

QUICK GUIDE QUANTITY FORECASTING

PROJECT SETTINGS



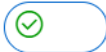
* These settings can be accessed here: [Project > Settings > Design > Quantity Forecasting](#).

GENERAL

Enables whether an ID is system generated or user specified when a new Quantity Item is added to the project.

Auto ID configuration

Automatically generate a new quantity item's ID?



When an Account Code Set is tied to a project, the tagged attribute fields will be auto-populated on the Quantity Item when an Account Code is assigned. The project will also be limited in selecting only the account codes within the account code set. **Note:** this setting needs to be enabled in Organization settings to be seen.

Account code set

Tied to account code set?



When the setting is enabled, the OB and/or CB MHRs will not be generated using the unit rates from InEight Control. With the setting enabled, the "Get OB MHRs/Unit" and/or the "Get CB MHRs/Unit" will be removed from the Actions menu and the OB MHRs/Unit and/or CB MHRs/Unit fields will become editable.

Manual Unit Rate Configuration

Enable editing of OB MHRs/Unit or CB MHRs/Unit fields?

Original Budget



Current Budget



This setting allows project admins to specify which unit rate should be used to calculate the CE MHRs on each Quantity Item in the project.

CE MHRs Configuration

Select unit rate that will drive CE MHRs:

CE MHRs/Unit

CB MHRs/Unit

This setting allows project admins to add and remove tags on project which can be added to the individual notes maintained on a Quantity Item. A tag that is marked as required at the root org will automatically be selected for all projects.

Notes

Tags

	Position	ID	*Description	
	03		Select tag	
<input type="checkbox"/>	01	DG	Design Growth	
<input type="checkbox"/>	02	DR	Design Reduction	

QUICK GUIDE QUANTITY FORECASTING PROJECT SETTINGS



DESIGN ELEMENT SETUP

On the Design Element Setup tab, Project admins will be able to select which Design Elements to make available on the project.

Project preferences

Design elements				
<input checked="" type="checkbox"/>	Design elements	UoM	Include quantity I...	Available in project
<input type="checkbox"/>	Supports	Ea		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Thermal Control - Heating / Hoarding -	CY		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Equip Erect Handle	SF		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Bolted Connections	Ea		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Material Handling	Ton		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Erect Steel	Ton		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Ladders	VF		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Railings	LF		<input checked="" type="checkbox"/>

DESIGN TRACKING STAGES

This project setting allows project admins to configure which Design Stages to add to the project and in what order. Functionality includes adding, reordering and deleting Design Stages from the project.

Design tracking stages		
	Position	*Design stage title
<input type="button" value="+"/>	01	30% Qty <input type="text"/>

FIELDS & COMPONENT INTEGRATION

The system will check that these required fields are maintained when adding or editing Quantity Items in the project. If you select System, Area, and Turnover in the Unique setting, then the system will not allow two Quantity Items to exist in that project with the same System, Area, and Turnover combination.

Required and unique fields

Identify the required fields for a quantity item, and the combination of fields that will make the quantity item unique:

	Required ⓘ	Unique ⓘ
ID	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account code	<input type="checkbox"/>	<input type="checkbox"/>
WBS phase code	<input type="checkbox"/>	<input type="checkbox"/>
Area	<input type="checkbox"/>	<input type="checkbox"/>
System	<input type="checkbox"/>	<input type="checkbox"/>
Discipline	<input type="checkbox"/>	<input type="checkbox"/>
Work type	<input type="checkbox"/>	<input type="checkbox"/>
Cost segment	<input type="checkbox"/>	<input type="checkbox"/>
Design element	<input type="checkbox"/>	<input type="checkbox"/>
UoM	<input type="checkbox"/>	<input type="checkbox"/>
Ground	<input type="checkbox"/>	<input type="checkbox"/>
Turnover	<input type="checkbox"/>	<input type="checkbox"/>
Subsystem	<input type="checkbox"/>	<input type="checkbox"/>

Allows project admins to enable the integration with InEight Plan and configure the criteria for how Plan components get associated to the Quantity Items during the process. Only available component can be selected. Anything not available is greyed out.

Plan component integration

Enable component integration with Plan?



Component rollout

Configure criteria for how component data is assigned to a quantity item:

- | | |
|--|---|
| <input type="checkbox"/> Discipline | <input checked="" type="checkbox"/> Turnover |
| <input checked="" type="checkbox"/> System | <input type="checkbox"/> Account code |
| <input type="checkbox"/> UoM | <input checked="" type="checkbox"/> Subsystem |
| <input checked="" type="checkbox"/> WBS phase code | <input type="checkbox"/> Cost segment |
| <input checked="" type="checkbox"/> Area | <input type="checkbox"/> Construction Segment |