PLANNING, SCHEDULING & RISK

INEIGHT

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CHAPTER 1 – INEIGHT DESIGN OVERVIEW

InEight Design is a design management application that lets designers, engineers, and contractors manage deliverables and quantities during the design process. Design gives you visibility into a project before the design is complete so that you can mitigate risk. Design is especially useful for projects that use alternative delivery methods such as engineering, procurement, and construction (EPC) and design-build. Design brings designers, engineers, and contractors together into one application to stay on top of risks and project delivery impacts and provide transparency.

Design consists of two modules: Engineering and Quantity forecasting. Your organization might use one module more than the other depending on your industry and business processes.

The Engineering module lets you plan, allocate resources, and track the progress of design scope and deliverables.

Quantity forecasting lets EPC contractors consume design changes in quantity form, relate design changes and quantities to the budget, forecast, resource needs, and schedule, among other needs.

Design also integrates with the following InEight applications:

- Control – Budget data is used to accurately forecast.
- Report – Compares latest design quantity to the Control budget.
- Explore – Dashboards are available for both modules.
- Plan – Component data can be sent to Quantity forecasting.

1.1 OPEN DESIGN

1.1.1 Summary

You can open Design from the main menu at the project level.
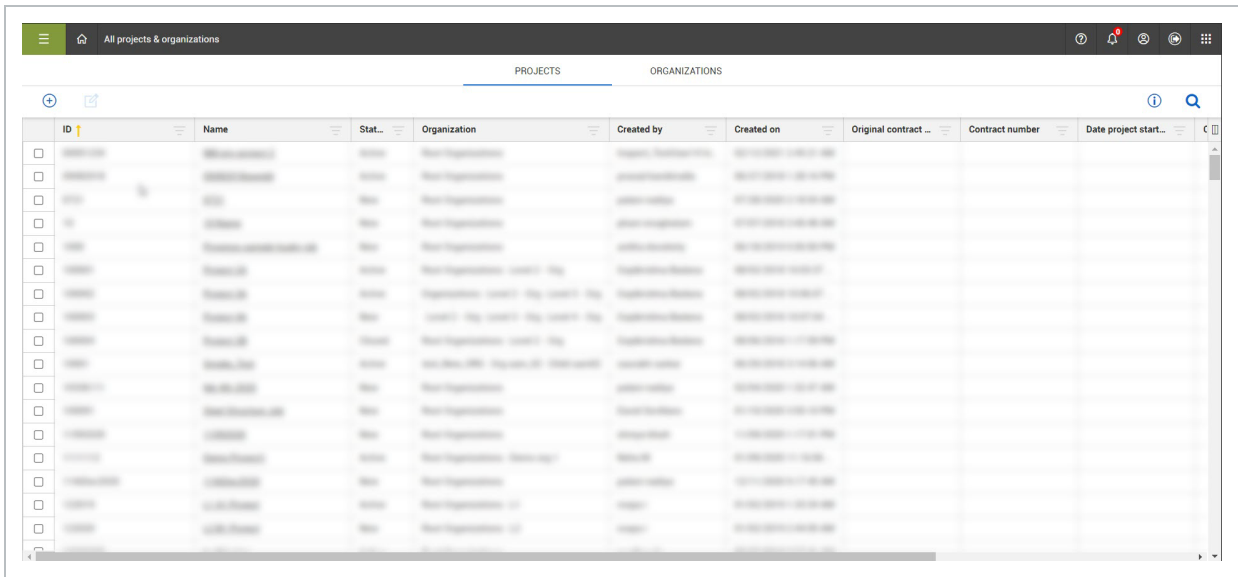
1.1.2 Steps

To open Design using the main menu at the project level:

1. Use the URL provided, and then open the InEight software in your web browser.

2. Open the **Main menu**, and then click **All projects & organizations**.
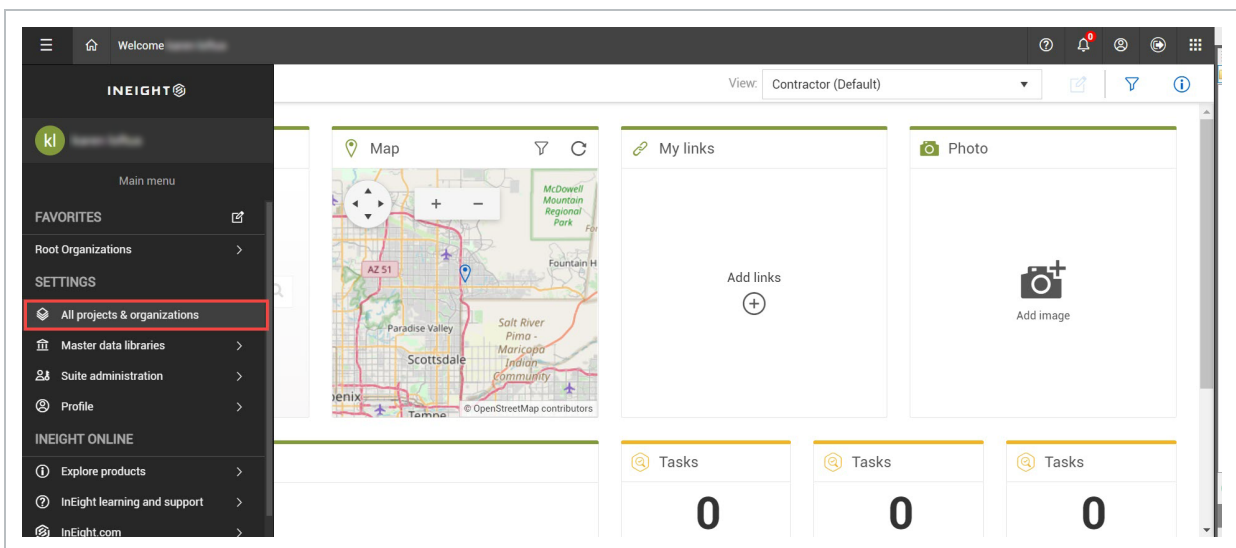
3. From the Projects tab of the All projects & organizations page, select a project by clicking the project name hyperlink. The Project home landing page opens.

| TIP | If your project is not shown on the initial screen, you can search by clicking the **Search** icon in the upper right. This search function searches all terms in all columns. |

4. From the Project home landing page, click the **Main menu** icon, and then click the **project name** to open the second-level menu.
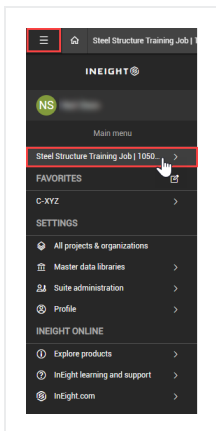
5. From the second-level drop-down menu, select **Design**, and then select the **Engineering** or **Quantity forecasting** module.
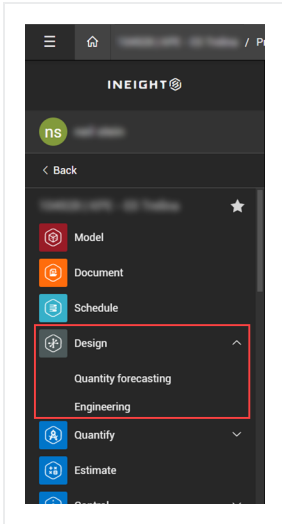
CHAPTER 2 – ADMINISTRATION OVERVIEW

2.0.1 Summary

As an administrator, you can configure settings for the Engineering and Quantity forecasting modules at the organization and project levels.

2.1 ENGINEERING SETTINGS

2.1.1 Summary

As an administrator, you can configure settings for the Engineering module 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.

For general information on InEight cloud platform settings, see Organization Settings and Project Settings.

Detailed information about Engineering module settings can be found in the links below.

2.2 PROJECT VALUES

2.2.1 Summary

You can select which project values can be associated to engineering scope items and if they are required in a project. The values are configured at the organization level in Settings > Design > Engineering > **Project values**. Project values configured at the organization level are available in all projects.

To configure project values, go to Engineering > **Project values**.
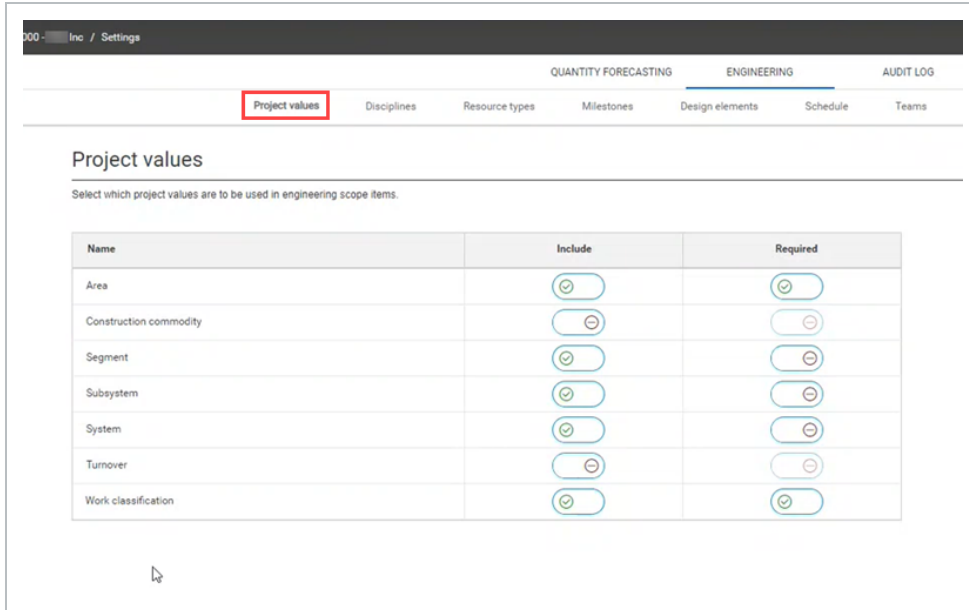
When you include project values, those values are available for selection in Settings at the project level. You can select or deselect the values that are not required for the project.

When you require a project value, the value is required at the project level. The project-level toggles for these values are automatically disabled.
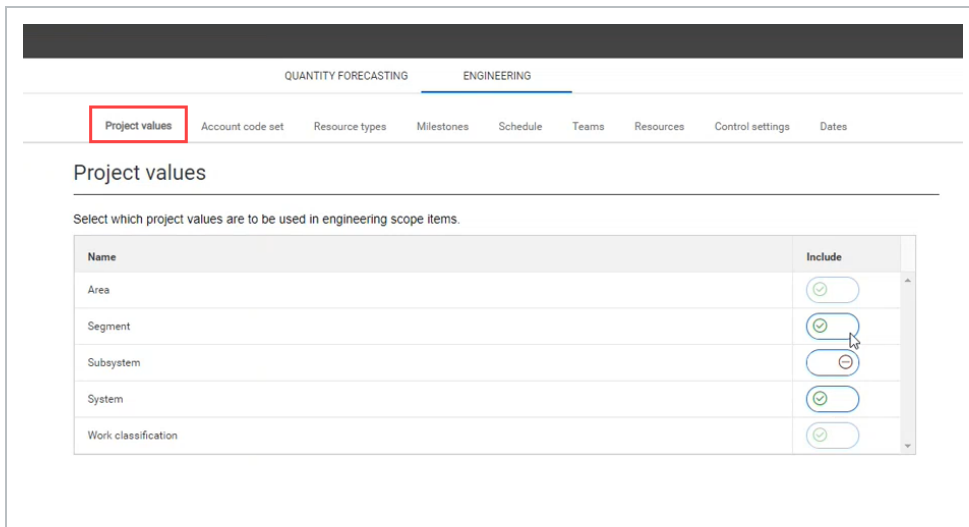
The selected project values are shown in the Scope item grid and slide-out panel. You can also export and import them in a Microsoft Excel spreadsheet.
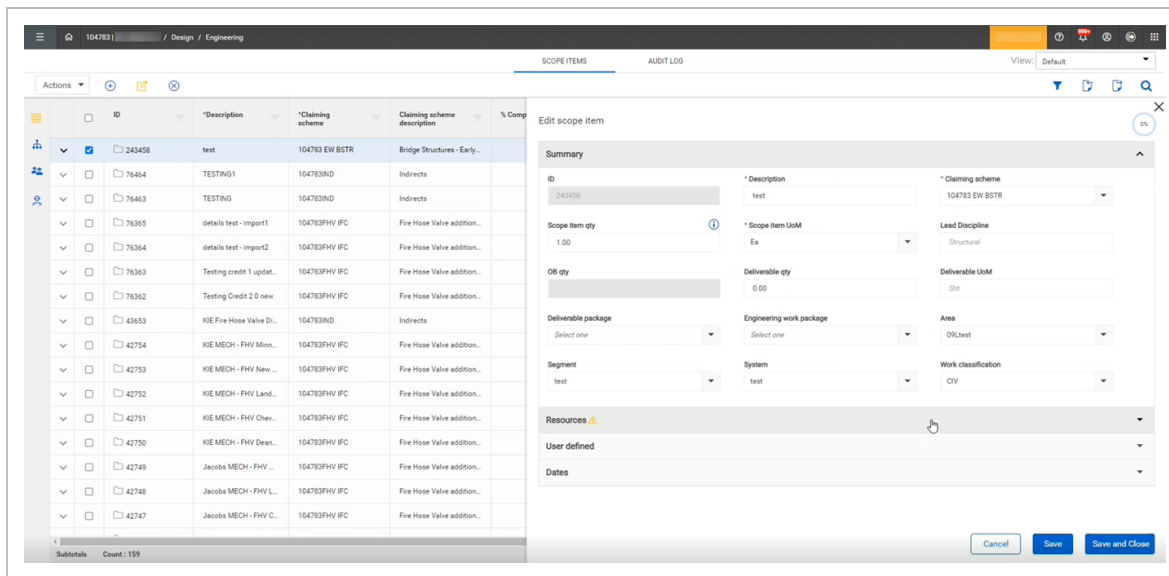
2.2.2 Considerations

- You must have the Edit engineering settings permission.

2.2.3 Related links

After project values are set up, you can configure **disciplines**. For more information on how to configure disciplines, see Disciplines.

2.3 ACCOUNT CODE SETS

2.3.1 Summary

Account code sets are used in the Engineering module to group together account codes and tag them for use with scope items. This lets you narrow down the account codes in the master data library to only those necessary for use in Design for specific projects.

Account code sets are created at the organization level in Settings > Design > Engineering > **Account code set**. To enable account code sets, turn on the toggle at the top of the page.

To view an existing account code, click the Account code set drop-down list, and then select a set. The list of account codes associated with the set opens in the table. To make an account code set available in project settings, select an account code at the organization level, and then turn on the **Include selected account code set in project settings** toggle.

At the organization level, you can perform actions such as:

- Add a new account code set.

- Add an account code to an account code set.

- Edit an account code.

- Remove an account code.

- Update account codes that have been modified in InEight Platform.

- Configure account code groups.

- Configure drawing codes.

- Import and export account codes.

At the project level, you can tie an account code set to your project. If you turn on the Tie to account code set toggle, and then select an account code set, only account codes in that set are available to assign to scope items in the project. You can also set either the primary or alternate system UoM to be used throughout the project.

2.3.2 Considerations

- You must have the permission Edit engineering settings.

- To enable or disable the Tie to account code set toggle for a project, the scope items grid must be empty.

- Only account codes available in InEight Platform Master data libraries > Account codes can be added to an account code set.

- You can delete an account code from an account code set only if it is not assigned to a scope item.

2.4 RESOURCE TYPES

2.4.1 Summary

Resource types are associated with disciplines and are used in the Engineering module to add claiming schemes. Each claiming scheme step must have an assigned resource type. Examples of resource types for an Electrical discipline might include Electrical Designer and Electrical Engineer.

Resource types are created at the organization level in Settings > Design > Engineering > **Resource types**. After creation, you can assign resource types at the suborganization level.

At the project level, all resource types from the parent organization are automatically inherited and you can assign or remove resource types as necessary.

To add a new resource type at the organization level, enter an ID, a description, and a discipline, and then click the **Add resource type** icon. To edit resource types, click in the fields, and then enter text. To remove a resource type, click the **Remove resource type** icon to the right. To adjust the position of a resource type in the list, select the resource type, and then click the up or down arrows to the right of the table.

To add a resource type at the project level from the parent organization, select a description from the drop-down list, and then click the **Add resource** icon.

2.4.2 Considerations

- You must have the permission Edit engineering settings.

- When you assign a resource type to a claiming scheme step, its associated discipline is automatically populated.

- You cannot edit or remove a resource type when it is assigned to a project.

2.4.3 Related links

After resource types are set up, you can configure claiming scheme steps. For more information, see [Configure claiming schemes](#).

2.5 MILESTONES

2.5.1 Summary

You can define completion milestones in the Engineering module to assign to claiming scheme steps. Examples of completion milestones might be Issue for Review or Issue for Construction.

A system-generated milestone named Scope Complete is automatically assigned to every project ensuring that all scope item's scope can be planned with dates.

Milestones are created at the organization level in Settings > Design > Engineering > **Milestones**. After creation, you can assign milestones at the suborganization level.

At the project level, all milestones from the parent organization are automatically inherited and you can assign or remove resource types as necessary.

To add a new milestone at the organization level, enter an ID, a description, and a discipline, and then click the **Add resource** icon. To edit resource types, click in the fields, and then enter text. To remove a resource type, click the **Remove resource type** icon to the right. To adjust the position of a resource type in the list, select the resource type, and then click the up or down arrows to the right of the table.

To add a milestone at the project level from the parent organization, select a description from the drop-down list, and then click the **Add milestone** icon.

2.5.2 Considerations

- You must have the permission Edit engineering settings.
- You cannot edit or remove a milestone when it is assigned to a project.

2.5.3 Related links

After milestones are set up, you can assign them to claiming scheme steps. For more information, see Configure claiming schemes.

2.6 TEAMS

2.6.1 Summary

Teams are used in the Engineering module to group resources for assignment to claiming steps on scope items. Teams can be associated with either organizations or vendors.

Teams are created at the organization level in Settings > Design > Engineering > **Teams**.

To add a new team at the organization level, enter an ID, a name, and either select an organization or select the Is Vendor check box and a vendor. Click the **Add team** icon. To edit teams, click in the fields, and then enter text or select an option. To remove a team, click the **Remove team** icon to the right. To adjust the position of a team in the list, select the team, and then click the up or down arrows to the right of the table.

At the project level, all teams from the parent organization are automatically inherited and you can add or remove teams as necessary.

To add a team at the project level from the parent organization, select a team from the drop-down list, and then click the **Add team** icon.

There are two additional check boxes at the project level:

- View All Scope Items – When selected, team members can view all scope items, even if they are not assigned as the planned team.

- Limit Claiming to Team – When selected, team members can only claim on scope items they are assigned to as the planned team.

2.6.2 Considerations

- You must have the permission Edit engineering settings.

- The Limit Claiming to Team check box is only available if the Limit user assignment to only those Teams associated with the project toggle is turned on in the Resources project settings.

- You cannot remove a team if it is already assigned to a scope item.

2.6.3 Related links

You can assign a planned team to a scope item in the Resources section of the Add and Edit scope item dialog boxes. See Scope item resources for more information.

For more information about resource users, see Resources.

2.7 RESOURCES

2.7.1 Summary

Resource users are used in the Engineering module to for assignment to claiming steps on scope items. Resource users are associated with resource types and can be grouped into teams.

Resource users are created at the organization level in Settings > Design > Engineering > **Resources**.

There are multiple methods to create resource users:

- Assign resource user – Add an individual resource user.
- Assign resource users by type – Add multiple resource users assigned to one resource type.
- Assign resource users to team – Add multiple resource users assigned to one team.

At the project level, there is a toggle called Limit user assignment to only those Teams associated with the project. When this toggle is disabled, you can assign any user with the applicable permissions to the project. When this toggle is enabled, only users assigned to teams that have been added to the project are available to assign. By default, this toggle is disabled. To enable the toggle, at least one team must be added to the project.

2.7.2 Steps

To add an individual resource user:

1. From the Resources organization settings page, click the **Add resources** icon, and then select **Assign resource user** from the drop-down menu. The Add resource slide-out panel opens.

2. Select a user, start date, and resource type.
3. You can add one or more teams and select a start date for the resource user on that team. Click the **Add team** icon.

4. Click **Save**.

2.7.3 Considerations

- You must have the permission Edit engineering settings.

- A user can only be assigned as a resource in one organization at a time.

- You can only assign resource users to teams associated with the organization.

- If you enable the Limit user assignment to only those Teams associated with the project toggle after the project has started, the system validates that all users assigned to incomplete claiming steps are associated with teams added to the project.

2.7.4 Related links

For more information about teams, see [Teams](#).

2.8 DISCIPLINES

2.8.1 Summary

You can define disciplines for the Engineering module to associate with resource types and claiming schemes. Examples of disciplines might be architectural, civil, or drainage. The list of available disciplines are configured at the organization level in Settings > Design > Engineering > **Disciplines**. Disciplines configured at the organization level are available to all projects.

To add a new discipline, enter an ID and a description, and then click the **Add discipline** icon.

To edit disciplines, click in the fields, and then enter text. To remove a discipline, click the **Remove discipline** icon to the right. To adjust the position of a discipline in the list, select the discipline, and then click the up or down arrows to the right of the table.

2.8.2 Considerations

- You must have the permission Edit engineering settings.
- You cannot remove a discipline when it is assigned to a resource type or assigned to a claiming scheme.

2.8.3 Related links

After disciplines are set up, you can configure claiming schemes. For more information, see Configure claiming schemes.

2.9 DESIGN ELEMENTS

2.9.1 Summary

Design elements are subdisciplines that you can associate to scope items in the Engineering module. Design elements are used to group labor types above account codes for rolling up data. You can define and configure design elements at the organization level in Settings > Design > Engineering > **Design**

elements. Design elements configured at the organization level are available to all projects in that organization.

To add a new design element, enter a unique name, select a UoM, and an associated EPC option (engineering, procurement, or construction). You can also select a parent design element to group elements together. Click the **Add design element** icon.

To edit design elements, click in the fields, and then enter text or select a new option. To delete a design element, click the **Delete design element** icon to the right. To adjust the position of a design element in the list, select the design element, and then click the up or down arrows to the right of the table.

You can also import and export a Microsoft Excel spreadsheet of design elements.

2.9.2 Considerations

- You must have the permission Edit engineering settings.

- The Alternate system UoM field is automatically populated according to the units of measure in the InEight Platform master data library.

- You cannot delete a design element or edit its UoM when it is assigned to a scope item.

- You cannot delete a parent design element when it has other design elements associated with it.

- Although you can group design elements together using parents, you can only assign terminal design elements to scope items.

2.9.3 Related links

You can assign a design element to a scope item in the Resources section of the Add and Edit scope item dialog boxes. See [Scope item resources](#) for more information.

2.10 CAUSE CODES (ENGINEERING)

2.10.1 Summary

In the Engineering module, cause codes are required when a quantity change occurs. The list of available cause codes are configured at the organization level in Settings > Design > Engineering > **Cause codes**. Cause codes configured at the organization level are available to all projects.

To add a new cause code, enter an ID and a description, and then click the **Add Cause code** icon.

To edit cause codes, click in the fields, and then enter text. To delete a cause code, click the **Delete cause code** icon to the right. To adjust the position of a cause code in the list, select the cause code, and then click the up or down arrows to the right of the table.

2.10.2 Considerations

You must have the permission Edit engineering settings.

2.10.3 Related links

For more information about updating scope item quantity, see [Update scope item quantity](#) and [Update scope item quantity by import](#).

2.11 DOCUMENTS

You can associate InEight Document documents and scope items by enabling Document integration. Document integration can be enabled on the project's settings > Engineering > **Documents** tab.

When Document integration is enabled, the Document Types grid is shown. This is where you can select the document types. The Associate documents action is also made available in Engineering > Scope Items > **Actions** drop-down.
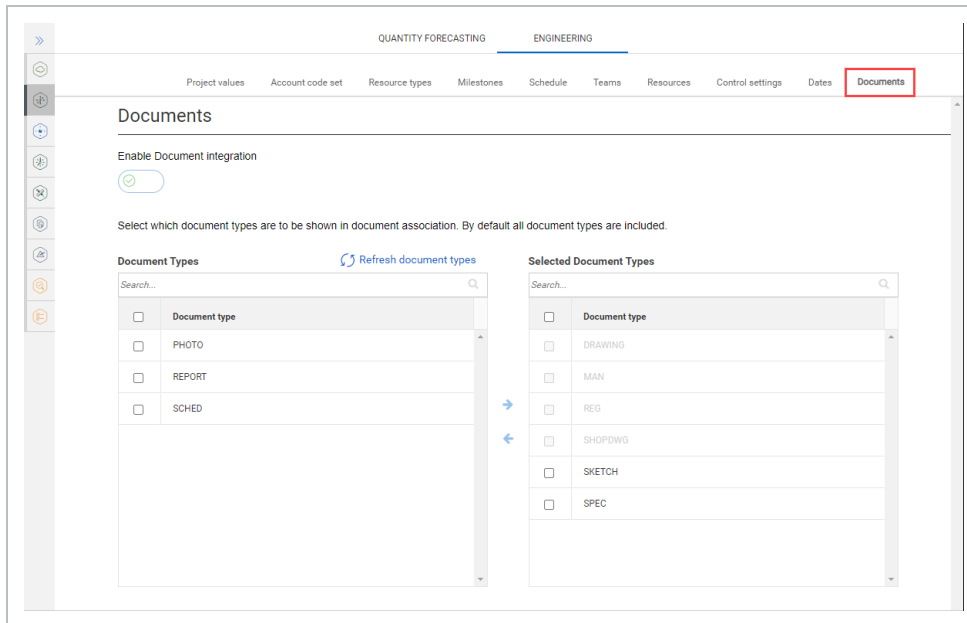
2.11.1 Document types

The Document Types grid shows all available document types from Document. Click **Refresh document types** to sync them from Document. You can select which document types from the Document register are shown in the Associate documents page when associating documents to scope items.

The Selected Document Types grid shows the document types to be synced. Document types that have an active association cannot be removed unless you remove their associations.

To add a document type, select it from the Document Types list, and then click **Move right**. To remove a document type, select it from the Selected Document Types list, and then click **Move left**.

2.11.1.1 Associate documents

You can associate documents in project > Engineering > Scope Items > Actions > **Associate documents** page.

For more information about associating documents, see Associate documents.

2.11.2 Considerations

- To enable Document integration, you must first setup the project in InEight Platform > Suite Administration > **Application integrations**.
- You must have the appropriate permissions to enable Document integration.

2.12 QUANTITY FORECASTING SETTINGS

2.12.1 Summary

As an administrator, you can configure settings for the Quantity forecasting module 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.

For general information on InEight cloud platform settings, see Organization Settings and Project Settings.

Detailed information about Quantity forecasting module settings can be found in the links below.

CHAPTER 2 – GENERAL

2.0.1 Summary

Design's general settings allow project admin users access to general project configurations.

The table below is an overview of the General settings tab:

General settings tab

	Title	Description
1	Auto ID configuration	Allows project admins to set whether an ID is system generated or user specified when a new Quantity Item is added to the project.
2	Account code set	Allows project admins to enable the use of Account Code Sets on a project and select which Account Code Set to use. Account Code Sets are created in the Org Settings and consist of many Account Codes that

General settings tab (continued)

	Title	Description
		are tagged with Design Element, UoM, Ground, Discipline, Qty Source information. 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 Quantity Items grid must be empty to enable/disable the Account Code Set project setting. When an Account Code Set is tied to a project, only those Account Codes in the set will be available to assign to the Quantity Item. This setting gives project admins the option to use either the Primary UoMs or Alternate System UoMs on the project when an Account Code is assigned to a Quantity Item. Project admins can also enable the ability to edit the inherited UoMs and their usage in the column, add or edit in the slide-out panel, and via import. To disable the feature, all Quantity Item UoMs must align to the assigned Account Code's UoM from the associated Account Code Set.
3	Control Integration	Enable integration of InEight Control's WBS attributes for the project. Quantity items will inherit the Account code, Cost segment, and UoM attributes. The inherited attributes are disabled in the quantity item fields. To enable Control

General settings tab (continued)

	Title	Description
		Integration, the WBS phase code must be selected as **Required** and **Unique** in the Quantity Forecasting > **Fields and component integration** settings tab and existing data must align with Control's WBS attributes.
4	Manual Unit Rate Configuration	Allows project admins to manually set the OB MHrs/Unit and/or CB MHrs/Unit on all the Quantity Items in the project. 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. The system requires all OB MHrs/Unit and/or CB MHrs/Unit fields to be empty to turn this setting Off. If you were functioning off Control OB and/or CB Unit Rates, then the system will allow you to turn this setting On, but all the OB and/or CB Unit Rate fields will be cleared.
5	CE MHrs Configuration	Allows project admins to specify which unit rate should be used to calculate the CE MHrs on each Quantity Item in the project. The setting allows for either the CE unit rate or the CB unit rate to be used to drive the CE MHrs. This setting will

General settings tab (continued)

	Title	Description
		be applied to all Quantity Items in the project. The setting can be changed in the middle of a project. If the setting is changed, the user will be prompted with a warning message and the system will automatically update the CE MHrs on every Quantity Item using the updated unit rate.
6	Notes	**Tags** - Allows project admins to add and remove tags on project which can be added to the individual notes maintained on a Quantity Item. Once a tag is created in the Organization Settings, then it will become available to add to a project through this project settings.

2.0.2 Considerations

You must have the applicable permissions in Quantity Forecasting

2.0.3 Steps

To navigate to the General tab, from your projects home page go to Settings > Design > Quantity Forecasting > **General**.

2.1 LINKED ENGINEERING PROJECTS

You can link projects with the goal of sharing deliverable and engineering work packages from the Engineering module to the Quantity forecasting module and show Engineering Work Packages in

InEight Plan. To navigate to Linked engineering projects, from your projects home page left navigation menu, go to Settings > Design > **Quantity Forecasting**. In Quantity Forecasting, select the **Linked engineering projects** tab.
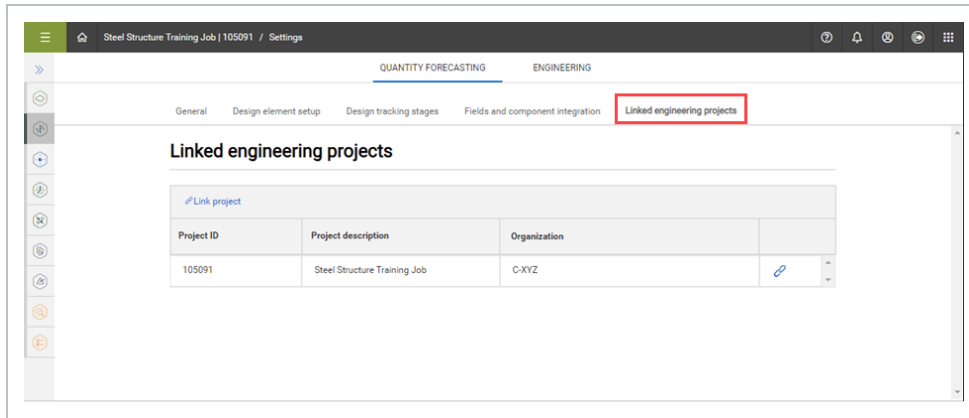
To share engineering work packages between different projects and Plan, you must link the projects.

NOTE	By default, each project is already linked to itself, so you can always share deliverable and engineering work packages in the same project.

In the Quantity forecasting module, there are two fields that are linked and populated from the Engineering module:

- **Deliverable package**: This field draws data from Actions > Configure work packages > **Deliverable Package** in the Engineering module for linked projects.

- **Engineering work package**: This field draws data from Actions > Configure work packages > **Engineering Work Package** in the Engineering module for linked projects.

> **NOTE**   These fields are also available as columns in the quantity items grid.

After you associate a deliverable or engineering work package with a quantity item, you cannot delete the package or unlink the project.

2.1.0.1 Integration with Plan

In Plan's Work packaging module, you can associate EWPs from Design to Construction work packages (CWP). For more information on associating EWPs, see Engineering work package (EWP) in Plan's Work package creation topic.

2.1.1 Steps

To navigate to Linked engineering projects, from your projects home page left navigation menu, go to Settings > Design > Quantity Forecasting > **Linked engineering projects** tab.

Link projects

1. From the Linked engineering projects tab, click **Link project**.
2. In the dialog box, select one or more projects, and then click **Add**.

NOTE	You will only see projects you have permission for.

To unlink a project, click the **Unlink** project button next to the project.

2.1.2 Related information

Engineering work package (EWP) in Work package creation.

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CHAPTER 3 – ENGINEERING MODULE OVERVIEW

3.0.1 Summary

The Engineering module lets you perform design planning, resourcing, and progress tracking. The module lets you take off your design scope in a standardized method and associate configurable master and project-level data. The design scope is taken off as a combination of claiming schemes and scope items. Resources can be allocated to the scope items.

The Engineering module is integrated with InEight Control to let you assign WBS phase codes to a scope item. This lets earned quantity value flow to integrated WBS phase codes in Control, where you can manage budgets, earned value, and earned revenue.

3.1 SCOPE ITEMS

The Scope items page is the main page of the Engineering module. All individual engineering deliverables are created and tracked as scope items in the grid on this page.

The following table and image give an overview of each section of the Scope items page and what can be performed there.

Overview - Scope items page

	Title	Description
1	Actions menu	Do any of the following: • Configure claiming schemes • Configure work packages • Configure project values

Overview - Scope items page (continued)

	Title	Description
		• Unlock Budget • Role assignment
2	Scope item buttons	Add, edit, and delete scope items.
3	View	Select, save, rename, and delete views.
4	Upper right toolbar	• Create query filter - Opens the query builder • Import and Export - Import and export sets of data • Find - Search scope items
5	Scope items	Grid showing scope items and related information organized by columns.
6	Column chooser	Select which columns are shown or hidden.
7	Show/Hide claiming steps	Shows claiming scheme steps, details, and history. It also lets you claim completion for each scope item.
8	Additional views	Choose whether to view all scope items or only those Assigned to Me.
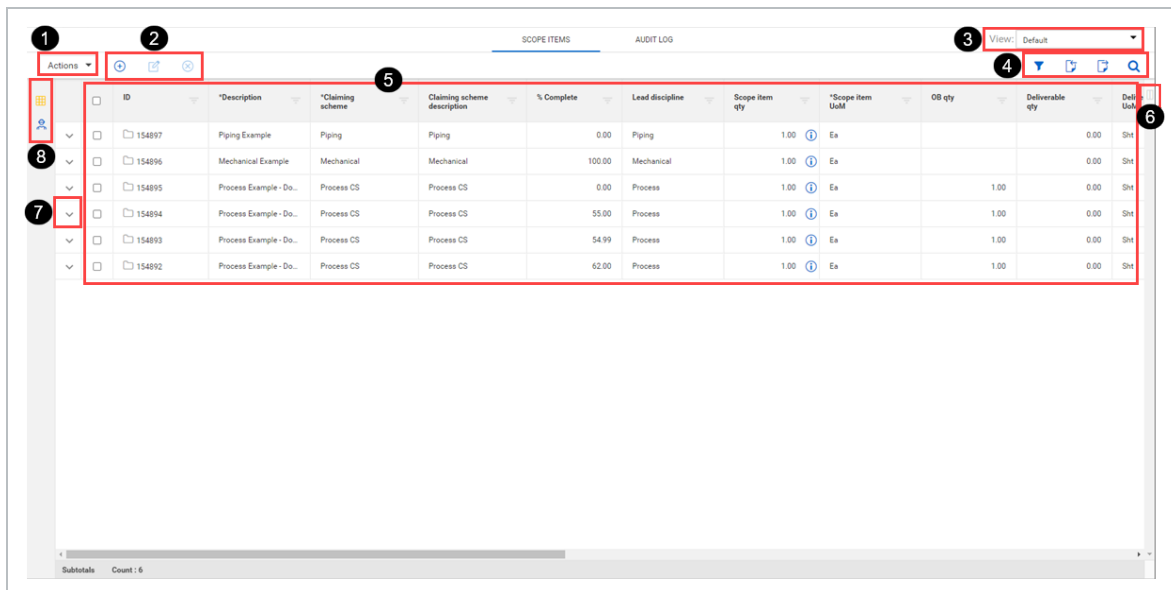
3.1.1 Considerations

You must have the permission View scope items.

3.2 ADD A SCOPE ITEM

3.2.1 Summary

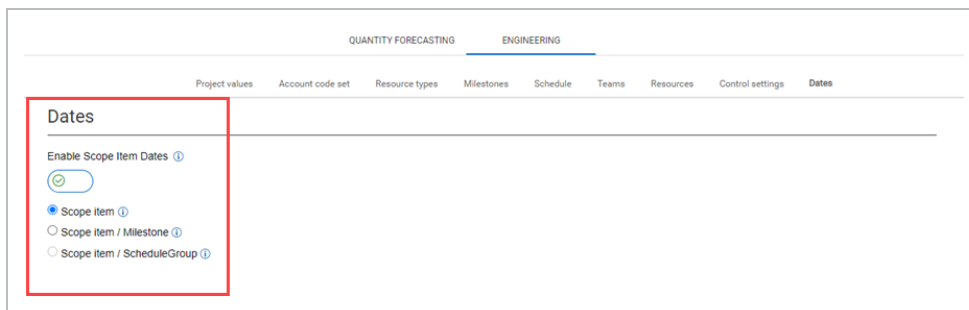You can add a scope item manually in the Scope items page.

The Add scope item slide-out panel contains the following sections:

- Summary – Basic details of the scope item, including:

    - ID – This field is automatically populated.

    - Description - Must be unique.

    - Claiming scheme – Must be set up on the Configure claiming schemes page.

    - Scope item qty and UoM – If an account code set in enabled for the project, the UoM must match the UoM of the resource type's associated account code in the Resources tab, which is automatically populated after you select a claiming scheme. Scope item UoM must also match WBS phase code UoM to claim progress.

    - Lead Discipline – This field is automatically populated based on the claiming scheme.

    - OB qty – This field is initially populated by the Scope Item qty field when the budget is locked. It is not editable but is shown for tracking purposes. If you edit the scope item qty, you must enter a reason to explain the difference. See Update scope item quantity for more information.

    - Deliverable qty and UoM – The quantities and units of the design deliverables, such as sheets.

    - Construction work area, Work classification, and Deliverable package – You can use these fields to group your scope of work.

    - Engineering work package – This field can be used to group your scope of work separately from deliverable packages. For example, you might group multiple deliverable packages under one engineering work package.

- Resources – Shows the resources assigned to the selected claiming scheme so you can know what percentage of scope needs to be done by each resource. See Scope item resources for more information.

- User defined – These are free-form text fields with a maximum of 250 characters each.

- Dates

Actual start dates are an aggregated value based on the claim date that you specified when beginning claiming.

The Actual start date is based on the project setting for Dates:

- If the Dates project setting is set to Scope item, the system captures the first claim date made on the scope item in the Actual start field.

- If the Dates project setting is set to Scope item / Milestone, the system captures the first claim date made on each milestone on a claiming scheme in the Actual start field.

- If the Dates project setting is set to Scope item / ScheduleGroup, the system captures the first claim date made on each schedule group on a claiming scheme in the Actual start field.

3.2.2 Considerations

- To add a scope item, you must first add claiming schemes to associate with the scope item. For more information, see Configure claiming schemes.

- You must have the permission Add scope items.

3.2.3 Steps

To add a scope item:

1. Click the **Add scope item** icon in the upper left. The Add scope item slide-out panel opens.
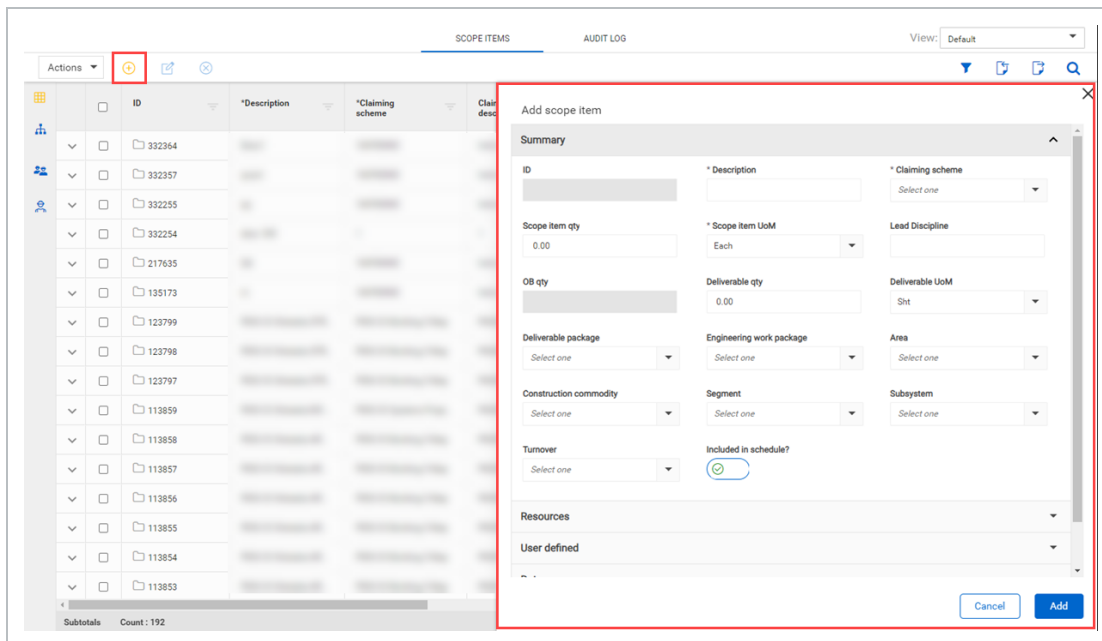
2. Fill out the required fields:

   - Description

   - Claiming scheme

   - Scope item UoM

   > **NOTE** If an account code set in enabled for the project, Scope item UoM must match the UoM of account code on the Resources tab. Scope item UoM must also match WBS phase code UoM to claim progress.

3. Click **Add**.

3.2.4 Related links

- You can also add new scope items in bulk with the import process. For more information, see Import new scope items

- For more information about the Resource section, see Scope item resources.

- After a scope item is added with a WBS phase code assigned to all assigned resource types, you can claim on it. For more information, see Claim on a scope item.

3.3 EDIT A SCOPE ITEM

3.3.1 Summary

You can edit a scope item manually in the Scope items page.

The Edit scope item slide-out panel contains the following sections:

- Summary – Basic details of the scope item, including:
  - ID – This field is automatically populated.
  - Description - Must be unique.
  - Claiming scheme – Cannot be edited after claiming has been made.
  - Scope item qty and UoM – If you edit the quantity after claiming has been made, you must enter a reason in the Update scope item qty dialog box. See Update scope item quantity for more information. If an account code set in enabled for the project, the UoM must match the UoM of the resource type's associated account code in the Resources tab, which is automatically populated after you select a claiming scheme. Scope item UoM must also match WBS phase code UoM to claim progress.
  - Lead Discipline – This field is automatically populated based on the claiming scheme.
  - OB qty – This field is editable only if the budget is unlocked. If you edit the scope item qty, you must enter a reason to explain the difference. See Update scope item quantity for more information.
  - Deliverable qty and UoM – The quantities and units of the design deliverables, such as sheets.
  - Construction work area, Work classification, and Deliverable package – You can use these fields to group your scope of work.
  - Engineering work package – This field can be used to group your scope of work separately from deliverable packages. For example, you might group multiple deliverable packages under one engineering work package.
- Resources – Shows the resources assigned to the selected claiming scheme so you can know what percentage of scope needs to be done by each resource. See Scope item resources for more information.
- User defined – These are free-form text fields with a maximum of 250 characters each.
- Dates

Actual start dates are an aggregated value based on the claim date that you specified when beginning claiming.

The Actual start date is based on the project setting for dates:

- If the Dates project setting is set to Scope item, the system captures the first claim date made on the scope item in the Actual start field.

- If the Dates project setting is set to Scope item / Milestone, the system captures the first claim date made on each milestone on a claiming scheme in the Actual start field.

- If the Dates project setting is set to Scope item / ScheduleGroup, the system captures the first claim date made on each schedule group on a claiming scheme in the Actual start field.

3.3.2 Considerations

You must have the permission Edit scope items.

3.3.3 Steps

To edit a scope item:

1. Select the check box to the left of one scope item and then click the **Edit scope item** icon in the upper left. The Edit scope item slide-out panel opens.

2. Edit the fields you want to update.

3. Click **Save** or **Save and Close**.

3.3.4 Related links

For more information about the Resource section, see Scope item resources.

After a scope item is added with a WBS phase code assigned to all assigned resource types, you can claim on it. For more information, see Claim on a scope item.

3.4 SCOPE ITEM RESOURCES

3.4.1 Summary

The Resources section of the Add and Edit scope item side panels lists the resource types associated to steps in the claiming scheme assigned to the scope item.

The Resources section is organized into a grid.

The following columns are automatically populated based on the selected claiming scheme:

- % Complete – Percent claimed by the resource type on the scope item.

- WBS % Claim Ratio – Sum of % Claim across claiming steps with the associated WBS.

- CE Mhrs/Unit – CE unit rate from Control of the associated WBS. See Considerations for more information.

- Scope item qty – Automatically populated from the Summary section.

- Scope item Mhrs – (CE Mhrs/Unit) × Scope item qty

The following columns can be assigned for each resource type:

- WBS

- Account code

- Design element - See Design elements for more information.

- Role - Only roles configured in the Role assignment dialog box are available. See Role assignment for more information.

- Planned team - If roles are enabled, this field is automatically populated based on role assignment. If roles are disabled, you can assign any team according to resource project settings.

- Assigned user - If roles are enabled, this field is automatically populated based on role assignment. If roles are disabled, you can assign any user according to resource project settings.

- CE Mhrs/Unit – See Considerations for more information.

These assignments are inherited by claiming steps with the associated resource type in the claiming scheme.

3.4.2 Considerations

- If account code sets are enabled for the project, only account codes from the assigned account code set are available to assign to a resource type on the scope item. The design element is automatically populated based on the account code assigned. The account code UoM must match the Scope item UoM in the Summary section.

- When you assign a WBS phase code, the account code is automatically populated with the account code associated with the WBS in InEight Control. If an account code has already been assigned to the scope item's resource type, then the system checks if the account code matches Control. If the account code does not match, a warning message is shown, and the account code assignment is overridden to match Control.

- You cannot edit the WBS phase code if percent complete is above zero. If you claim up and then back down to zero, you can edit the WBS phase code.

- The CE Mhrs/Unit column can be manually edited when a WBS phase code has not been assigned. After you assign a WBS phase code, CE Mhrs/Unit is inherited from the WBS phase code.

- After the CE Mhrs/Unit column is filled, the Scope item Mhrs is automatically calculated.

- When you assign a role to a scope item, the role, planned team, and assigned user are inherited by the claiming steps. You can still update the role on individual steps if the step has not been claimed.

3.5 IMPORT NEW SCOPE ITEMS

Importing lets you add scope items in bulk. All imported scope items that pass validations are added to the Scope items page. The imported scope items that fail validations are added to the Error resolution page. All imports are shown in Audit log > **Import history**.

3.5.1 Considerations

You must have the permission Import scope items.

3.5.2 Steps

To import new scope items:

1. On the Scope items page, click the **Export** icon, and then select **Export scope item template**. A Microsoft Excel spreadsheet is downloaded.
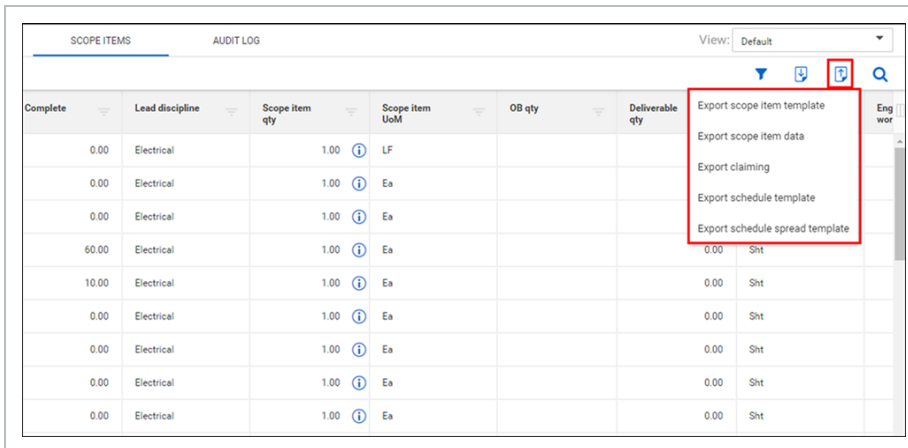
2. Fill in the fields in the spreadsheet, and then save it.

3. On the Scope items page, click the **Import** icon, and then select **Import scope items**.

4. Click **Browse**, and then select the saved spreadsheet.

5. Click **Import**. The import status is shown, and then the Import history page opens. If there are any errors, they are shown in the table.

6. If there are issues, click **Completed with issues** in the Status column to open Scope item error resolution, and then click the scope item ID to view and resolve issues before saving.

3.5.3 Related links

You can also add individual new scope items manually using the interface. For more information, see [Add a scope item](#).

3.6 CLAIM ON A SCOPE ITEM

3.6.1 Summary

You can claim earned quantity against a scope item directly on the Scope items page. Claiming is done in the Claiming tab of a slide-out panel that can be expanded for each scope item in the grid.

3.6.2 Considerations

- To claim, you must have the permission Edit claiming.

- To claim against a scope item, a WBS phase code must be assigned to all resource types associated with the scope item.

- If any compliance issues exist on a scope item, you cannot claim against it.

- For partial claiming using the Claim qty field, you can enter any quantity less than or equal to the scope item quantity. If Claim qty equals Scope item qty, the Complete check box is automatically selected.

- If you enter a partial quantity, and then later claim additional quantity in the same step, you must enter the total amount up to that point, not an incremental amount. For example, if a step is partially claimed for 10, and you want the current claimed quantity to be 100, you must enter 100, not 90.

- You can enter a value in the Claim qty % column if partial claiming is enabled. After you enter the percentage value, the Claim qty field is automatically filled with the corresponding quantity value.

- Claiming history can be seen in the History tab of the scope item slide-out panel and in the Claiming history tab of the Audit log.

3.6.3 Steps

To claim a step on a scope item:

1. On the Scope items page, click the down arrow to the left of the scope item. An expanded panel opens to the Claiming tab.

2. Select the check box in the Complete column for the step.

3. You can edit the Date and Claimed by fields. By default, these fields are automatically populated with today's date and the user who selected the check box.

    > **NOTE** You cannot select a future date.

4. You can enter a partial quantity in the Claim qty column.

    > **NOTE** Partial claiming must be enabled for the associated claiming scheme step to use this feature.

5. Click **Save** or **Save and Close**. The claim is locked and the Date, Actual team, and Claimed by fields cannot be edited.

To make changes to a claim, the step must be unclaimed, and then reclaimed.

You can also claim on scope items in bulk. For more information, see Import claiming.

3.7 UNDO CLAIMING

Undo claim wizard lets you undo claims for a step or scope item, which reduces the claiming back to 0% complete. This reverses all claims for the specific step or scope item to the day the original claim occurred.

All original claims and claim reversal are captured for audit purposes.

3.7.1 Considerations

- You must have the permission Edit claiming.

- You can undo claiming for a step or an entire scope item. See the steps below for more information.

- When a step or scope item has not been claimed and is at 0%, the undo claiming icons do not show.

3.7.2 Steps

To undo claim for a step:

1. On the Scope items page, click the **Undo claim** icon.

   A dialog box shows all claims for the step.
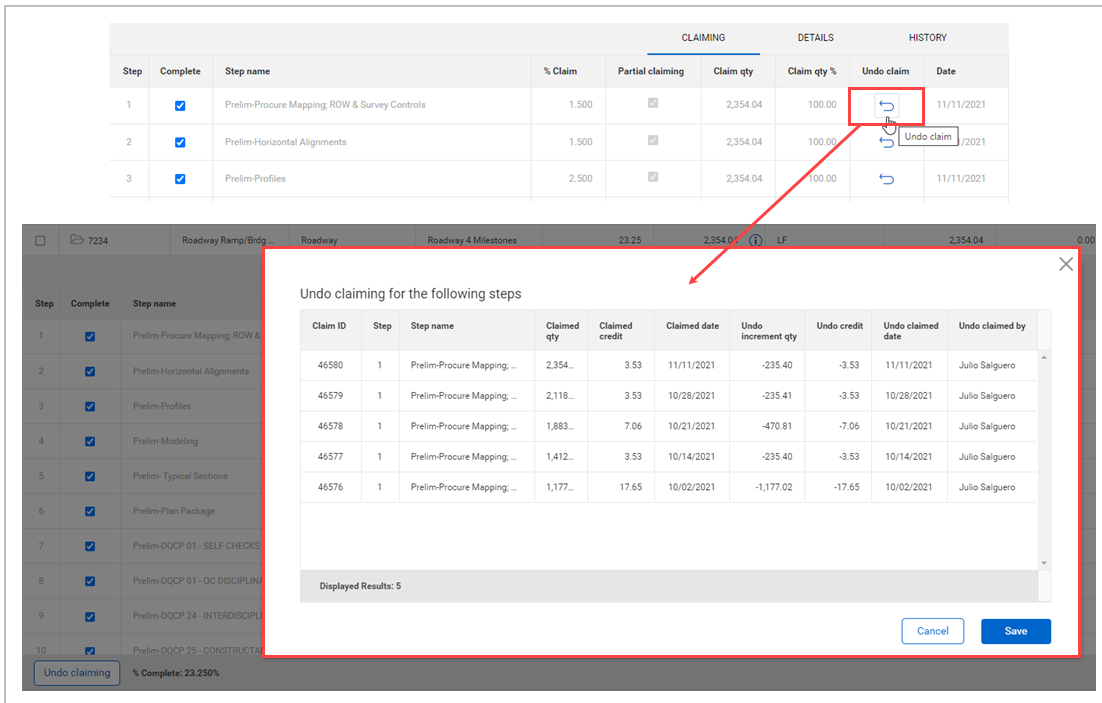
2. Click **Save** to undo claiming for the steps shown.

To undo claim for a scope item:

1. On the Scope items page, click the Undo claiming button at the bottom left.

   A dialog box shows claims for all the steps in the scope item.
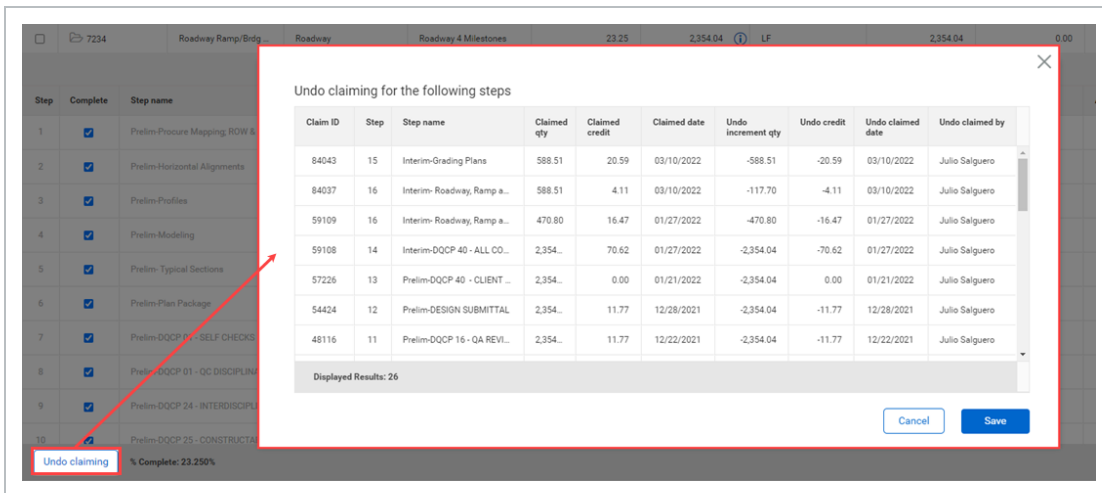
2. Click **Save** to undo claiming for the all the steps in the scope item.

> **NOTE** When InEight Control integration is enabled, the undo claims are sent to the assigned WBS in Control.

3.7.3 Related links

You can also claim on scope items manually using the interface. For more information, see [Claim on a scope item](#).

3.8 IMPORT CLAIMING

Importing lets you claim against scope items in bulk. All imported claiming that passes validations is added to the Scope items page. The imported claims that fail validations are added to the Error resolution page. All imports are shown in Audit log > **Import history**.
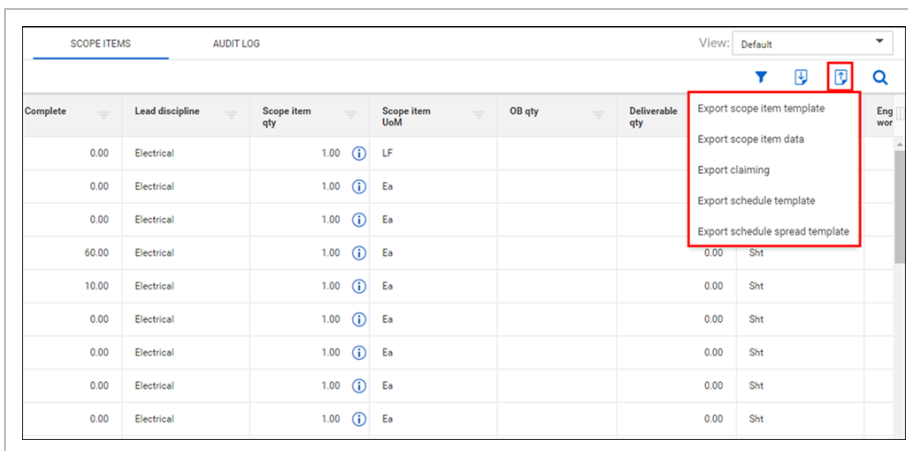
3.8.1 Considerations

- You must have the permission Import claiming.
- You can import all claiming based on either quantity or percentage. See the steps below for more information.

3.8.2 Steps

To import claiming:

1. On the Scope items page, click the **Export** icon, and then select **Export claiming**. A Microsoft Excel spreadsheet is downloaded.

2. Fill in values in either the Claim qty % or Claim qty columns in the spreadsheet, and then save it.

3. On the Scope items page, click the **Import** icon, and then select **Import claiming**.

4. Click **Browse**, and then select the saved spreadsheet.

5. Select either **Claim by quantity** to import only values in the Claim qty column or **Claim by percentage** to import only values in the Claim qty % column.

6. Click **Import**. The import status is shown, and then the Import history page opens. If there are any errors, they are shown in the table.

7. If there are issues, click **Completed with issues** in the Status column to open Claiming error resolution, and then resolve issues before saving.

3.8.3 Related links

You can also claim on scope items manually using the interface. For more information, see Claim on a scope item.

3.9 UPDATE SCOPE ITEM QUANTITY

3.9.1 Summary

When you update the Scope item qty field of a scope item, the Update scope item qty dialog box guides you through adjusting the claiming on any previously claimed steps to reflect the new scope item quantity.

The Update scope item qty dialog box shows a grid of all steps with claiming history. The earned value is automatically adjusted to the new quantity value for complete steps. You can export all claimed steps for additional review by clicking the **Export** icon in the upper right of the grid.

To see previous scope item quantity changes, hover over the **Information** icon in the Scope item qty field.
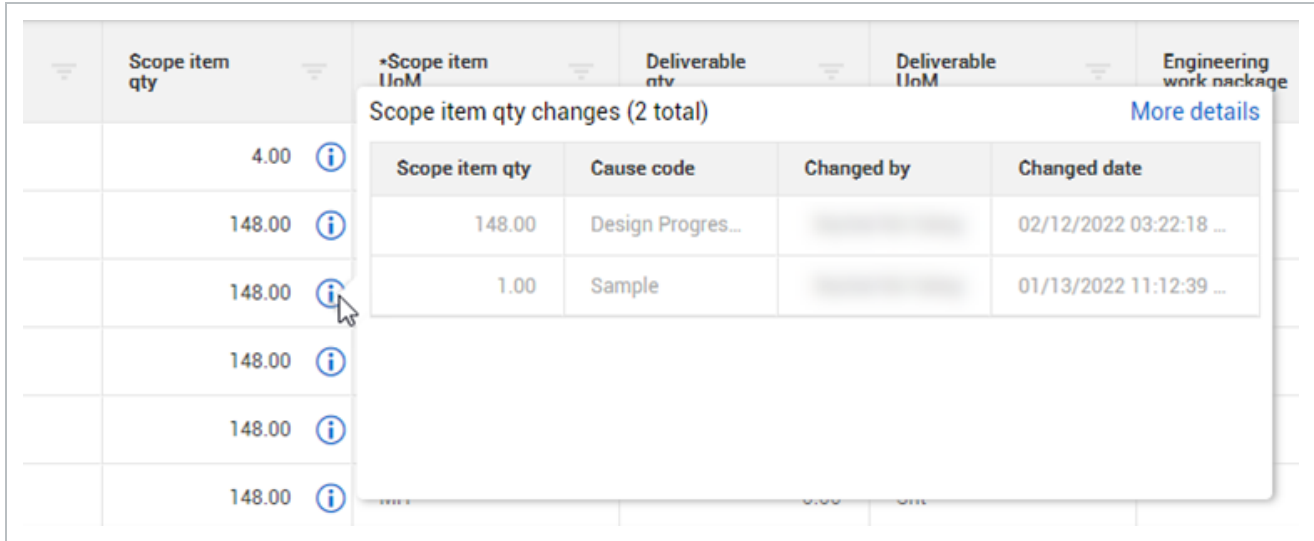
3.9.2 Considerations

You must have the permission Edit scope items.

3.9.3 Steps

To update scope item quantity:

1. Select the check box to the left of one scope item and then click the **Edit scope item** icon in the upper left. The Edit scope item slide-out panel opens.

2. Change the value in the Scope item qty field, and then click **Save** or **Save and Close**. The Update scope item qty dialog box opens.
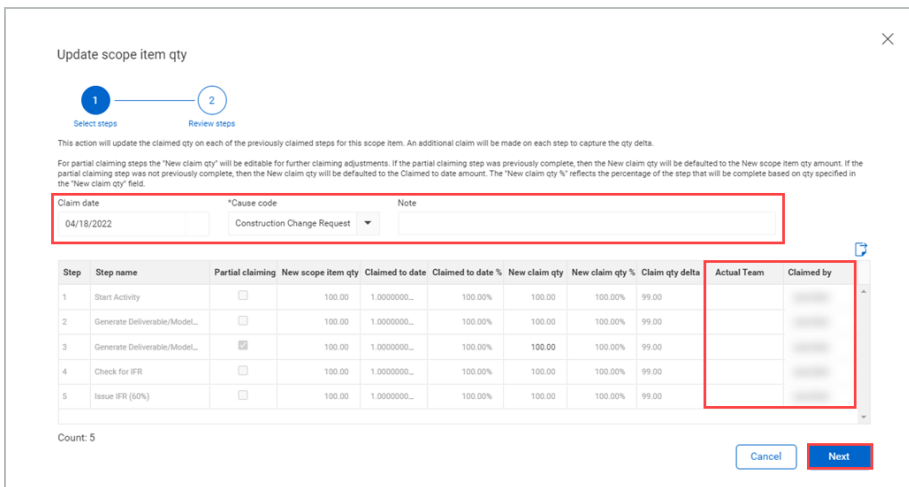
3. Select a cause code, if necessary. Optionally, add a note.

4. Optionally, edit the Claim date field. By default, it is set to today's date. This claim date is reflected for all steps.

5. Optionally, edit the Actual Team and Claimed by fields in the grid. By default, these fields are set to the team and user specified on the last claim.

6. Click **Next**. The Review steps page opens.

7. Review the changes, and then click **Update**.

3.9.4 Related links

You can also update scope item quantity for multiple scope items through the import process. For more information, see [Update scope item quantity by import](#)

3.10 UPDATE SCOPE ITEM QUANTITY BY IMPORT

3.10.1 Summary

When you update the Scope item qty field of multiple scope items through the import process after claims have been made, the Update all scope item qty dialog box guides you through adjusting the claiming on any previously claimed steps to reflect the new scope item quantities.

The Update all scope item qty dialog box shows grids of all selected scope items and steps with claiming history. You can export all scope items and claimed steps for additional review by clicking the **Export** icon in the upper right of the grid.

3.10.2 Considerations

You must have the permission Edit scope items.

3.10.3 Steps

To update scope item quantities by import:

1. Import a file with changes to the quantities for more than one scope item. The import process results in an error.

2. In Import history > **Scope item error resolution**, click the **Update all scope item qty** icon at the top of the grid. The Update all scope item qty dialog box opens.
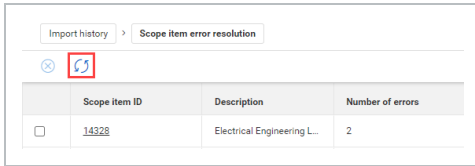
3. Select the scope items whose claiming you want to adjust.
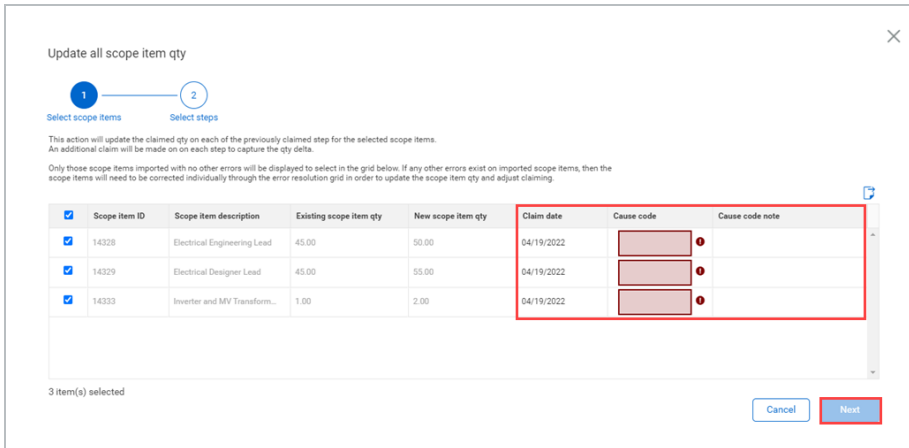
4. Select a cause code. Optionally, add a note.

5. Optionally, edit the Claim date. By default, it is set to today's date. This claim date is reflected for all steps.

6. Click **Next**. The Select steps page opens.
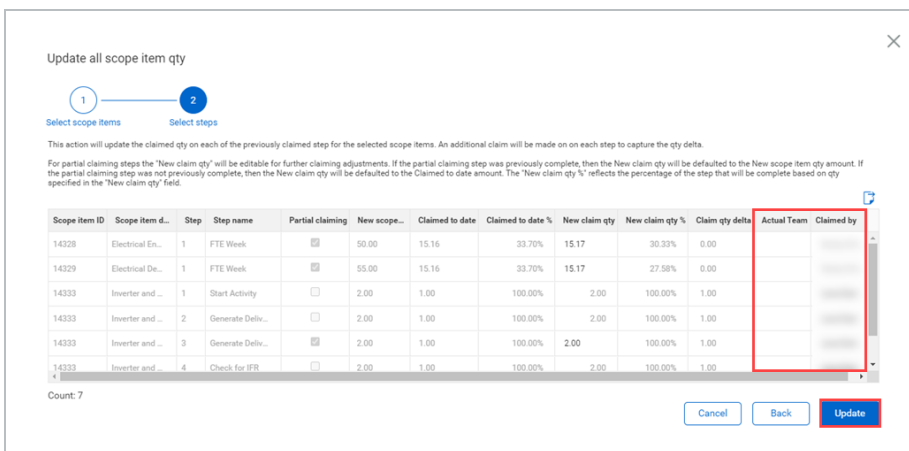
7. Optionally, edit the Actual Team and Claimed by fields in the grid. By default, these fields are set to the team and user specified on the last claim.

8. Review the changes, and then click **Update**.

3.10.4 Related links

You can also update scope item quantity manually through the interface. For more information, see [Update scope item quantity](#)

Administrators can configure cause codes at the organization level. For more information, see [Cause codes (Engineering)](#).

3.11 COMPLIANCE ISSUES

3.11.1 Summary

Compliance warning icons are shown on any scope item where claiming is disabled due to missing data or data discrepancies. The warning icon is shown in the Compliance column on the Scope Items page.
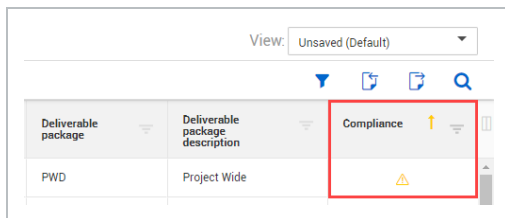
To see which fields are causing a compliance issue, select the scope item with the issue, and the click the Edit scope item icon. In the Edit scope item slide-out panel, fields with issues show warning icons. When you hover over the warning icon, a message is shown with issue details and how to resolve the issue. You must resolve all compliance issues to enable claiming on a scope item.

The following list details possible compliance issues and how to resolve them:

- Claiming is disabled when scope item qty value is 0.00. Add quantity to the scope item to enable claiming.

- WBS phase code assignment is missing on the resource type. Assign a WBS phase code to the resource type to enable claiming.

- Account code is not in the assigned account code set. Add the missing account code to the account code set to resolve. This is applicable only if account codes are enabled for the project.

- Account code UoM does not match the scope item UoM. Update the scope item UoM to match the account code UoM or assign a different account code with an associated UoM that matches the scope item UoM. This is applicable only if account codes are enabled for the project.

- WBS UoM does not align with the scope item UoM. Update the scope item UoM to match the WBS UoM or assign a different WBS with an associated UoM that matches the scope item UoM.

3.11.2 Considerations

The Compliance column is not part of the default view but can be added to the grid as an available column through the column chooser.

3.12 AUDIT LOG

3.12.1 Summary

The Audit log gives you visibility to scope item changes, claiming history, import history, and scope item quantity history on a project.

The Scope item page shows changes made to any attribute field on a scope item, scope item resource type, or step details. This log also records the creation and deletion of scope items. For each change, the values before and after, the user who made the change, and the time and date the change was made are also shown.

The Claiming history page shows all the claims made on scope items in the project. On this page, you can resend individual claims to InEight Control. When a claim is saved in the Engineering module, the claiming record is immediately sent to Control to consume the claim quantity on the associated WBS. If the claim does not make it to Control successfully, this feature can be used to resend the claim. To resend claims to Control, select one or more claim records in the grid, and then click the **Resend selected claims to Control** icon in the upper left.

The Import history page shows all the imports started on the project. If a file has any errors when it is imported, then the Failed record count column shows the number of records in error and the Status column has a value of Completed with errors, in a link.

To view and correct errors, click **Completed with errors** to open the error resolution page. For claiming schemes and scope items, click the claiming scheme or scope item ID to view and resolve issues before saving. For claiming, resolve the issues in the grid before saving.

The Scope item quantity history page shows all scope item quantity updates on a project.

3.13 ACTIONS

3.14 ACTIONS OVERVIEW

In the Scope items page, you can perform various actions on an engineering project. The following table provides an overview of each action.

Overview - Actions

Action	Description
Configure claiming schemes	You can manage claiming schemes as the first step in setting up a project in the Engineering module. Claiming schemes are required to be configured prior to creating a scope item.
Configure work packages	Manage work packages in the Engineering or Deliverable package tabs. After a work package is created on a project, it will become available to assign on a Scope Item within the project.
Configure project values	Create project values for Segment, Construction commodity, System, Turnover packages, Subsystem, Work classification, Assigned disciplines, and Assigned commodities on a project. You can assign these to scope items.
Get FC Remaining MHrs/Unit	You can get the current Forecast Remaining unit rate from Control for the WBS phase codes on the project and calculate the remaining forecasted man hours on the related scope items where the WBS is assigned. Control Integration must be enabled in project settings.
Lock and Unlock Scope	When you initially lock scope on a project, a snapshot is taken of the original quantity for each existing scope item. Cause codes are required for any scope item quantity changes. When unlocked, the OB qty field is editable on all existing scope items. A warning will show when scope is unlocked that reads "*Scope is unlocked*".
Role assignment	Manage role assignments in a project in the Current and Future Assignments tab and view its history in the User Assignment History tab.

3.14.1 Considerations

You must have applicable permissions in Engineering.

3.15 ASSOCIATE DOCUMENTS

3.16 ASSOCIATE DOCUMENTS OVERVIEW

You can associate scope items and documents to support status and progress reporting on deliverables. Go to project > Engineering > Scope Items > **Actions**, and then click **Associate documents**to open the Associate documents page.
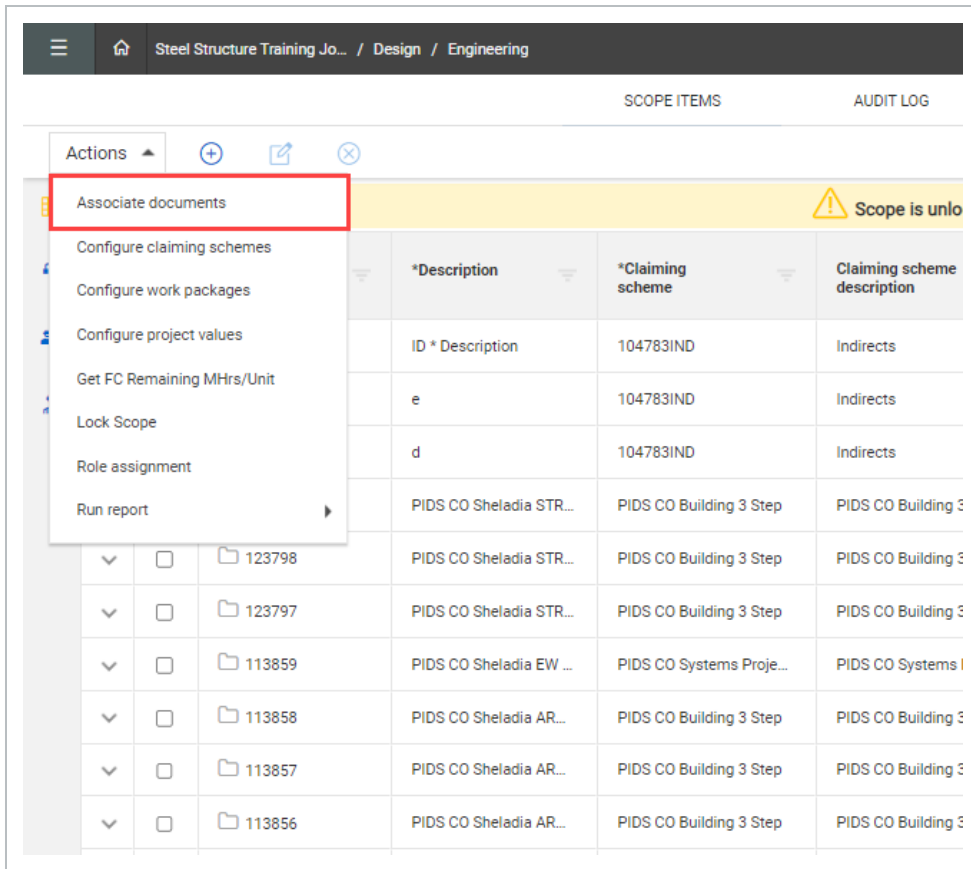
The table and image below are a summary of the Associate documents page.

Item	Description
1	**Scope Items grid**	The left grid shows the project's list of scope items.
2	**Documents grid**	The right grid shows the list of documents synced from Document.
3	• **Map many documents to a single scope item** • **Map many scope items to single document**	Select to map many documents to a single scope item, or many scope items to a single document.
4	• **Map scope item and Map document** • **Unlink scope items or documents**	• After making your selection, you can map documents to a scope item or map scope items to a document. • After making your selection, unlink scope items or documents.
5	**Auto hide mapped**	Auto hide mapped scope items or documents to filter them out from the grid.
6	**Search**	Use to search scope items in the Scope items grid or search documents in the Documents grid.
7	**Document sync**	Sync existing, new, and updated documents from the Document application. Synced documents will show in the Associated documents page. The Last synced status is shown on the lower right side of the panel.
8	**Mapped and unlinked items column**	View of mapped and unlinked items. Mapped items show a green mapped icon. Unlinked items show the Unlink icon.
9	• **Document count** • **Scope item count**	• In the Scope items grid, the Document count column shows the number of documents mapped to a scope item. • In the Documents grid, the Scope item count shows the number of scope items mapped to the document. The number is a hyperlink you can click to open a dialog box that shows the list of associated items.

When mapped documents are deleted in Document, a warning shows at the top of the page showing the number of documents that no longer exist.
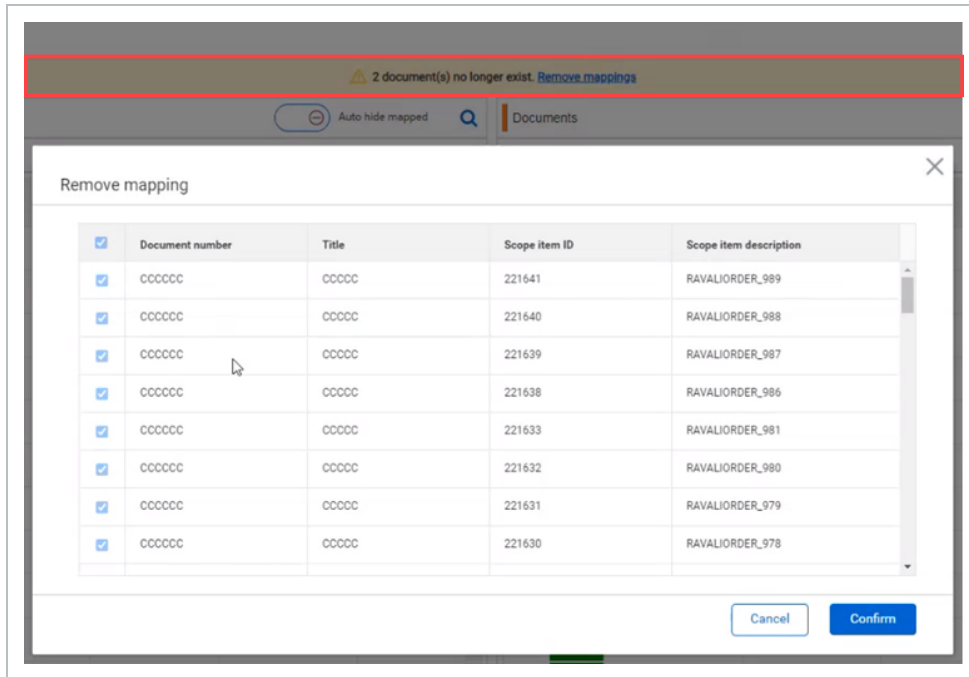
You can click **Remove mappings** to view the deleted documents and remove.

3.16.1 Considerations

- To enable Document integration, you must first setup the project in InEight Platform > Suite Administration > **Application integrations**.

- You must enable Document integration in Design > Settings > Engineering > **Documents** to access Associate documents.

- You must have the required permissions in Engineering for document associations.

- To view documents in Document, you must have the applicable Document permissions.

3.17 MAP DOCUMENTS AND SCOPE ITEMS

You can map one to multiple documents to a scope item and map one to multiple scope items to a document. Use the toggle at the top right to switch between the two options.
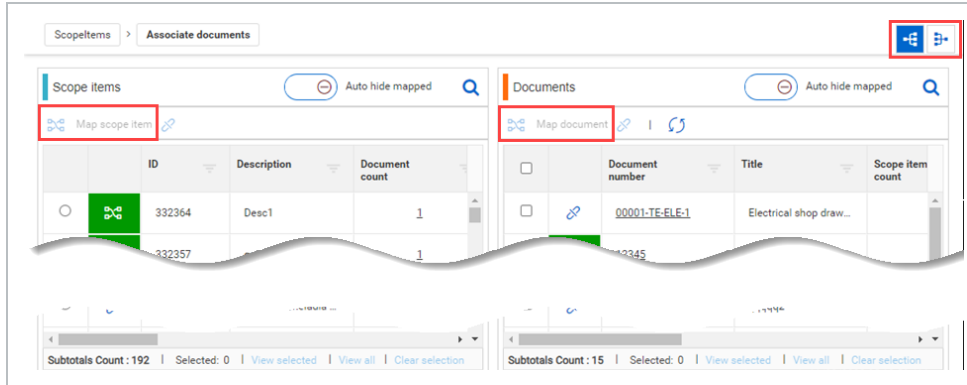
3.17.1 Considerations

You must have the required permissions in Engineering for document association.

3.17.2 Steps

Map documents to scope items

1. Click **Map many documents to a single scope item** at the top right of the page.

2. Select a single scope item in the Scope items panel, and then select one to multiple documents in the Documents panel.

3. Click the **Map document** button in the Documents panel to complete the mappings. The green linked icon will show next to the scope item indicating that it has been mapped.

Map scope items to documents

1. Click **Map many scope items to single document** at the top right of the page.

2. Select a single document in the Documents panel, and then select one to multiple scope items in the Scope items panel.

3. Click the **Map scope item** button in the Scope items panel to complete the mappings. The green linked icon will show next to the document indicating that it has been mapped.

3.18 VIEW ASSOCIATED ITEMS

You can view items that are associated with Scope items and Documents. Click the Document or Scope item count number to open the Associated Items dialog box.
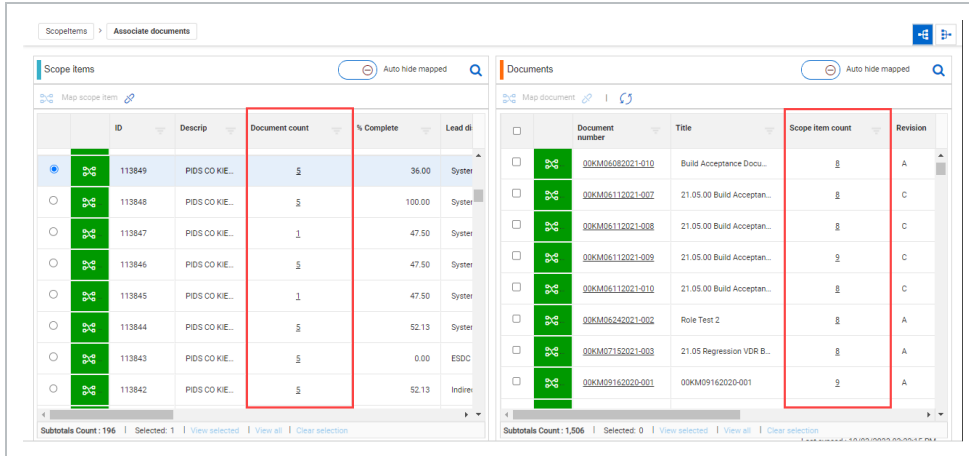
3.18.1 Scope item's document count column

In the Scope items panel, the Document count column shows the number of documents associated to scope items. Click the document count hyperlink to open the Associated Items dialog box.
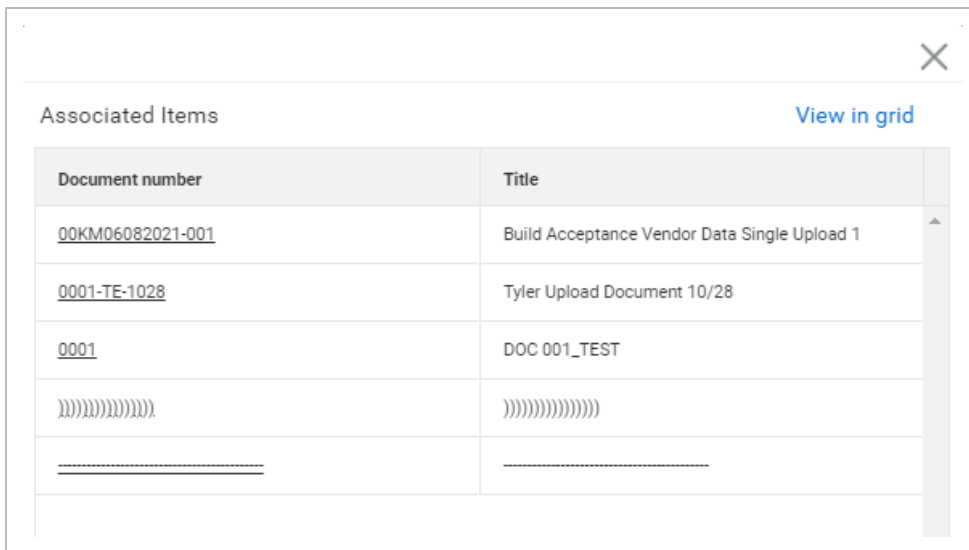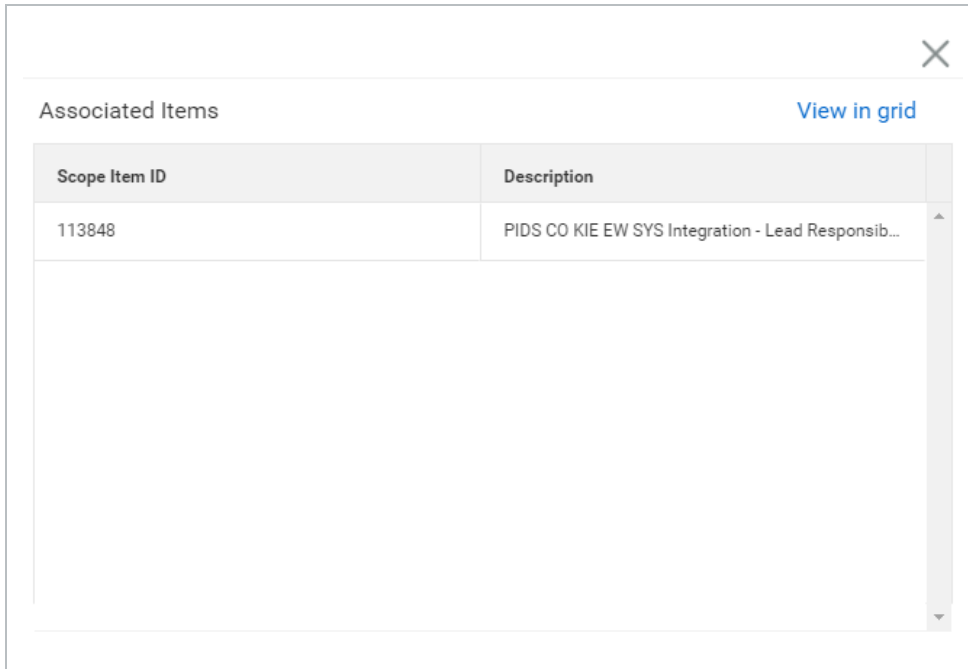
- **Document number** – The document number from Document as a hyperlink. Click on the hyperlink to open in Document.
- **Title** – The title of the document.

- **View in grid** - Filter the scope items and view them in the Scope items grid. You can click the **Document number** link to open the associated document in Document.

3.18.2 Document's scope item count column

In the Documents panel, the Scope item count column shows the number of scope items associated with Documents. Click the scope item's hyperlink to open the Associated Items dialog box.

- **Scope Item ID** – Unique identifier for the scope item.
- **Description** – Unique description for the scope item.
- **View in grid** - Filter the documents and view them in the Documents grid.

3.18.3 Considerations

You must have the required permissions in Engineering for document association.

3.19 UNLINK ASSOCIATED ITEMS

You can unlink associated items from scope items and documents.
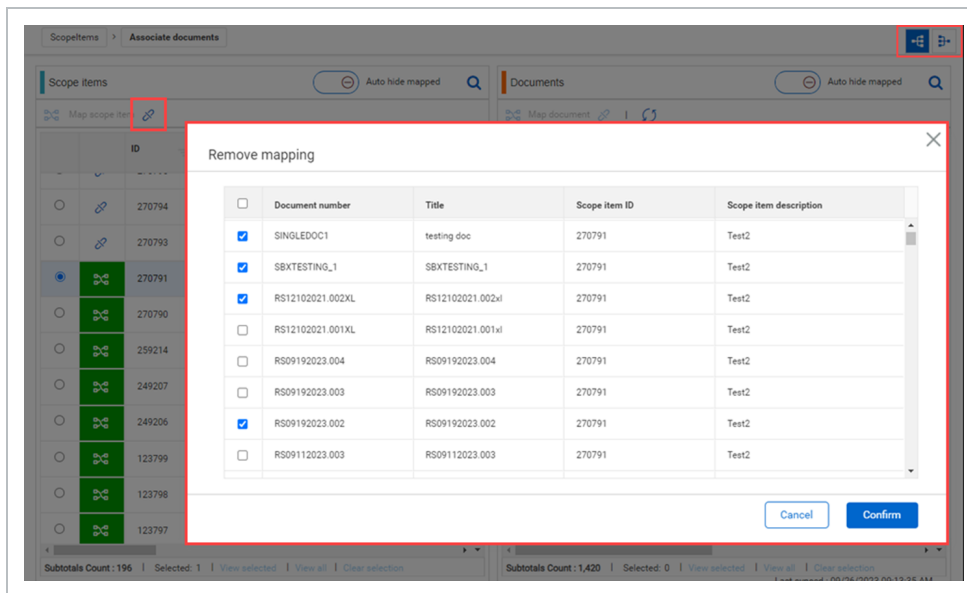
3.19.1 Considerations

You must have the required permissions in Engineering for document associations.

3.19.2 Steps

Unlink associated items

1. To unlink documents from a scope item, select **Map many documents to single scope item**. To unlink scope items from a document, select **Map may scope items to single document**.

2. Select the scope item or document.

3. Click the **Unlink** icon. The Remove mapping dialog box shows.

4. Select the item or items you want to unlink, and then click **Confirm**.

3.20 CONFIGURE CLAIMING SCHEMES

3.20.1 Summary

A claiming scheme is a sequence of steps and milestones used to record progress of engineering deliverables called scope items. Steps and milestones are assigned a completion percentage based on

the level of effort to complete each step. This lets you progressively track progress as phases of design are completed on a daily or weekly basis.

Claiming schemes are broken out into engineering disciplines, which are set up at the organization level. See Disciplines for more information.

Configuring claiming schemes is the first step in setting up a project in the Engineering module.

To configure claiming schemes, open the Engineering module to the Scope items page, and then click Actions > **Configure claiming schemes**.
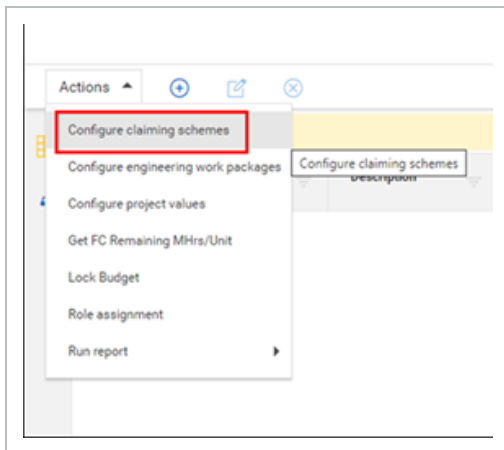
You can add claiming schemes using the following methods on the Configure claiming schemes page:

- Add button – Manually add a claiming scheme in the user interface.
- Copy button – Copy an existing claiming scheme
- Import scope items button

3.20.2 Considerations

- Scope Items cannot be created on a project without a claiming scheme assigned.
- You must have the permission View claiming schemes.

3.21 ADD A CLAIMING SCHEME MANUALLY

3.21.1 Summary

Claiming schemes can be manually added individually using the Add button on the Configure claiming schemes page. When you add a claiming scheme, you must also set up at least one step in the claiming

scheme.

A system-generated milestone named Scope Complete is automatically assigned to a claiming scheme's last step if the last step is a null value when configured.

Claiming schemes can also be added individually using the Copy button and in bulk using the Import claiming scheme button.

3.21.2 Considerations

- You must have resource types and disciplines added to the organization and project to be able to add claiming schemes. See [Disciplines](#) for more information.

- The Resource discipline field of a claiming scheme step is automatically populated based on the selected resource type.

- You must assign a Lead Discipline to each claiming scheme. This discipline is separate from the resource disciplines assigned to each individual steps, which do not need to match the lead discipline. This is useful when a claiming scheme generally falls under one discipline even if individual steps' assigned resource types fall under different disciplines.

- You can optionally set up a step for partial claiming, which lets you claim only partial completion for that individual step.

- You can optionally assign a single project milestone to a step. You must have milestones set up and assigned to the project.

- The sum of % Claim across all steps must equal 100% to save a claiming scheme.

- You must have the permission Add claiming schemes.

3.21.3 Steps

To add a claiming scheme manually:

1. Click the **Add claiming scheme** button. The Add claiming scheme slide-out panel opens.

2. Fill out required fields:

    • ID – must be unique

    • Lead Discipline

3. Fill out the required fields for the first step:

    • Step number

    • Step name

    • % Claim – The percentage completed by this individual step.

    • Resource type

    • Schedule group

    • Activity ID format

4. Optionally, select the **Partial claiming** check box if you want to be able to claim only partial completion of this step.

5. Optionally, select a milestone under Milestone Completion for the step.

6. To add additional steps, click the **Add** icon on the right, and then repeat steps 3-5.

NOTE	To delete a step at any time, click the Delete claiming scheme step icon on the right.

7. Click **Add**.

3.21.4 Related links

After claiming schemes are added, you can add scope items associated with claiming schemes. For more information, see Scope items and Add a scope item.

You can also create a claiming scheme by copying an existing one. For more information, see Copy a claiming scheme.

You can also create claiming schemes in bulk by importing. For more information, see Import claiming schemes.

3.22 COPY A CLAIMING SCHEME

3.22.1 Summary

You can copy an existing claiming scheme and its steps from the Configure claiming schemes page. You also have an opportunity to modify details of the claiming scheme and its steps before saving.

Copying an existing claiming scheme is useful when you want to create multiple claiming schemes whose steps are similar to each other and that only require minor modifications instead of creating each claiming scheme from scratch.

3.22.2 Considerations

- You can only copy one claiming scheme at a time.
- You must have the permission Add claiming schemes.

3.22.3 Steps

To copy an existing claiming scheme:

1. Open the Configure claiming schemes page, and then select one claiming scheme in the grid. The Copy claiming scheme button is enabled in the upper left.
2. Click the **Copy claiming scheme** button. The Copy claiming scheme slide-out panel opens.

3. Enter a unique ID, and then select a Lead Discipline.

4. Modify or delete existing steps, or add new steps, as necessary.

5. Click **Save**.

3.22.4 Related links

After claiming schemes are added, you can add scope items associated with claiming schemes. For more information, see Scope items and Add a scope item.

You can also create a claiming scheme from scratch. For more information, see Add a claiming scheme manually.

You can also create claiming schemes in bulk by importing. For more information, see Import claiming schemes.

3.23 IMPORT CLAIMING SCHEMES

3.23.1 Summary

Importing lets you add claiming schemes in bulk using a Microsoft Excel spreadsheet. Each row in the spreadsheet represents one step in a claiming scheme.

All imported claiming schemes that pass validations are added to the Configure claiming schemes page. The imported claiming schemes that fail validations are added to the Error resolution page. All imports are shown in Audit log > **Import history**.

3.23.2 Considerations

- You must have the permission Import claiming schemes.

There are two export options:

- Template - This option exports a blank Excel template that you fill out to add new claiming schemes.

- Data export - This option exports an Excel file of all selected claiming schemes. To select all claiming schemes, select the check box in the upper left of the Configure claiming schemes page.

You can only import new claiming schemes, not edit existing ones. To edit an existing claiming scheme on the Configure claiming schemes page, select a claiming scheme, and then click the **Edit claiming scheme** icon.

A system-generated milestone named Scope Complete is automatically assigned to a claiming scheme's last step if the last step is a null value when configured.

3.23.3 Steps

To import claiming schemes using the Excel template:

1. In the Configure claiming schemes page, click the **Export claiming scheme** icon, and then select **Template** from the drop-down menu. The Export Claiming Scheme Template.xlsx spreadsheet is downloaded.
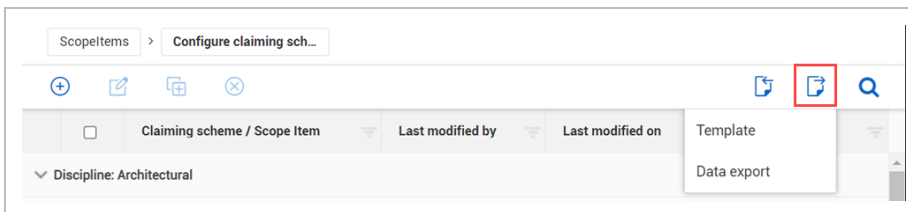
2. Open the template in Excel.

3. Fill out the required fields for each claiming scheme and step. Each row represents one step. The ID column is the name of the claiming scheme.

4. Save the Excel file.

5. In the Configure claiming schemes page, click the **Import claiming scheme** icon.

6. In the Import data from template dialog box, click **Browse**, and then select the Excel file. Click **Import**. The Import history page opens with the status of the import.
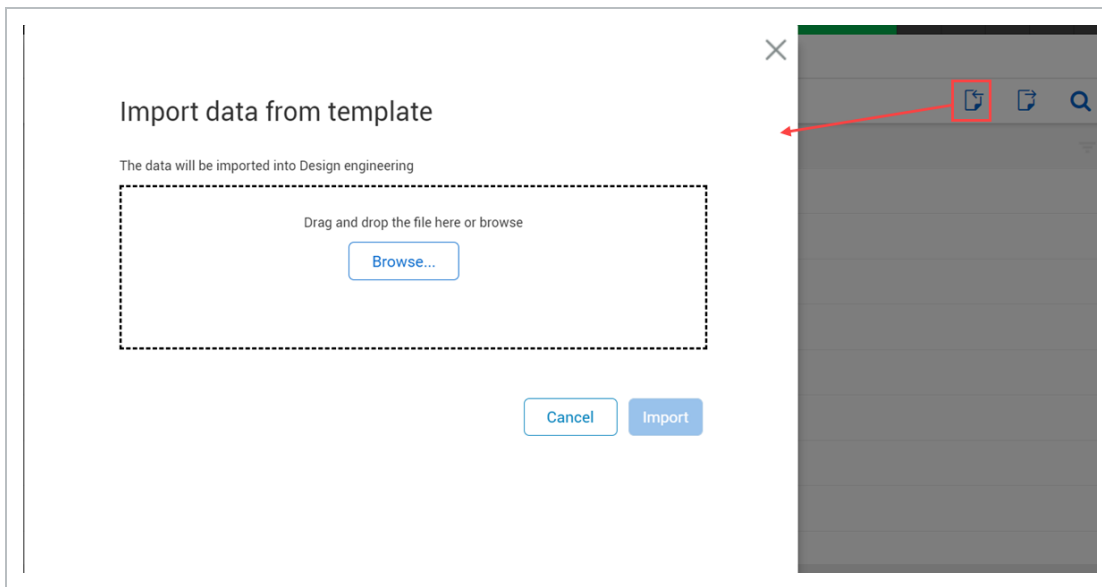
7. If there are issues, click **Completed with issues** in the Status column to open Claiming scheme error resolution, and then click the claiming scheme ID to view and resolve issues before saving.

3.23.4 Related links

After claiming schemes are added, you can add scope items associated with claiming schemes. For more information, see Scope items and Add a scope item.

You can also create claiming schemes manually. For more information, see Add a claiming scheme manually.

3.24 CONFIGURE WORK PACKAGES OVERVIEW

A work package is a small, manageable scope of work that can be assigned for supervision, execution, and tracking.

In the Configure work packages page, the Engineering Work Package and Deliverable Package tabs are where you can create a list of work packages associated with the project. To open Configure work packages, go to Engineering > Scope Items > Actions > **Configure work packages**.

The Engineering Work Package and Deliverable Package have the same functions. For example, you can create the same work packages in each tab, and then group them so they roll up differently. You can choose to define and group the work packages based on your business process.

You can add, edit, and delete engineering work package and deliverable package items.

The work package grid shows the aggregated work package data for all scope items associated to the work packages on the project. When you add or remove a scope item from a package, the work package summary information is updated. When you update a scope item's hours, dates, or claiming, the summary information is also updated to reflect the changes.

Data validations are built into a work package's summary information for percent complete, hours, and dates. When a scope item associated with a package has missing or null values for hours or dates, a warning icon shows next to the values that depend on the missing or null values to calculate. For example, if a scope item has the MHrs null due to a missing CE MHRs/qty unit rate, the warning icons show in the % Complete, CE total MHrs and Earned MHrs. You can hover over the warning icon for more information.

3.24.1 Considerations

You must have the applicable permissions in Engineering.

3.25 WORK PACKAGES OVERVIEW PAGE

The Work packages Overview page provides transparency of various work package related items. You can open a work package overview page by clicking an Engineering or Deliverable work package in Scope Items > Actions > **Configure work packages**.

The table below is an overview of the Work and Deliverable work package overview page:

Overview - Work package overview page

	Title	Description
1	Overview of test package	View and edit the current work package attributes.
2	% Complete	% complete is based on the scope item hours and earned progress on scope items within the work package. ((Earned Qty x CE MHRs ÷ Unit) ÷ CE Hours).
3	Hours	• CE – Sum of the scope item man hours for all scope items within a package (Scope Item Qty x CE MHRs ÷ Unit). • Earned – Sum of the scope item earned hours for all scope items within a package (Earned Qty x CE MHRs ÷ Unit). • Remaining – Sum of the scope item forecast remaining man hours for all scope items within a package (CE Hours – Earned Hours) if Control integration is off and ((Scope Item Qty – Earned Qty) x CE MHRs ÷ Unit) if Control integration is on.
4	Dates	Start dates show the earliest date, and

Overview - Work package overview page (continued)

	Title	Description
		finish date will show the latest date from the related scope items.
5	Milestones	When the Project Settings - Dates setting is configured with Scope Item/Milestone, the milestones window will show. You can use the **Dates Chooser** icon to toggle between the following dates: • Planned start/finish • Current start/finish • Actual start/finish • Completion
6	Remaining steps	View non-completed steps and their percent complete for all related scope items to the package. Remaining steps will be shown ascending based on step order.
7	Teams	Shows all teams associated to the work package and the teams' percent complete. The teams' percent complete is based on scope item hours and earned progress the team is assigned to on the scope items within the work package (Earned Hours ÷ Scope Item Hours). An unassigned team will show for scope items that does not have a team assigned.
8	Gantt	List of scope items with their related work packages. In the Gantt chart, you can view the start and finish dates for the scope items within the work package. You can use the **Dates Chooser** icon to toggle between the following dates: • Planned start/finish • Current start/finish

Overview - Work package overview page (continued)

Title	Description
	• Actual start/finish When the Project Settings, Dates setting is configured with Scope Item/Milestone, you can expand the scope items and view the milestone dates below the scope item.

In the scope item list, when you click on a scope item link, the Edit scope item slide-out panel opens. You can view and make changes to scope items. When changes are saved, the overview page is updated to reflect the new changes.

3.25.1 Considerations

You must have the applicable permissions in Engineering.

3.26 CONFIGURE PROJECT VALUES

You can define project-specific values to assign to scope items in the project. Types of project values are construction work areas, work classifications, and deliverable packages. You define the values for each of these. For example, a construction work area might be named Main St NE bridge, a work classification might be named Civil, and a deliverable package might be named Main St NE bridge access and laydown.

You can configure project values manually from the Scope items page or by importing a Microsoft Excel file.

3.26.1 Steps

To add a project value manually:

1. From the Scope items page, click **Actions**, and then select **Configure project values** from the drop-down menu. The Configure project values dialog box opens.

2. Click the type of project value you want to add (Construction work area, Work classification, or Deliverable package).

3. In the table, enter an ID and description for the project value.

4. You can also enter an activity code. Activity codes are optional to associate with project values, but they are used to run the Engineering Activity Report.

5. Click the **Add** icon.

6. Click **Close**.

3.27 LOCK AND UNLOCK SCOPE

On the Scope items page, you can lock and unlock the scope on a project.

When the scope is locked for the first time on a project, the current Scope item qty value is automatically used as the OB qty value for each existing scope Item in the project. When you update the scope item quantity while the scope is locked, a cause code is required. Any new scope items added after the scope is locked do not have an OB quantity.

When the scope is unlocked, then the OB qty field is editable on all existing scope items in the project.

To lock or unlock the scope from the Scope items page, click **Actions**, and then select **Unlock Scope** or **Lock Scope** from the drop-down list.
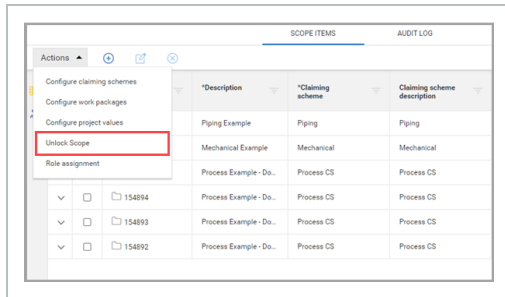
3.27.1 Considerations

- The scope is unlocked by default for new projects.

- To lock the scope, you must have the permission Lock project.

- To unlock the scope, you must have the permission Unlock project.

3.28 ROLE ASSIGNMENT

3.28.1 Summary

The Role assignment dialog box lets you create roles by resource type, and assign teams and users to roles. You can create roles for any resource type added to your project. When you add a claiming scheme to a scope item, a default role is automatically added for the associated resource type and claiming scheme if a role does not already exist.

The Role assignment dialog box shows the Current and future assignments tab by default when opened. On this tab, you can add roles and assign teams and users. There is also a User assignment history tab, which shows a record of all user assignment changes made.

The Current and future assignments tab shows counts of current assignments to scope items and steps.

After a role is created, you can assign it to a scope item in the Resources section of the Add and Edit scope items slide-out panels and in the Resource Assignments sheet of the Microsoft Excel import template. When you assign a role to a scope item, the Planned team and Assigned user fields are automatically populated with assignments from the Role assignment dialog box and become read-only.

3.28.2 Considerations

- To see role assignments, you must have the permission View role assignment. To perform actions on role assignments, you must have the permissions Edit role assignment, Add role assignment, and Delete role assignment.

- When you assign a role to a scope item, the role, planned team, and assigned user are inherited by the claiming steps. You can still update the role on individual steps if the step has not been claimed.

- You can delete a role only if it is not assigned to a scope item.

- When you update a planned team or assigned user on a role, those fields are updated on all incomplete scope items and steps with that role assigned. Any completed roles with the role assigned keep the previous planned team and assigned user.

- There is no limit on the number of roles that can be created for a resource type.

- For each existing role, you can add a future user by clicking the **Add future user** icon next to the role name. This allows another user to be assigned on a role on a future start date. The start date defaults to today's date, and can be updated to a future date. On the start date, the current user is replaced by the future user and each incomplete step is updated with the future user.

    - After a future user is added to a role, the end date of the current user on the role defaults to the day before the future user's start date.

	Resource type / Role	Planned team		Assigned user		Start date	End date
⊕	Drainage Engineer						
👤	Drainage Engineer 1	Water	⊖	Brian	⊖	06/07/2021	06/28/2022
	Drainage Engineer 1	Water	⊖	Dominic	⊖	06/29/2022	
⊕	CES						

    - Each role can have only one future user at a time.

3.28.3 Steps

To assign a role, planned team, and user to a resource type:

1. From the Scope items page, click **Actions**, and then select **Role assignment** from the drop-down menu. The Role assignment dialog box opens to the Current and future assignments tab.

2. Click the **Add role** icon next to a resource type. A new row is created below with a default name.

    To change the name, click on the role name, edit the name, and then press Enter.

3. Click in the Planned team field for the new role, and then select a team from the drop-down list. Any team added to project settings is available to be selected.

4. Click in the Assigned user field, and then select a user from the drop-down list. Any user with access to the project is available to select.

5. Click **Save**.

3.28.4 Related links

For more information about assigning a resource type to a scope item, see Scope item resources.

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CHAPTER 4 – QUANTITY FORECASTING MODULE OVERVIEW

4.0.1 Summary

The Quantity forecasting module lets you maintain a continuous integration of quantities, man-hours, and schedule for design-build and EPC work. Quantity forecasting lets you configure a project to track quantities that are being driven by estimate, design, and construction phases on a project.

Quantity forecasting is integrated with the InEight Control and InEight Plan applications, which allows for seamless transition of data between the systems.

4.1 QUANTITY ITEMS

4.1.1 Summary

The Quantity items page contains the main grid for managing all quantity items and progressing quantities on a project.

The following table and image give an overview of each section of the Quantity items page and what can be performed there.

Overview - Quantity items page

	Title	Description
1	Actions menu	Do any of the following: • Get Control unit rates • Run report • Lock and unlock scope • Quantity change notes
2	Quantity item buttons	Add, edit, and delete quantity items.
3	View	Select, save, rename, and delete views.
4	Upper right toolbar icons	• Data conflicts - Show whether conflicts exist. • Create Query Filters – Open the query builder. • Import and Export - Import and export sets of data. • Row density lets you adjust the spacing of grid rows • Find lets you search quantity items.
5	Quantity items	Grid showing quantity items and related information organized by column.
6	Column chooser	Select which columns are shown or hidden.

4.1.2 Considerations

You must have the permission View quantity item and rollup.

4.2 ADD A QUANTITY ITEM

4.2.1 Summary

You can add a quantity item manually in the Quantity items page.

The Add quantity item slide-out panel contains the Details and Quantities tabs.

On the Details tab, the fields required to make a quantity item depend on how your project is set up. Whether each field is required or must have a unique value is set in the Fields and component integration subtab of Quantity forecasting project settings.

When a quantity item is added, and the quantity item is associated to a cost item, the quantity is sent to InEight Control. Any quantity where the UoM does not align between a cost item and a quantity item is not sent to Control.

On the Quantities tab, you can set the Quantity driver for the quantity item. The quantity driver designates which design stage drives the quantity item's forecast (TO) qty. When you select a stage as the quantity driver, the forecast (TO) qty is automatically updated with the quantity maintained on that stage. Design stages are used to group and collect quantities as the design changes. Design stages are created at the organization level and added at the project level.

You are not required to set the quantity driver when adding the quantity item, and can change it later. The quantity driver is set to CB qty by default. For more information, see [Quantity driver](#).

4.2.2 Considerations

You must have the permission Add quantity items.

4.2.3 Steps

To add a quantity item:

1. Click the **Add quantity item** button in the upper left. The Add quantity item slide-out panel opens.

2. Fill in any required fields, as indicated by an asterisk.

3. Click **Add**.

4.3 QUANTITY DRIVER

4.3.1 Summary

The quantity driver designates which design stage drives a quantity item's forecast (TO) qty. Design stages are used to group and collect quantities as the design changes. Design stages are created at the organization level and added at the project level.

You can update the quantity driver using the Edit quantity item slide-out panel, the Quantity items grid, or the import process. When you select a stage to be the quantity driver, the Forecast (TO) qty field is automatically updated and a blue pushpin icon is added to the design stage.

When the quantity is updated and the quantity item is associated to a cost item, the quantity is sent to InEight Control. Any quantity where the UoM does not align between a cost item and a quantity item is not sent to Control.

You can set the quantity driver to be the CB quantity, any of your project's design stages, or component quantity. Component quantity is the sum of quantities of components from InEight Plan associated to the quantity item.

4.3.2 Considerations

- You can select Component qty as the quantity driver only if the Design Complete check box is selected for the quantity item.

- You can set a stage as the quantity driver even if no quantity is maintained on that stage. In this case, the Forecast (TO) qty field is set to 0.00.

4.4 DATA EXPORT

4.4.1 Summary

You can export quantity items in the Quantity forecasting > **Quantity Items** page using the export tool. You can export all items or selected items using the tool.

After you start the export, the Audit log > **Export History** page opens to show you the export status and history information. The export status shows as *In progress*. The export processes run in the background, and when completed, the status changes to *Completed* and the Download export file icon becomes available.

You can then download the file by clicking the **Download export file** icon. The file is downloaded as a Microsoft Excel file to your Downloads folder.

4.4.2 Considerations

- You must have View quantity forecasting settings permission.

- Other users of Design with the same permission can download the file.

- The file will be available for 60 days. After 60 days, the Download export file icon is disabled.
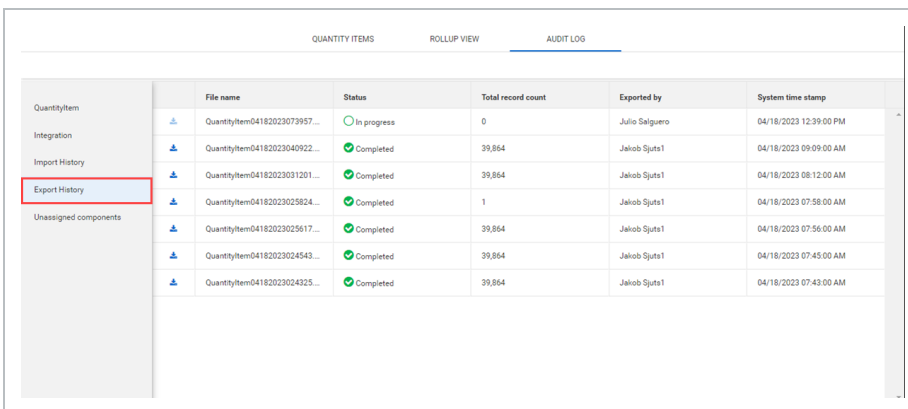
4.4.3 Steps

To export all quantity items:

1. Click the **Export quantity items** icon, and then select **Data export**.

   > **NOTE** To export selected items, click the check box next to the item or items, and then select **Data export**.
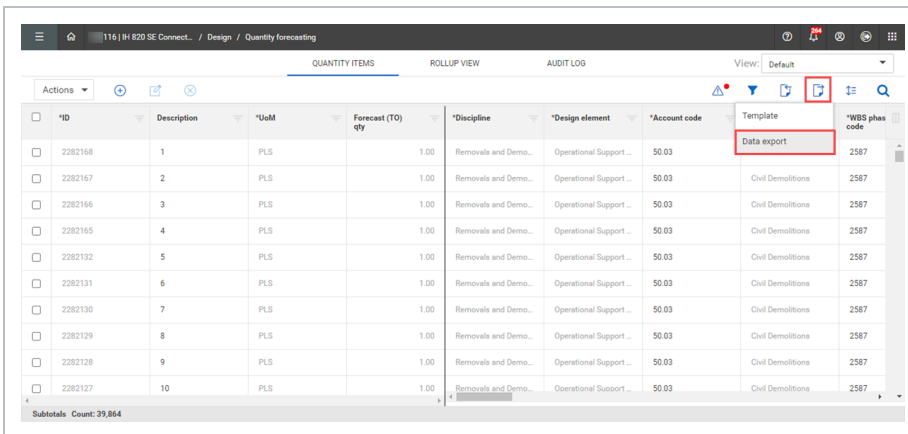
The Audit log > **Export History** page opens.

2. In Export History, click the **Download export file** icon to download the file.