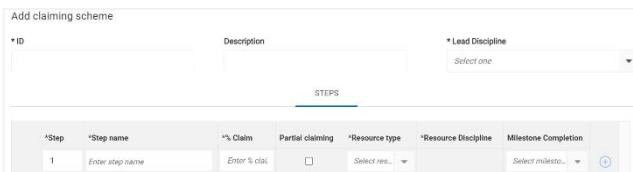


ADDING A CLAIMING SCHEME

1. Click on the **Actions Menu** ► **Configure claiming schemes**
2. Click on **+** icon
3. Enter in the required fields:



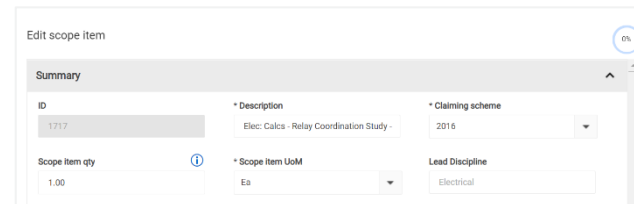
*Step	*Step name	*% Claim	Partial claiming	*Resource type	*Resource Discipline	Milestone Completion
1	Enter step name	Enter % claim	<input type="checkbox"/>	Select res...	Select res...	Select milesto...

4. Enter the Steps for the Claiming Scheme
 - Sum of % Claim across steps must equal 100% exactly to save the claiming scheme
5. Click **Add**

ADDING A SCOPE ITEM

Through the grid

1. Click on **+** icon
2. Enter in the required fields:



Summary		
ID	* Description	* Claiming scheme
1717	Elec: Calcs - Relay Coordination Study	2016
Scope item qty	* Scope item UoM	Lead Discipline
1.00	Ea	Electrical

Import

1. Click on **📄** icon
2. Select **Export scope item template** to download the Excel file ► Enter scope item details in the file
3. Click on **📄** icon
4. Select **Import scope items**
5. Drag and drop or browse the Excel file
6. Select **Import**

BUDGET LOCK

1. Click on the **Actions Menu** ► **Lock 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

CLAIMING ON A SCOPE ITEM

*Claiming can't begin on a scope item until a cost item is assigned

1. Select the expand **arrow** on a Scope Item
2. In the **Complete** column, select the checkbox
 - Notice the % complete has increased
3. Select **Save** or **Save and Close**

QUICK GUIDE ENGINEERING CLAIMING GRID



ID	*Description	*Claiming scheme	Claiming scheme description	% Complete	Lead discipline	Scope Item qty	Work classification	Work classification description	Deliverable package	Deliverable package description
1581	Mech: Calcs - Low Co...	1032	1032. ME - Mechanical ...	60.00	Mechanical		MCF	MCF	168	Mech: Calcs - Low Com...

Step	Complete	Step name	% Claim	CLAIMING		DETAILS		HISTORY		
				Partial claiming	Claim qty	Date	Milestone completion	Resource type	Actual Team	Claimed by
1	<input checked="" type="checkbox"/>	Perform Project Contract, Lessons Learned, Toolbox Searches, and review the estimating calculation results.	4.000	<input type="checkbox"/>	1.00	01/23/2022		Mechanical Engineer	North Division	Catie Williams
2	<input checked="" type="checkbox"/>	Review all applicable local codes.	4.000	<input type="checkbox"/>	1.00	01/23/2022		Mechanical Engineer	North Division	Catie Williams
3	<input checked="" type="checkbox"/>	Calc format created and saved.	2.000	<input type="checkbox"/>	1.00	01/23/2022		Mechanical Engineer	North Division	Catie Williams
4	<input checked="" type="checkbox"/>	Generate calculation (create model or excel/mathcad files).	25.000	<input type="checkbox"/>	1.00	01/23/2022		Mechanical Engineer	North Division	Catie Williams
5	<input checked="" type="checkbox"/>	Gather all references, design basis, and assumptions.	15.000	<input type="checkbox"/>	1.00	01/23/2022		Mechanical Engineer	North Division	Catie Williams
6	<input checked="" type="checkbox"/>	Compile check packet for review. Ensure appropriate checklists have been included.	10.000	<input type="checkbox"/>	1.00	01/23/2022		Mechanical Engineer	North Division	Catie Williams
7	<input type="checkbox"/>	Calculation check performed and comments returned.	20.000	<input type="checkbox"/>				Mechanical Engineer		
8	<input type="checkbox"/>	All comments from checker and lead have been addressed and resolved. Checklist has been completely filled out and signed. Calc cover sheet has been...	10.000	<input type="checkbox"/>				Mechanical Engineer		
9	<input type="checkbox"/>	Calculation issued.	0.000	<input type="checkbox"/>				Mechanical Engineer		
10	<input type="checkbox"/>	Close-out calculation assumptions and/or any required uprevs.	10.000	<input type="checkbox"/>			Issue for Construction	Mechanical Engineer		

% Complete: 60.000%

Buttons: Cancel, Save, Save and Close

To claim a step

Select the checkbox in the "Complete" column for the step record. Claim qty, Date, Actual Team, Claimed by will be auto populated when the step is claimed.

Partial Claiming

If the "Partial Claiming" column checkbox is selected when creating a claiming scheme, then a partial claim will be made through the "Claim qty" field. On Partial Claiming steps, the "Claim qty" field on the Claiming grid will be editable and will allow any positive quantity less than or equal to the Scope Item Qty to be entered.

Date

Can be back dated.

Actual Team

Can be edited with another team.

Claimed by

Can be edited with another user.

To save a claim

Once the claim is saved by selecting the "Save" or "Save and Close" button, the claim will be locked and the Date, Actual Team, and Claimed by fields will no longer be editable.

% Complete

Every claim made in InEight Engineering will be sent to InEight Control. The Claiming Qty Credit of each claim will be applied against their associated WBS phase code's "Actual qty (to date)" value. The "% Complete" value represents the Actual Qty (to date) / Forecast (T/O) Qty in Control.