

QUICK GUIDE ENGINEERING ACTIONS MENU



Actions
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✎

Configure claiming schemes

Configure engineering work packages

Configure project values

Unlock Budget

Role assignment

CONFIGURE CLAIMING SCHEMES

Goes to the page where you can manage the claiming schemes on the project

LOCK/UNLOCK BUDGET

The budget will be unlocked by default for new projects.

- **Lock Budget:** the system will capture and automatically apply the current Scope Item Qty as the OB Qty for each existing Scope Item on the project.
- **Unlock Budget:** the OB Qty field will become editable on all existing scope items on the project.

CONFIGURE ENGINEERING WORK PACKAGES

Once an EWP is created, it will become available to assign on a Scope Item. EWP defines a scope of work to support construction in the form of drawings, procurement deliverables, specifications and vendor support. EWPs can be used to develop Construction Work Packages.

Configure engineering work packages

	Position	*Name	Note	
+	03	Enter name	Enter note	
<input type="checkbox"/>	01	EWP1		⊗
<input type="checkbox"/>	02	EWP2		⊗
Engineering work packages: 2				

ROLE ASSIGNMENT

When planning a project, you may know how many roles you are going to need on a project, but you may not know who those users are. Roles can be associated to scope items and then users can be associated to Roles.

Role assignment						CURRENT AND FUTURE ASSIGNMENTS		USER ASSIGNMENT HISTORY		
	Resource type / Role	Planned team	Assigned user	Start date	End date	Total scope items	Scope items remaining	Total steps	Steps remaining	Note
+	Structural Engineer									
	Structural Enginee...	North Divisi...	⊖ Brad Barth	⊖ 01/13/2022		0	0	0	0	⊗
	Structural Enginee...	North Divisi...	⊖ Brad Barth	⊖ 02/17/2022		0	0	0	0	⊗
	Structural Enginee...	Gillies Engin...	⊖	02/17/2022		0	0	0	0	⊗
+	Structural Designer									

CONFIGURE PROJECT VALUES

Allows users to create **Construction Work Areas**, **Work Classifications** and **Deliverable Packages** on a project and are then available to be assigned on a Scope Item.

Configure project values

Construction work area					
	Position	*ID	*Description	Activity code	
+	12	Enter ID	Enter description	Enter activity code	
<input type="checkbox"/>	06	AD	AD I	AD0	⊗
<input type="checkbox"/>	07	BOP	BOP	BOP	⊗
<input type="checkbox"/>	08	HEA	HEAT1	HEA	⊗
<input type="checkbox"/>	09	EOO	One Line Diagrams - Overall	EOO	⊗
<input type="checkbox"/>	10	ETP	Duct Bank - Temp Power	ETP	⊗
<input type="checkbox"/>	11	EWC	VCA Wire and Cable	EWC	⊗
Work classification					
Deliverable package					