

## CLAIMING SCHEMES

Claiming schemes are standardized steps to complete a scope of work.

**\* ID**

2016

**Description**

2016. Elec - Relay Study

**\* Lead Discipline**

Electrical

STEPS      SCOPE ITEMS

	*Step	*Step name	*% Claim	Partial claiming	*Resource type	*Resource Discipline	Milestone Completion		
	9	Enter step name	Enter % claim	<input type="checkbox"/>	Select resou...		Select milestone	<input type="button" value="+"/>	
<input type="checkbox"/>	1	Start Activity	5.000	<input type="checkbox"/>	Electrical Engi...	Electrical		<input type="button" value="⊗"/>	
<input type="checkbox"/>	2	Generate Deliverable	45.000	<input checked="" type="checkbox"/>	Electrical Engi...	Electrical		<input type="button" value="⊗"/>	
<input type="checkbox"/>	3	Check for IFR	10.000	<input type="checkbox"/>	Electrical Engi...	Electrical		<input type="button" value="⊗"/>	
<input type="checkbox"/>	4	Issue for Review	0.000	<input type="checkbox"/>	Electrical Engi...	Electrical	Issue for Review	<input type="button" value="⊗"/>	
<input type="checkbox"/>	5	Internal/Owner Review Complete (Comments Received)	0.000	<input type="checkbox"/>	Electrical Engi...	Electrical		<input type="button" value="⊗"/>	
<input type="checkbox"/>	6	Incorporate Comments	30.000	<input checked="" type="checkbox"/>	Electrical Engi...	Electrical		<input type="button" value="⊗"/>	
<input type="checkbox"/>	7	Check for IFC	10.000	<input type="checkbox"/>	Electrical Engi...	Electrical		<input type="button" value="⊗"/>	
<input type="checkbox"/>	8	Issue IFC	0.000	<input type="checkbox"/>	Electrical Engi...	Electrical	Issue for Construct...	<input type="button" value="⊗"/>	
<b>D</b> Subtotal:100.000%									

**Step Name**  
Steps and sequence required to complete a scope of work.

**ID & Lead Discipline**  
A unique ID and Lead Discipline must be populated to save the new claiming scheme.

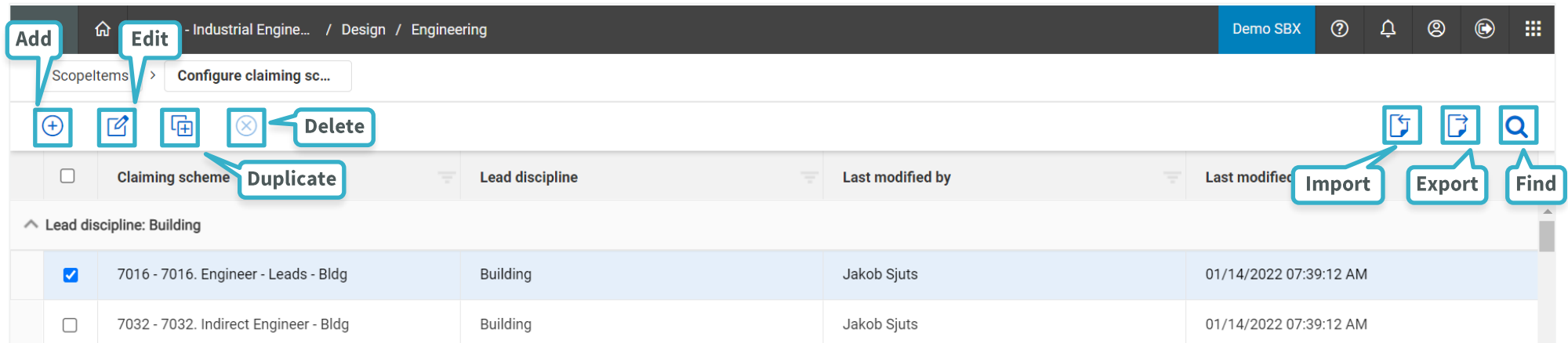
**% Claim**  
Allows incremental earning on a scope of work.

**Subtotal**  
Sum of % Claim across steps must equal 100% exactly to save the claiming scheme.

**Resource type**  
Resource types help drive accurate resource planning/allocation. Discipline will be auto-populated.

**Milestone Completion**  
Configured milestones can be used to track progress to a milestone delivery.

## CLAIMING SCHEME GRID



The screenshot shows the 'Claiming Schemes Grid' interface. At the top, there are navigation tabs for 'Add' and 'Edit'. Below the tabs, there are icons for '+', 'Edit', 'Duplicate', and 'Delete'. The 'Delete' icon is highlighted with a callout. Below the icons, there is a table with columns: 'Claiming scheme', 'Lead discipline', 'Last modified by', and 'Last modified'. The 'Claiming scheme' column has a 'Duplicate' callout. To the right of the table, there are icons for 'Import', 'Export', and 'Find', each with a callout. The table contains two rows of data:

	Claiming scheme	Lead discipline	Last modified by	Last modified
<input checked="" type="checkbox"/>	7016 - 7016. Engineer - Leads - Bldg	Building	Jakob Sjuts	01/14/2022 07:39:12 AM
<input type="checkbox"/>	7032 - 7032. Indirect Engineer - Bldg	Building	Jakob Sjuts	01/14/2022 07:39:12 AM

### ADDING

ID, Lead Discipline, and at least one step are required to add a claiming scheme.

### EDITING

With a single claiming scheme selected, the Edit button will become enabled. You can edit the selected claiming scheme at that point.

### DUPLICATING

With a single claiming scheme selected, the Copy button will become enabled. A scope of the selected claiming scheme will be created.

### DELETING

Once a claiming scheme gets assigned to a Scope Item on the project, then the system will not allow the claiming scheme to be deleted.

### IMPORTING

You can add claiming schemes via import. You will need to export the .xlsx file template, populate that with claiming scheme data and then upload the file using the import button.

### EXPORTING

- “Template” export option, which will export out a .xlsx file template that can be used to add new claiming schemes in mass through the import functionality.
- “Data Export” option, which will export out those claiming schemes currently selected in the grid at time of export in a .xlsx file.