracts. For more information about the use of vendors in Contract, refer to Overview tab > [Adding Information and user assignments](#) and Contract details > [Vendor](#).

Also, users with a vendor assigned to them and with the applicable vendor-related permissions can have limited access to submit invoices in the Vendor contract summary page of Contract. When vendors log in, the home page includes a Contracts tile, where they can select from the list of contracts they have with the contractor to submit invoices. For more information, refer to [Vendor submission setup](#).

6.18.8.5 Control

There are two columns in Control related to vendors: Assigned vendor and Actual vendor MHrs (to date). For more information about the use of vendors in Control, refer to [Vendor work hours from Progress](#).

6.18.8.6 Design

If you are using Design for engineering work, you could be collaborating with third party vendors, such as an Engineering firm, to design work on a project. As design work progresses, you might need vendors to participate in the review or development of the designs, and you can give them access to claim against the design steps they are working on. For more information about the use of vendors in Design, refer to [Vendor access to scope items](#).

6.18.8.7 Estimate

The Vendor and Contact master data libraries in Platform serve as the single repository for all InEight applications including Estimate. Entries in the Estimate library address book populate automatically via integration with Platform. Entries in the address book are then used in Estimate for managing quotes and filling out project details in the Job Properties form. For more information about the use of vendors in Estimate, refer to [Library address book](#) for more information.

6.18.8.8 Plan

In Plan, vendors are used for informational purposes. When a contract component is created automatically in Plan from a schedule of value item in Contract, it includes component details from the schedule of value item it relates to, including the name of the associated vendor. This vendor name can be used on the components page or in Plan-related reporting to sort and filter your components.

	Name	Type	Discipline / Commodity	Claiming scheme	WBS	Vendor name	Is default
<input type="checkbox"/>	7400001004-2	Contract	Contract	Contract		Merrill Iron & Steel I...	True
<input type="checkbox"/>	7400001004-1	Contract	Contract	Contract		Merrill Iron & Steel I...	True
<input type="checkbox"/>	7200001001-1	Contract	Contract	Contract		Bayhill Contracting	True
<input type="checkbox"/>	Module 30 - F22: Cross Brace Ass...	Activity	Metals	Erect Steel - Light	1005		False
<input type="checkbox"/>	Module 30 - F24: Beam Assembly	Activity	Metals	Erect Steel - Light	1005		False

6.18.8.9 Progress

Progress uses the Vendors master data library for a multiple use cases.

- As an owner or contractor to track hours of a third-party vendor. For more information about vendor associations, refer to [Daily Plan from scratch](#) and the [Tracking Vendor Hours](#) video.
- As a vendor given access to Progress daily plans to track their own hours.
- To associate vendors to issues on a daily plan. For more information about association vendors to issues, refer to [Completing a daily plan](#).

6.19 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](#)